



INSIGHT REPORT

Introducing Employee-Engaging Transformation

**FIVE PRACTICES FOR CREATING SUSTAINABLE CHANGE
ACROSS LARGE ORGANIZATIONS**

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EXECUTIVE SUMMARY

Organizations have ambitious goals for improving their customer experience (CX). But CX change isn't easy; it requires significant transformation across almost every aspect of operations. Therefore, given the effort required, it's no surprise that XM Institute research shows that less than half of large organizations rate their CX improvement efforts as effective. Our research into how large organizations successfully change uncovered a core insight: CX change must be focused on changing the way employees do their every-day jobs. We have developed an approach to CX change that we call Employee-Engaging Transformation (EET), which we define as, "*Aligning employee attitudes and behaviors with the organization's desire to change.*" There are five practices required to succeed at EET: Vision Translation, Persistent Leadership, Activated Middle Management, Grassroots Mobilization, and Captivating Communications. This research shares examples of these practices in action from over a dozen large organizations. To assess your own organization's effectiveness in these five practices, use XM Institute's Employee-Engaging Transformation Assessment.

CUSTOMER EXPERIENCE TRANSFORMATION REQUIRES DIFFICULT CHANGES

XM Institute research shows that over 80% of large organizations will be placing more importance on improving customer experience next year compared to this year.¹ But customer experience (CX) change requires more than just superficial adjustments. CX transformation only succeeds when:

- **Executives change.** Senior leaders can't expect their organization to deliver a different CX if they don't change the messages they deliver, the behaviors they applaud, or the projects they fund.
- **Middle managers change.** It's hard to get any group of employees to change how they operate if their managers still reinforce old processes, measurements, and beliefs.
- **Frontline employees change.** Customers won't see any difference if the people they interact with continue to follow the same old scripts.
- **Processes and technologies change.** It's impossible to sustain great CX if the technologies and processes aren't updated to support the new mode of operation.

¹ See XM Institute Insight Report "State of Customer Experience Management, 2019" (July 2019)

Large-Scale Change is Hard

Even when companies recognize that CX transformation requires large-scale change, they still can fail. Only one-third of organizations mostly or completely agree that they regularly make improvements without significant internal resistance, with the nearly the same percentage reporting they are able to quickly recognize and adapt to changes in the marketplace.² Why is large-scale change so hard?

- **People are creatures of habit.** As John Kenneth Galbraith so aptly stated, “*Faced with the choice between changing one’s mind and proving that there is no need to do so, almost everyone gets busy on the proof.*” The factors that influence an employee’s reaction to change are varied and complex (see Figure 1). Even with the best intentions, people tend to protect the status quo.
- **Change can be painful.** Transformation is not a linear process; it tends to go through a number of ups and downs along the way. Even the most successful change efforts go through periods of difficulty, providing naysayers with sufficient reasons to abandon the effort.
- **Short-term goals don’t go away.** Most organization must deliver on their current business objectives even while they’re shifting in another direction. The need to meet quarterly sales and margin goals can easily pull focus away from any new initiative.
- **Leaders lack strong change skills.** Often, even executives who are fully committed to the change fall prey to common mistakes, such as under-communicating the change vision, selecting the wrong change leader, asking employees to make too many changes at once, or declaring “victory” too soon.³

INTRODUCING EMPLOYEE-ENGAGING TRANSFORMATION

To understand how large organizations successfully go through change efforts, we interviewed both individuals who are leading CX change inside their organizations and companies that help firms design and implement large-scale change initiatives.⁴ Our research uncovered a core insight: CX change must be focused on changing the way that employees do their every-day jobs.

Based on our research, we developed an approach to CX change that we call *Employee-Engaging Transformation (EET)*. We define EET as:

Aligning employee attitudes and behaviors with the organization’s desire to change.

EET represents a significant shift from how most organizations currently approach their change initiatives (see Figure 2). To succeed with EET, organizations must master five practices (see Figure 3):

² Source: XM Institute Q2 2019 CX Management Survey

³ “*Leading Change: Why Transformation Efforts Fail*” by John P. Kotter, Harvard Business Review (1995, 2006)

⁴ The companies interviewed for this report are: Adobe, Alder Associates, The Arnouldse Group, Inward Consulting, Ipsos, Merkle, MetLife, Oklahoma City Thunder, Oracle, Prime Therapeutics, Rackspace, Root Inc., Symantec, and Waters Global Services.

- **Vision Translation: Connect Employees with the Vision.** The organization clearly defines and conveys not only what the future state is, but why moving away from the current state is imperative for the organization, its employees, and its customers.
- **Persistent Leadership: Attack Ongoing Obstacles.** Leaders realize that change is a long-term journey and commit to working together until the organization has fully embedded the transformation into its systems and processes.
- **Activated Middle Management: Enlist Key Influencers.** Middle managers are invested in the transformation and understand their unique role in supporting their employees' change journeys.
- **Grassroots Mobilization: Empower Employees to Change.** Frontline employees operate in an environment where they help to shape and are enabled to deliver the change.
- **Captivating Communications: Share Impactful, Informative Messages.** The organization shares information about the change through a variety of means that balance both the practical and the inspirational elements for each target audience.

Vision Translation: Connect Employees with the Vision

It's impossible to align any group of people in the same direction if they don't know where they're heading. But many transformation efforts suffer from visions that are vague, too high-level, or fail to resonate with employees. To drive EET, the vision of the future after the change occurs must be compelling, convey both the extrinsic and intrinsic benefits for the people involved, and support the organization's overall mission and values. Here are some examples of how companies apply Vision Translation:

- **Start with a clear purpose statement.** A good change vision is one that people can understand and remember so that they can use it to guide the myriad of decisions they make every day. When independent pharmacy benefit manager Prime Therapeutics undertook its most recent customer experience change, the work started with defining a simple 10 to 15-word purpose statement. The goal: something that was clear, repeatable, and memorable for all employees and that would have some longevity to guide their efforts. The result: *"To help people get the medicine they need to feel better and live well."* Over six to nine months, the executive leadership team tapped into research and analysis to define the purpose statement, to understand how far away the company was from where it wanted to be, and to determine what its customer experience should become.
- **Help employees understand what the vision means to them.** Having a vision that focuses on company-wide objectives is not enough. Adobe worked with employees and teams to translate the company-level vision into something they could understand and act upon. In order to map the "what's in it for me" for employees, the company identified the roles directly and indirectly involved in its CX transformation efforts. Adobe used select employees in these roles to express what the vision meant to them through storytelling, panels, and interviews, and then shared these insights across the company. Adobe also works one-on-one with many team leaders to coach them on how to align their goals and metrics to the company's overarching goals and teach them what success should look like for their individual teams.

