**Culture, Culture, Culture
What it Means to Your Client
Experience Transformation**
CX Pilots

CX matters now.

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Experience Transformation
CX Pilots
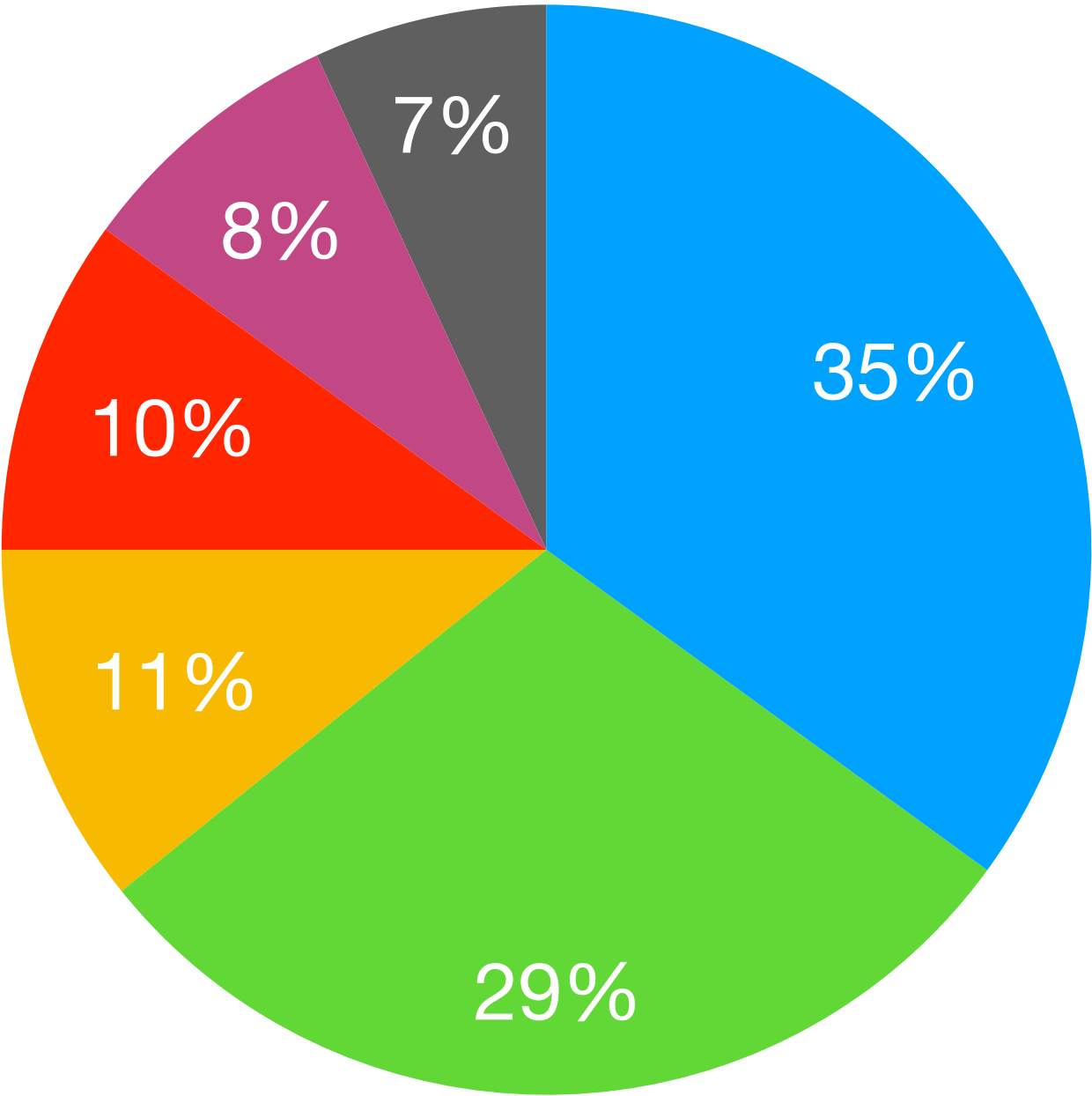
Culture
~~CX~~ matters now**.**

THIS SESSION

1. understand 'culture'

2. team + focus

3. EX + CX = ♥

4. balance

5. challenges

6. actionable insights

OUR GOAL FOR YOU TODAY

SHIFT your perceptions of culture so that you can UNDERSTAND, create, and IMPROVE / IMPACT the conditions that INFLUENCE yours.

