

# EFFECTIVELY COMBINING CX AND EX

How combining customer experience and employee experience can enhance the experiences of your customers and accelerate success for your business



# AT A GLANCE

You may have heard the saying, “Happy employees make for happy customers!” But it is more accurate to say that engaged employees create engaged customers – and that considering both customers and employees leads to the best results.

What do we mean by combining CX and EX? It’s about developing the 360-degree view of experiences and value delivery. It’s about gaining a well-rounded perspective internally and externally about how well a company is delivering on its promise of experience – and doing that in a more targeted way.

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# THE VALUE OF COMBINING CX AND EX FEEDBACK

Employees know what's going on. They know how customers feel about your company because they talk with them every day. They can tell when processes are broken because they waste time or face unnecessary challenges. They know when practices prevent them from taking care of customers to the best of their ability.

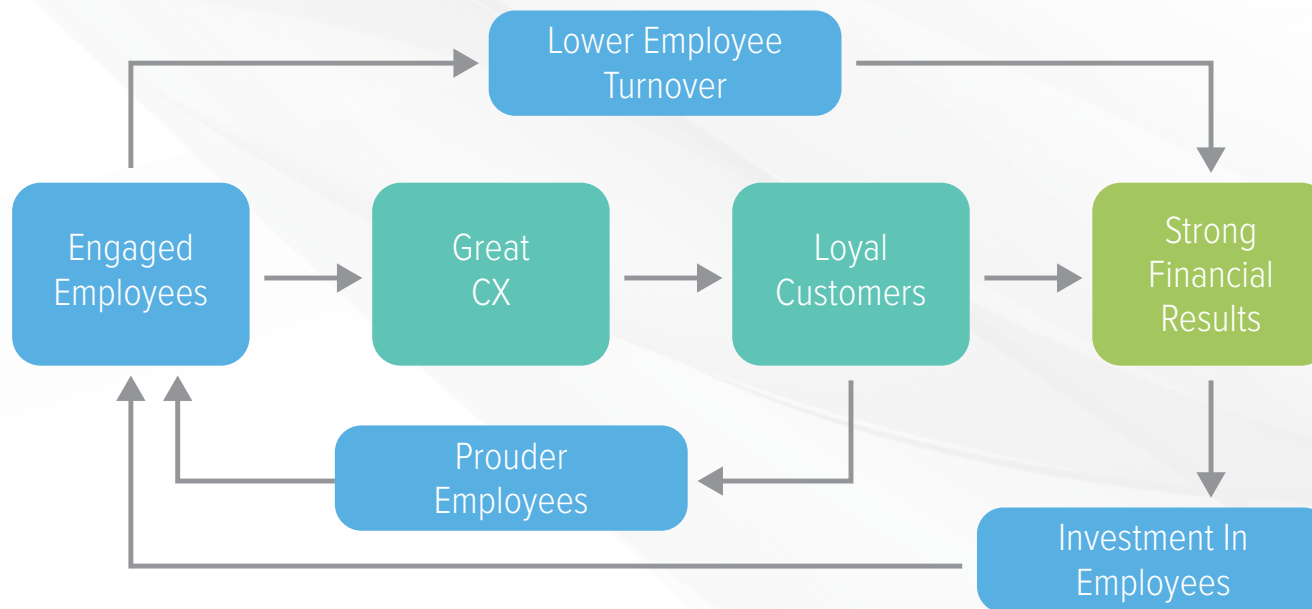
Customers also know what's going on. They know what they are trying to accomplish and whether those objectives are being met. They know when they're waiting an unreasonable amount of time. They get tired of repeating the same information to several different employees. They can tell when employees are enabled to help or when

they are having to fight against poor policies and processes.

The goal is to create a feedback loop where customer and employee feedback is used to change how the company does business and therefore improve experiences – both externally and internally.

# ENGAGED EMPLOYEES CREATE ENGAGED CUSTOMERS

Employee engagement is not just about offering higher salary or more time off. It's about making employees proud to do their job. A critical aspect of this pride comes from knowing they can deliver an experience that meets customer needs.