- **Frequently reinforce the vision.** Organizations can harness the tremendous power of intrinsic motivators—such as a sense of purpose or sense of progress—to encourage employees to embrace the change vision. The Oklahoma City Thunder, a National Basketball Association franchise, strives to help guest-facing employees understand that they are key contributors to achieving the team’s vision “*to be the most FAN-centric organization in all of professional sports.*” It starts by educating more than 600 part-time team members who work Thunder home games on the organization’s five service values and reinforcing its vision. In the training and every day, the Thunder remind frontline staff: “Are you doing something each and every day to get close to our vision? We cannot do this without you—our team members.” Throughout the season, the Thunder empowers its frontline employees to be problem-solvers in the moment and instills within them the knowledge that they have the single greatest positive day-to-day impact on their Thunder guests.
- **Identify employee behaviors that align with the vision.** All organizational transformation requires some change in employee behaviors. Successful change efforts make these changes very explicit. When Safelite AutoGlass set out to go above and beyond to delight every customer, it broke down its new vision into guidelines instructing employees on how to create this delight. It focused on two key roles teaching customer service representatives to deliver delight with the *Five Bs* and teaching field technicians to use the *Five Ts* (see Figure 4). When BMO Financial started their customer experience journey in 2008 and introduced a new brand promise, it translated that promise into specific behaviors employees could demonstrate on a daily basis. The *Brilliant at the Basics* campaign identified eight actions, including “Our heads are up, not down,” and “Everyone pitches in...titles don’t matter.”⁵
- **Measure the company against the vision.** Rather than measuring only corporate-level performance with little linkage to individual behaviors, EET aligns metrics with new behaviors and employees’ contributions with results. When regional financial institution UMB translated its refreshed vision into guiding principles and behaviors, those behaviors became the foundation for its VoC program (see Figure 5). The bank can now see how well each of its branch and non-branch channels delivers its guiding principles. Technology provider Fiserv converts its vision “*To delight customers with every interaction*” into a balanced set of metrics, which includes both customer-centric measures—such as associate satisfaction and customer effort—along with customer effectiveness metrics—like quality and availability. Its *myPerformance* portal, a peer-defined performance scorecard based on these metrics, places emphasis on consistently delivering the right customer experience down to the individual employee level.⁶

Persistent Leadership: Attack Ongoing Obstacles

The difference between the success and failure of a change often comes down to the ongoing role that leaders play. We’ve identified that transformational leaders demonstrate three

⁵ See Temkin Group Insight Report “Employee Engagement Case Studies: Five I’s in Practice” (May 2013)

⁶ See Temkin Group Insight Report “Lessons in CX Excellence, 2014” (January 2014)

characteristics: they communicate the “why,” they model desired behaviors, and they reinforce change (see Figure 6). Here are some examples of Persistent Leadership in action:

- **Build executive commitment into an ongoing rhythm.** Employees pay more attention to what leaders do than what they say. Oracle has sustained the momentum of its CX vision by taking a coordinated, multi-faceted approach to executive involvement. Executive committee members meet with customers on a weekly basis to maintain their connection to customers, while the *Executive Sponsorship Program* assigns executives to develop deeper relationships with some of Oracle’s largest clients. These executive sponsors “hit the road” and join customer meetings with the account team. Oracle’s President, Mark Hurd, hosts global employee town hall meetings twice a quarter to align strategic initiatives with customer needs, and he encourages employees to send questions and ideas directly to him through his *Ask Mark* internal portal.
- **Train leaders to be transformational leaders.** One trap that organizations fall into when embarking on a transformation journey is focusing solely on the front lines. To ensure higher-level employees fully understand what they were accountable for during its CX change efforts, Adobe targeted 3,000 leaders to participate in their rollout of its *Customer Learning Experience* training. The training—which was completed by 100% of those targeted leaders—focused on what the change vision was, why it was important, and how individuals could specifically contribute to what the company was trying to build. As part of Safelite AutoGlass’s initial *People First* initiative, over one thousand leaders participated in the company’s custom-designed *People First Leadership Development* series, which prepared them to support this new employee-focused philosophy (see Figure 7).
- **Have leaders take active roles driving change.** When embarking on employee-engaging transformation, leaders cannot delegate responsibility to an internal project team and then step back. At MetLife, the CEO and executive group take an active role by handling customer calls on a regular basis. Each leader blogs about his or her experience, what they learned and what the organization needs to do differently as a result. These posts open a two-way dialogue with other employees, who are able to submit comments and questions in response. At Symantec, the company selects a targeted number of areas to strategically invest in as part of their CX improvement journey. Over the course of six to twelve months, ten senior people (directors or higher) pair up with senior leaders from different lines of business, and they work together on the end-to-end product or process improvement opportunities.
- **Align goals and plans with overall change objectives.** Sustaining change when an individual’s interests conflict with the company’s overall objectives is challenging—if not impossible—so organizations need to align what leaders must do for personal advance with the change initiative’s success. Following a region-wide leadership workshop to introduce a common service vision, AIG Asia Pacific worked with each of its fourteen country consumer insurance managers to align their annual goals with the firm’s customer-centricity objectives. Those managers then worked with champions in each of their countries to define 90-day plans to make progress towards those

goals. They submit detailed quarterly reports on their actions and progress, which are then shared globally.⁷

- **Assign specific responsibilities to executives.** To get and keep leaders involved, change initiatives should be explicit about the ongoing role of executives. At Cisco, its *Ease of Doing Business* (EoDB) initiative is led by a group of senior level executives selected by the CEO for their passion for customer success and simplifying the customer experience. These sponsors work with a group of VPs, who then take the lead on the individual improvement tracks being pursued. These leaders regularly hold milestone reviews where they examine pain points across the different tracks and verify the metrics used to measure CX changes. As part of the governance model, the company equips executives with regular, accurate EoDB messages for them to share internally and externally, which enables them to serve as spokespeople across the organization. These leaders also speak at internal and external speaking engagements—such as town hall meetings and customer advisory boards—to maintain the flow of information across key audiences.

