DRIVING RESULTS

A PRACTICAL GUIDE TO USING CUSTOMER INTELLIGENCE TO DRIVE **ACTION, CHANGE, AND RESULTS**

WALKER

CUSTOMER INTELLIGENCE

THE ULTIMATE TOOL FOR DRIVING RESULTS

Driving results in your organization is the single most important thing you can do as a customer experience professional. Results can mean many different things, but they all have one thing in common – a direct impact on generating more revenue (growth) or improving efficiency (profitability).

Customer-focused initiatives are created to impact results, but it doesn't always work that way. Why not? What stands in the way of customer initiatives driving results in your organization?

We have created this guide to answer that question and help you, the customer experience professional, drive results in your organization using customer intelligence.

Not to be confused with the multitude of guides, books, and consultants on the topic of change and change management, this guide focuses specifically on change resulting from customer-focused initiatives. After all, the intelligence we gain from understanding our customers becomes the ultimate tool for results in almost any organization.

We hope Walker and this guide will be a critical resource for executing plans that drive results in your organization.

PHIL BOUNSALL
President

CONTENTS

INTRODUCTION

WHO IS THIS DESIGNED FOR?

This material was developed with customer experience professionals in mind – the people most closely involved in gathering, analyzing, and delivering customer intelligence so it can be put to use throughout an organization.

"Customer experience professionals" have many titles and can be located almost anywhere in an organization. Titles may include terms like voice-of-the-customer, customer advocate, customer satisfaction, customer loyalty, or customer engagement. They may be in marketing, corporate strategy, market research, corporate quality, sales, service, or account management. Regardless of their titles or department, these are the people that are trying to turn customer intelligence into real change to drive results in their organizations.

Based on customer intelligence, customer experience professionals identify the need for change and implement the process to make sure it all happens. Therefore, this guide centers on the individuals that champion customer initiatives, but will often incorporate lessons and advice for others in the organization.

A FOCUS ON B-TO-B

When we set out to design this guide we were determined to provide specific advice and practical ideas that could be easily applied. To do that effectively, we narrowed our focus on complex B-to-B companies. While some principles of customer-driven change are similar for B-to-B and B-to-C organizations, we don't believe they can be combined.

Customer relationships are managed very differently in B-to-B companies. Not only are more people involved, but many companies work through layers of channel partners or distributors which means they often don't "own" the customer relationship. So our advice can be most relevant, we've designed this guide for B-to-B companies and their unique challenges.

YOU ARE A CATALYST FOR DRIVING RESULTS

Regardless of your title or level of responsibility, if this document has been placed in your hands, you are a catalyst for driving results.

Much of the time it may not feel that way. Instead, you may feel like an administrator, organizer, manager, or technician that handles many details. However, make no mistake – the role of customer experience professionals is to use customer intelligence to prompt action, spark change, and drive results.

Is this easy? No. However, you can make a big difference for your company and for your customers – and not everyone can say that!

GETTING STARTED

Sometimes the most difficult step is the first one.

To help you get started, we suggest you step back and take a look around. What do you see when you look at your organization?

ASK YOURSELF A FEW QUESTIONS

Unfortunately far too many companies that implement customer-focused initiatives do not ever realize the results they set out to achieve. Why is that?

The road to results is not easy. In today's complex corporate environment it has become very difficult to implement customer-focused initiatives that really pay off. As you get started, consider asking yourself a few questions.

FIVE QUESTIONS ON THE ROAD TO RESULTS

There are many, many details that need to be managed to consistently deliver customer-focused results. Here are five key questions to help you anticipate the most difficult challenges for your journey.

DO WE HAVE THE RIGHT CULTURE?

Possibly the toughest aspect to control is the culture of the organization. However, no one can deny its importance. The company has to truly believe that customer initiatives are a priority, leadership must provide resources and support, and the focus on customers must be visible throughout the organization. What's more, there should be clear alignment between how the company prioritizes customer needs with the overall corporate objectives.

DO WE HAVE A GOOD STRATEGY IN PLACE?

Customer initiatives don't just happen. There needs to be a strategy in place that includes specific goals, a leader with influence, a committed team, a roadmap, and the authority to make it all happen. In any organization there is no shortage of corporate initiatives. To rise above the corporate clutter the customer strategy must have a strong mandate to achieve real results.

HOW STRONG IS OUR CUSTOMER INTELLIGENCE?

Probably the most complicated component on the road to results is developing a system for gathering and distributing the right customer intelligence. This is much more than monitoring social media or conducting surveys. This means making the most of available customer information to do more than just listen to customers. Instead you need to predict their next move and anticipate their future needs. Companies must be skilled at gathering and analyzing operational data, financial information, behavioral data, survey feedback, service case data, social media, and more. It doesn't stop there—this information must be turned into insights that are readily available throughout the company so they are put to use.

DO WE TAKE ACTION?

The next question is about taking action on customer intelligence. In any organization there are countless individuals that should use customer intelligence to improve the decisions they make and the action they take. They need to be aware of what is available and must understand how it can best be leveraged. Ultimately, customer experience professionals need to develop an infrastructure for action that delivers timely customer insights, educates users on its value, and encourages them to make use of it.

HOW WELL DO WE IMPLEMENT CHANGE?

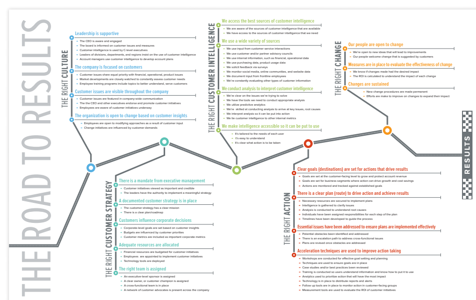
Let's say your company has a supportive culture, has a good strategy in place, gathers rich customer intelligence, and takes action on this intelligence. That's all good, but it still doesn't guarantee success. To generate results, real change has to occur. This means the follow through takes place to ensure the change is implemented effectively, measured carefully, and constantly modified to optimize its impact.

The answers to these questions will give you some indication of the challenges ahead of you.

While the road to results may be filled with detours, obstacles, and hazards, navigating these twists and turns will drive results that will improve performance and create value for your shareholders.

A MORE DETAILED LOOK

In reality, five questions will not tell you all you need to know, so we took it much further. Later in this workbook you'll find a section titled, "The Road to Results." In this section we expand upon the five questions we have asked here. That section can serve as your checklist or self-evaluation to consider all the elements you need for a successful, results-driven customer strategy.



FRAMEWORK FOR RESULTS

Driving results is no easy task. To make it more logical and purposeful, we decided to provide structure to the process.

In this section we'll provide a framework for driving results and discuss the components that make it work. By applying this simple framework you can improve the way you drive results across your organization.

THE GROUPS THAT DRIVE RESULTS

The framework features three separate groups that are instrumental in driving results in B-to-B companies.

CUSTOMER-FACING GROUPS

This is the group closest to the customer, and they interact with customers regularly. They include sales managers, strategic account managers, national account managers, channel managers, and others that strive to maintain, increase, or protect account revenue, so it is important they have access to customer intelligence to anticipate or respond to problems and to seize opportunities.

BUSINESS SEGMENT GROUPS

When we refer to business segments we're talking about a broad range of departments, divisions, regions, and functional groups. This includes product groups, quality departments, geographic regions, service departments, marketing groups, and other areas that rely on customer intelligence. These groups need customer insights, usage data, and other customer information to ensure they are developing the right solutions, fixing the right problems, and providing the best services to exceed customer expectations.

COMPANY LEADERSHIP

Customer initiatives cannot achieve their true purpose – customer-focused results – without engagement by the company's leaders. This group provides the direction and support for the action and change that will drive results within the customer-facing and business segment groups. This group includes the CEO and other C-level executives, as well as other leaders of divisions and functional groups that rely on customer intelligence.

THE CUSTOMER-FOCUSED JOURNEY

Results do not occur in an instant. In fact, in most organizations it seems like it takes forever! At Walker we feel it is more like a journey where you set your sights on a destination and create a route to successfully arrive. We like the travel metaphor because, just like going on a trip, it requires a starting point, an end point, and a plan to go from start to finish.

THE PROCESS FOR DRIVING RESULTS

The framework features three important steps in your journey to drive results.

DESTINATION

An important aspect of results is establishing your destination. In other words, what results are you setting out to achieve? The more specific an organization can be in defining their destination, the more likely they will be to reach it. In both the customer-facing and business segment groups, we'll discuss the potential destinations that most organizations are trying to achieve.

ROUTE

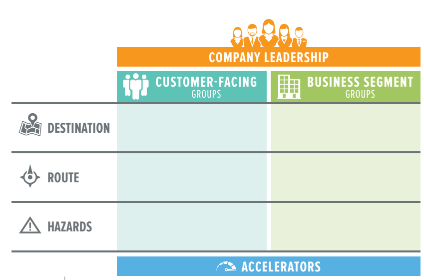
Once your destination is clear, the organization needs a route to get there. This is the process or steps planned to achieve your desired outcomes. Having a good route can be the key to reaching your destination. This portion of the framework highlights the key elements of a good route and provides advice on developing a plan that makes your journey successful.

HAZARDS

On the road to your destination, it's not a matter of whether there will be hazards, but what the hazards are. There will always be obstacles on the way, and you must be prepared to overcome them. This section will provide the questions you need to ask yourself, as well as tips and tactics that will be necessary to make your journey successful.