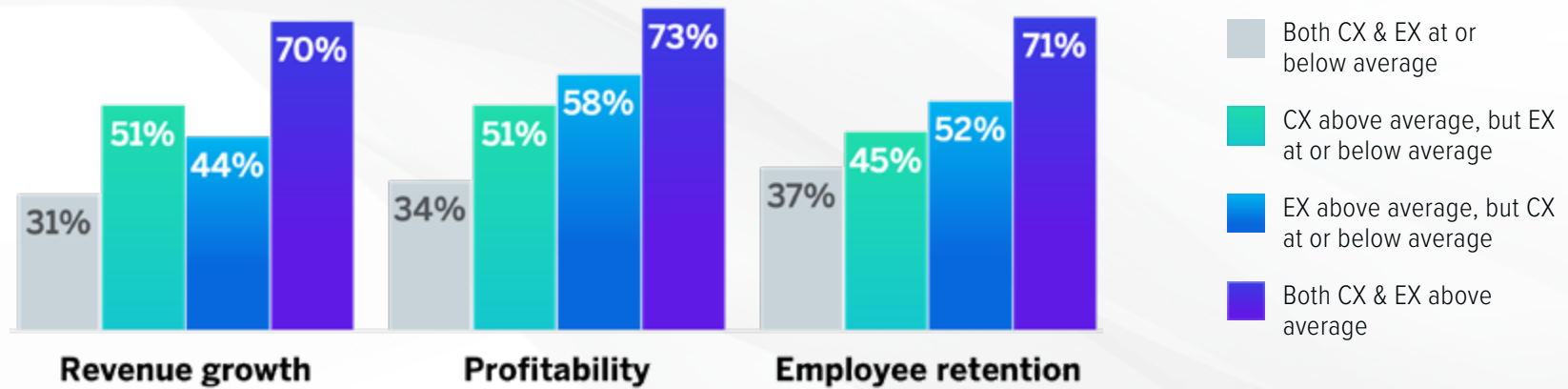


Simply having a strong EX program that drives employee engagement and a CX program that drives customer centricity and optimal experiences can lead to great business outcomes. Combining the two takes it to the next level.

Source: Employee Engagement Virtuous Cycle, XM Institute

# BUSINESS IMPACT OF CX AND EX MANAGEMENT, 2020

Percentage of respondents who say their company’s performance over the previous year is “moderately better” or “significantly better” than industry competitors in these three business areas:



Research conducted by the XM Institute revealed that companies with above-average customer AND employee engagement report substantially higher financial performance and employee retention compared to companies that excel at only one dimension. Consider that for a moment: Having both highly engaged customers and highly engaged employees is substantially better for employee retention than just having highly engaged employees.

Base: 1,292 senior executives from companies with 2,000 or more employees  
 Source: The Global State of XM, 2020 Report

# MAKING IT WORK

## TO MAKE THIS WORK REQUIRES TWO THINGS:

1. Hearing from everyone involved in an experience
2. Enabling employees to provide a good experience



There are several tried and true ways to assess the full customer experience

Combining customer and employee insights accelerates the impact of delivering optimal human experiences

Gather employee feedback and ideas about experiences on a regular basis



# LEVEL 1: CUSTOMER AND EMPLOYEE HEALTH CHECK

Customer Relationship  
Health Assessment

CUSTOMER &  
EMPLOYEE  
HEALTH CHECK

Employee  
Engagement

For an integration of CX and EX to work, the organization needs to believe it is important to deliver an optimal experience to all people they affect – including customers and employees. This requires thinking about the entire human experience as one integrated goal instead of focusing separately on customer experience and employee experience. The recommendations below assume you have at least a basic Customer Experience and Employee Experience program in place with an active customer relationship survey and employee engagement survey. Here are a few ways to start reinforcing the importance of thinking about the human experience your organization delivers to both customers and employees.

## REPORTING CX AND EX KPIs AND FINDINGS TOGETHER

Simply reporting results from customers and employees in the same presentation can start a meaningful cultural shift. It communicates that both are important to the company's success. Reporting them frequently helps keep both customers and employees top of mind.

When considering the type of information to report from each program, we suggest the following options:

- Current scores and, ideally, historic trends on KPIs such as customer NPS and employee engagement
- Key findings and recommendations from the individual analysis of both customer and employee feedback

## INTEGRATING CX AND EX DATA

Combining customer relationship data and employee engagement data can be a very effective way to begin showing the value of optimizing the human experience across the organization. However, this data combination is not always possible or would take resources away from other, more impactful CX or EX initiatives.