THE
FAILURE
GRAPH

ORIGINS OF CLIENT EXPERIENCE (CX) FAILURE

35%
29%
11%
10%
8%
7%

ORIGINS OF CLIENT EXPERIENCE (CX) FAILURE

7% - Bad strategy

35%

29%

11%

10%

8%

7%

ORIGINS OF CLIENT EXPERIENCE (CX) FAILURE

7% - Bad strategy

8% - Poor leadership

7%

8%

35%

10%

11%

29%

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7% - Bad strategy

8% - Poor leadership

10% - Execution

35%

7%

8%

10%

11%

29%

ORIGINS OF CLIENT EXPERIENCE (CX) FAILURE

7% - Bad strategy

8% - Poor leadership

10% - Execution

11% - Lack of urgency

7%

8%

35%

10%

11%

29%

ORIGINS OF CLIENT EXPERIENCE (CX) FAILURE

7% - Bad strategy

8% - Poor leadership

10% - Execution

11% - Lack of urgency

29% - Lack of communication

35%

29%

11%

10%

8%

7%

ORIGINS OF CLIENT EXPERIENCE (CX) FAILURE

7% - Bad strategy

8% - Poor leadership

10% - Execution

11% - Lack of urgency

35% - Culture is disengaged

29% - Lack of communication

35%

29%

11%

10%

8%

7%

ORIGINS OF CLIENT EXPERIENCE (CX) FAILURE

100% - Disengaged culture
- **Strategy**
- **Leadership**
- **Execution**
- **Urgency**
- **Communication**