Activated Middle Management: Enlist Key Influencers

When asked to assess the support that they receive from different groups of employees, customer experience leaders put middle managers and team leaders at the bottom of the list.⁸ Companies often overlook this important group of influential employees during the change effort, with severe consequences. Successful change initiatives must explicitly enlist the support of middle managers in shaping and driving the change. Here's how some organizations tap into the power of Activated Middle Management by investing in this key group of employees:

- **Provide tools for managers to engage with their teams.** Organizations cannot turn middle managers loose to support change independently without first giving them guidelines on how to engage with their teams. Thanks to the work of the Rackspace's Product Competency Development Team, managers are better able to measure and coach their employees around a clearly defined set of skills and capabilities required to achieve the change vision. Rackspace stresses the importance of managers spending time with their people— giving attention and sharing their perspectives, along with coaching and mentoring the individual. The company uses a strengths-based approach to coaching, which has a common language around what each individual employee is good at and how their strengths apply to the change, as well as how to get support where he or she is not as strong. This common language helps managers more effectively communicate the individual connection each employee has to the change effort.
- **Provide middle managers with exposure to customers.** One way that Symantec connects people in mid-level roles broadly and strategically to the company's

⁷ See Temkin Group Insight Report "Lessons in CX Excellence, 2014" (January 2014)

⁸ In XM Institute's Q2 2018 CX Management Survey, we asked 178 organizations with 1,000 or more employees to rate the degree to which different groups of employees were supporting their organization's customer experience efforts. More than 80% of this group felt that frontline employees were at least moderately supportive and 69% felt that way about the senior executive team. But just over half of the respondents say they had that level of support from middle managers and 50% felt the same way about non-customer facing team leaders. See the July 2018 XM Institute Insight Report Employee Engagement Competency & Maturity, 2018.

customer experience vision is to have managers who are responsible for end-to-end offerings in specific countries sit down and talk with customers, prospects, and former customers. This listening activity helps these employees understand critical moments of truth in the customer journey, and, at the same time, raises their willingness to change where needed. Each manager takes what they learn back to his or her team and works alongside them, bringing the power of the stories from the customer interviews. This not only reinforces the overall shared vision, but it also helps team decision-making reflect what was heard from the prospects, customers, and former customers.

- **Train and coach managers on key skills.** When promoting employees into middle management roles, companies sometimes neglect to help their new managers make the transition. At Fiserv, contact center managers go through *Integrated Coaching Certification* to help them progress through multiple levels of expertise. Coaches all receive certification within six months through a combination of training and observation by both their direct and indirect leadership. As coaches demonstrate mastery, they can pursue senior and master certification. The certification develops their personality-based coaching abilities and sharpens their understanding development opportunities at the local level, skills that they then use in ad-hoc and scheduled coaching sessions with employees.
- **Provide middle managers with access to customer feedback.** Just as the frontline need systems and processes to do their jobs, so do middle managers. At UMB, managers have role-specific dashboards that supply a variety of insights from the company's voice of the customer (VoC) program. Managers then use these insights to support employees through the change journey. Managers engage employees on a continuous basis using information from these dashboards, which report on the branch or departments' performance both in fulfilling the bank's guiding principles and in closing the customer alerts triggered by customer feedback. Additionally, when a customer submits positive feedback about a specific associate, managers receive a *Recognize Alert* on the dashboard, which allows them to immediately congratulate this employee on a job well done. It also enables managers to close the loop by thanking the customer.
- **Engage middle managers in goal setting.** Rather than assigning targets and objectives to middle managers and their teams, the EMEA division of Waters Global Services purposefully utilizes middle managers to set goals and coach employees during periods of change. To enhance trust and build a comfort level around the new objectives, middle managers work with employees in a workshop setting to collectively define both team and individual goals. Managers stay in close contact with their team members through ongoing one-on-one discussions about individual performance, work/life balance, and what the employee needs to do to contribute to the team's success. Managers capture these monthly conversations in a working document that they review with their leaders throughout the year.

Grassroots Mobilization: Empower Employees to Change

The employees who actively participate in making change efforts a reality ultimately make up the heart of Employee-Engaging Transformation. Organizations accomplish Grassroots

Mobilization by deploying appropriate training, effectively using recognition and rewards, and seeking out employee input. Here's what we've seen from some organizations:

- **Create an environment that encourages employee feedback.** When an organization makes employees part of the decision-making process, their commitment level and optimism for the change significantly increases. Waters Global Services recognized that seeking employee input was something new for the company, and employees would feel pressure when asked to weigh in on major decisions for the first time. Thus, Waters eased employees into their new role by first focusing on smaller or easier changes; inviting employees to share ideas and answer the simple question, “What do you think?” during calls or meetings. Employees were recognized for their contributions and began to see their feedback drive action, instilling confidence and trust in the process. While Waters still uses that method for minor changes, the company now holds employee input workshops where, after a 30-minute introduction on the issue or improvement opportunity, employees work together as a team for a longer period of time to come up with solution recommendations.
- **Recognize employees for driving the change.** Companies need to celebrate the types of employee behaviors that are consistent with where the company is heading, and not reinforcing the “old ways.” To drive home how employees can impact the company’s CX change efforts, MetLife put employees’ focus on identifying persistent and troublesome customer issues by establishing its *Trailblazers Award* program (see Figure 8). Through an online portal, individuals and teams submit changes that they have made to improve underlying customer experience problems. The company judges submissions based on weighted criteria that takes into account how broken the experience was and how important the fix was. In addition to the individual and team Trailblazer awards, MetLife gives site-level spot awards that can be initiated at any time. The grand prize for 2013’s Trailblazer program was a trip to the NFL’s Super Bowl game.
- **Reinforce new knowledge and skills with ongoing training.** Any organizational changes require that some employees do some things differently necessitating training that continues beyond the initial introduction of the change. At the start of every season, the Oklahoma City Thunder brings new employees up to speed and keeps returning employees’ skills sharp with training on the team’s core principles and Guest Care tactics. New employees, or “rookies,” are required to take part in a three-hour onboarding session about the Thunder’s service values—known as *CLICK!* (see Figure 9). “Veterans,” the Thunder’s returning employees participate in a two-hour *CLICK!* recertification that focuses on what went well during the previous season, supported by metrics and customer feedback. To foster an *attitude of invitation*, veterans and rookies also make a commitment to do at least one thing 1% better, commemorating it on their *CLICK!* Badge, keeping a reminder of their commitment close by. The education is reinforced season-long through coaching, evaluation of guest experiences, and congratulating team members through the Thunder’s three-tier *Pyramid of Recognition* program.
- **Use peers to inspire their co-workers.** Employees are more likely to change when they see that other employees have been successful using “the new way.” During Adobe’s *Customer Learning Experience* sessions, employees on a panel share personal stories about what actions they have taken that relate to the CX

transformation underway. These stories make the change very real and provide specific examples other employees can model. At Symantec, a network of 250 global and cross-functional employees who are working on specific customer-focused initiatives has formed to create a *Customer Community of Practice*. Under the stewardship of the customer experience team, this community's purpose is to learn and grow together in order to expand customer-centric thinking, methodologies, and behaviors. The community of practice meets in person several times a year and holds virtual meetings on relevant topics. Participants also volunteer to share with each other their knowledge, expertise, and questions.