The combined data can be used to provide value in two key ways:

### 1. Create a scatterplot, heat map, or matrix of customer and employee KPIs by key organizational segments.

By showing how segments or groups perform in delivering both customer experiences and employee



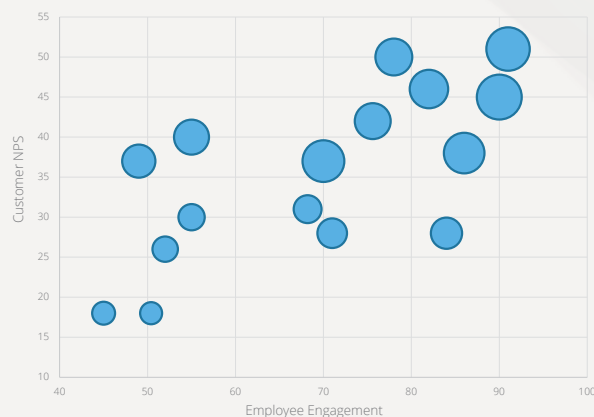
experiences, your organization can target areas with above average performance on both for developing and sharing best practices while funneling more resources and training to areas tracking below average. Adding additional dimensions around performance and outcomes will allow you to begin investigating the returns associated with mastering the total human experience.

- 2. Determine the employee engagement drivers of the relational CX KPI.** Assuming enough observational units, correlation analysis can determine which drivers of employee engagement are most strongly related to the customer experience. These analyses can help inform internal initiatives to improve both employee engagement and customer relationships.

### JOINT CX+EX GOVERNANCE

At this point, it is also important to begin setting up a joint governance team for your CX and EX programs. Creating a governance process allows leaders and teams from both programs to begin collaborating on shared objectives and practices. It also sets the groundwork for being able to act on the insights gathered from a combined CX+EX approach.

## Customer and Employee KPIs and Sales by Facility



## Recommendations for integrating CX and EX data

Informative linkage of employee and customer feedback programs to determine employee engagement drivers of the customer experience has two general requirements:

- A common unit of analysis to link data across both programs. This could be by branch, country, product business unit, account team, etc.
  - Analysis requires a minimum of 30 units of analysis with data in both programs, but we recommend at least 60, and ideally more than 100. Data will be aggregated within each unit for analysis.
- Data from the same general time period
  - As with any data linkage effort, having at least two waves of data for both programs is ideal, but you can still get useful insights by linking a single wave. Just be careful not to combine data that is too temporally distant (e.g., customer experience data collected in January and employee engagement data collected the following December).

# LEVEL 2: IDENTIFYING SYMPTOMS AND DIAGNOSING CAUSES



The next level involves measuring interactions and experiences at a more granular level to identify specific issues that are affecting customer relationships and employee engagement. This level of investigation is fairly common among CX programs but is less common on the EX side.