100%
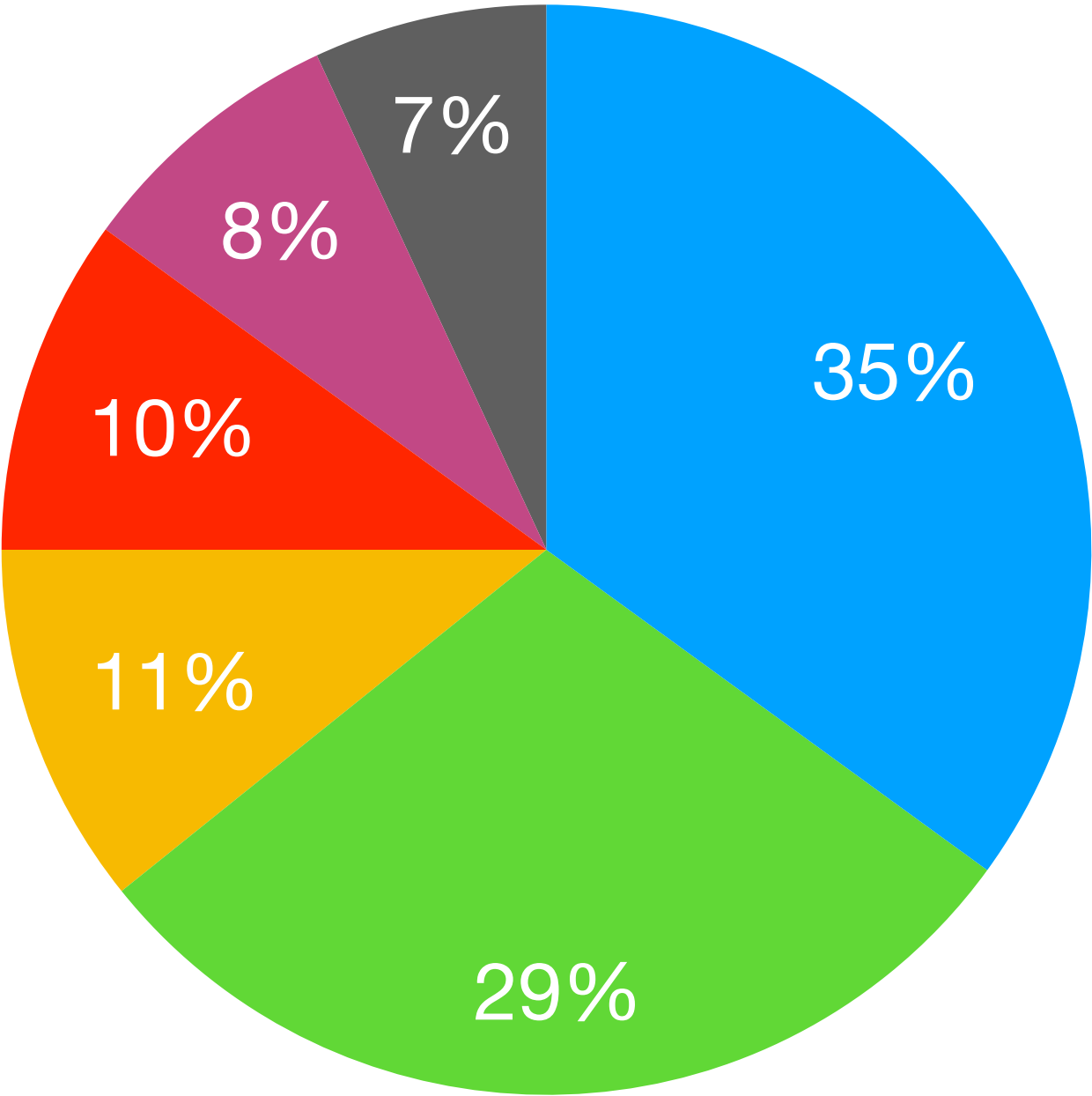