Successful customer experience professionals will quickly recognize the practical nature of setting specific goals (destination), assembling an effective plan (route) and anticipating obstacles (hazards) along the way.

The fold-out portion of this section provides a short description of the components. We'll discuss them in more detail in the next section and consider how they all work together.



THE GROUPS

CUSTOMER-FACING – The customer-facing groups are closest to the customer. They includes sales managers, strategic account managers, national account managers, and other similar positions.

COMPANY LEADERSHIP – This refers to the leadership of the company – CEO, and other C-level executives who provide direction on company initiatives.

BUSINESS SEGMENT – The business segment groups are driving results within specific business units, product lines, functional areas, or geographic regions.

COMPANY LEADERSHIP

THE PROCESS

DESTINATION – The results you are setting out to achieve.

ROUTE – The process or steps that are planned to achieve your desired outcomes.

HAZARDS – The obstacles along the route to your destination and the survival tips and tactics to overcome them.

	CUSTOMER-FACING GROUPS	BUSINESS SEGMENT GROUPS
DESTINATION	**CUSTOMER-FACING DESTINATION –** Typical customer-facing destinations are goals to protect account revenue that's at risk or to capitalize on opportunities to increase revenue.	**BUSINESS SEGMENT DESTINATION –** Business segment destinations generally focus on improving shortcomings or processes that span or cross business units, regions, or functions.
ROUTE	**CUSTOMER-FACING ROUTE –** Steps taken to achieve results by addressing issues and/or seizing opportunities for growth on an account-by-account basis.	**BUSINESS SEGMENT ROUTE –** Steps taken to improve quality, streamline processes, enhance services, and boost overall performance in specific business segments.
HAZARDS	**CUSTOMER-FACING HAZARDS –** Staffing, escalation, prioritizing accounts, customer organizational changes, and compensation incentives are common obstacles for account groups.	**BUSINESS SEGMENT HAZARDS –** Cross-functional collaboration, competing activities, eliminating redundancy, and lack of executive support or funding are business segment pitfalls.

ACCELERATORS

ACCELERATORS – Resources, process, and tools that will accelerate the process for achieving results.

ACCELERATORS FOR DRIVING RESULTS

Accelerators get you where you need to go in a faster, more efficient way. These are the techniques, tactics, and tools that will speed up your journey to results and make it a less painful ride.

ACCELERATORS

Below are some of the most common types of accelerators recommended by Walker:

- **GOAL-SETTING TOOLS** – Frameworks and exercises that help groups align on setting goals that are specific, measureable, attainable, realistic, and tangible (SMART).
- **WORKSHOPS** – Used for alignment and planning, facilitated workshops can be a useful way for teams to determine their destination, plan their route, and identify hazards.
- **TRAINING** – This is to arm the users of customer intelligence with everything they need to understand the information they receive and to know how best to put it to use.
- **CASES/BEST PRACTICES** – Teams don't need to start their journey from scratch. Important learnings can come from the experience of others that have traveled the same road.
- **ADVANCED ANALYTICS** – There are plenty of tools, methods, and experts that can help determine shortcuts on your journey by establishing priorities and zeroing in on the most important elements.
- **TECHNOLOGY TOOLS** – Technology is a critical accelerator for gathering, integrating, analyzing, and distributing customer intelligence.
- **FOLLOW-UP PROCESSES** – This includes procedures, often involving technology, to ensure customer intelligence is transformed into action.
- **MEASUREMENT TOOLS** – This include methods and models to calculate the impact and return on investment of your customer initiatives.

Walker prides itself in having a comprehensive range of tools and services available. We're prepared to speed up your journey by providing all of these accelerators and more.

MAKING IT WORK

Having described all the components of the framework, let's consider how they work together. After all, it's the combination of the elements where the framework provides the real direction.

CUSTOMER FACING JOURNEY

DESTINATION

For customer-facing teams, the destination should be focused on revenue. Consider the following examples of destinations for your company to establish:

PROTECTING REVENUE THAT IS AT RISK: Intervening to address issues that are preventing customers from renewing or putting relationships in jeopardy is a destination that customer-facing teams often establish. Common customer issues that cause revenue to be at-risk include:

- Product and/or service quality issues
- Lack of responsiveness or proactive communication from account teams
- Problems with indirect channel partners.
- Procurement and other decisions makers not appreciating your full value

Evidence of these issues may come to light through regular communications between teams, during strategic or operational reviews, and through feedback provided through survey and other processes.

CAPITALIZING ON OPPORTUNITIES TO INCREASE REVENUE: Leveraging and growing accounts where strong relationships exist is another destination that makes good sense for customer-facing teams. Challenges that often limit the growth of customer accounts include:

- The network of relationships is too narrow – it doesn't support the generation of new business from other areas of the company
- There is very little collaboration with the customer in developing shared goals and plans
- There is a limited understanding of the customer's business objectives and industry dynamics
- Feedback from customers is minimal or not relevant – additional customer needs are not revealed
- Interaction with decision makers has been limited so growth opportunities do not often surface

SMART GOAL-SETTING

SMART (Specific, Measurable, Attainable, Realistic, Tangible) is a method to apply in setting your goals and objectives. Destinations that are SMART will yield better outcomes.

MAKING IT EASY FOR CUSTOMER-FACING TEAMS TO SEE THE DESTINATION

These examples of destinations are likely familiar to customer-facing teams, but the reality is there are increasing demands on their time. The following tools are recommended to make it easy for customer-facing teams to identify if there are issues that need addressed or opportunities to leverage:

Predictive Analytics: By applying predictive analytic techniques, Walker can help companies anticipate which customers are not likely to renew contracts or which customers are most likely to purchase new products.

Opportunity Triggers: Walker technology can automatically alert sales teams when there is a business opportunity to pursue.

Service Recovery Triggers: Walker technology can automatically alert sales teams when there is a customer issue that needs addressed.

ROUTE

Once the destination is clear, you need to plan the best route to get there. Mapping out the route should include the following steps:

STEP ONE: **INVENTORY CUSTOMER INTELLIGENCE AND CLARIFY CUSTOMER ISSUES**

As the destination is being set, customer-facing teams will have some idea of issues or opportunities to be addressed with their customers. However, it is important to assess all available insights to clarify issues so that the route – the detailed plan to reach the destination – can be established:

- **Customer insights** – survey feedback, contact center notes, purchasing patterns
- **Discussions with customers** – strategic business review notes, notes entered in CRM systems
- **Account plans** – strategic plans developed by teams with input from customers and discussed on a regular basis
- **External research** – research on customer business/industry, competitive intelligence, market share, share of wallet allocations

STEP TWO: **DOCUMENTING THE ROUTE**

Once customer insights have been inventoried, customer-facing teams should set out on mapping the route. This process works best when teams make certain the following items are addressed:

1. **Prioritize action items.** Teams should prioritize those items that will have the *most impact* on their customers and are the *most feasible* to accomplish.
2. **Assign an owner to each task.** Each prioritized action item that is selected for a customer should be assigned to an owner. Also, determine if additional resources are needed. Often times customer-facing teams will require help from other teams to address customer opportunities or issues.
3. **Set a timeline.** Make certain that each action item has a specific date for completion.
4. **Identify success metrics.** Customer-facing teams should document specific, objective success metrics associated with each action item.

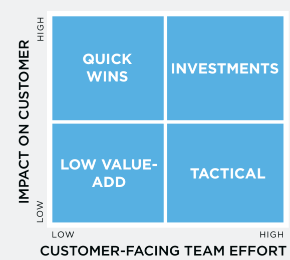
FACILITATING THE ACTION PLANNING PROCESS

Customer-facing teams can leverage Walker's experienced consultants to assist with the inventory of customer insights and collaborate with internal teams to determine the best route to reach your destination.

PRIORITIZE ACTION ITEMS

Conducting an inventory of customer intelligence is an important first step in mapping out the route to the customer destination. However, customer-facing teams may be left feeling overwhelmed with the number of potential routes they could take.

As customer-facing teams are working on the map, the following framework is a beneficial tool in sorting out the potential routes...and detours.



HAZARDS

Even the best of plans are susceptible to obstacles. Situations evolve, people change positions, and problems occur. How you handle these hazards will have a lot to do with the results you achieve. Because Walker has worked with many companies, suggestions below can help you avoid common pitfalls before they occur and/or better respond to those that complicate your journey.

Here are some common obstacles customer-facing teams will likely face in their efforts to drive results:

HAZARD	HOW TO ADDRESS	ADDITIONAL SUPPORT OR RESOURCES NEEDED
TEAM RESOURCE & STAFFING Customer-facing teams may not be staffed in a way to optimize service with a customer. Common examples include: • Lack of executive support • Chemistry between customer & account team is not working • Not enough resources on the team to serve the needs of the customer	• Identify supportive leaders and recruit their involvement • Add team members to improve chemistry • Clearly outline the resources needed to succeed	If a resource change is needed, make sure account leaders have access to the appropriate channels within HR, Sales Operations, or the Executive Team (whoever is responsible for account team staffing decisions) to be able to swiftly make a change.
ISSUES OUTSIDE THE CONTROL OF CUSTOMER-FACING TEAMS It is common that a customer-facing team will create a destination for a customer that involves addressing issues that are outside of their control. Common examples include: • Product quality issues • Service issues • Issues with product lead time • Cross-functional problems	Make certain that account teams have a clear escalation path for issues they need help addressing for their customers that they cannot control. Engage all functions and cross-functional account teams to minimize “silos” and facilitate resolutions.	In many cases, account teams may need support from a cross-functional team to help address customer issues, particularly for large or strategic accounts – so having all functions represented already can make problem-solving smoother and easier.

