

Understand Customers Better with the

Customer Experience Prioritization Guidebook

With Jeannie Walters, CCXP &



Why does CX Prioritization Matter?

Ideas are rarely in short supply. The key is to identify which of those ideas will be most impactful – for your business objectives and for your customers.

The workshops and consulting run by me and my team are often eye-opening for the companies we work with, and give us great lists of initiatives and action items.

But trying to work on all of them at once is overwhelming and picking what's most important can be difficult when leaders in different departments have different objectives.

Deciding what to prioritize shouldn't be determined exclusively by what certain customers or leaders ask for. It's about what's going to deliver for your customers and your business objectives.

The principles and actions laid out in this guidebook are designed to help you get clarity on what to prioritize as an organization, so you can reduce the overwhelm, minimize the cross-departmental politics, and get to work making meaningful change.

How to Use This Guidebook

This 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:

- **Involve your teams.** CX is a team sport! Share this guidebook with your team and ask for their feedback.
- **Talk about which ideas are best for you.** We introduce several concepts and ideas in this guidebook, but don't feel like you need to follow each step in sequential order. These ideas can be applied in several different ways – so discuss with your team to decide what's best for you.
- **Adjust as necessary.** This guidebook is designed to be very general and can't get specific to your organization the way direct consulting can. With that in mind, recognize that the ideas presented here can be adjusted to fit your existing systems.

Working with Jeannie and the Experience Investigators Team? She'll guide your team through these concepts and lead you through exercises based on these concepts and tailored to your organization and goals.

If you'd like to hire Experience Investigators to facilitate a strategic session, simply email Inquire@ExperienceInvestigators.com.

What Factors Impact Prioritization?

You've likely heard some or all of these as reasons for CX initiatives to be started – or stalled:

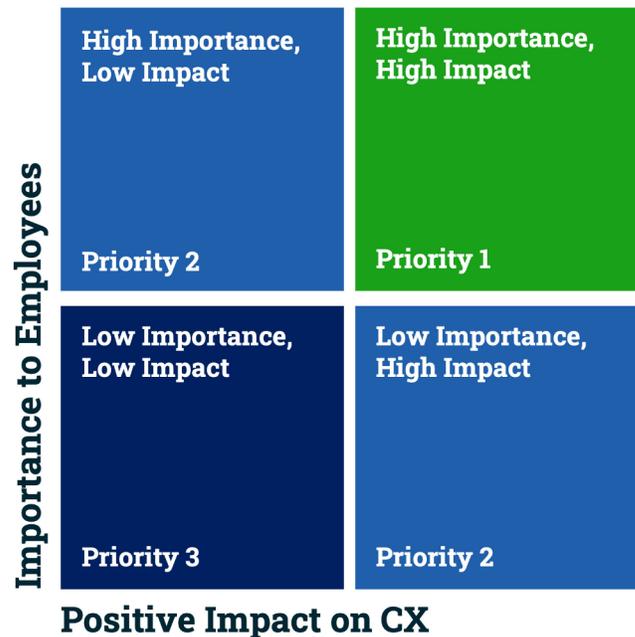
- **Importance to Employees.** Employees – even those not working directly with customers – will see some CX initiatives as more important than others.
- **Impact on Customer Experience.** How will each new CX initiative impact the customer and their experience? This goes beyond simply what customers are asking for and is often a chance to uncover micromoments – those little moments in the customer journey that make a big impact.
- **Importance to Leadership / Decision Makers.** It's not unusual to see leaders take a siloed approach to CX, wanting to prioritize initiatives that will directly impact their goals.
- **Efficiency.** Which initiatives will have the best ratio of investment to return?
- **Sequencing & Prerequisites.** There will be times when an important initiative can't begin until others

To simplify, let's begin by focusing on the first two of these factors – **Importance to Employees** and **Impact on Customer Experience** – using a tool we call the **CX Priority Matrix**.

Introducing The CX Priority Matrix

The CX Priority Matrix, as fancy as it may sound, just answers two key questions about any CX initiative:

- How important is this to (*all*) employees?
- How positive an impact does it have on the customer experience?



By plotting our ideas on these axes, we can batch our ideas into three priority levels:

- **Priority 1:** High importance to employees & High impact on CX
- **Priority 2:** High Importance to employees & Low impact on CX
or Low importance to employees & High impact on CX
- **Priority 3:** Low importance to employees & Low impact on CX

Why These Metrics Matter: Importance to Employees

Without buy-in from employees – including, but not limited to leadership – it's hard to make CX initiatives stick.