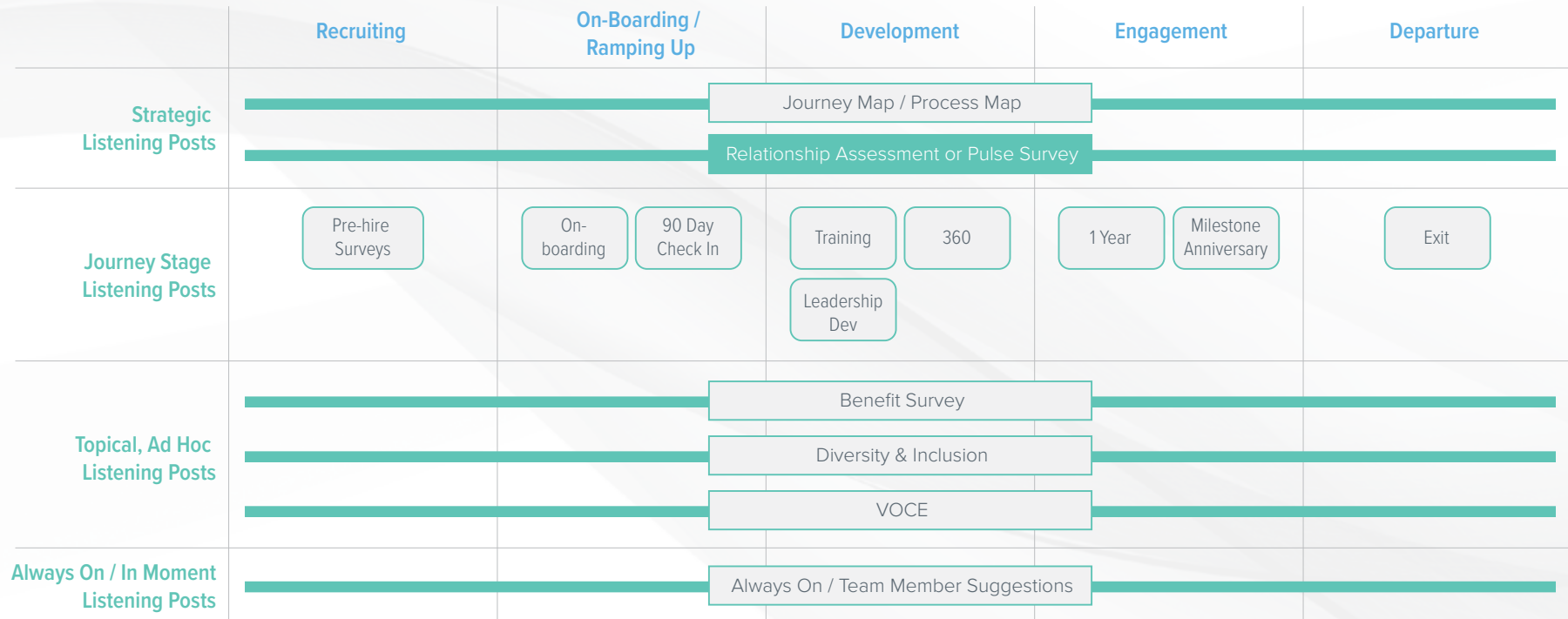
CX programs need to understand the journeys of key customer personas and the key moments and interactions that matter most to them. The CX team must use this knowledge to target specific journey stages and touchpoints that need customer feedback to measure customers’ tactical experiences. This feedback allows companies to identify specific interaction points and processes that are affecting the customer and track specific experiences over time – information that helps inform continuous improvement initiatives.

	RESEARCH	PURCHASE	ONBOARD	USE PRODUCT	RECEIVE SUPPORT	REALIZE VALUE	RENEW
RELATIONSHIP						Bi-Annual NPS Survey	Key Account Loyalty (Qualitative)
JOURNEY		Win/Loss Assessment (Qualitative)	New Service Install Survey	<ul style="list-style-type: none"> <li>Usage Survey</li> <li>Ad Hoc New Product Assessment Surveys</li> </ul>			Pre-Renewal Health Check
TOUCHPOINT	ExactTech.com (Public URL) Site Intercepts			In-Product Feedback	<ul style="list-style-type: none"> <li>Ticket Sat Survey - Email &amp; Site Intercept</li> <li>Omnichannel Support Feedback</li> </ul>		

Understand your customers’ journey stages and the moments that matter and then design a set of listening posts to get the necessary feedback and insights to cover the breadth and depth of customer experiences. This type of listening map ensures you have feedback in the areas you need it and helps as you align employee listening posts.

EX programs are beginning to catch up at this level as many programs begin implementing employee lifecycle surveys. These can be valuable for helping organizations identify specific problem areas and track performance throughout the year. These surveys can also lead to internal changes

and improvements that lead to better CX. One example is education and training. Do employees understand what's expected of them, and do they know how to provide that experience? A lack of training can be a big reason why employees aren't delivering great experiences.



There is a standard employee lifecycle, but the alignment and composition of listening posts will vary across companies. Implementing targeted feedback opportunities allows the organization to respond to employee concerns quickly and in context before they affect overall engagement. An employee listening map like the one above helps guide this process and ensure a holistic feedback system.

The one piece that is all too often missing, however, is the **employee insight into the touchpoints and interactions that directly affect customers**. While the CX transactional surveys provide an important perspective at these touchpoints, we are missing at least half the story by not getting the employee perspective. While we often talk about 360-degree performance feedback for associates, we need similar 360-degree feedback for customer touchpoints. We gather this at key customer journey stages and touchpoints by asking both customers AND employees about their goals, experiences, and obstacles. These insights help organizations more quickly identify and fix internal obstacles that affect customer and/or employee experiences.