HAZARD	HOW TO ADDRESS	ADDITIONAL SUPPORT OR RESOURCES NEEDED
DAILY ACTIVITIES PREVENT STRATEGIC PROGRESS On a daily basis, customer-facing teams are faced with many short-term activities – planned and unplanned – that can serve as distractions from long-term strategic goals.	Executive sponsors and account leaders need to be updated on a regular basis. Although it depends on the scope, monthly or quarterly updates are appropriate. More communication is always better than less!	A communications specialist can be a very beneficial addition to the team to help with status updates, and formal communications after the team has met the objectives.
MANAGING MULTIPLE CUSTOMER RELATIONSHIPS One customer can keep a customer-facing team busy enough, but most teams are managing multiple relationships which can serve as a distraction from focusing on business goal destinations.	Make sure the team has regular meeting times on the calendar at the commencement of the team formation. Make meetings mandatory, if needed.	Team members should know their role and have the support of their management to participate as needed.
CHANGES WITH THE CUSTOMER One hazard that is out of the control of customer-facing teams, yet happens often, is a change at the customer that significantly impacts the relationship and the business destination for the account. Common examples include: • Changes in contacts at the customer side • Customer being acquired by another company or integration with another organization	Create onboarding process and materials to navigate transitions more effectively. Increase communication around any change to be able to quickly adapt and keep on track.	Widening your web of relationships with a customer may require other resources to be more customer-facing than usual (either temporarily or on a more permanent basis) throughout the change.
MISALIGNED MOTIVATION Customer-facing teams are going to spend their time on activities that they are incentivized on. Most often these are sales-related activities. This becomes a potential distraction from focusing on the route to the business goal destination.	Ensure that incentives motivate the desired behaviors and don't shift teams' attention away from serving customers.	Coordination between customer-facing teams, sales, service, and HR will result in the right combination of incentives.

BUSINESS SEGMENT JOURNEY

DESTINATION

For business segment groups (such as functions, regions, or business units), the destination, or business goal, is to drive measurable change that leads to positive outcomes for that business segment. At the simplest level, this typically means revenue growth, cost savings, or process improvements that lead to increased profitability for the company. Consider the following destination examples for business segments:

IMPROVE AREAS THAT WILL LEAD TO GROWTH

A variety of customer listening posts and analyses will help you anticipate customer needs and lead you to your destination.

- **Surveys identify performance shortcomings:** Customer surveys are a primary way to determine which areas customers perceive as weak.
- **Advanced analytics identify levers to pull to improve customer experiences:** Advanced analytics techniques can determine the key circumstances leading to an upset customer, or highlighting a specific group of customers that may likely be struggling with their products or solutions. You can then contact these customers proactively to address issues and salvage relationships.
- **Financial and operational linkage can identify areas for improvement:** Overlaying financial and operational metrics onto customer feedback is a key way to identify areas to take action. You can learn how to optimize customer strategies (because not all customers are created equally).
- **Corporate directives for change**: One CEO believes that everything begins with their customers. He said, "I think the whole organization today realizes that we start with the customers." And he means it. Everything – even their acquisition strategies – starts with what customers want. And, the payoff is clear – since he has been CEO, their stock price has risen more than 250 percent

MAKING IT EASY FOR BUSINESS SEGMENT GROUPS TO SEE THE DESTINATION

Destinations for business segment teams often end up competing with other demands on their time. The following tools are recommended to make it easy for business segments to identify if there are issues that need addressed or opportunities to leverage:

Key Driver Analyses: Identify the priorities which have the most impact on customer loyalty and behaviors to set your action plans.

Predictive Analytics: Leveraging predictive analytic techniques, Walker can help companies predict which levers should be pulled to improve certain processes and experiences.

Link to other company information: A completely different perspective for action focus can be achieved by combining customer feedback with financial or operational metrics – a great way to get the biggest return on investment.

Action workshops: Sessions targeted at determine action priorities and how to establish an action plan for improvement are a key first step for any business segment group.

ROUTE

Having established a clear destination, you must now map out the route to get there. The steps and questions in the business segment route are outlined below:

FORM APPROPRIATE TEAMS

Unlike customer-facing teams which already exist to serve customers, forming the right team and securing the right resources to drive business results is a critical first step. While designing and managing a customer initiative that serves an entire organization is a vast undertaking, too often the program is assigned to a person or a small group expected to engage the whole enterprise. The scope and importance of these initiatives must have a structure and resources identified for using the results.

CLARIFY ISSUES

To establish the route, make a comprehensive list of all of the information sources available.

- Identify areas where information is missing, incomplete, or not reliable.
- Ask yourself "Do we have feedback from the various customer types, employees, and distribution channels?"
- Once you have prioritized the information gaps, gather the missing elements that will create a holistic view of the customers' situation.

ESTABLISH THE ROUTE

The following items should be part of your plan:

1. **Analyze the root cause.** You must get to the heart of the issue to fix systems and processes that are causing the problem. This will prioritize your actions.
2. **Assign responsibility, secure resources**. Start by identifying the resources aligned as part of your team. Determine who will do what, by when, to drive the desired outcome. Allocate these tasks to appropriate individuals or teams, recruiting others as needed.
3. **Develop timelines and success metrics**. Each action needs to have a specific deadline to ensure success. List ways in which progress of the action plan can be monitored and successful completion can be determined.

ROOT CAUSE ANALYSIS

Using specific tools, frameworks, and approaches will help you get to the root cause of any problem. An example of a tool is "The Five Why's."

This method involves asking, "Why does this happen?" about an issue. Once you answer the question ask it again until you arrive at the root cause. Generally asking five times will provide the guidance needed to address important issues.

WHY DOES THIS HAPPEN?
WHY DOES THIS HAPPEN?
WHY DOES THIS HAPPEN?
WHY DOES THIS HAPPEN?
WHY DOES THIS HAPPEN?

HAZARDS

Even the best of plans are susceptible to obstacles. Situations evolve, people change positions, and problems occur. How you handle these hazards will have a lot to do with the results you achieve. We have provided suggestions below to help you avoid common pitfalls before they occur and/or better respond to those that complicate your journey.

Take a look at some common hazards that business segment groups might face and how they can be addressed:

HAZARD	HOW TO ADDRESS	ADDITIONAL SUPPORT OR RESOURCES NEEDED
NEGATIVE TEAM DYNAMICS Unclear roles, poor leadership, and other elements can cause negative dynamics on teams.	• Make sure a formal leader is in place • Ensure clear objectives are established and roles are documented • Involve a neutral facilitator to address conflicts • Escalate to supervisors in extreme situations	If a resource change is needed, make sure the change is made quickly and the new member brings a fresh perspective to the group. Be sure to learn from these unwanted experiences.
DIFFERING AGENDAS ACROSS THE CROSS-FUNCTIONAL TEAM With cross-functional teams, individuals have different, or even opposing objectives which can impede group success.	• Allow for moderation or escalation of issues if it is constructive and needed to come to a group consensus • Engage all functions to minimize “silos” and facilitate resolutions • Focus on achieving the team’s stated goals	Additional resources, such as subject matter experts, may be needed – even on a short-term basis. Include these as appropriate, but be on the lookout that this does not inadvertently re-route the group.
DAILY ACTIVITIES COMPETE WITH DESIRED OUTCOMES On a daily basis, team members are often too busy with many competing activities • These can serve as distractions in getting to a destination • Time can elapse and momentum is lost	• Make sure members are aware of time requirements before committing • Regular meetings and good documentation can keep teams on track • Connect activities with individual and team objectives	If all members are not active and contributing, seek additional members and recruit them to be part of this important team.

HAZARD	HOW TO ADDRESS	ADDITIONAL SUPPORT OR RESOURCES NEEDED
DECENTRALIZED TEAMS RESULT IN REDUNDANCY OF EFFORTS Common in large decentralized organizations, there is duplication of efforts leading to confusion and lack of clarity.	• Ensure there is a clear and distinct charter for each team • Leverage an existing team to avoid overlap • Maintain an inventory of action teams and issues – review before establishing a new team	Tap resources who know what teams exist before deciding to establish a new team, and only do so when there is a unique need.
LACK OF EXECUTIVE OR NEEDED SUPPORT A key to success is ensuring that all the needed people are bought into the goal or outcome. Common examples include: • A key person who does not want change to happen • A change in executive sponsorship requires bringing someone new "up to speed" • Regular updates aren't provided to ensure ongoing support • Apathy or disinterest is blocking group progress	• Seek support to navigate the politics that exist in many companies • Develop onboarding materials to ensure smooth transitions • Regular communication should be established to maintain support/buy-in • Document the ROI of initiatives to ensure continuous support is provided • Ensure that customer initiatives are aligned with corporate initiatives	Knowing key influencers who will ensure ongoing support is achieved is often critical in avoiding this pitfall. Tailoring communication is key to securing needed support, so a communication specialist may assist in this regard.
LACK OF FUNDING OR INVESTMENT NEEDED FOR CHANGE Customer-driven change should be part of the strategic planning and budgeting process to ensure that funding is available – and the only question is how is it optimally allocated among the various groups. Even though customer-driven change is supported in principle, it may not receive the resources to really make a difference.	• Ensure this is part of annual planning cycles • Anticipate realistic scope and allocate accordingly • Ensure that customer-driven change initiatives are part of the strategic planning and budgeting process • Involve executive sponsors to ensure program needs are well represented	Involve the right resources to plan for and obtain allocation of funds to ensure change occurs. Consider resourcing the initiative in stages if the scope is too big and involve someone from finance team to assist in planning.