Creating a CX strategy means having a plan to execute that requires getting other leaders and teams on board with an aligned mission.

Without buy-in from employees – including, but not limited to leadership – it's hard to make CX initiatives stick.

CX leaders can't simply decide on their own where the organization will spend money or invest resources. And when they try to align others, it can become an internal battle of budgets and attention.

The solution is to consider the importance of a new CX initiative to all employees – not just leaders.

Why These Metrics Matter: Positive Impact on CX

If we're not working on what matters to our customers, then we're spinning our wheels.



Efforts need to focus on what will positively impact the overall customer experience.

Ensure priorities are aligned with the CX Mission Statement and Success Statement:

- What are the promises we've made to customers?
- What actions should we take to deliver on that promise?
- How will these efforts lead to happier customers or a more proactive, positive customer experience?

Alright! We know these factors are important.

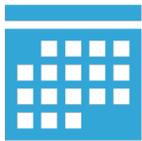
But how do we measure them? Let's investigate in the next section.

How to Measure Importance to Employees

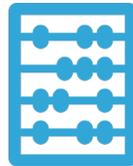
Method 1: Send a Survey

Surveys can be an easy way to collect measurable feedback.

They're ideal in scenarios where you...



Don't need real-time feedback



Seek quantitative feedback



Don't need respondents to go deep

Try This:

Send a survey out to all employees listing a handful of potential CX initiatives. Keep it simple with a name and short overview of each.

Ask employees to give each initiative a rating (we like a 1-5 scale) of how important it seems to them.

Ratings can be averaged and plotted directly on your CX Priority Matrix.

How to Measure Importance to Employees

Method 2: Real-Time Simplified Polling

Real-time simple polling provides quick feedback & starts a conversation.

It's great in scenarios where you...



Seek real-time
feedback



Seek more
qualitative feedback



Want to create a
deeper dialogue

Try This:

Before your next meeting, have a short list of potential CX initiatives (and brief explanations) ready to share with the group.

Give everyone participating a limited number of sticky notes:

- Red represents items they believe are **not important**
- Yellow represents items they find **somewhat important**
- Green represents items they believe are **very important**

One by one, go through the initiatives, asking participants to place their sticky notes according to what they want to prioritize most.

This will not only give you a clear visual of how employees rank potential initiatives; it can also open a great dialogue.

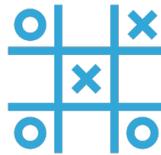
How to Measure Impact on CX

Method 1: Send a Simple Customer Survey

Customer surveys are a great tool in scenarios where you...



Need answers
quickly



Haven't planned
ahead



Require one-time
feedback

Try This:

Create a simple survey including a quick explanation of the survey along with a handful of action items.

For example: "we're building out our CX roadmap: which of these are most important to you?"

There are multiple ways to survey customers, including asking customers:

- To rank their top 3 choices from a larger list
- To rank the full list
- To score each item on a numerical scale

Find what suits your organization and situation best!

How to Measure Impact on CX

Method 2: Include Questions at Select Customer Listening Posts

Customer listening posts are a great method when you...



Want feedback on moments as they happen



Are planning ahead



Seek new initiatives you haven't thought of

Try This:

If you're already set up with Customer Listening Posts along your customer journey, choose a post that aligns with a potential initiative and add a question about that initiative to the post.

*For example, if employee surveys have shown that adding chatbot support is important, **a question can be added at the touchpoint when a customer first reaches out for support: "How valuable would a chatbot option be to you to help you solve your problem?"** with a simple scale of 1-5.*

Not Using Customer Listening Posts Yet?

We've got a guide for you: [Get Our Customer Listening Assessment Guidebook](#)



How to Measure Impact on CX

Method 3: Conduct Customer Interviews

Customer Interviews are a wonderful way to...



