



# CREATE WOW

*customer experiences*

9 Rules for Designing the Perfect CX Strategy  
for Customers and Employees – Chapter One

# A BOX TO CHECK



## CHAPTER ONE: A Box to Check



Craig, an executive at ACME Enterprises, gets a call from Fred, his top sales guy. Fred says, “I lost a big deal, because of our Google reviews.” Ouch! Craig is not happy. He runs down the hall and quickly sticks his head into the office of Stephanie, the head of marketing. “Steph, what’s up with all these Google reviews? We just missed out on a massive deal that we couldn’t afford to lose. Fix it!”



And there it is—a box to check.



## ACME Enterprises

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2.3 ★★☆☆☆ 272 Google reviews

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The biggest mistake companies make is solving problems one at a time—literally checking one box after the other. This is how the reputation management world started. Companies work on one problem at a time, check one box and then move on to the next. But checking a box is not the same thing as finding a solution. In this example, Craig wants to “fix” the company’s Google reviews. He has no visibility past the problem in front of him. He wants happy customers writing Google reviews.

“Fix it!” That’s usually how it starts. That’s also the reason many marketers choose solutions that limit their outcomes. Stephanie needs to fix the company’s Google reviews, so she hires a software partner that focuses on creating Google reviews to check this box.

Six months later, ACME opens up its 15th retail storefront. Stephanie notices the business listings for many of the locations have inaccurate or inconsistent data. For example, her Danville, CA location shows 723 Becker Street on Yelp. That's an old address. Bing and Yahoo have the correct address information, but both use an old 1-800 number. In fact, there are more than 100 online listings for the Danville location and none of them perfectly match the ACME website. Stephanie has another box to check. This time, she goes with a SaaS partner who has a premium business listings distribution product.

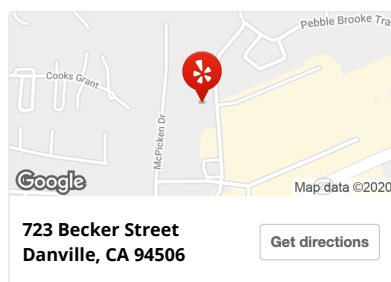


## ACME

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A few months later, Craig is in a board meeting and the board wants deeper insights from the customer base. Brian, the chair of the board, has a lot of experience with NPS<sup>1</sup> reports and wants to see how ACME stacks up against the competition. For this, they choose a data analytics partner known for business intelligence reporting. Brian has worked with them in the past, so it was an easy choice. Another box checked.

<sup>1</sup> Net Promoter®, Net Promoter System®, Net Promoter Score®, NPS® and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., Fred Reichheld and Satmetrix Systems, Inc.

After a few months with customer survey insights, Craig, Brian and the board realize they have an employee engagement problem. This time they need an employee survey to collect employee sentiment and will likely need an employee engagement partner. Good news, their data analytics partner has an employee survey. It's an additional fee, but they won't need another vendor. Next they hire an employee engagement consultancy to help motivate their workforce to perform at their best and deploy a pay-for-performance culture. Yet another box is checked.

I could go on and on about all the boxes that get checked one by one. We haven't discussed employee scorecards, brand mentions, social monitoring, third-party review sites beyond Google, or omni-channel data and AI. Check, check, check, check . . . and functions that should work together become siloed. ACME selects software, hires people to manage it, spends money, reacts to the problem of the day and checks box after box, one at a time.

## **IT'S ALL WRONG!**

### **ALL OF THESE PROBLEMS ARE THE SAME PROBLEM!**

They are a part of a single puzzle. Piece it together and you will discover a beautiful picture of your company—happy employees and happy customers partnering as advocates and fanatics for your brand. It is a picture of consistent data for all locations and lots of happy customer reviews everywhere. Each of the individual providers are checking a box. Put them together and you have an experience strategy. Evolving your ideas and seeing it as a single problem will create better outcomes than any of the box-checking solutions could individually.

Experience Management is not a list of individual problems and solutions. It is a single puzzle. When it is put together properly, each piece works far more efficiently than it possibly could as an individual solutions.



Craig wanted to fix his Google reviews so he would stop losing business. What he didn't know was that he should be focused on putting together a complete, interconnected strategy. Instead, the ACME Enterprises team took two years and spent millions of dollars checking boxes, only to build siloed technologies and teams.

Which pieces of the puzzle are you addressing with siloed technologies? Which are a part of integrated systems? If you are just beginning to build a strategy, then you are in luck. Building a strategy from scratch can be far easier than trying to off-board technology and start over. Software companies know that even mediocre technology can be sticky, especially for bigger companies. That is why many software companies focus on building scale more than improving product.

Siloed technologies are often managed by different stakeholders within the organization. The head of HR may start kicking and screaming if you try to remove software they have been using for years. Department heads and their teams often protect their domains and stay with bad tech because of a relationship with the vendor, familiarity with the product, or any number of other reasons. You may find yourself building a highly integrated strategy and only deploying a few pieces of the puzzle at a time. Winning over the long haul may not be perfect, but it is still winning.

**“The ACME Enterprises team took two years and spent millions of dollars checking boxes, only to build siloed technologies and teams.”**

# Improving the Customer Experience (CX) You Deliver

You've just read that experience management is not a list of individual problems and solutions. It is a single puzzle. When it is put together properly, each piece works far more efficiently than it possibly could by itself. To make this a reality, businesses need to change how they approach CX and that requires thinking differently.



# The CX 2.0 Shift

CX 2.0 is all about putting data in motion to drive improvement. No more box-checking solutions, siloed technologies and parking unhappy customers in a report for an executive to look at later. No more data at rest waiting for someone to react to it. Instead, CX 2.0 is all about putting data in motion to drive business outcomes. This is the important CX 2.0 shift.

So how do you evolve from where you are today into a modern, agile CX 2.0 business? It's a lot easier than you think. You just need to follow 9 simple rules.



**RULE #1**  
**Focus on the**  
**most Impactful**  
**Interactions**



**RULE #2**  
**Start with**  
**Behavior**



**RULE #3**  
**Know and**  
**Drive Business**  
**Outcomes**



**RULE #4**  
**Wherever Possible,**  
**Automate**



**RULE #5**  
**Escalate**  
**and Resolve**  
**Issues**



**RULE 6**  
**Manage Content**  
**and Consistent**  
**Data**



**RULE #7**  
**Collect and Share**  
**Feedback**



**RULE #8**  
**Create A**  
**Virtuous Cycle**



**RULE #9**  
**Make**  
**Data-Driven**  
**Decisions**

## Ready for More?

To learn how to design the perfect CX 2.0 strategy based on these 9 rules, please visit [Amazon](#) to order your copy of the book *"CX 2.0 - Create WOW Customer Experiences"* authored by SocialSurvey CEO Scott Harris.

Want to know how your company ranks online against three similar companies across six critical parameters so you can start planning your CX strategy? Visit [www.try.socialsurvey.com/request-an-audit/](http://www.try.socialsurvey.com/request-an-audit/) to request a complimentary CX Audit with one of our experts.

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12677 Alcosta Blvd #250

San Ramon, CA 94583

+1 (888) 701 4512

[www.socialsurvey.com](http://www.socialsurvey.com)