WORKING WITH COMPANY LEADERSHIP

Working with company leaders to drive results means increasing leaders' awareness of customer action initiatives and value, and engaging them – gaining their visible support of those activities. Achieving this is a must if customer initiatives are to be successful.

Too often, company leaders don't know of the efforts to grow customer loyalty happening in their companies. Account teams, business units, and customer-facing teams may be responding to the customer intelligence to sustain relationships and win new business. But, when executives are in the dark about these efforts and the return, they will in time question the value of the customer intelligence initiatives.

Customer intelligence initiatives cannot achieve their true purpose – customer-focused change – without engagement by the company's leaders. Whether using insights to enhance account relations or change customer processes, only active, visible sponsorship by customer leaders will sustain those efforts. In fact "Leadership Buy-in and Involvement" has become the most crucial success factor to making business model changes, according to Brown and Pope's research on Best Practices in Strategy Implementation, 2011.

For example, it can be impossible getting even the most strategic projects started without approval of the right people and resources, which often must be from the top. Leaders also help counter the inevitable resistance to changes in procedures. Would-be detractors to improvements refrain from undermining the project, when they face escalation of the issue to company leadership.

With leadership involvement so critical, customer experience professionals should know steps to take to engage company leaders in driving results using customer insights. These stages are to:

1. GAINING THEIR SUPPORT

2. SHARE WHAT TO EXPECT

3. CLARIFY THE LEADER'S ROLE

"Leadership Buy-in and Involvement" has become the most crucial success factor to making business model changes, according to Brown and Pope's research on Best Practices in Strategy Implementation, 2011.

GAINING THEIR SUPPORT

1

Gaining the support of leaders hinges on showing them evidence of the impact and value of customer-focused actions. The value of customer intelligence programs comes far less from the data than the actions and changes undertaken for customers. So, company leaders should be shown the sum of the value from customer-focused actions taking place.

The leaders should not be forced to make assumptions about customer actions. There should be an approach that keeps track of customer-driven initiatives and makes that part of the regular scorecard reporting that top management runs the business with.

Beyond having a customer-focused strategy, the trend toward having "balanced scorecards" means executives are not relying purely on financial and operational (efficiency) metrics. They increasingly want to know in concise terms, the company's positive engagement with customers. Including customer metrics in the corporate scorecard is becoming a requirement. We also believe that a metric showing the scope of customer driven-changes provides a more tangible, leading indicator of success that complements scores on customer loyalty.

Evidence or cases from internal users of customer results, such as a support function or an account team, are always helpful, particularly where the initiatives generated positive results for customers and the company.

SHARE WHAT TO EXPECT

2

Be prepared to share with your sponsoring executive the framework for *Driving Results*. Also present your plan for various teams to be briefed on the framework and tools for action using the customer intelligence reports and insights.

If your company has a formal quality management effort such as Lean or Six Sigma, consider how the *Driving Results* effort may be integrated with quality activities. While quality improvement initiatives often deliver cost-saving efforts while reducing defects or errors, *Driving Results* improvements offer relationship-building and revenue growth opportunities.

Consider a vision for the *Driving Results* effort ahead of your executive recruiting efforts so you can collaborate with the executive on what the vision entails. For example, which teams in the company will be involved? Where will the effort begin – do you have teams or groups very open to being early adopters of *Driving Results* and using the framework? How can the program scale so that you can be reporting back an impressive volume of customer-driven activities underway?

Most importantly, consider how the initiative will be wrapped into the mainstream of how the business is being run.

3 CLARIFY THE LEADER'S ROLE

The executive can best lead in *Driving Results* with their support for various teams undertaking new initiatives. This support will ideally be voiced early in the process through internal communications such as the intranet announcement or articles and annual or quarterly staff messages.

But the most significant support for *Driving Results* may be when the executive gets asked to decide whether resources should given to a customer initiative or whether an initiative should continue in the face of meeting short-term emergencies or goals. Certain cross-functional or large account improvements may require projects taking two or three years to complete. There should be adjustment against the "tyranny of the urgent" and of having purely short-term versus longer-term business goals.

Collaborate with the leader on where in the organization any resistance to new initiatives can be expected. Discuss in advance some good ways that questions about the viability of the effort should best be handled and how those can be escalated.

Be alert for early wins that make good stories for the leader to communicate and help build momentum for the effort. Customer feedback and testimonials can be a key part of these early cases to share in internal communication.

PEOPLE DRIVING RESULTS

No matter how good your strategy may be, people ultimately are the ones that drive results for your company.

This section will take a look at the people you will work with to make a difference. It will discuss the importance of building a strong network of support, and will outline steps to encourage buy-in for customer-focused initiatives. We'll also look at the most common users of customer information and outline their role, their needs, and the best ways to work with them.

BUILDING YOUR NETWORK

Customer experience professionals are catalysts for change. They possess important customer intelligence – a crucial element to decision making and driving results. This intelligence must be channeled through various departments and individuals to effectively drive results. To do this, customer experience professionals must build a strong support network.

Given the broad scope of responsibilities it is easy to get caught up in the details of administering customer programs. Developing surveys, reviewing social media input, analyzing data, crafting reports, and hundreds of other tasks take a great deal of time. However, it is critical that customer experience professionals are outwardly focused. They need to be in touch with the needs of the organization and work through many people to prompt action, instigate change, and drive results.

At Walker, we use a simple image to identify the obstacles to action. As the above graphic represents, for action to take place, individuals must first be aware customer initiatives exist. Next, they need to understand each initiative and know the role they are to play. Finally, they must believe that it is credible and worthwhile.

All three of these elements must be in place before action occurs. Only then will you be able to realize the results you are striving to achieve.

BUILDING BLOCKS

Here are several useful steps to build an effective network.

1. **IDENTIFY POCKETS WITH POTENTIAL.** Begin by asking yourself which parts of the organization will drive the greatest results with your help. In other words, where can you have the most impact? Consider these to be the key centers where you can drive results. These are areas where the perspective of the customer is essential and can make a tangible difference for the company.
2. **DO YOUR HOMEWORK.** Before going to the leaders of these areas, find out more about them. What are their current objectives? What are they struggling with? Who do you know in the group? What customer intelligence can be put to use to help them overcome their obstacles and achieve their objectives? How can you help them be more effective and efficient?
3. **REACH OUT.** Meet with the leaders of the areas you have identified that have the most potential. Make sure they are aware of your role. Convince them that what you do will be useful to their group. Share what you know about their objectives and why it makes sense to work together to achieve customer-focused results.
4. **SEEK EARLY WINS.** When working with new groups consider the fastest route to make an impact. Early wins build credibility within the group and help spread the news to other areas that may benefit from similar programs.

COMMON CENTERS FOR DRIVING RESULTS

Where should you start? Realistically, most customer-focused initiatives begin in particular areas of the company. However, for customer strategy leaders looking to have broad impact across the company, the areas below are common groups where customer intelligence can be an excellent source for driving results:

- Sales groups, including account management and sales operations
- Support groups, including technical support and/or customer service
- Installation process groups
- Product management, including research and development
- Indirect sales, including channel networks and distribution
- Marketing, including branding and lead generation
- Quality
- Logistics
- Corporate growth, including mergers and acquisitions and alliances
- Regional leaders

SOME MAY NOT WANT YOUR HELP – REALLY?

A word of caution – some leaders may not initially want your help. Even though it seems crazy, some will see it as more work. They may view it simply as volumes of data to wade through as opposed to insights that will help them in their jobs.

That's why it is so important to understand the goals of each leader so that you can develop programs aimed at helping them meet their specific objectives.

THE CENTER OF YOUR NETWORK

While customer strategy leaders need to reach across the company to build a broad network of contacts, the nucleus of their network are the people involved in the day-to-day work. It is worth noting that every company is different in size and scope so your implementation team will be different than any other. Some companies have customer intelligence groups centralized and some are decentralized. Some have one person managing everything while some have a full dedicated team. Some focus all their time to customer strategies while for others, it is one small part of their overall job.

Regardless of size and structure, Walker recommends several roles to effectively drive results.

- **EXECUTIVE SPONSOR** – A chief customer officer or senior executive that is the key sponsor and advocate for the program, typically with direct access to the CEO. This role is vital to ensure your program has the resources, the authority and the credibility to drive results.
- **CUSTOMER STRATEGY OWNER** – The individual that leads the team, guides day-to-day activities, allocates resources, and tracks initiatives.
- **PROGRAM LEADERS** – Individuals or teams focused on execution of specific program elements and ensuring follow-up procedures are in place.
- **REGIONAL LIAISONS** – Common in large, global organizations, they are focused on supporting associates in their geographic area. They act as an ambassador to help make customer intelligence more relevant for their specific markets.
- **CROSS-FUNCTIONAL TEAMS** – Made up of functional managers that use customer intelligence to drive improvements in their specific area.
- **DATA ANALYSTS** – Involved in analyzing and interpreting customer information including conducting root cause analysis to determine actions that will be most effective in driving results.
- **IT SUPPORT** – Because technology is an important accelerator, information technology representatives are important members for data access and integration.
- **COMMUNICATION SUPPORT** – To ensure customer strategies don't get lost in the corporate clutter, a representative from marketing or corporate communications can provide needed support.
- **EXTERNAL PARTNER** – Walker representatives provide an objective viewpoint and provide services in program design, implementation, technology, analytics, and consultation.