For instance, call centers usually have a combination of KPIs based on operational metrics (e.g., Average Handle Time, First Call Resolution, Occupancy Rate, etc.) and customer experience metrics (e.g., Overall Customer Satisfaction and Representative Effectiveness). There are cases where these metrics tell opposing stories – good operational performance and poor customer experiences – which can lead to significant time spent in deep-dive analysis. However, a survey of call center employees will often reveal the issue much more efficiently. We may find that agents feel the need to rush resolution because of a new target for Handle Time, but they are aware that some cases and customers are feeling rushed. By including a 360-degree view of the interaction point, leaders have more insight to help diagnose and fix a problem.

## Steps to help decide where to deploy CX and EX transactional feedback:

1. Document the customer journey and identify key customer moments of truth (MOTs)
2. Prioritize the MOTs at which to deploy customer listening posts
3. Align key operational metrics and internal processes with prioritized MOTs
4. Identify associates involved in service delivery at MOTs
5. Document the employee journey for these associates

## LEVEL 3: TALKING TO THE SPECIALISTS

Unstructured  
Customer Feedback

TALKING TO  
SPECIALISTS

Employee  
Innovation Ideas

The third level of combining CX and EX feedback involves providing open opportunities to collect detailed, real-time commentary from the customers and employees involved in daily interactions with or for our companies. This type of feedback can provide early warnings on new or worsening issues, compliments on specific processes or people, and suggestions on fixes or improvements from the people directly involved in interactions. This level of feedback generally utilizes unstructured, open-text feedback, which can contain incredibly valuable insights that are difficult to extract. However, the value of this type of feedback is worth the effort, and with a few tips you can make it easier to find value.

It is quite common to gather this type of feedback from customers via open-text questions on surveys, but following these suggestions may expand and improve the data and insights to get more feedback to help employees.

- **Encourage customers to specifically name employees who provided a great experience** and then use this feedback for rewards and recognition. This can be a powerful motivator for associates and can increase the feelings of engagement and personalization for customers, too.
- **Provide opportunities for quick and easy unstructured feedback immediately after an interaction.** The sooner the feedback is given, the more specific it can be. Even

when deploying a simple pop-up star rating or thumbs up/down rating after a digital interaction, include an option for providing open-text feedback.

- **Deploy passive feedback forms across your digital platforms** for customers to provide feedback whenever they want.
- **Utilize voice analysis tools** to derive insights from customer service calls and other customer audio sources.

When gathering feedback from employees, these suggestions help make it easier and more effective:

- **Add two open-text questions to employee**

**transactional surveys** – one asking about any new or significant issues they are facing in delivering an optimal experience and a separate one asking for ideas or suggestions to improve the experience delivery process.

- If the organization is innovating a specific process or interaction point, **conduct an idea-gathering campaign targeting the appropriate front-line employees**. Have employees submit ideas for improving the process and let them up-vote/down-vote submitted ideas. This can be a valuable input for the project team and increase employee engagement.
- **Create virtual suggestion boxes where employees can submit ideas and observations at any time**. Embed these suggestion boxes in the tools that employees are using to manage the customer interactions or tools the employees use daily to make it easy for them. Have multiple virtual suggestion boxes specific to individual touchpoints or journeys instead of one generic form to collect all feedback. This will make the data much easier to analyze even though the data management could be more complex.
- Regularly communicate employee suggestions back to the organization and **show how employee ideas have been used to improve processes**.
- **Analyze call center notes and logs as another source of the voice of the customer from your employees**. These notes can also reveal insights about the common ways employees try to solve customer issues.