- **Ask employees to personally commit to being a part of the change.** Sometimes it makes sense to ask employees for a formal, albeit non-binding, commitment. Following up on its communication campaign and employee *GAME Plans*—which put the emphasis on how every employee plays a part in its change vision—Findel Educational Resources created its customer pledge tree (see Figure 10). Employees in all roles and across all levels of the organization review voice of the customer results and customer comments and then make a personal action commitment stating how they will make Findel *the* choice for educational resources. They write their pledge onto a leaf cutout, which is then added to a large poster in the shape of a tree. When rolling out its *FEEL GOOD* employee engagement initiative, AIG Asia Pacific asked employees across the region to share what “Feel Good” meant to them both as individuals and as departments working together. The company has also held employee video and poster contests, and recently completed a traveling journal.

Captivating Communications: Share Impactful, Informative Messages

Change efforts can easily falter when they share too little information, provide disjointed messages, or leave out compelling content like customer insights and success stories. That's why no transformation initiative is complete without a well-designed communications plan. Organizations need to deliver ongoing messages that balance both practical and inspirational elements relevant for each target audience. Here are some examples of how to deliver Captivating Communications:

- **Design role-specific messages.** Adobe has developed a clear and explicit communication plan that identifies specific audiences and the impact of change on each audience. This plan includes the current pain points driving the change, what changes will happen, and how the changes will benefit employees and customers. The company sends messages to employees through a variety of channels, such as presentations from the CEO and other leaders, an internal blog, intranet highlights, and frontline and executive learning programs (see Figure 11). For example, Adobe produced a communication series highlighting its new customer advocacy objectives with a focus on wins and success stories. Each of these articles told the customer success story through the eyes of the specific employees involved and provided them with a platform to share what they saw, why and how they got engaged, and how they improved the customer's experience.
- **Include customer insights and stories.** During times of change, customer feedback—even more than corporate messages—can motivate employees and instill within them a greater sense of ownership and urgency for change. This type of communication can be a powerful way to make the change “real” by providing the

customer's perspective. Oracle shares the customer data it collects with employees through a variety of means ranging from a *customer feedback and response bulletin* and *executive readouts* down to individual alerts meant to trigger immediate resolution of issues generated through surveys, escalations, or visits. Storytelling also plays an important part in Oracle's feedback sharing and is captured through both the customer-centricity awards—which highlight individuals and teams—and customer success stories. Video is an increasingly more powerful storytelling tool that Oracle uses to get customers to tell stories about the impact Oracle has had on them personally.

- **Communicate in simple and relatable terms.** To support its belief that changing the customer experience starts with a cultural change at their organization, every single employee at Prime Therapeutics has 25 percent of their annual incentive program tied to ease of use and helpfulness of information metrics. So, when it felt ready to share the change vision with employees, Prime identified simple things that everyone in the company can understand and rally around. The company translated its vision into a clear set of interaction principles – a set of do's and don'ts like “Never use acronyms” and “Always communicate in the member's preferred way (email, phone, paper or web).” To help employees understand this *Let's Be Clear* initiative, Prime also created a tool that provides word suggestions to use with members in their own day-to-day communication (see Figure 12).
- **Use technology to engage employees in a dialogue.** Rackspace holds monthly leadership team presentations for all employees. During these *Open Book* meetings, leaders share updates on corporate strategy, employee engagement, and other key metrics for the month. A screen behind the leaders displays a telephone number that employees can use to text questions, comments, or concerns for leaders to address. MetLife uses its social innovation tool to share ideas and questions with employees and solicit their input across geographic boundaries. For example, employees' can communicate their thoughts on unnecessary policies and procedures that get in the way of the customer experience. Employees can submit responses, build upon the postings of others, and vote ideas up and down to influence where the company takes action.


ASSESS YOUR COMPANY'S READINESS TO SUCCESSFULLY TRANSFORM

To help your organization use the five fundamentals of Employee-Engaging Transformation to successfully navigate large-scale change, we created this assessment (see Figure 13). You can use this tool in a number of ways:

- **Self-assessment.** Complete the assessment yourself and identify the strengths and weaknesses of your organization's approach to the transformation.
- **Group discussions.** Have senior leaders or other key change stakeholders complete the assessment and convene to discuss the results. Review the strengths and weaknesses identified as well as areas of agreement and disagreement in the results.
- **Action planning.** When creating or refreshing the transformation's execution plan, use this assessment to identify specific actions to take at the corporate level or within specific business units.

- **Progress tracking.** Gauge your company's improvement over time in applying each of the five principles during transformation initiatives by completing the assessment on an annual basis.

Factors Influencing Employees' Reactions to Change	
Factor	Impact
<p>Personal Characteristics of the Employee</p>	<ul style="list-style-type: none"> Individuals who have a greater sense of self-determination, higher tolerance for ambiguity, better developed coping skills, and a natural tendency towards optimism are more likely to handle change situations positively. An employee's age, education, tenure at company, past experience with change, and general life circumstances also play a role in their likelihood to accept and internalize change.
<p>Perceived Impact of the Change on Employees</p>	<ul style="list-style-type: none"> Employees interpret corporate communications about the change and make their own judgments as to the impact the change will have. Employees are more likely to resist change when they perceive that they will lose something—ranging from job satisfaction and personal well-being to financial loss to decision-making rights—as a result.
<p>Existing Company Culture</p>	<ul style="list-style-type: none"> One of the strongest drivers of change reaction is an individual's trust in management, which is influenced by the employee's personal engagement and commitment to the organization.
<p>Perceived Impact of the Change on the Organization</p>	<ul style="list-style-type: none"> The actual change and how it is implemented can affect adoption and change how people will react to the change. This includes how effective the organization is in describing the change as well as sharing the impact and timing of the change.