THE TEAM OF THE FUTURE

Walker's *Customers 2020* report provides an intriguing look at how customer intelligence roles will change as we look toward the next decade. Existing roles are projected to expand and new roles will emerge.

Below are the emerging leadership roles identified in *Customers 2020*.

- **CHIEF CUSTOMER CHAMPION** – Expect this role to be more common and prominent in organizations. Often reporting directly to the CEO, this individual will be charged with creating a persistent focus on the customer throughout the enterprise.
- **STRATEGY TEAM** – Directed by the chief customer champion, the cross-functional strategy team will have the authority and resources to launch new initiatives and implement programs to meet specific customer-focused objectives.
- **CUSTOMER INTELLIGENCE ADVOCATES** – The chief customer champion will rely on these advocates to support the use of customer intelligence within their part of the business which will be increasingly broad – internal operations, such as human resources and finance, product groups, such as research and development and product development, and client-facing roles, such as sales and account management.
- **INFORMATION ARCHITECTS** – Because customer information will stream from a wider variety of sources and more areas of the company will rely on this information, the management of data will be seen as vital. The chief customer champion will rely on the information architect for two key activities – to align disparate sources of customer information and to create an infrastructure for enterprise-wide accessibility.
- **DATA SCIENTISTS** – The skills of data scientists will be tapped to interpret data to improve decision making. Turning big data and predictive analytics into practical and useful insights will be the charge of data scientists.
- **TOP ACCOUNT SUPPORT** – In the B-to-B world, strategic accounts must be treated as high priority. The chief customer champion will share customer intelligence related to individual accounts, will review account plans to ensure customer needs are addressed, and will track the execution of account plans.
- **ENGAGEMENT CREATOR** – Getting and keeping customers engaged is seen as a strategic initiative for B-to-B companies. Engagement support teams will develop ways to increase customer engagement through collaboration and by connecting customers with each other to share best practices and offer support.

Walker's *Customers 2020* report forecasts emerging leadership roles for customer experience professionals.

DRIVING RESULTS THROUGH OTHERS

One of the key skills necessary for driving results is the ability to get things done through others. In any organization there are countless people that use customer intelligence in their role. While some rely on it more than others, one thing is certain – everyone can benefit from a better understanding of their customers.

FEATURE PERSONAS – KEY USERS OF CUSTOMER INTELLIGENCE

The following pages show personas of some of the most common and influential users of customer intelligence. We're assigning a name and a face to each type of user to help you consider those in your organization that might have similar roles.

With each persona we describe their role, their needs, and provide tips on how you can work with them effectively.

JULIE

THE STRATEGIC ACCOUNT MANAGER

HER ROLE:

Julie is a strategic account manager. She manages a small number of large and complex business accounts and each one of them may involve multiple relationships, all of which are important to maintain. She is focused on the performance of her accounts and her activity is aimed at driving growth with each of those accounts. It is personal too – her income is directly affected by the performance of her customers. On a regular basis she is working with her customers to understand their issues, solve their problems and address their complaints.

Julie is busy, aggressive, determined, and has a no-nonsense attitude. She is often busy putting out fires and has little patience for meaningless tasks and corporate details that often get in the way of her success and the success of her clients.

HER NEEDS:

Julie needs customer intelligence that will help her retain and grow her accounts. She needs to be able to anticipate problems and quickly understand how each contact feels about their relationship with her and with her company. She needs to know if a customer plans to decrease their orders or if they are considering a competitor. Similarly, she needs to be alerted of customers that may be ready to increase their orders or may be open to the cross-selling of new solutions.

WORKING WITH JULIE:

Simple, fast, and relevant – those are the keys to driving results through strategic account managers like Julie. She already has more tools to access, more reports to file, and more company emails to read than she desires. Giving her one more thing to do, will not help. So getting Julie's support will not necessarily be easy.

For Julie to get on-board, the customer intelligence you provide must help her retain and grow her accounts, which of course will help her more successful. Keys to making this happen include:

- **Easy access** – Deliver intelligence in the most seamless possible way. If possible integrate it into the tools she already uses, such as her CRM system.
- **Provide training** – Whether it is in-person, virtual, or on-demand, provide a training module that succinctly explains to Julie why your this program is important and how it will deliver value to Julie and her customers.
- **Make it simple** – People like Julie don't want to wade through data. Give her just what she needs and make it easy for her to know what action to take.
- **Make it relevant** – If the intelligence you provide isn't relevant or helpful, Julie won't use it. Make sure it specifically relates to the accounts she manages and provides useful direction for retaining and growing her accounts.

DENNIS

THE QUALITY DIRECTOR

HIS ROLE:

Dennis is the Quality Director. His role is to champion, support, or lead quality improvement initiatives within the company.

A critical part of this role is to ensure that external customer requirements and opinions are known, aligned, and managed as part of the system to ensure customer expectations are continuously met or exceeded. He leads the establishment of quality-related goals and targets in the company's strategic planning.

Dennis is often analytical, detailed, numbers-oriented but with the ability to assimilate and interpret the meaning of the data and maximize its use with various groups across the company.

HIS NEEDS:

Dennis needs customer intelligence that will align with internal metrics, but offer an external perspective. He needs to be able to zero in on the top priorities for improvement actions with a high confidence that focused attention in these areas will result in maximum return on the improvement investments.

WORKING WITH DENNIS:

Clear, confident, and collaborative – these are critical attributes to drive results related to continuous quality improvement. Dennis might be defensive – especially if the Quality organization is not directly involved in the program. Thus, it is of utmost importance to befriend Dennis to ensure you can work together, rather than against each other, in mutual goals of continuous improvement.

To get Dennis's buy-in and collaboration, the customer intelligence you provide must assist him in his priorities of alignment, integration, and execution of actions – which of course will make him/her more successful. Keys to facilitate this include:

- **Collaborate early** – Connect with Dennis and integrate the metrics and customer intelligence with the efforts underway in the CI, Lean, Six Sigma, and related quality programs in the company.
- **Align effectively** – Explicit alignment of internal programs with corresponding external perceptions is critical to truly affecting customer behaviors and relationships.
- **Ensure confidence** – People like Dennis are numbers oriented and analysis savvy, so leverage strong scientific foundations of your approaches, models, frameworks, and techniques to build confidence and credibility.
- **Provide clear focus** – Action is bred by specificity, it is important to provide targeted and specific recommendations that translate into meaningful and relevant improvement initiatives.

CINDY

THE TECHNICAL SUPPORT SPECIALIST

HER ROLE:

Cindy is one of many technical support specialists that responds to customer issues and concerns. She is constantly fielding calls, responding to emails, or engaging in online chats with customers that have questions or issues with the product or solution they purchased from her company. She is focused on providing the fastest and most accurate solutions for customers. In many cases she must research issues and get back to customers, each time setting an expectation with the customer on how and when their issue will be addressed.

Cindy moves fast (she has to) to keep up with requests from customers. She is focused on getting answers as quickly as possible so she can deliver a positive experience. She knows that each interaction is a “moment of truth” that may ultimately determine whether or not the customer continues to do business with her company.

HER NEEDS:

To do her job effectively, Cindy needs immediate access to customer information that will help her understand previous issues as well as the customer’s perspective on how each issue was resolved. What’s more, Cindy must receive timely and relevant feedback after each case to understand if she is meeting customer expectations and if she needs to modify the way she is interacting with customers.

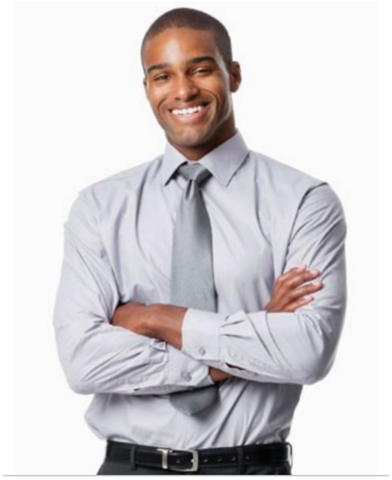
WORKING WITH CINDY:

Real-time, seamless, uncomplicated – those are the keys to driving results through technical support specialists such as Cindy. She is in a role where she needs answers at her fingertips so she can quickly access everything about her customer in the fastest possible way.

For Cindy to put customer intelligence to use, it must help her do her job faster and/or better. Otherwise it gets in the way. The keys to working with Cindy include:

- **Deliver in real-time** – Deliver intelligence in ways that it is easily accessible and up-to-date.
- **Make it seamless** – Whenever possible integrate customer intelligence into the tools she already uses. She won’t have time to log in to separate applications to get everything she needs.
- **Provide dashboards** – Use methods that are quick and easy to decipher. Online dashboards and easy-to-read summary reports that point out the most relevant information will help Cindy quickly get to the information she needs.
- **Proactive** – Help Cindy get ahead of problems by profiling customers reporting issues. She can anticipate the volume of cases and potentially contact customers before they even experience issues or problems.

