

Set Better CX Goals with the **SMIRC** Goals Checklist

With Jeannie Walters, CCXP &



How To Use This Checklist:

Completing this exercise alone? Use the checklist to assess your organization's existing goals and create great new goals.

When presenting these goals to leadership, use the SMIRC framework to show how your goals are well-thought out and designed to set everyone up for success.

Working on this with your team? Fantastic! Make sure everyone has a copy of the SMIRC checklist and is familiar with the framework. Then review existing goals and brainstorm new goals together, using the framework as your guide.

Working with Jeannie? She'll guide you through each letter in the SMIRC framework, assessing your existing goals, suggesting improvements, and learning more about how your organization operates in order to suggest great new CX goals that can impact your entire company.

If you'd like to hire Jeannie to facilitate a SMIRC Goals workshop, just email Inquire@ExperienceInvestigators.com.

What are SMIRC Goals, and how can they help your organization?

It's not uncommon in my experience [coaching, consulting, and workshopping](#) with business leaders to come across goals that are vague, impossible to quantify, or otherwise unhelpful.

It's difficult to create great goals, especially related to Customer Experience.

A classic methodology to combat this in business and life has been SMART goals — an acronym for specific, measurable, achievable, relevant, and timebound.

SMIRC serves as an alternative goal-setting acronym designed specifically for setting and reaching better Customer Experience (CX) goals.

SMIRC Goals are...

This checklist will give you guidelines to follow as you build your own CX goals.

While designed for Customer Experience, the benefits aren't limited to CX. As your organization begins to set and achieve better CX goals, you can expect to see better customer retention, referrals, and lifetime customer value – something that will please everyone in the organization, from the sales team to the C-Suite.

More SMIRC Goal Resources:

Use SMIRC Goals to Define Customer Experience Outcomes
Article | [Read](#) or [Listen](#)

How to Set Better CX Goals with a SMIRC
Webinar | [Watch](#)

Social
Measurable
Inspiring
Relevant
Contextual

A Brief Overview of SMIRC Goals:

SMIRC Goals are **Social**

Social goals are those that are shared across the organization and support everyone's success.

This doesn't mean every department needs to own the same exact goals, but **these goals should support one another as well as the bigger goals of the organization.**

Creating goals that are social will help you get critical buy-in from others in your organization, which is key not only to getting initiatives approved, but in seeing them through to a successful resolution.

Your CX outcomes must relate back to your overall business and leadership goals.

A Brief Overview of SMIRC Goals:

SMIRC Goals are **Measurable**

Without defining what success looks like, how do you know if you've really achieved it?

If you've got an existing goal that's not measurable, that doesn't mean it needs to be thrown out – just updated. **Often a goal can be made measurable simply by attaching numbers or constraints to it.**

For example:

A non-measurable goal to “Delight Customers More” can be turned into this measurable goal: “Increase Promoters by 5% as measured by our Net Promoter Score program.”

Voila!

A Brief Overview of SMIRC Goals:

SMIRC Goals are **Inspiring**

While numbers are great for measuring data, they don't always inspire others to care and act.

A goal is inspiring when it's described in storytelling terms:

- What is one of the worst comments you are seeing from customers today?
- What do you hope they'll say in 6 months?
- How does being successful in CX support your larger mission?

In short: Beyond our bottom line, what makes this goal matter? What makes it meaningful? **How does each goal help take our customers from their "before" state to their ideal "after" state?**

A Brief Overview of SMIRC Goals:

SMIRC Goals are Relevant

Customer Experience Success cannot be designed in a vacuum. It must be relevant to your customers, your leadership, and everyone else it touches.

- What unique problems do your customers face?
- What unique results do they want to achieve?
- What is impacting your customers today?
- What can you predict for their futures?

And the most important question of all: **How do our CX goals relate back to these questions?**

A Brief Overview of SMIRC Goals:

SMIRC Goals are **Contextual**

Your goals serve different people inside and outside your organization. Position goals in the right context for each of these groups of people.

For example, a general goal might be to add additional support documentation to your website.

- **To your support staff**, the context of this goal is fewer support calls and less urgency.
- **To your Chief Financial Officer**, the context is reduced costs.
- **To your Chief Marketing Officer**, the context may be better customer reviews
- **And to your customer**, the context is easier access to answers.

The goal itself can remain unchanged, but **you'll see greater success when you can anticipate and describe the goal in the proper context.**

SMIRC Goals Checklist

Social: This goal...

- Supports goals across departments, directly or indirectly
- Aligns with overall organizational goals
- Positioned to gain buy-in from leaders

Measurable: This goal...

- Can be quantified
- Uses data that your organization can reliably measure
- As clearly either “done” or “not done”

Inspiring: This goal...

- Tells a meaningful story, or fits within the framework of one
- Considers your customers’ “before” and ideal “after” state
- Is based on real customer feedback you’ve received

Relevant: This goal considers...

- The unique obstacles, conditions, and desired outcomes of our target customer
- The unique obstacles, conditions, and opportunities within our organization
- Expected conditions in the foreseeable future

Contextual: This goal can be described within the context of...

- Our Customer
- Various C-Suite leadership
- And other involved members of the organization

**Congratulations –
You’re on your way to making a
big difference for your
organization and your customers.**

How else can Experience Investigators help?

Click on any item to learn more:

[Learn About Workshopping,
Training, & Consulting](#)

[Join the free 21-Day
CX Challenge](#)

[Explore Jeannie’s
LinkedIn Learning Courses](#)

Or find more at
ExperienceInvestigators.com.



Jeannie Walters, CCXP
**Founder and Chief
Experience Investigator**