

Responsibilities of a CX Core Team: Strengths and Gaps

Original Report: *The Federated Customer Experience Model*

SUMMARY

A centralized customer experience (CX) team is an essential component of CX efforts as it works with leadership to set the strategic direction of the CX program and defines the standardized methodologies, tools, trainings, processes, and procedures used across the organization. This core team is also responsible for circulating best practices and recipes for success along with generally managing the portfolio of CX activities on a daily basis. Use this worksheet to help you identify your centralized CX team's current responsibilities as well as opportunities to expand and strengthen the areas the team owns and manages.

FIVE AREAS OF A CX CORE TEAM'S RESPONSIBILITIES

Centralized CX teams serve as the main coordinator of CX efforts across an organization, overseeing the setting of collective goals and objectives, enforcing enterprise-wide standards to prevent localized deviation, and acting as a hub for cross-pollination of ideas and success stories. To be effective, this CX team should strategically facilitate:

- 1. Enterprise CX Strategy and Governance.** Working with the CEO and other senior leaders, the centralized CX team defines a common CX vision, strategy, and priorities for the organization. This includes aligning the CX strategy to business and brand strategies and prioritizing how CX resources will be invested to support the strategy. The CX core team also establishes a governance model to drive on-going oversight and accountability for executing CX initiatives across the organization.
- 2. Insights, Metrics, and Reporting.** The core focus of any CX effort is to measure and improve customer experiences. The CX core team manages the approaches and tools that provide relevant and timely insights to the organization. The CX core team coordinates everything from the data rules and metrics and measurement frameworks to how data and insights will be reported and distributed across the organization.
- 3. Standard Methodologies and Tools.** CX efforts are unlikely to be successful if different parts of the organization are not acting consistently. The CX core team introduces and institutionalizes standard CX methodologies and processes, which includes identifying emerging practices and tools, defining how they will be used, and collaborating with other teams to shape CX-related training, systems, tools, performance management, and recognition approaches.
- 4. Central CX Storyline.** The CX core team defines the enterprise-wide CX communication plan and creates the storyline for the company by identifying key themes derived from both the company's CX strategy and its customer and employee feedback. This work includes customizing key messages for distinct audience segments and coaching executives on the content of their CX-related communications.
- 5. Portfolio Management.** As CX-related efforts become distributed across the company, the CX core team focuses on the portfolio of work being done by others in order to track progress across the organization. This includes identifying collaboration opportunities, cross-pollinating key learnings across projects and teams, and monitoring other teams' progress on their CX commitments.

HOW TO USE

To consider the current and potential future responsibilities for your CX core team, you can use this tool for:

- + **Self-evaluation.** Fill out this worksheet yourself by first marking existing strengths of your CX core team, then identifying gaps in your team's responsibilities.
- + **Group discussion.** Use the worksheet in a group exercise. After each individual completes it, discuss the current strengths and gaps you've identified as well as areas of agreement and disagreement in the results.
- + **Action planning.** Develop plans for expanding strengths and closing gaps in your CX core team's responsibilities. Or, if you are in the later stages of maturity, identify which responsibilities you may want to enable other teams to take ownership for executing. For inspiration and examples of how to own and manage CX responsibilities, read the original report, *The Federated Customer Experience Model*.

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First, in the “strength” column, check off the activities that your core CX team successfully owns and manages. Then, in the “gap” column, mark responsibilities that the team should consider taking on or improving.

		STRENGTH	GAP
Enterprise CX Strategy and Governance	Aligns CX strategy to business and brand strategy		
	Builds buy-in among senior executives for company’s CX strategy		
	Prioritizes how CX resources (time, money, people) will be invested to support CX strategy		
	Establishes governance council and engages regularly to share updates, gather input, and request assistance		
	Implements accountability model for line of business CX efforts		
	Builds and manages network of company-wide CX champions		
Insights, Metrics, and Reporting	Manages all elements of enterprise VoC program, including standard surveys and reporting		
	Defines universal CX metrics and measurement frameworks		
	Delivers all executive-level CX reporting		
	Selects CX vendors and other service providers and identifies emerging practices and tools		
	Monitors VoC efforts within COEs and lines of business to ensure compliance with enterprise standards		
Standard Methodologies and Tools	Identifies established and emerging CX practices and tools and defines how they are used at the company		
	Selects CX vendors and other service providers to support use of standard methodologies and tools		
	Collaborates to shape CX related employee training, performance management, incentives, and feedback processes at the company level		
	Establishes a process assurance approach to review the effectiveness of COEs in using standard methodologies and tools		
Central CX Storyline	Defines enterprise-wide CX communication plan that cascades across the business		
	Leverages employee social networks to support enterprise and local CX efforts		
	Coaches executives on content of CX related messages		
	Contributes input to customer-facing messages about CX		
Portfolio Management	Shares key learnings and best practices across the company		
	Identifies cross-functional collaboration opportunities		
	Monitors line of businesses’ progress on their CX commitments		
	Engages with COEs to support overall CX strategy		
	Looks for signs indicating company’s CX priorities or investments need to be adjusted		