

Get More Out of Meetings with the

CX Meeting Agenda & Guidebook

With Jeannie Walters, CCXP &



How to Use This Agenda & Guidebook

This agenda & guidebook is only as good as the information you include in it and the team members who are using it. To make the most of this guidebook, here are some helpful tips:

- **Review with your leadership team.** Before implementing a new meeting agenda, review this guidebook with your team to get their understanding and buy-in. Ask for assistance in choosing questions and prompts to help them take ownership.
- **Adjust as needed.** No meeting agenda is one-size-fits all. Adjust the timing, prompts, and other details of this agenda to fit your needs. Make sure you're not deviating too far into the comfort zone though – challenge yourself and your team!
- **Use our other resources to be prepared.** You'll be most successful if you already have a CX Mission Statement, CX Success Statement, and CX Charter. At the end of this resource, find links to resources to help you develop all three.
- **Need help? Jeannie and the Experience Investigators Team are here for you.** We can help your team build a custom agenda, develop your CX Charter, and more. If you'd like to hire Experience Investigators to facilitate a strategic session, simply email [**Inquire@ExperienceInvestigators.com**](mailto:Inquire@ExperienceInvestigators.com).

Determining Your CX Meeting Cadence & Agenda

When it comes to CX Meetings, there are three questions I hear more than any others. Let's address each of them:

1. How Long Should CX Meetings Be?

Once you feel confident with your CX Team and meetings, **we recommend each meeting last 90 minutes.**

The suggested agenda that follows assumes a 90-minute meeting time.

2. How Often Should CX Meetings Be Conducted?

When you have a cross-functional team coming together for meetings, scheduling can be a real issue.

Once you're up and running, **we recommend meetings either every two weeks or once monthly**, depending on what your schedules will allow.

Don't Be Afraid to Adjust!

If you're starting from scratch, you may consider having shorter, more frequent meetings – such as weekly meetings of 60 minutes – to get momentum going initially.



Determining Your CX Meeting Cadence & Agenda

3. What Should We Do in These Meetings?

That's the key topic we'll be covering in this guide.

There are five key items at the core of almost every successful CX Team Meeting Agenda:

- 1 Review & Discuss CX Mission and Goals**
- 2 Check-in on Progress of CX Programs & Priorities**
- 3 Review Customer Feedback and Insights**
- 4 Discuss Innovations and Forecasting**
- 5 Identify Next Actions and Accountabilities**

On the following pages we'll review each of these in greater detail.

1

Review & Discuss CX Mission and Goals

Time:
About 10 minutes

When kicking off each meeting, setting the tone is key.

I've seen teams have great success when they open meetings by reviewing their CX Mission and the CX Goals.

Try these fill-in-the-blank prompts at your next meeting:

Thank you everyone for taking the time to meet today! Of course, we want to make sure this meeting is a great use of everyone's time. Do help with that, let's all get on the same page by reviewing our mission and goals.

Our Customer Experience Mission is... _____

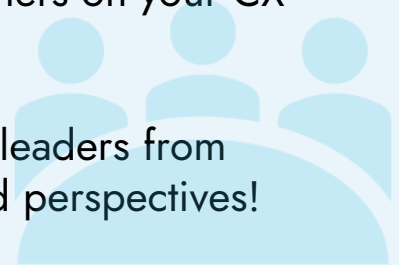
And our CX Goals for this quarter are to... _____

These CX Goals tie to our larger company goals, which are to... _____

Get Your Team Involved!

Instead of simply stating your CX mission and goals, ask others on your CX Team to contribute.

This can be a great way to get everyone involved and give leaders from different departments opportunities to share their goals and perspectives!



2

Check-in on Progress of CX Programs & Priorities

Time:
About 20 minutes

In the following three sections, we'll *look back, check in, and look forward*.

Let's begin by looking back at our priorities and achievements.

Ask each leader to bring in the priorities that have been set for their department.

For each priority, ask the leader to address:

Our priority was to... _____

The actions to take for this priority were... _____

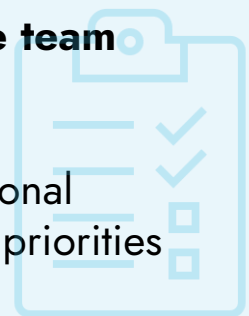
The person responsible for each of these actions was... _____

Our desired outcome was... _____

Was this outcome reached? Why or why not? _____

This is where having a top-notch project manager as part of the team can really help!