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Figure 1

Employee-Engaging Transformation is Different From Today's CX Change Efforts

Employee-Engaging Transformation

Aligning employee attitudes and behaviors with the organization's desire to change.

	Today's CX Change Efforts	Employee-Engaging Transformation
Executive mindset	Short-term change	Long-term sustainability
Change efforts	Mandated top down	Designed top down and refined bottom-up
Role of employees	Conformance	Involvement
Planning metaphor	Command and control	Political campaign
Focus of change	Processes and rules	Actions and behaviors of people
Change activities	Make changes and move on	Change, refine, and reinforce
Key areas of leverage	Front line employees	Middle managers
Primary focus of communications	What's changing	Why change is important

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Figure 2

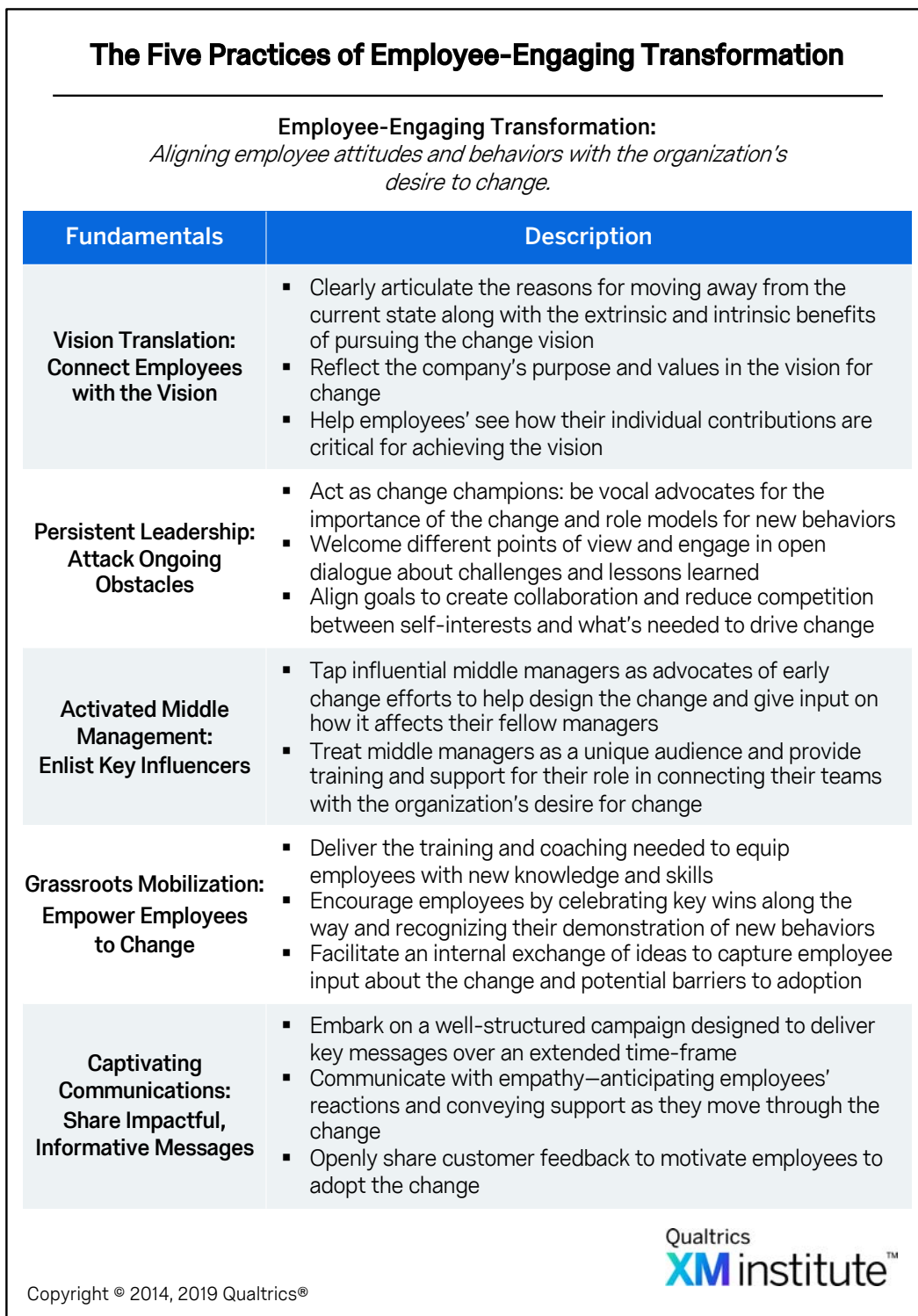


Figure 3

Safelite AutoGlass Customer Driven Behaviors

Safelite's *Being Customer Driven* Objective:

Achieve *extraordinary results* by looking at our business through *the eyes of our customers*, making it *easy for them to do business with us and ensuring their experience is memorable*.

Behavioral Elements for Different Audiences

Contact Center Representatives

- Two-week orientation focuses on "The Five B's":
 - Be Sure
 - Be Helpful
 - Be Sympathetic
 - Be Honest
 - Be Appreciative
- Supported after orientation with Safelite University, an online reference tool, and with coaching and feedback from dedicated CSR coaches

Field Technicians

- All new technicians complete an eight-week training program, and every technician, new or experienced, must pass Safelite's certification.
- Training focuses on "The Five T's":
 - Time: Call customers in advance to notify them of arrival
 - Touch: Shake hands, make eye contact, and engage the customer
 - Technical excellence: Doing it right the first time, every time
 - Talk: Tell the customer what we're going to do and do it
 - Thanks: Show appreciation for choosing Safelite
- Customer feedback is reported by market and individual technicians and reviewed on a weekly basis to identify strengths and areas to improve