Understand the story
behind the metrics



Dive deep into
customer feedback



Get insights surveys
can't deliver

Try This:

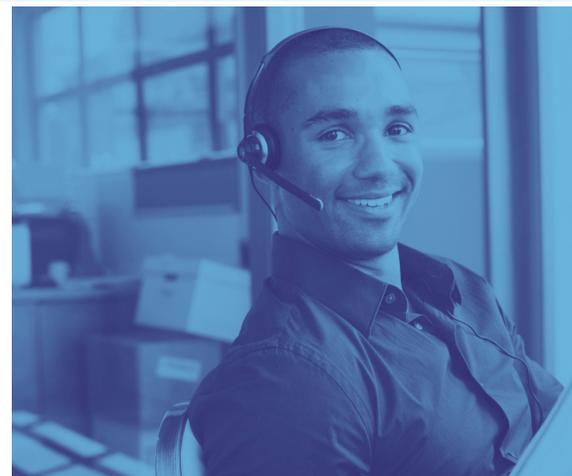
Choose a simple list of 5 to 10 customers whose feedback you'd value and ask them each for a 15 minute phone call.

Ask consistent questions to each participant and record answers in a single place for easy reference.

Just Getting Started with Customer Interviews?

We've got a tool for you:

[Get Our Customer Interview Guidebook](#)



How to Measure Impact on CX

Method 4: Create a Customer Advisory Board

A Customer Advisory Board can help your organization...



Learn from
customers who care



Combine quantitative
& qualitative feedback



Get ongoing feedback
from a consistent cohort

Try This:

If you don't already have a Customer Advisory Board, think about which of your company's customers might fit these guidelines:

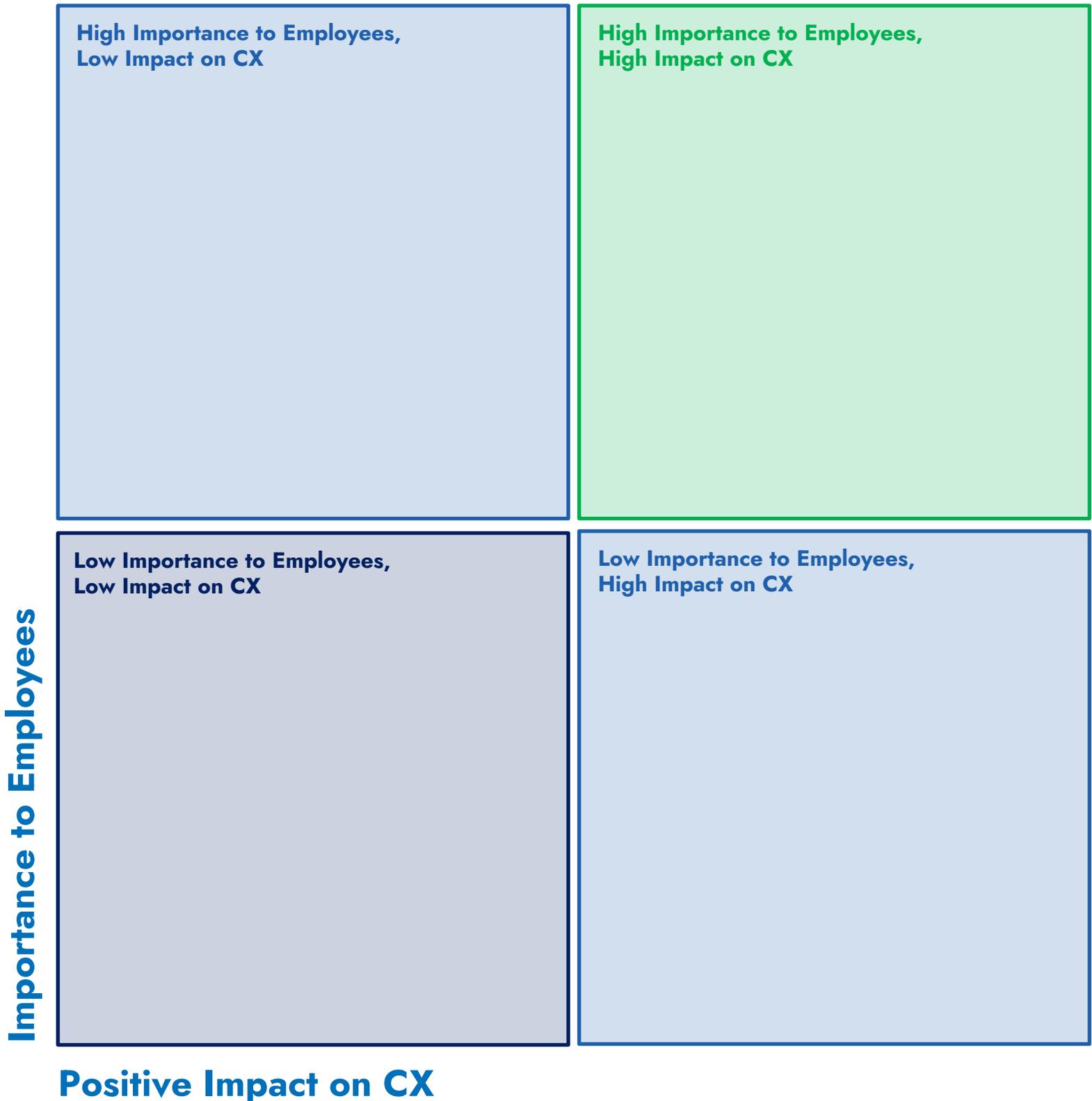
- They care about your organization and its direction
- They have enough familiarity with your industry or theirs that they can provide market insights
- They're willing to provide feedback at a regular cadence

