



# Governance: Building the Foundation of All Great CX Programs

## “Let’s do a survey!”

For many companies, this statement marks the beginning of their customer experience (CX) program. However, thinking only about the survey and questions to ask has businesses jumping in at the end of the planning process. It’s like picking interior paint colors before you even have the blueprint when building a new home. A sustainable CX program requires a blueprint too. In our industry, we call this blueprint “governance.” When done correctly, the program launches with the right goals and objectives, a roadmap to achieve them, and the best people and resources to execute the plan. CX initiatives without this usually waste time and money, get stale too quickly, and limit return on investment.

For companies wanting a CX program with lasting impact, governance is the foundation on which everything is built.

## So What Is CX Governance?

At its simplest form, it’s the development of a formal plan and process that a company will use to manage their CX program and ensure its success. It offers the organizing framework for establishing the vision, goals, and priorities of the program as well as an intentional discipline to ensure the program adapts as business and customer needs change. The structure aids decision-making, cross-functional alignment, and accountability as companies implement or redesign a CX initiative.

Adopting a customer experience program often requires that companies undergo a culture shift. After all, the move demands a new way of thinking across all departments. Everyone becomes responsible for the customer experience. Without governance, disjointed CX measurement and improvement projects launch within functional groups. Each operates with their own ideas and objectives for making the customer happy. They track success differently and play by different rules. We come across this challenge often with clients and dub it the “wild west” of CX. In one recent example, we found that an enterprise B2B technology company had 20 disparate listening posts deployed, collecting feedback across 10 different platforms, with different KPIs and scales and no survey fatigue rules established to make sure customers weren’t being asked to share feedback too often. Data analysis, insights and improvement efforts were conducted in departmental silos and because of the disparate scales/platforms, it wasn’t and couldn’t be brought together to create a holistic view of the customer experience.

Want to avoid the “wild west” of CX? Ensure your program has a governance model taking into account these 5 key elements:

1. Executive engagement and buy-in
2. A formal CX vision and strategy
3. Adequate resources
4. CX Standards and processes
5. A plan to communicate often

# 1. Executive Engagement and Buy-in

Good CX governance starts at the top. This does not mean executives lead the day-to-day work of a CX program. They instead serve as the visionaries, influencers, and champions of a customer-centric enterprise transformation—not a one-and-done survey.

The role of executives in a CX program includes:

- Shape the CX strategy, vision, and goals, aligning with company strategic priorities
- Ensure the program has the proper support and resources for success
- Communicate the importance of CX throughout the organization
- Meet regularly to review CX metrics
- Advocate for and break down barriers to drive CX improvement across the organization

Executive support gives credibility to CX initiatives and ensures they are viewed as a key company initiative. [Interested in learning more about leveraging executive support? Check out The CX Leader Podcast episode “Buy-In from the Top” to learn how one company leveraged executive buy-in to drive CX success.]

## 2. Formal CX Vision and Strategy

Setting the vision and strategy starts with the end in mind, determining what the CX initiative should accomplish based on business needs. Customer experience programs offer endless opportunities for continuous improvement. Governance brings focus to those opportunities by ensuring the program’s vision includes a set of mutually agreed upon goals and priorities that everyone can rally around.

With goals defined, strategy outlines how to achieve them. The plan details actions for progress, necessary resources, and measures of success. This keeps everyone aligned around the intended outcomes and results of the CX initiative. Its focus promotes disciplined decision-making around program objectives.

When setting the vision and strategy, answering these fundamental questions is important:

- What opportunities and challenges exist that a strategic focus on customer experience can solve?

- Why is now the right time?
- What are the top priorities for this program?
- What does success look like? How will we track it?
- What actions must we take to make progress?
- Who should be involved to make this initiative work?
- Who is accountable for program progress?
- What resources do we need for implementation?

## 3. Adequate Resources

A strong CX program requires having the right people around the table to set the strategy, make decisions, and take action. Identifying those resources is critical when building your CX governance plan.