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Figure 4

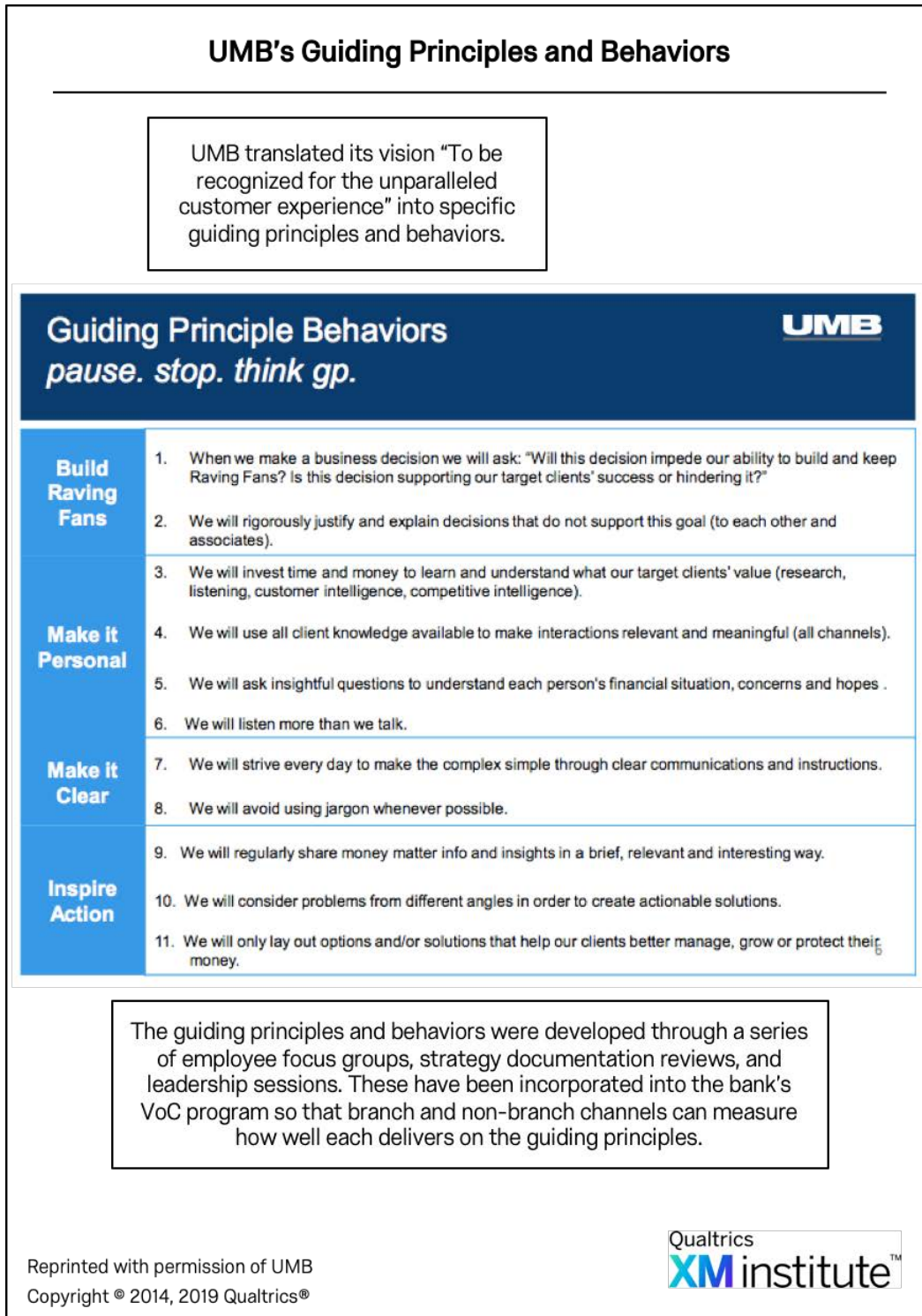


Figure 5

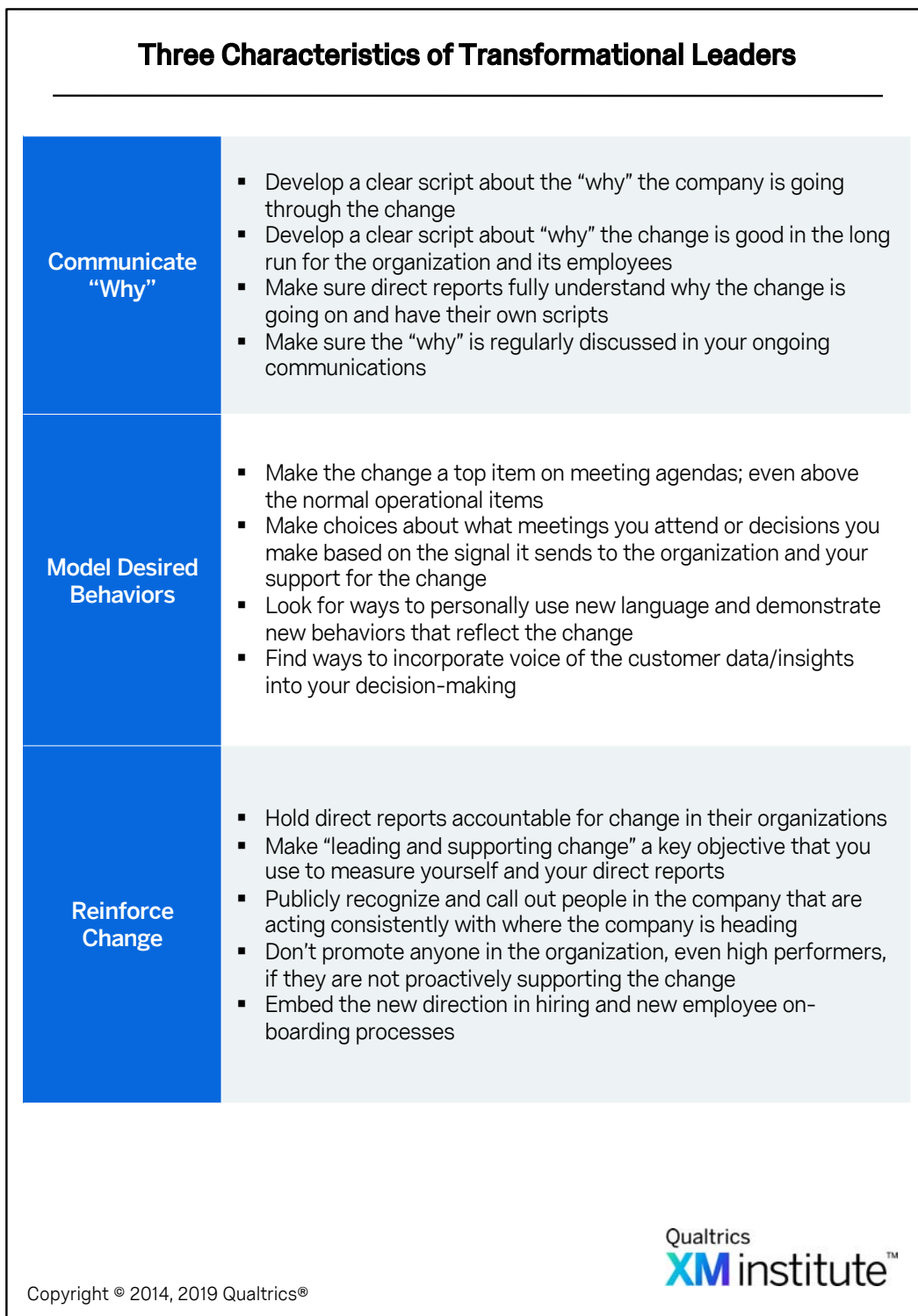


Figure 6

Safelite AutoGlass's People Pledge and Leadership Development Program

The "People Pledge"

You'll experience great leadership. We strive for great leadership. You'll be treated with respect. You'll often be asked for your opinions and involved in decisions that affect your work. You'll understand the big picture and your role in it. You'll receive coaching and guidance to help you reach your full potential and you'll be recognized for your hard work in delivering extraordinary results.

We focus on you first. Concentrating on our people is a key part of our business strategy. You'll have the tools, information and resources to position you for success, along with support and opportunity for a rewarding and fulfilling career.

We hire top talent...that includes you. Having great people is what sets us apart from the rest. You'll work with smart people every day who will inspire you to be at your best. By bringing your ideas and applying your skills, you'll have endless opportunities to grow both personally and professionally.

You'll work in a caring culture. At Safelite, we've got a strong set of values and a big heart...for our people, our customers, our environment and the communities in which we live and work. We strive for a culture that will inspire you to achieve...not because you have to, but because you want to.

Safelite AutoGlass: People Powered Leadership Development Series

- Based on its People Powered philosophy: drive business performance by putting people first and having an obsessive focus on having great people (through leadership, focus, talent, and caring)
- 1,000+ leaders participated in a development series that included 75 e-learning courses on Safelite's core competencies, with topics such as "Creating Engagement" and "Coaching for Performance"
- People Powered concepts were also integrated into a talent management platform that supported performance evaluations, succession planning, recognition, and more
- Reinforced with the People Powered Leadership Award, which honors leaders who live up to the People Powered philosophy

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Figure 7

MetLife's Trailblazers Program

What is the Trailblazers Program?

The Customer Centricity Trailblazers program celebrates employees who are successful in driving customer-centric changes in MetLife.

Customer-centric Trailblazers are those employees (individuals and teams) whose efforts demonstrate behaviors which result in reducing the effort it takes for customers to do business with MetLife. Winning entries will be those that focus on fixing customer dissatisfiers, creating a more positive customer experience.

Recognition Criteria

All submissions must describe the change which resulted in reducing the effort it takes for customers to do business with MetLife, for example improving cumbersome processes or helping to change a procedure that got in the way of customers understanding their policies.