Does creating a Customer Advisory Board feel overwhelming?

Don't worry! **In cases where you're not seeking ongoing feedback, there's nothing wrong with keeping things simple and running a single survey with a group of customers.**

Tool: The CX Prioritization Matrix

Using feedback provided by employees & customers, categorize your organization's potential CX initiatives into the CX Prioritization Matrix.



Other Factors that Impact Prioritization

On page 4, we identified five factors that impact prioritization, but up to now we've focused on the two I find most critical:

- Importance to Employees
- Positive Impact on CX

The other three factors I mentioned earlier serve as great tiebreakers when multiple initiatives appear very close to one another on your Prioritization Matrix.

Let's briefly review each now.

1 Importance to Leadership & Decision Makers

While this is certainly an important factor – especially when it comes to getting new initiatives off the ground – **we've found that in most organizations, importance to leadership is inherently weighed heavily in decision-making.**

We've also found it's not unusual for leaders take a siloed approach to CX, wanting to prioritize initiatives that will directly impact their goals.

For these reasons, I want to be considerate of this important factor while encouraging you to prioritize importance to *all* employees.

Other Factors that Impact Prioritization

2 Efficiency

Which initiatives will have the best ratio of investment to return?

In this context *Investment* can mean money, time, or other resources.

Return may be directly correlated to the business' bottom line – like an initiative that to improve the checkout process that increases sales – but oftentimes they're more subtle, like an initiative that increases Customer Loyalty, driving up Lifetime Customer Value, Referral Rate, and other key metrics.

3 Sequencing & Prerequisites

This factor helps us ground our ideas in reality.

Imagine everyone on your CX team is tepid on Initiative A, but agrees that Initiatives B and C are crucial.

If we recognize Initiative A is required before B and C can get underway, suddenly that tepid response becomes boiling hot.

Our CX initiatives aren't islands – they support one another. Thinking about sequencing and prerequisites helps us contextualize.

Recap & Next Steps

To Review:

We identified five factors that impact CX

prioritization, and picked two of the most important ones to focus on (**in blue**):

- **Importance to Employees**
- **Impact on Customer Experience**
- Importance to Leadership
- Efficiency
- Sequencing & Prerequisites

We looked at some of the ways to collect feedback from customers and employees depending on your needs.

And we saw the CX Prioritization Matrix, a tool we can use to categorize potential initiatives into high, medium, and low priority levels.

What Now?

Share this with your team. Share not only with your CX team, but across the organization. Ask for specific feedback. CX is a team sport – nobody can win it alone!

Get a discussion on the agenda for your next meeting. Any customer-focused organization will wind up with a big list of potential actions. Being ready for this so you can make sure those activities lead seamlessly into action instead of getting stalled.

Experience Investigators can help. Taking action can be easier with an expert guide alongside your team. To learn more about CX Prioritization workshopping, [send us a message](#).

Additional Resources

It's impossible to fit everything in a single resource. Luckily, we have many more available to you!