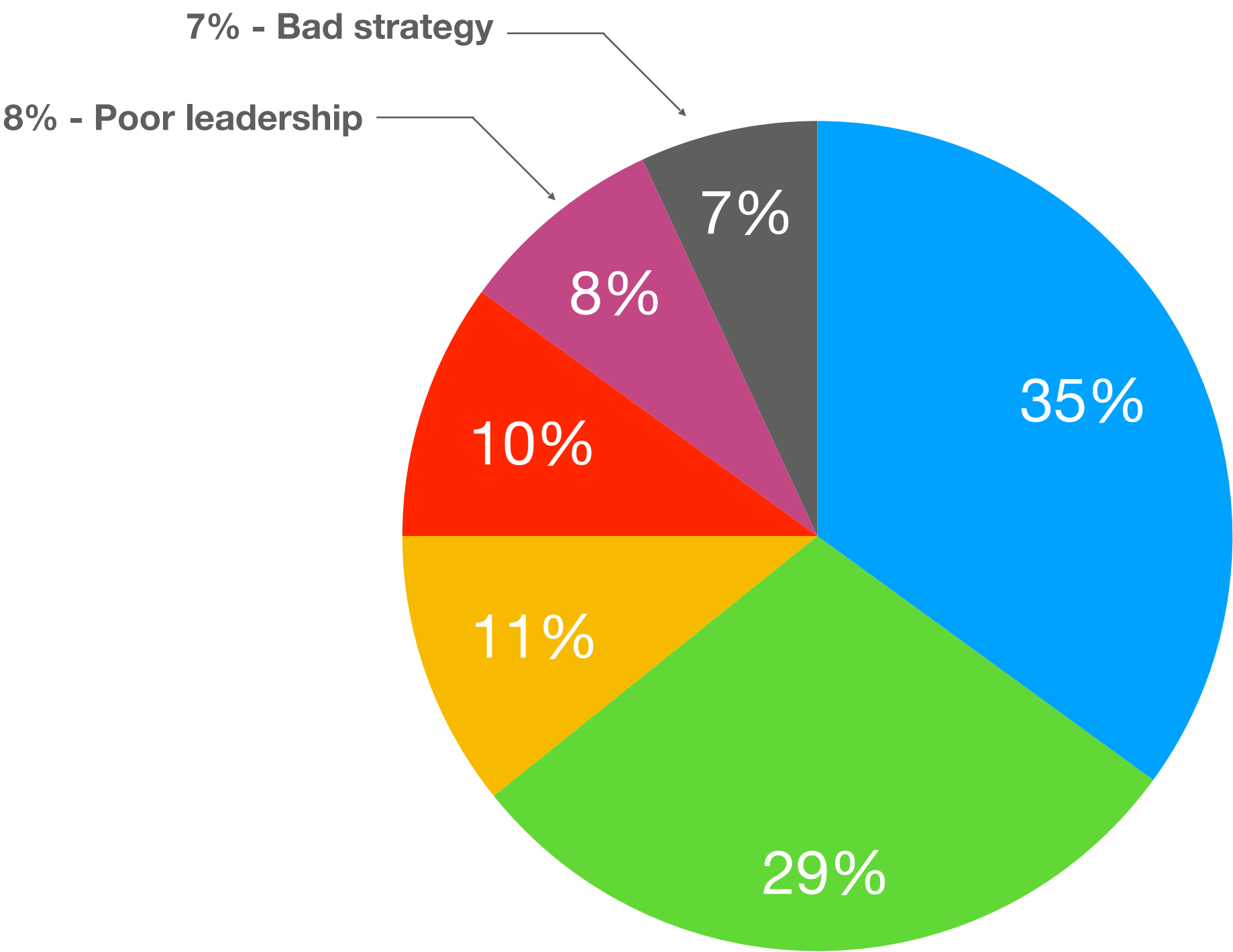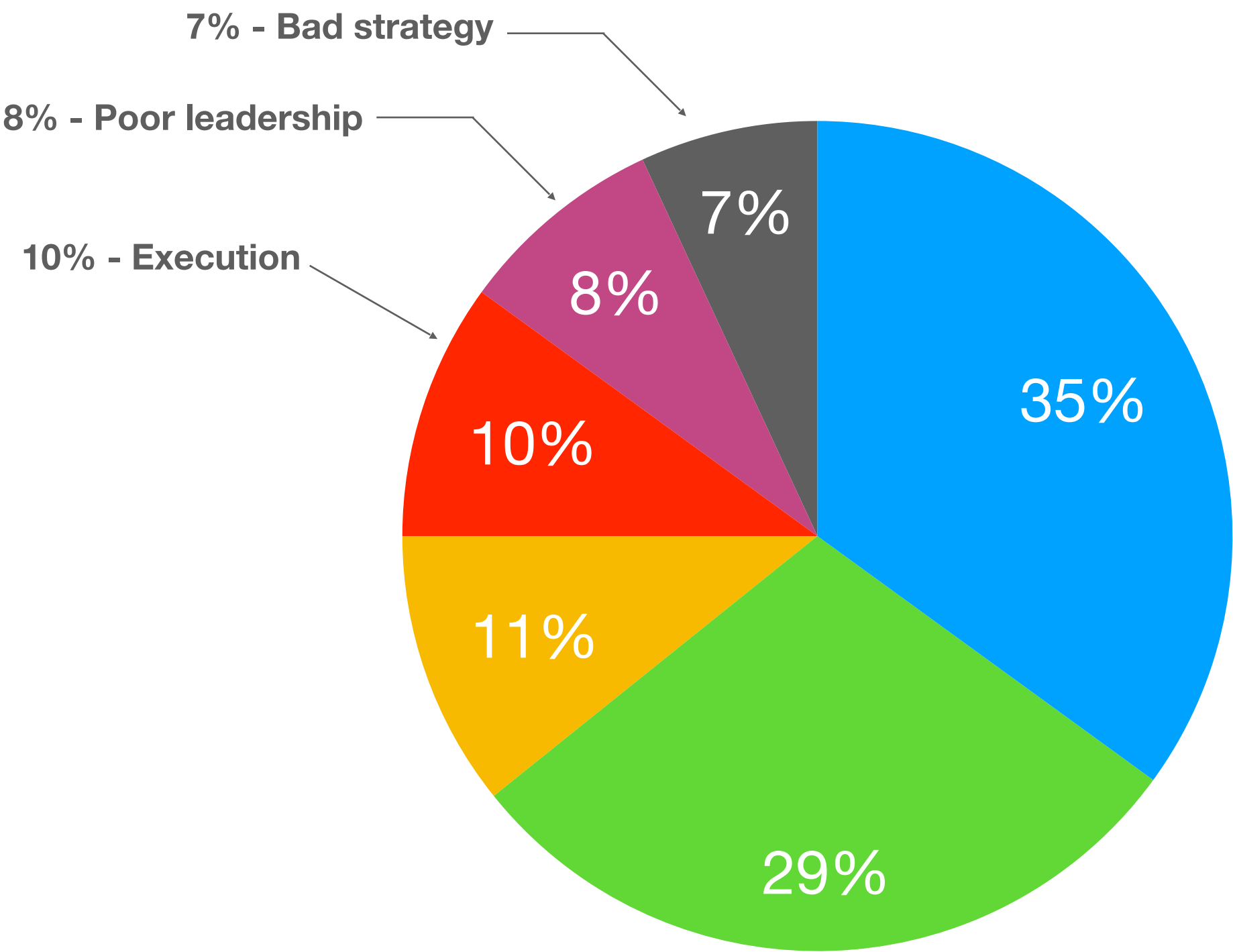