DAN



THE SALES PROFESSIONAL

HIS ROLE:

Dan wears a lot of hats when it comes to selling for his organization. He is tasked with generating leads, prospecting, presenting concepts, building relationships, responding to requests for proposals (RFPs) with solutions that are customized to meet the unique needs of each potential customer. However, he is ultimately focused on one thing: driving revenue. Dan is under a lot of pressure to close deals and continuously grow the top line. Once he closes a deal he generally puts it behind him and is focused on the next deal to be closed.

HIS NEEDS:

Because of his independent nature, like most sales professionals, he is confident he can do most things on his own. However, he can benefit greatly from customer intelligence to help maximize his potential.

Dan needs timely customer insights that will help him focus on the issues that matter most to existing customers and new prospects. He also can benefit from intelligence that will help him know which accounts show the most potential so that he doesn't waste his time focusing on accounts that aren't going to buy.

WORKING WITH DAN:

Dan's basic attitude is, "Help me sell or get out of the way," so you can expect some resistance. He already utilizes databases that contain qualified leads and sales operations data. You will have to prove that customer intelligence can be another source of leads. You will need to sell that it provides talking points/ dialogue that can be used in purchasing negotiations with customers. Show Dan that it will allow him to more effectively manage customer expectations. Here's how:

- **Make it actionable** – Your customer intelligence initiative has to thoughtfully and purposefully consider the needs of the sales force. Traditional methods typically do not gather insights in a way that will be actionable for your sales teams.
- **Provide alerts** – Build in triggers that can immediately notify Dan of issues to address or opportunities to pursue. This is a quick and easy way to deliver value. After a few quick wins, Dan will be hooked.
- **Provide profiles** – Help Dan be more efficient by profiling his target prospects to narrow in on the ones most likely to purchase. This will make him more effective and efficient.
- **Follow up** – Touch base regularly with Dan to ensure the information you are providing is meeting his needs. Work with him to refine your programs. Helping Dan close deals is one of the most direct ways do deliver value from your customer intelligence initiatives.

HOLLY

THE PRODUCT MANAGER

HER ROLE:

There are many important people that indirectly affect the customer experience, and as product manager, Holly is one of them. Holly works behind the scenes to ensure her product stays on the technological edge, meets customer needs, is error free, and is continually growing in sales. She must appease many different internal stakeholders as she interacts with sales, marketing, manufacturing, engineers and others.

HER NEEDS:

Holly has a wealth of information at her fingertips and a plethora of metrics that she tracks. However, her list of metrics may not include customer intelligence data – and that is a key ingredient to her success. Since Holly must make important product decisions in a timely manner she needs to understand the pulse of her customers at any time. She needs to have easy access to a wide range of customer insights that she can access to make better decisions.

WORKING WITH HOLLY:

If Holly decides the customer information you are providing is not worthwhile, good luck getting her time, energy, or attention! Remember, Holly has a lot on her plate and she may be perfectly content with the current information sources and metrics she receives. The last thing she may need (or want) is another data point cluttering up her already chaotic reporting output. You can collaborate with her through these suggestions:

- **Supplement her current sources** – Find a way to fit into her current measurement system. More often than not, an internal metric she tracks has a complementary customer-facing metric that is not currently being tracked (e.g., product delivery timelines meeting Holly's expectations but not the customer's).
- **Be proactive** – Don't make Holly learn a new tool or make her go somewhere to find information. Come to her with prepared deliverables that can be scheduled for future delivery and scaled to meet her needs.
- **Keep it simple** – Make it simple and straightforward to understand. Start easy, don't dissect the data every which way and present 40 different data points. Present one, track it over time, and align it with her metric.
- **Integrate with current initiatives** – Holly more than likely has several improvement initiatives currently being worked. Provide customer intelligence to prove out the effectiveness of these improvements.

DAVID

THE EXECUTIVE

HIS ROLE:

David is a regional executive for a global technology company. He is responsible for P&L performance including production, sales, and delivery of his company's products, solutions, and services throughout one of the company's larger regions. To run the business, David coaches his department executives towards their goals and tracks essential metrics. He also meets with customers on a regular basis – typically senior contacts for strategic accounts or meetings with large client prospects – but he also reaches out to a mix of customers during customer councils or industry conferences.

HIS NEEDS:

David needs to see customer experience scores regularly and use these in the mix of performance metrics to run the business. However, he likes to see client feedback on a more personal basis as well. He specifically looks for evidence of issues and their resolution. He pays close attention to the trends in customer loyalty and commitment to spending more. He will read verbatim comments from customers when they are well organized by topics he is interested in, such as key product lines and for their most profitable offering – professional services.

WORKING WITH DAVID:

David's mindset is, "How will this help us meet our goals and how will it pay off for the business?" He is partly bought into investing time and priority resources for the sake of customers. However he also regularly faces high-level problems in other areas – operational efficiency, new regulations, technology, personnel, demands from the corporate office, budget pressures, and more.

For David to engage with the customer intelligence you provide, you must first earn his mindshare. Here's how:

- **Make the case** – Show him the impact on the business, and you will gain attention from him. His job is all about performance, so he needs to see that the opportunity you present helps him achieve those goals.
- **Be straight and clear** – Avoid any customer intelligence jargon and keep what you describe in terms that are straightforward and logical.
- **Use connections to make it more relevant** – Try to connect what you propose into other aspects of David's job. For example, say you are proposing ramping up the number of customer initiatives with his support and reporting the volume of those as a new metric. That will be most relevant if David sees the metric as part of what he already hears in quarterly business reviews. It also helps when he can show his boss, the corporate COO, the effectiveness of his customer initiatives.

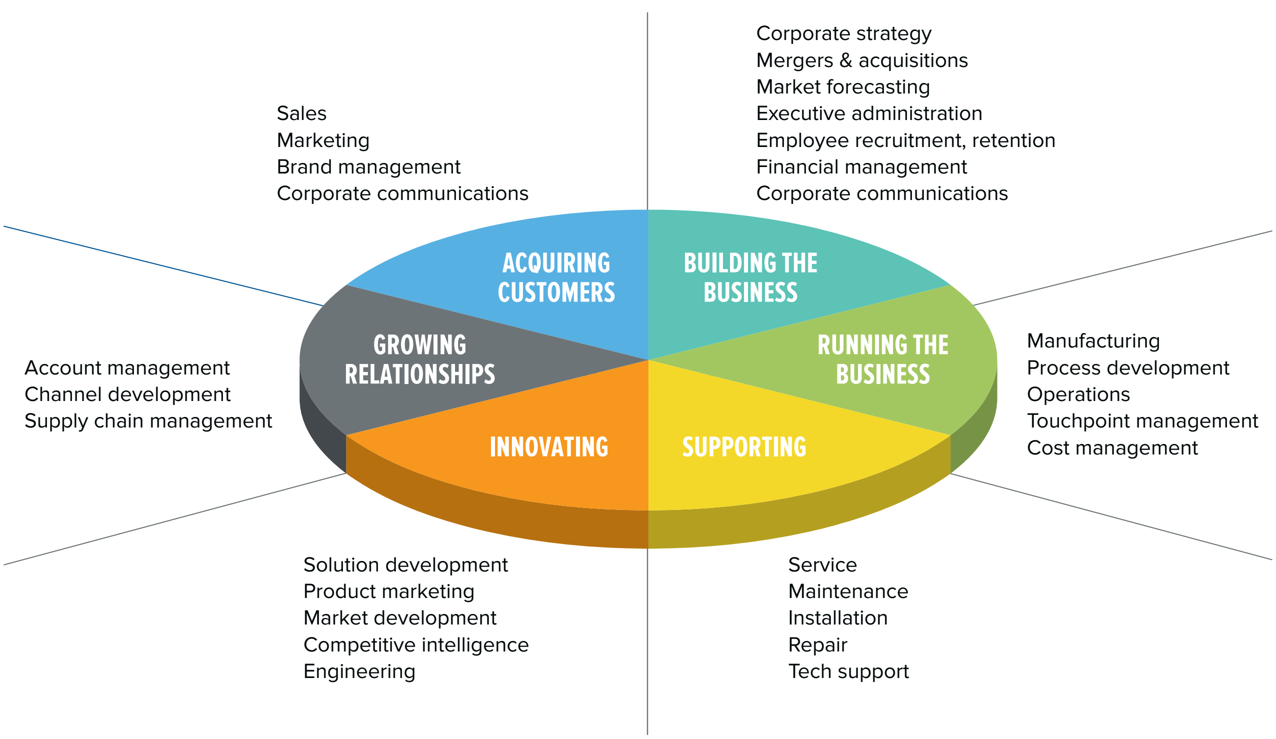
OTHER ROLES

The previous pages listed several personas, or key roles that are common in most organization. It is also common that these are some of the people that rely heavily on customer intelligence to succeed in their roles and drive results for their company.

But it doesn't stop there.

There are countless individuals and groups throughout your company that can improve the way they work through customer intelligence. Other common functions include channel management, network partners, distributors, channel operations, order processing, logistics, human resources, and back-end system groups such as billing, credit, contracts, procurement, and finance.

Take a moment to review the diagram below. Consider how many of these groups you touch today. Most customer experience professionals isolate their activity to just a few. However, to really achieve results you should target all the areas of your company where customer intelligence can make a difference.



