Proactively Manage CX Governance with the

Customer Experience Charter

Guidebook

With Jeannie Walters, CCXP &

Experience Investigators

What is a Customer Experience Charter?

A CX charter is nothing without a cross-functional team to use it!

Some organizations call this a CX Strategic Council, or a CX Steering Committee.

For the sake of this guide, we'll simplify things by referring to the CX Team.

A Customer Experience (CX) charter is a brief document outlining the agreements the CX governing team needs to align with their decisions.

It typically focuses on statements around the overall vision and goals, as well as the roles and responsibilities of those on the team.

Key Players Include:

- **Any leader with direct accountability over the most likely actions required to improve the customer journey**

  Often this includes leaders from marketing, technology, product development, customer success and customer service.

- **Team members from other areas that are close to the customer experience**

  This may include front-line operations, accounting, and product delivery.

- **Team members who will be involved in CX governance**

  Those who can approve resources, provide budget and gain overall approval.

The Six Key Components to a Customer Experience Charter:

In this guidebook, we'll look at six key components of a CX charter so you can begin developing your own charter with your CX Team.

Every CX charter should address:

1 **CX Mission**

2 **CX Goals**

3 **CX Roles**

4 **CX Priorities**

5 **CX Communication**

6 **CX Management**

! **We've Only Just Begun**

Depending on your organization, you'll likely benefit from considering other components too – but these six areas consistently apply no matter your industry or customers.

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1 Customer Experience Mission

Your CX Mission acts as a guide to help your CX Team be sure that the journeys you're developing align with what's most important to your organization.

We recommend recording this in a CX Mission Statement, which defines what the experience should be for each customer, every time.

If you don't already have a CX Mission Statement, we've got good news for you! You can build one with your team using our **CX Mission Statement Workbook**.

Click Here to Get the Free Workbook

Or visit bit.ly/cx-mission-statement-workbook.

Key Questions:

➤ What is our CX Mission?

➤ What is most important about the experience we deliver?

! More Than Words

Your CX Mission is no good if it's written down and then ignored.

Engage with the CX Mission Statement and the overall Vision by starting meetings with it, looking for ways to reward efforts that reflect it, and provide context by sharing it with new team members.

2 Customer Experience Goals

Your charter should include a concise statement regarding the customer experience goals and objectives.

One tool that can help with this is a **CX Success Statement**, which identifies the CX strategies that will be most meaningful to larger organizational and leadership goals.

Don't have a CX Success Statement yet? You can use our CX Success Statement Workbook to develop yours.

Click Here to Get the Free Workbook

Or visit bit.ly/cx-success-workbook.

Key Questions:

- What is our CX Success Statement?
- Are our CX Goals Specific, Measurable, Inspiring, Relevant, & Contextual?

!

What Do You Mean?

Goals here can be short-term and long-term, but it's important to know what success means.

Long-term goals can be more complex and harder to define. Work with the CX Team to break down these goals into specific steps, then assign accountability around them.

3 Customer Experience
Roles

If you're building a team of cross-functional, diverse leadership, you're on the right track.

Now... **who will be responsible for what?** Define those roles and assign specific outcomes to specific CX team members.

For your CX Team, record:

- The names and roles of those involved
- The strategies each member is responsible for
- The actions each member is responsible for
- The specific outcomes each member is responsible for

Key Questions:

- Who on the CX Team will be responsible for what?
- How will outcomes be measured?
- How frequently will we check in?
- How can we involve the larger organization beyond the CX Team?

! **We Can be Heroes.. If Just for One Day**

Some team members may be a part of shorter-term initiatives... And that's ok!

Keep short-term team members accountable by making their specific outcomes time-bound.

4 Customer Experience Priorities

Your CX Team will no doubt come up with more potential tactics and actions than it has time for. **This is where prioritization becomes key.**

Members of a cross-functional team often have different priorities that align with their own goals, which can naturally cause some friction.

This is where your <u>CX Success Statement</u> can help by tying CX outcomes to larger organizational & leadership goals.

It's also somewhere where a simple priority matrix can help, asking you to organize each idea by how impactful and feasible it's likely to be.

Key Questions:

✈ What efforts will we prioritize?

✈ What larger goals are these priorities tied to?

✈ What limitations do we need to account for?

✈ When will we next check in with the responsible parties?

> **!**
>
> **"Tell [Us] What You Want"**
>
> Your charter can also describe where and how to collect customer feedback to provide central governance around that part of the experience.
>
> How do you prioritize seeking feedback and "closing the loop" with customers? When customers are engaged to provide feedback, that is just as much a part of their journey as anything else.

5 Customer Experience Communication

Leadership buy-in is a critical element in any customer experience program. That means keeping those stakeholders engaged in the process and communicating little victories along the way.

Be sure the team is communicating regularly about what insights have been uncovered, what actions are taking place, and what successful outcomes are happening as a result of these CX efforts.

Key Questions:

➤ What does the internal communication strategy look like?

➤ Who is responsible for the communication strategy?

➤ What is the ongoing cadence of communication and what expectations should be set?

! Something to Talk About

Communication isn't just about communicating UP to leaders. Communicating *OUT* to the larger organization is critical to building a customer-centric culture.

This means celebrating the efforts that lead to outcomes and asking for input from employees throughout the organization.

6 Customer Experience Management

How will everything work together? It depends on systems and leadership that set everyone up for success.

Look for someone who can:

- Identify who's regularly showing up and participating -- and who's less committed to the process.

- Outline expectations before meetings.

- Guide meetings, follow up with attendees, and document activities & accountabilities.

- Check in on progress between meetings.

Key Questions:

- How will leaders on this team show up for one another?

- How many times and how often will the team meet?

- What action steps are promised and how are those things communicated between meetings?

! Don't Let the Days Go By

When first getting started, don't let too much time go between meetings. These gatherings serve a few purposes when organizations are at the start of their CX journey:

- They remind leaders this is not just about words but about action.

- They remind leaders to communicate with their teams and partners about the importance of customer experience and what the organization is doing about it.

- And finally, they provide real accountability and communication around CX efforts. CX is a team sport!

Additional Resources

This may all seem overwhelming – that's okay, and perfectly normal!

A charter is just a tool designed to help your CX Team:

- Define & support your CX Mission

- Identify the roles your team members will play and how you'll involve the larger organization

- Manage your communication — with your CX Team, your organization, and even your customers

- Set & reach CX Goals

- Prioritize the most important efforts and anticipate potential limitations

- Manage CX meetings and expectations

Take things one step at a time and lean on these resources to guide you:

Articles:

- Why a CX Mission Statement Matters — And How to Create One

- Use SMIRC Goals to Define Customer Experience Outcomes

- Customer Experience Management Defined: How is it Different From CX?

Videos:

- Struggling to Manage CX? Try a Customer Experience Charter

- Ways to Communicate About Customer Experience

- How Can You Define Success? Start with a CX Success Statement

Downloadable Resources:

- CX Mission Statement Workbook

- CX Leaders' Reflection & Planning Questionnaire

- SMIRC Goals Checklist

Additional Resources

If you'd like help building your CX Charter...

Experience Investigators can help. From small businesses to Fortune 500s, we've worked with countless organizations to fulfill our goal to Create Fewer Ruined Days for Customers.™

Jeannie Walters, CCXP
Founder and Chief Experience Investigator

Learn more at ExperienceInvestigators.com

Or reach out to our team and we'll find the right next step for you.

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Send Us A Message!

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 Remote Workshopping, Training, & Consulting

Join the free 21-Day CX Challenge

Explore Jeannie's LinkedIn Learning Courses

Or find more at
ExperienceInvestigators.com.

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