Submissions must include the following information:

- Identify the issue/problem getting in the way of a positive customer experience
- Describe how that issue/problem was dealt with at the root cause, so it does not occur again
- Detail the business result or metric which demonstrates the value to the customer and company

Recognition Awards

- Individual and Team Wave Winners were selected during each of two waves of submissions.
- Wave winners received a congratulatory letter from MetLife's Chairman, President and CEO, a Customer Centricity "gold medal" in presentation boxes their winning customer centric submission, and Customer Centricity plush Snoopy figures
- One Grand Prize Winner was chosen from among the 20 Wave Winners
- The grand prize includes a professional video production of the winning story that is played on MetLife's global intranet and in the brand experience exhibition space in its NYC headquarters, along with a trip for the winners and guests

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Figure 8

Oklahoma City Thunder – “CLICK!’ing With Your Guests”

At the start of each new NBA season, the Thunder strives to educate new and returning employees on its five Guest Care service values. These are:

- **C** - Communicate Courteously
- **L** - Listen to Learn
- **I** - Initiate Immediately
- **C** - Create Connections
- **K** - Know Your Stuff



Guest Care service values are supported three ways:

- **Educate:** Train new and returning employees every season
- **Evaluate:** Use metrically based research and overall fan feedback to determine areas in need of improvement and areas of strength
- **Congratulate:** Encourage staff to continue excelling in caring for their Guests via three separate recognition programs, which form the “Pyramid of Recognition”

Pyramid of Recognition

- **“100% Guest Care” Team:** Secret shoppers recognize front-line team members utilizing all five CLICK! service values resulting in an above-and-beyond Guest Care experience. Each “100% Guest Care” team member is recognized during one of two halftime presentations throughout the season with a 100% Guest Care lapel pin, custom framed presentation photo and two CLICK! chips.
- **Fan Favorite Award:** Fans recognize front-line team members caught doing a little extra through FAN-tastic acts of service. Each recipient is individually presented a \$100 gift card for the Thunder Shop and an I’m A Fan Favorite lapel pin during an in-game presentation.
- **CLICK! With Your Guests CLICK! Chip Program:** Full-time staff recognize front-line team members CLICK!’ing with their Guests – demonstrating one of the five service values by doing special things that make a big difference. Team members are awarded CLICK! chips, which they can redeem after earning four chips for a Thunder gift of their choosing and an I CLICK! With My Guests lapel pin.