THE ROAD TO RESULTS

In the beginning of this workbook we encouraged you to ask yourself a few key questions. In this section we dig much deeper to pick apart those five elements – culture, strategy, intelligence, action, and change – and share the twists and turns on the road to results.

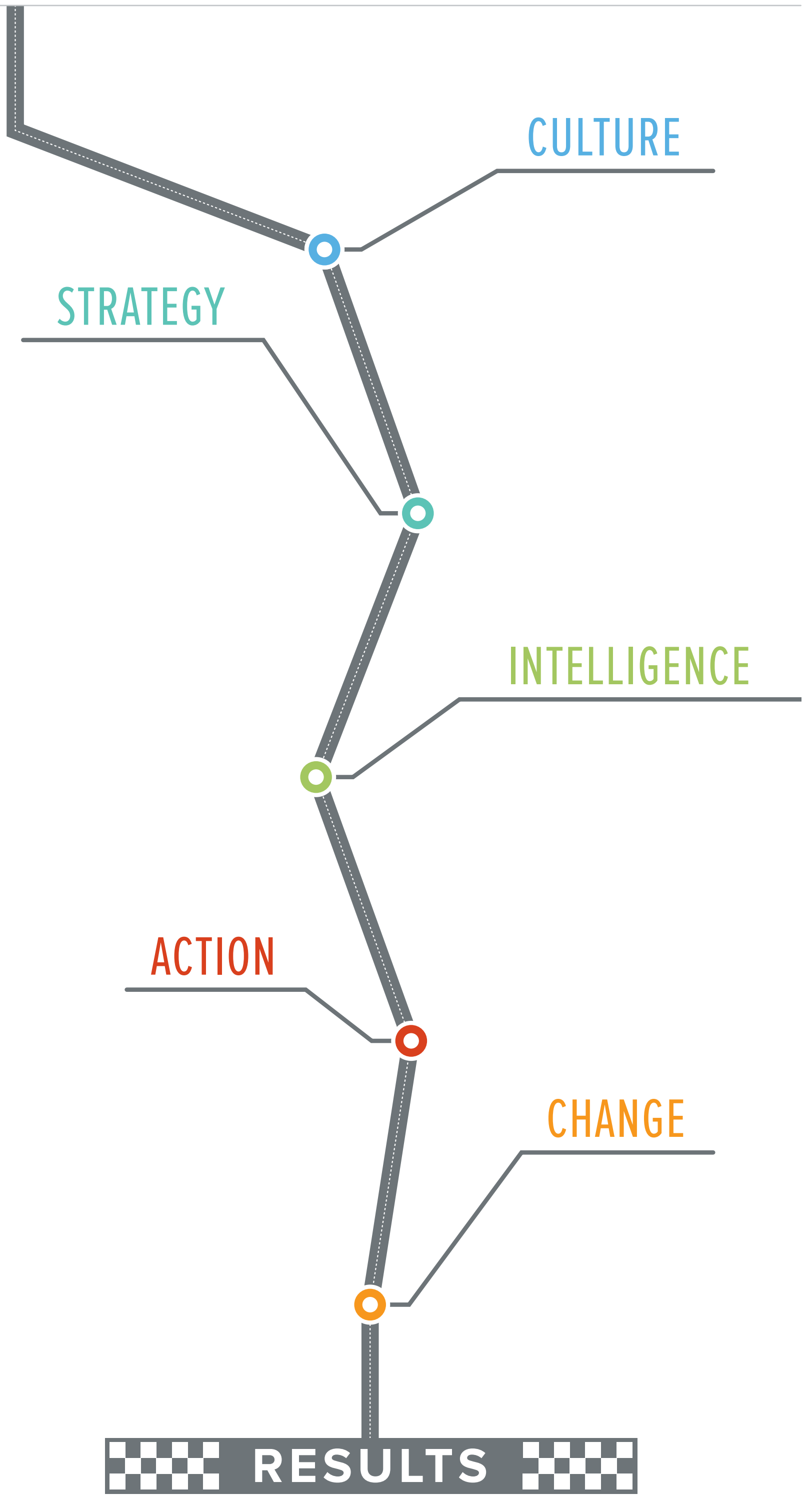
THE ROAD TO RESULTS

The road to results is full of ups and downs and twists and turns. Fortunately, we'll help you navigate them.

Over several decades Walker has worked with hundreds of companies to develop customer intelligence strategies. While every organization is different, there are a number of common elements we have identified to help chart your course.

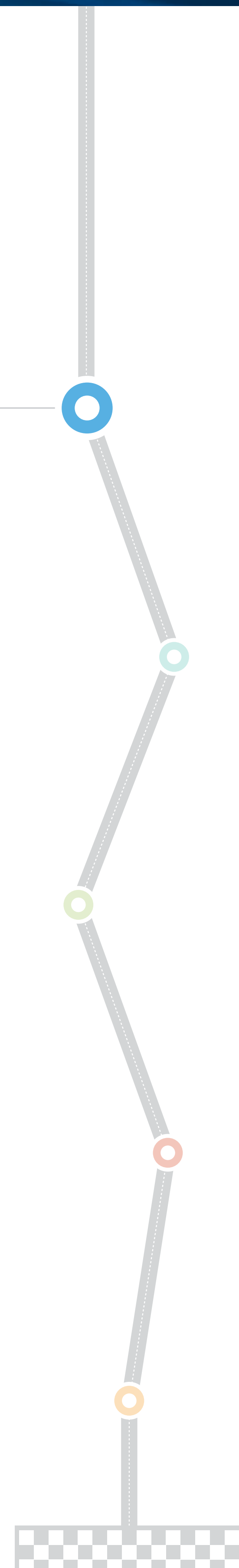
We start with five key elements – culture, strategy, intelligence, action, and change. On the following pages we'll break each of these areas down to highlight the key questions each customer experience professional should consider.

Use this section as a checklist or self-assessment to refine your approach and navigate your journey.



Look for a removeable infographic poster that accompanies this section of the workbook. This can serve as a visible reminder of the many elements necessary for achieving results from your customer intelligence strategies.

CULTURE



Building the right culture for customer-focused results can be incredibly difficult because so much lies beyond your control. However, without some of the elements mentioned on this page, all your hard work in other areas may fall flat. To be a real catalyst for results, the development of the right corporate culture is a must.

DO YOU HAVE THE RIGHT CULTURE?

Is leadership supportive of customer initiatives?

- Is the CEO aware and engaged?
- Is the board informed on customer issues and measures?
- Do C-level executives use customer intelligence to develop strategies and monitor progress?
- Do leaders of departments, divisions, and regions put customer information to use and insist on its use in their areas?
- Do account managers use customer intelligence to develop account plans?

Is the company really focused on customers?

- Are customer issues overshadowed by other priorities – financial, operational, product, etc.?
- Are market developments closely watched to constantly assess customer needs?
- Do training programs include topics to help employees better understand and serve customers?

Are customer issues visible throughout the company?

- Are customer issues featured in company-wide communications?
- Do the CEO and other senior executives endorse customer initiatives and promote the use of customer intelligence?
- Are employees aware of customer programs and initiatives that are underway?

Is the organization open to change based on customer insights?

- Are employees open to modifying existing approaches as a result of customer input?
- Are change initiatives influenced by customer demands?

STRATEGY

Unfortunately, customer initiatives don't just happen. They require hard work, and ultimately the right strategy. This means specific goals have been set, leaders are assigned, a team is together, timelines are in place, and resources are allocated.

DO YOU HAVE A SOLID CUSTOMER STRATEGY IN PLACE?

Is there a directive or mandate from executive management to have a robust customer strategy?

- Are customer initiatives viewed as credible, or are they "just one more corporate initiative?"
- Do the leaders involved have the authority to implement a meaningful strategy?

Is there a documented customer strategy in place?

- Does the strategy have a clear mission?
- Is there a clear plan or roadmap?

Do customers influence corporate decisions?

- Are corporate-level goals set based on customer insights?
- Are budgets influenced by customer priorities?
- Are customer metrics included as important corporate metrics?

Are adequate resources allocated for customer strategies?

- Are financial resources budgeted for programs and initiatives?
- Are employees assigned to implement customer programs and initiatives?
- Are technology tools deployed to accelerate the use of customer intelligence?

Is the right team of individuals assigned to implement customer strategies?

- Is there an executive-level sponsor that is the company's champion for customer initiatives?
- Is there a clear owner, whose primary responsibility is the implementation of customer initiatives?
- Is there a cross-functional team in place focused on customer initiatives?
- Is there a network of customer advocates – leaders throughout the company that encourage the use of customer intelligence?

INTELLIGENCE

Likely the most complicated component on the road to results is developing a system for gathering and distributing the right customer intelligence to anticipate customer needs and exceed expectations.

HOW GOOD IS YOUR CUSTOMER INTELLIGENCE?

Is there a well developed plan designed to identify and access all the right sources of customer intelligence?

- Are you aware of the sources of customer intelligence?
- Do you have access to the sources of customer intelligence that you need?

Do you use a wide variety of sources of intelligence to gain the best understanding of your customers?

- Do you use input from customer service interactions such as call center interactions and chat records, and complaint records?
- Do you use customer and/or partner advisory councils?
- Do you use internal information such as financial and operational data?
- Do you access purchasing data or product usage data?
- Do you solicit feedback via transactional and/or relationship surveys?
- Do you monitor social media, online communities, and website data?
- Do you document input from frontline employees?
- What about other customer information that is specific to your business?