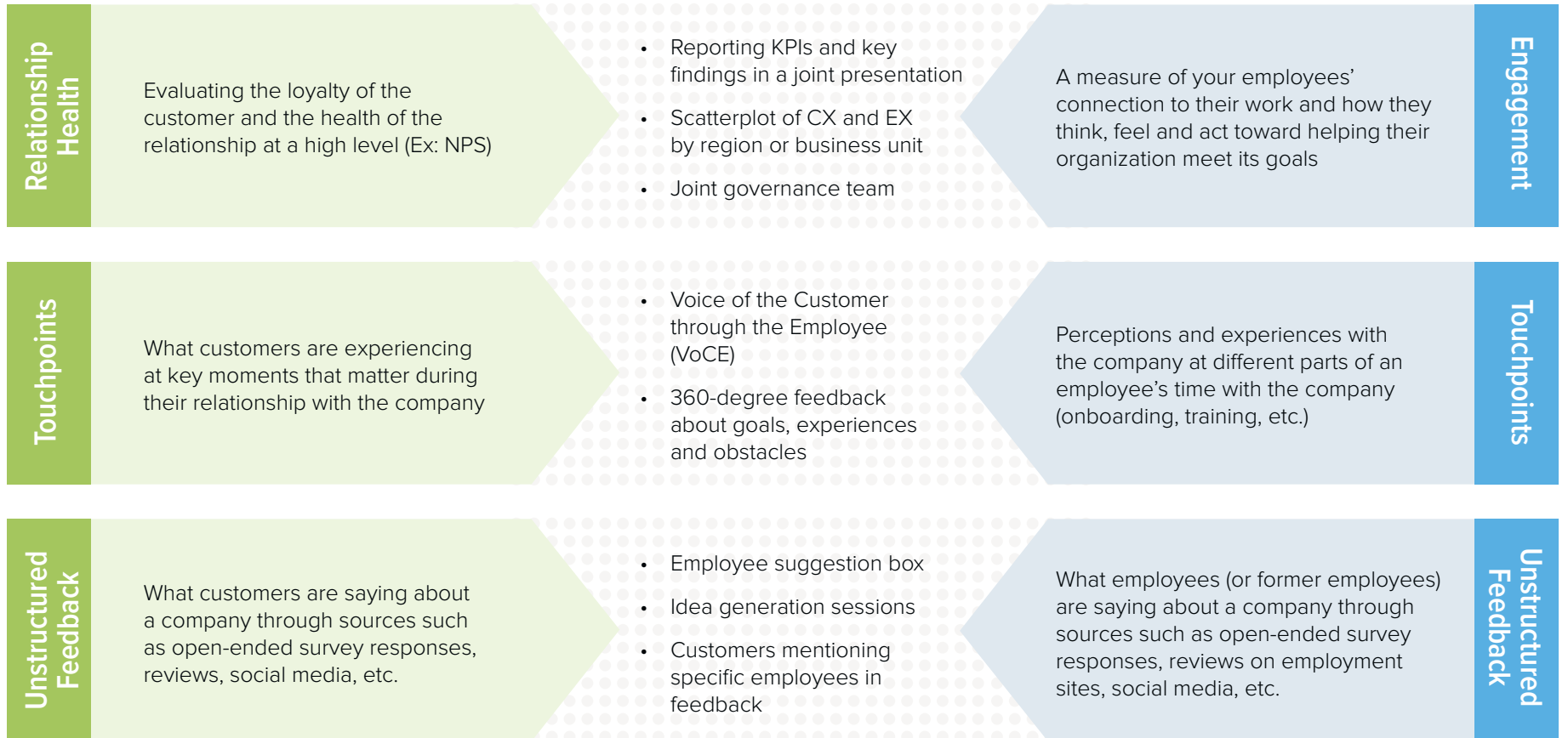


One company creates a word cloud of employee names that were mentioned positively in customer comments. Some names end up being very large! This word cloud is displayed on a large sign in the corporate headquarters. Another company conducts qualitative interviews with client executives. Employees praised in these interviews are shown in a slide at their annual sales conference.

# OVERVIEW

To experience the exponential impact of a mature, holistic experience management program, organizations need to:

1. Establish key aspects of their CX and EX programs to ensure they are hearing from all stakeholders involved in an experience
2. Execute specific, planned activities to ensure the integration of CX and EX insights that are necessary to create the differentiation that comes from a mature XM program



# THE WALKER DIFFERENCE

## CASE STUDY: ENGAGING EMPLOYEES, CUSTOMERS AT MEDXCEL



As the largest sole provider of healthcare facilities services in the U.S., Medxcel Facilities Management spun off from the Ascension healthcare system in 2015. Strong executive support for customer focus helped Medxcel get off to a good start.

### THE CHALLENGE

Initial CX efforts revealed inconsistencies in the service experience, including some systemic issues. Focused attention was needed to ensure customers have a consistent experience at more than 160 diverse sites.