Priorities must be centered on the CX Mission and highest organizational priorities. A project manager can help facilitate the back-and-forth of priorities changing and dependent efforts.



3

Review Customer Feedback and Insights

Time:
About 20 minutes

Now let's check-in on where things stand with our customers by reviewing their feedback and insights.

Start With a Story

It's easy for reviews of customer feedback & insights to turn into number narrations. Focusing exclusively on what numbers went up and down can lead to losing the human-aspect that helps us stay customer-centric.

Consider assigning a different team member the role of Storyteller each meeting, asking them to bring in a customer story – great, or not so great – that shares real moments from the customer journey with the broader team.

As you review your metrics & customer insights, ask these questions:

How did our customer metrics change? _____

Are these changes part of a larger trend that requires our attention? If so, what do we believe to be the root cause of these changes? _____

Are there specific moments in the customer journey that relate to this metric? How can these moments be modified to improve the customer experience?

4

Discuss Innovations and Forecasting

Time:
About 20 minutes

We've looked back. We've checked in. Now, let's look forward.

At this point in a meeting, I like to find forward-looking questions that are relevant to the priorities and insights already discussed.

Questions to ask your teammates to focus on may include:

What are we hearing from customers about future concerns? _____

What can we forecast if concerns are not addressed? _____

What CX innovations have you seen as a customer? _____

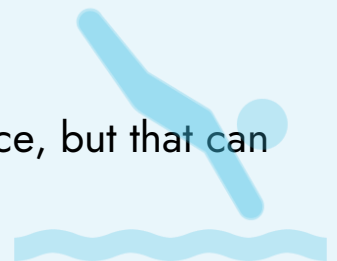
How can we create an ideal customer journey for our customers? _____

What incremental improvements do we have the capacity to implement before our next meeting? _____

Fewer Questions, Deeper Dives

It can be easy to present many forward-thinking questions at once, but that can get overwhelming

I recommend choosing one question at a time to discuss fully. If that question is fully answered with next steps established in the allotted time, another one can be brought up.



5

Identify Next Actions and Accountabilities

Time:
About 20 minutes

Way back in Step 2, we reviewed our priorities, actions, and outcomes.

Now in Step 5, we'll set the priorities and actions to be handled in the immediate future and reviewed early in our next meeting.

Prompts to help you set priorities and actions include:

What are our priorities? Based on today's discussion, do any priorities need to be adjusted, added, or abandoned? _____

What actions and accountabilities need to be created? Who will be responsible for each? _____

What CX innovations have you seen as a customer? _____

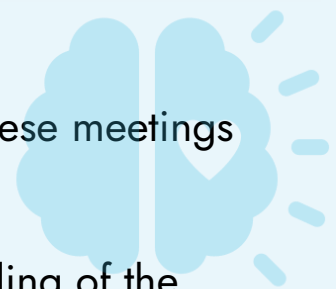
How can we create an ideal customer journey for our customers? _____

What incremental improvements do we have the capacity to implement before our next meeting? _____

Check In Now, Save Time Later

Even with an agenda to keep things on-track and predictable, these meetings can be full of big ideas and next steps.

Check in to make sure everyone departs with a clear understanding of the customer's journey and their role in it.



Additional Resources

Create a CX Mission:

- [\[Downloadable Resource\] CX Mission Statement Workbook](#)
- [\[Video\] 5 Questions to a CX Mission Statement](#)
- [\[Article\] Why a CX Mission Statement Matters — And How to Create One](#)

Create a CX Success Statement:

- [\[Downloadable Resource\] CX Success Statement Workbook](#)
- [\[Video\] How to Build Your CX Success Statement](#)
- [\[Article\] Want Greater CX Success? Build Your CX Success Statement](#)

Develop a Customer Experience Charter:

- [\[Downloadable Resource\] CX Charter Guidebook](#)
- [\[Video\] Struggling to Manage CX? Try a CX Charter](#)
- [\[Article\] Create Your CX Charter with These 6 Questions](#)

Run More Successful CX Team Meetings:

- [\[Video\] 7 Steps to Run an Effective Customer Experience Team Meeting](#)
- [\[Article\] How to Run an Effective Customer Experience Team Meeting](#)

Additional Resources

If you'd like help preparing your CX program for success...

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](https://www.experienceinvestigators.com)

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



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

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