Do you conduct appropriate analysis to accurately interpret the customer intelligence you gather?

- Are you clear on what issues or problems you are trying to solve?
- Do you have access to the tools needed to conduct appropriate analysis?
- Do you utilize predictive analytics to anticipate behaviors, problems and needs?
- Are you skilled at conducting analysis to arrive at key issues or root causes?
- Do you interpret your analysis in a manner that can be put into practical action?
- Do you tie customer intelligence to other internal metrics (such as financial or operational metrics) for validation?

Do you provide intelligence in a manner that can be easily put to use?

- Is it tailored to the needs of each group or user?
- Is it easy to understand?
- Is it clear what action is to be taken?

ACTION

Every organization needs an infrastructure that prompts action. This means people use customer intelligence to make a difference.

DO WE TAKE ACTION?

Are clear goals (destinations) set for the actions necessary to achieve results?

- Are goals set at the customer-facing level to increase and/or protect account revenue?
- Are goals set for business segments to drive revenue growth or cost savings?
- Are actions monitored and tracked against established goals?

Is there a clear plan (route) to drive action and achieve results?

- Are necessary resources secured to implement plans?
- Is suitable intelligence gathered to clarify issues?
- Is analysis conducted to understand the root cause and to decide right actions?
- Have individuals been assigned responsibilities for each step of the plan?
- Have timelines been developed to guide the process?

Have essential issues been addressed to ensure plans are implemented effectively?

- Have potential obstacles been identified and addressed?
- Is there an escalation path to address cross-functional issues?
- Are plans revised once obstacles are addressed?

Are acceleration techniques deployed to improve the way your organization takes action on customer intelligence?

- Are workshops conducted for effective goal setting and planning?
- Are techniques used to ensure goals are in place?
- Have case studies and/or best practices been reviewed to learn from others?
- Is training conducted to ensure users understand the information they receive and know how to put it to use?
- Are analytics used to prioritize action that will have the most impact?
- Is technology in place to distribute reports and alerts that prompt action?
- Are follow-up tools in place to monitor action in customer-facing groups?
- Are measurement tools used to evaluate the ROI of customer initiatives?

CHANGE

The right culture, a solid strategy, good intelligence, and action – all are good, but they don't always guarantee that change will occur. Follow through is important to ensure that change is implemented effectively, measured carefully, and constantly modified to optimize its impact.

HOW WELL DO WE IMPLEMENT CHANGE?

Are people willing to change?

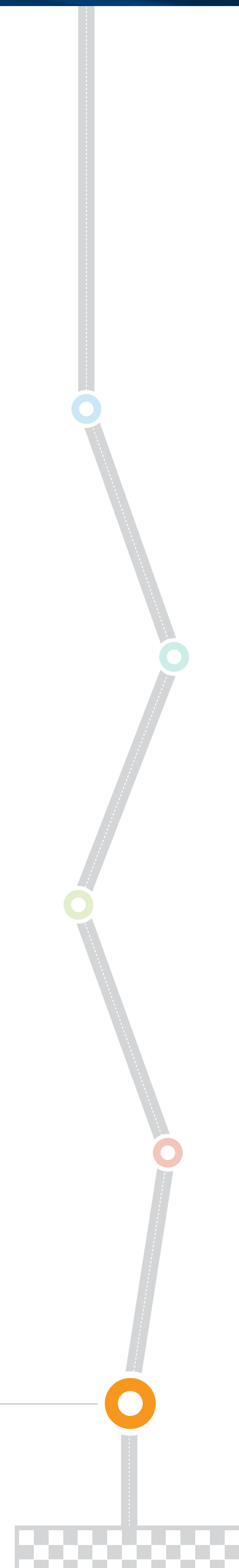
- Is there openness to new ideas that will lead to improvements?
- Do people welcome change particularly when the source of suggested change is customers?

Are measures in place to evaluate the effectiveness of change?

- Do you know if changes made had the desired effect? Did it work?
- Is the return on investment calculated to understand the impact of each change?

Are changes sustained?

- Are new change procedures made permanent?
- Are there efforts to improve on changes to expand their impact?



INFOGRAPHIC

To provide the full map of the road to results, we have included a infographic that can serve as a visual reference and reminder of the many elements necessary for achieving results.

THE ROAD TO RESULTS

THE RIGHT CULTURE

Leadership is supportive
- The CEO is aware and engaged
- The board is informed on customer issues and measures
- Customer intelligence is used by C-level executives
- Leaders of divisions, departments, and regions insist on the use of customer intelligence
- Account managers use customer intelligence to develop account plans

The company is focused on customers
- Customer issues share equal priority with financial, operational, product issues
- Market developments are closely watched to constantly assess customer needs
- Employee training programs include topics to better understand, serve customers

Customer issues are visible throughout the company
- Customer issues are featured in company-wide communication
- The CEO and other executives endorse and promote customer initiatives
- Employees are aware of customer initiatives underway

The organization is open to change based on customer insights
- Employees are open to modifying approaches as a result of customer input
- Change initiatives are influenced by customer demands

THE RIGHT CUSTOMER STRATEGY

There is a mandate from executive management
- Customer initiatives viewed as important and credible
- The leaders have the authority to implement a meaningful strategy

A documented customer strategy is in place
- The customer strategy has a clear mission
- There is a clear plan/roadmap

Customers influence corporate decisions
- Corporate-level goals are set based on customer insights
- Budgets are influenced by customer priorities
- Customer metrics are included as important corporate metrics

Adequate resources are allocated
- Financial resources are budgeted for customer initiatives
- Employees are appointed to implement customer initiatives
- Technology tools are deployed

The right team is assigned
- An executive-level sponsor is assigned
- A clear owner, or customer champion is assigned
- A cross-functional team is in place
- A network of customer advocates is present across the company

THE RIGHT CUSTOMER INTELLIGENCE

We access the best sources of customer intelligence
- We are aware of the sources of customer intelligence that are available
- We have access to the sources of customer intelligence that we need

We use a wide variety of sources
- We use input from customer service interactions
- We use customer and/or partner advisory councils
- We use internal information, such as financial, operational data
- We use purchasing data, product usage data
- We solicit feedback via surveys
- We monitor social media, online communities, and website data
- We document input from frontline employees
- We're constantly evaluating other types of customer information

We conduct analysis to interpret customer intelligence
- We're clear on the issues we're trying to solve
- We have the tools we need to conduct appropriate analysis
- We utilize predictive analytics
- We're skilled at conducting analysis to arrive at key issues, root causes
- We interpret analysis so it can be put into action
- We tie customer intelligence to other internal metrics

We make intelligence accessible so it can be put to use
- It's tailored to the needs of each user
- It's easy to understand
- It's clear what action is to be taken

THE RIGHT ACTION

Clear goals (destinations) are set for actions that drive results
- Goals are set at the customer-facing level to grow and protect account revenue
- Goals are set for business segments where action can drive growth and cost savings
- Actions are monitored and tracked against established goals

There is a clear plan (route) to drive action and achieve results
- Necessary resources are secured to implement plans
- Intelligence is gathered to clarify issues
- Analysis is conducted to understand root causes
- Individuals have been assigned responsibilities for each step of the plan
- Timelines have been developed to guide the process

Essential issues have been addressed to ensure plans are implemented effectively
- Potential obstacles been identified and addressed
- There is an escalation path to address cross-functional issues
- Plans are revised once obstacles are addressed

Acceleration techniques are used to improve action taking
- Workshops are conducted for effective goal setting and planning
- Techniques are used to ensure goals are in place
- Case studies and/or best practices been reviewed
- Training is conducted so users understand information and know how to put it to use
- Analytics used to prioritize action that will have the most impact
- Technology is in place to distribute reports and alerts
- Follow up tools are in place to monitor action in customer-facing groups
- Measurement tools are used to evaluate the ROI of customer initiatives

THE RIGHT CHANGE

Our people are open to change
- We're open to new ideas that will lead to improvements
- Our people welcome change that is suggested by customers

Measures are in place to evaluate the effectiveness of change
- We know if changes made had the desired impact
- The ROI is calculated to understand the impact of each change

Changes are sustained
- New change procedures are made permanent
- Efforts are made to improve on changes to expand their impact

RESULTS

ROADSIDE ASSISTANCE

On your road to results, consider the team at Walker to be your roadside assistance.

- Check out our **Knowledge Center** which features a library of ebooks, white papers, and case studies. *walkerinfo.com/knowledge-center*
- **Read our blogs** – We have more than 900 blog posts covering a wide variety of issues. *blog.walkerinfo.com*
- **Sign up for our newsletter** – Issued every week, our newsletters feature quick and timely content. *walkerinfo.com/contact*
- **Call on our experts** – Walker's team consists of individuals that have dedicated decades to helping companies drive results through customer initiatives. *info@walkerinfo.com*

The *Driving Results* team included Brianne Drlich, Patrick Gibbons, Katie Kiernan, Brad Linville, Jeff Marr, Melissa Meier, and Jamieson Prala. Dan McCormick was responsible for the design and layout. Our thanks go to all our Walker colleagues who provided valuable thoughts and ideas.

WALKER

301 Pennsylvania Parkway
Indianapolis, Indiana 46280
Telephone: 1.800.334.3939
International: +1.317.843.3939
info@walkerinfo.com
www.walkerinfo.com