### THE SOLUTION

Medxcel leadership understood the connection between customer experience and employee experience.

“We believe customer service and quality outcomes are intimately tied to employee engagement,” said Jennefer Pursifull, vice president of marketing. “Employees who feel valued and have a voice always do more than required, take great care of customers, and stay for the long run.”

The team took an intentional approach to manage the change process. They realized they couldn’t just set a target to improve customer scores; team members needed some help to do their part.

### FOCUS:

Although progress on goals is monitored at the top level, Medxcel understands the real action takes place at the site level.

- Initially started monitoring and reporting customer feedback at the site level for both the CARE service quality survey and the annual VOC survey
- Assessed associate engagement via annual Associate Voice survey, identifying overall engagement drivers and reporting engagement at the department and site level.

### SITES OF ENGAGED EXCELLENCE:

Medxcel created a site level metric to assess how each site is doing for customer relationship health, customer transactional performance, and employee engagement.



### ESTABLISHED PRIORITIES:

- Created success markers that everyone understands
- Defined best-in-class scores for specific key performance indicators for the CX and EX listening programs
- Monitored results
- Overall customer relationship, customer transaction, and employee results are shared with the leadership in the same session.
- Sites of Engaged Excellence are identified based on the combined CX and EX results
- Every site receives a summary of their overall customer relationship, customer transaction, and employee results to develop/refine site level action plans.

### COMMON PURPOSE:

Medxcel has continued to focus on associate engagement and standardized service standards around a common purpose.

- Developed the Engage! service program to provide a consistent Medxcel experience across 160+ healthcare facilities
- Engage! is based on the premise that as Medxcel takes care of employees, they will take care of customers through high-quality service

Medxcel’s initiative to combine customer experience and employee experience has resulted in stronger relationships with customers, heightened associate engagement and accelerated business success.

## Medxcel’s Site Level Engagement

A sample report from Medxcel’s CX and EX listening program.

REGION	SITE NAME	ASSOCIATE INDEX	CX: TRANSACTION EXPERIENCE	CX: VOC
1	Office 1	Orange	Blue	Red
1	Office 2	Red	Blue	Red
1	Office 3	Orange	Blue	Blue
2	Office 4	Blue	Blue	Blue
2	Office 5	Blue	Blue	Blue
2	Office 6	Blue	Blue	Blue
3	Office 7	Red	Blue	Red
3	Office 8	Orange	Orange	Orange
3	Office 9	Blue	Blue	Blue

## WALKER'S SERVICES

Walker provides a wide range of flexible services to maximize your technology investment and accelerate the success of XM initiatives.

- Technology services. Implementation and engineering services for all programs, from fast starts to highly customized deployments.
- Managed services. Flexible professional services model for end-to-end program management and optimization.
- Advisory services. Tailored advisory solutions to build a world-class experience management practice.

As important as what we provide is how we deliver it. At Walker, we provide a highly personalized experience regardless of if you are new to XM or you have a well-established program that you want to take to the next level.

## WALKER'S PARTNERSHIPS

Walker's strategic partnerships ensure that we provide best-in-class XM tools to complement our broad range of services. Walker is a charter member of the Qualtrics Partner Network (QPN) and is proud to be a top Delivery and Consulting partner in North America – recognized as CX Partner of the Year in 2019. Walker is also an SAP Silver Partner, specializing in helping companies make the most of their data.

To learn more about Walker, please visit [walkerinfo.com](http://walkerinfo.com)



## The CX LEADER PODCAST

The CX Leader Podcast with host Steve Walker provides weekly insights for business leaders to improve results by unlocking the potential of their customer experience. More than a discussion of CX topics, the podcast focuses on ways CX professionals can develop the right skills and ideas to be effective leaders in their organizations.

The CX Leader Podcast explores a wide range of customer-focused business topics. Here are just a few:

- B2B Versus B2C CX
- Luminaries of CX
- Intersections With CX
- The Influence of Technology
- CX Users
- CX Horror Stories
- Change Management
- Journey Mapping
- Immersion Experiences
- Customer Listening Architecture
- Traits of Effective CX Leaders
- The Future of CX
- Qualtrics XM Operating Framework
- Trends in CX

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