The Qualtrics XM Institute divides a CX program governance team into five groups:

- **Executive Sponsor** – builds buy-in and support for a CX strategy
- **Steering Committee** – decision-makers from different functional areas who shape and approve CX strategy
- **Core Team** – a centralized group setting the direction and sustaining CX efforts across an organization
- **Working Group** – influential managers who implement the plan and advance CX initiatives within their departments
- **Ambassadors** – employees at all levels who inform and execute on the CX plan

This group should expand beyond the CX team and customer-facing leaders. All functional departments, including marketing, finance, and IT should be represented, as all play a critical role in delivering a good customer experience. Actively involving those departments makes for a stronger CX program.

## 4. CX Standards and Processes

CX governance establishes guidelines for how the program is designed, ensuring consistency across departments and divisions. These guidelines serve as barriers to creating the “wild west” CX environment mentioned earlier.

Consider a large food franchise with thousands of locations around the world. Each offers a customer experience survey specific to their restaurant. The findings inform local improvement efforts. However, headquarters

wants to aggregate the data across all locations to identify systemic issues. Since every franchisee asks different questions in unique ways, bringing the information together is impossible. This creates three major problems:

- The company struggles with setting strategic CX priorities across all their restaurants.
- The chain spends more money resolving issues by location rather than creating economies of scale through a company-wide approach.
- The customer experience is inconsistent because no restaurants operate the same way. That hurts customer loyalty, which is key to survival in the hyper-competitive restaurant industry.

The company has a focus on customer experience. What is missing are guidelines to ensure consistent adoption and use.

In this same example, we often see that individual franchises want flexibility to adapt or expand their CX program to meet their unique business needs. Perhaps a subset of restaurants in the Midwest are trialing a new mobile ordering process, and they want a formal way to capture customer feedback related to this new service. This can be accommodated, woven into the CX program, as long as the restaurants follow the guidelines set forth on preferred CX methodologies, KPIs, and scales as well as processes to deploy new listening posts and take action based on the feedback.

CX governance does not just apply to surveys. Its guardrails could help this food franchise standardize its online ordering experience or create a more consistent employee training program. Its standards and processes help companies remove siloes that prevent teams, departments, and subsidiaries from working on CX together. With a common set of rules, different functional areas can advance the initiative despite unique operations.

## 5. A Plan to Communicate Often

What is one of the top reasons initiatives fail? Lack of communication.

Too often leaders tell employees what to do, rather than why to do it. They fail to communicate goals and measurable ways to achieve them. They do not invest the time to help teams understand a CX initiative's importance

and their role in advancing the work. And perhaps most ill-fated, they never solicit direct input from those critical to the program's success.

Good CX program governance makes communication an important part of every step in the planning and implementation process. There's no such thing as over-communicating.

Communication starts at the top with the executive sponsor sharing the initiative's business importance and impact. The core team and steering committee use company data and employee input to form the vision and strategy. The team shares the plan with departmental leaders and employees so they understand the goals and ways to attain them. Skipping this part of CX governance is a missed opportunity for gaining upfront buy-in throughout an organization.

CX governance also incorporates feedback from the executive and frontline levels throughout implementation. Acting on these opinions allows for continuous improvement. This double feedback loop facilitates faster adoption and quicker, more meaningful results. Finally, CX governance keeps people informed for the duration of the initiative. Cultural shifts take time and it's not often a linear path. Regularly providing program updates and success stories keeps staff engaged, inspired, and working together. Consistent communication lets everyone know "this program is important to all of us."

## Get the Most Out of Governance

Good governance enables a true vision for CX—and a broader plan for experience management transformation—to take shape. It serves as the foundation for the cultural shift required to move from simple surveys to company-wide customer centricity. Governance builds the buy-in, collaboration, and communication necessary for long-term CX success.

Ready to rethink your CX program governance strategy? At Walker, we empower companies with customer experience support that drives decision-making. We are a Qualtrics-certified full-service Experience Management (XM) firm. Our team of experts provides end-to-end managed services and strategic consulting so you can deliver best-in-class experiences to your customers. We manage by our motto: Everyone deserves an amazing experience. Let us help your company build the blueprint.