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Figure 9

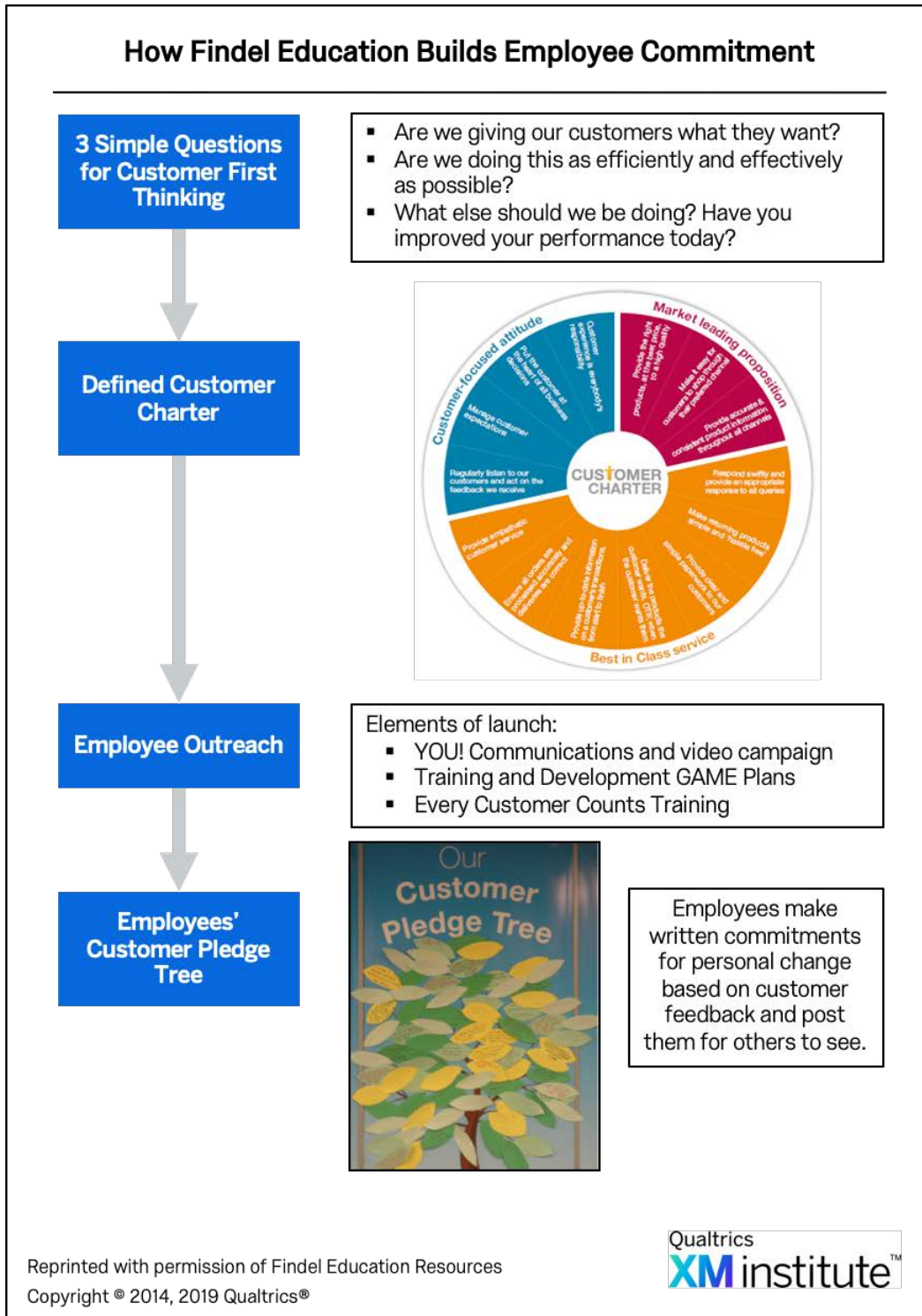


Figure 10

Adobe's Customer Experience and Advocacy Landing Page

Adobe's communication plan includes articles that highlight individual employee's contributions to success in delivering on Customer Advocacy objectives.

Employee's can also access role-specific information for their role as well as links for ways they can get involved.

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Figure 11

Prime Therapeutics: *Let's Be Clear Initiative* Employee Communication Tool

To help employees use more member-friendly language, Prime created this "Don't Say That – Say This" list of easier to understand words and phrases.

<i>don't say that</i>	<i>say this</i>
accessible	available, on hand
accompany	go with, take with
accomplish	do, finish
activate, activation date	start, start date
adhere	follow, stick with
adjudicate	process
advise	tell, let you know
advocacy	help, coaching
appropriate	right
authorize	allow, approve, let
benefit	coverage, covered services
coordination of benefits	match up, manage benefits from more than one plan
complete	fill out, finish
consult	talk with, talk to, discuss
coverage period	plan year, or time frame that you are covered
contract year	plan year
demonstrate	prove, show
determine	find out
effective date	start date
effective	works well
excessive	too much
fatigue	feeling tired

This list is also printed on Prime's employee calendar along with the full list of the company's interaction principles.

The company also has Let's Be Clear buzzers in every conference room at each of Prime's 16 locations. Employees are encouraged to press the buzzer at any point in a meeting if someone uses an acronym or other type of jargon.

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Figure 12

Temkin Group Employee-Engaging Transformation Assessment	
To what degree does this statement describe your organization's change efforts?	
1 = Not at all 2 = Slightly 3 = Somewhat 4 = Mostly 5 = Completely	
The company has a clear vision statement that explains why the change is important to the company, its employees, and its customers.	
The company defines specific employee behaviors—from executives to the frontline—that are required to support the vision.	
The vision for the change is reflected in the performance measures and metrics of both the company and of its employees.	
Vision Translation total	
Leaders' goals and objectives are aligned with what is needed for the transformation's success.	
Senior leaders are assigned specific responsibilities for communicating and reinforcing the change.	
Leaders keep the company focused on the long-term benefits of the change during times when the company navigates obstacles or faces short-term setbacks.	
Persistent Leadership total	
The company specifically targets middle managers to build buy-in and support for the change.	
Middle managers receive training and support on critical behaviors needed to support change.	
Middle managers are trained to help employees understand the connection between their individual contributions and their team's role in helping the organization achieve its transformation goals.	
Activated Middle Management total	
The company actively solicits employee feedback throughout the transformation process to understand and overcome obstacles.	
Employees are trained and coached on the new behaviors needed to succeed as the change takes hold.	
The company designs recognition and reward programs that focus specifically on reinforcing employees who demonstrate the new behaviors required for the change to succeed.	
Grassroots Mobilization total	
The company has a well-structured, formal campaign to communicate the importance and the progress of the change to employees.	
Customer and employee success stories are shared throughout all stages of the transformation process to reinforce the importance of the change.	
The company creates opportunities for a two-way dialogue with employees about the change.	
Captivating Communications total	
Overall EET Effectiveness	OVERALL TOTAL
Less than 35 : Very Weak 35 to 44 : Weak 45 to 54 : Adequate 55 to 64 : Strong 65 to 75 : Very Strong	
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Figure 13