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

CX Prioritization:

- [Article] [How To Prioritize Customer Experience Efforts](#)
- [Webinar Recording] [How To Prioritize Customer Experience Efforts](#)

Customer Listening Posts:

- [Article] [How Customer Listening Assessments Create Better CX](#)
- [Article] [Improving your Customer Listening Posts? Ask These Questions](#)
- [Webinar Recording] [How Customer Listening Assessments Create Better CX](#)
- [Downloadable Guide] [Customer Listening Assessment Guidebook](#)

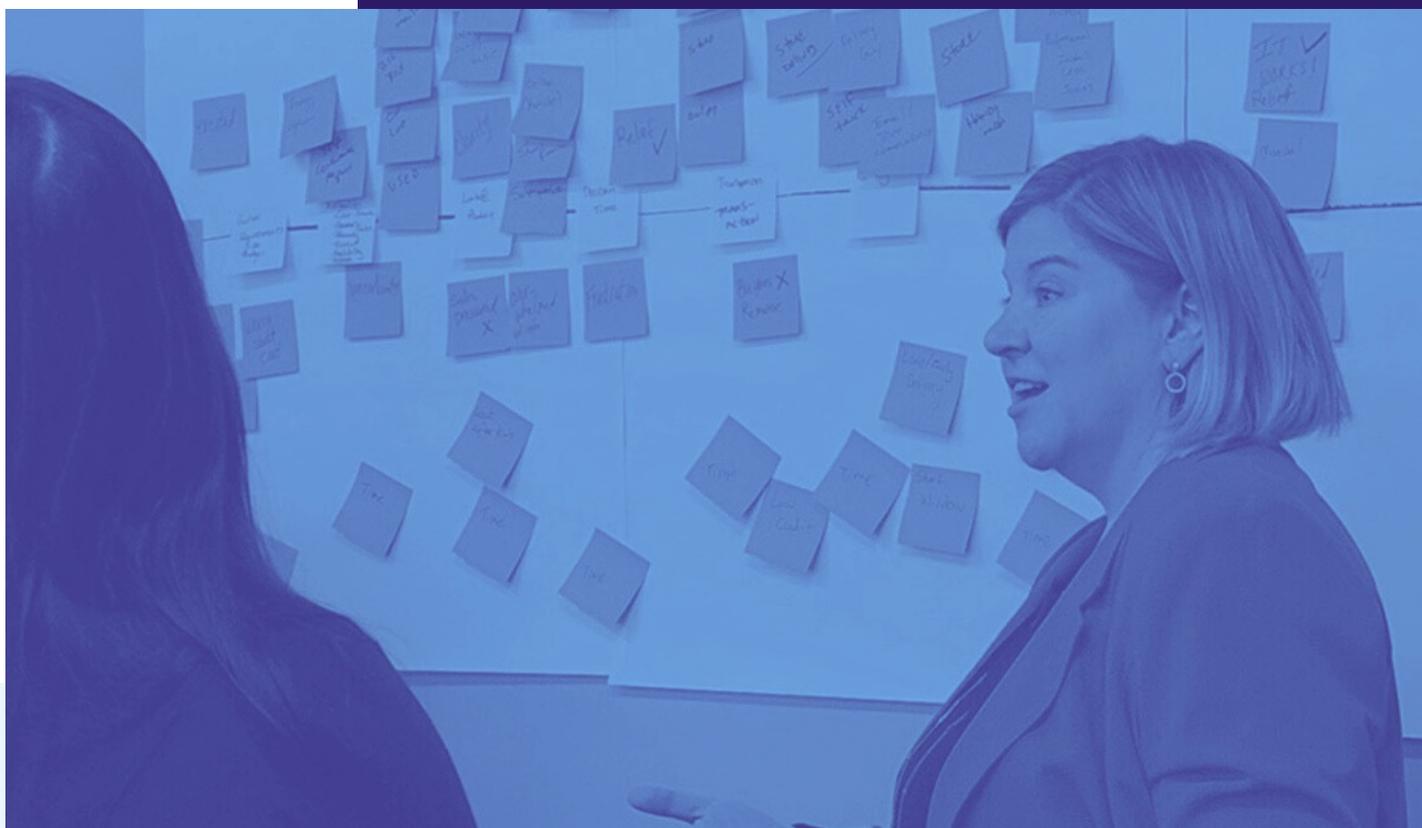
Customer Interviews:

- [Article] [Customer Interviews for CX: How to Conduct Interviews & How They Can Make a Difference](#)
- [Webinar Recording] [Customer Interviews for CX: Tips & Benefits](#)
- [Downloadable Guide] [Customer Interview Guidebook](#)

Additional Resources

If you'd like help prioritizing your CX Initiatives...

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.™



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.



[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 Workshopping,
Training, & Coaching](#)

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

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

Or find more at
ExperienceInvestigators.com.



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**Founder and Chief
Experience Investigator**