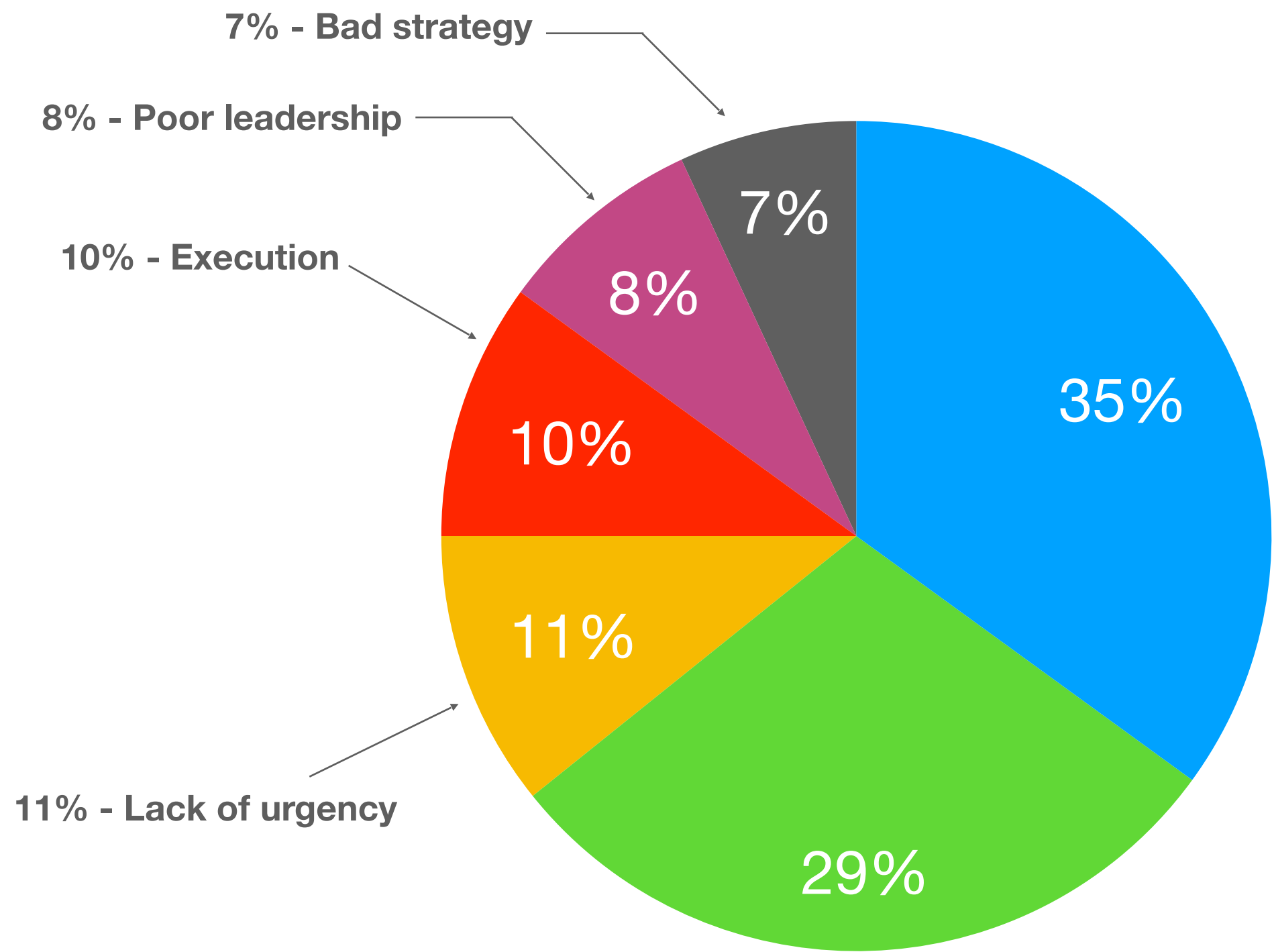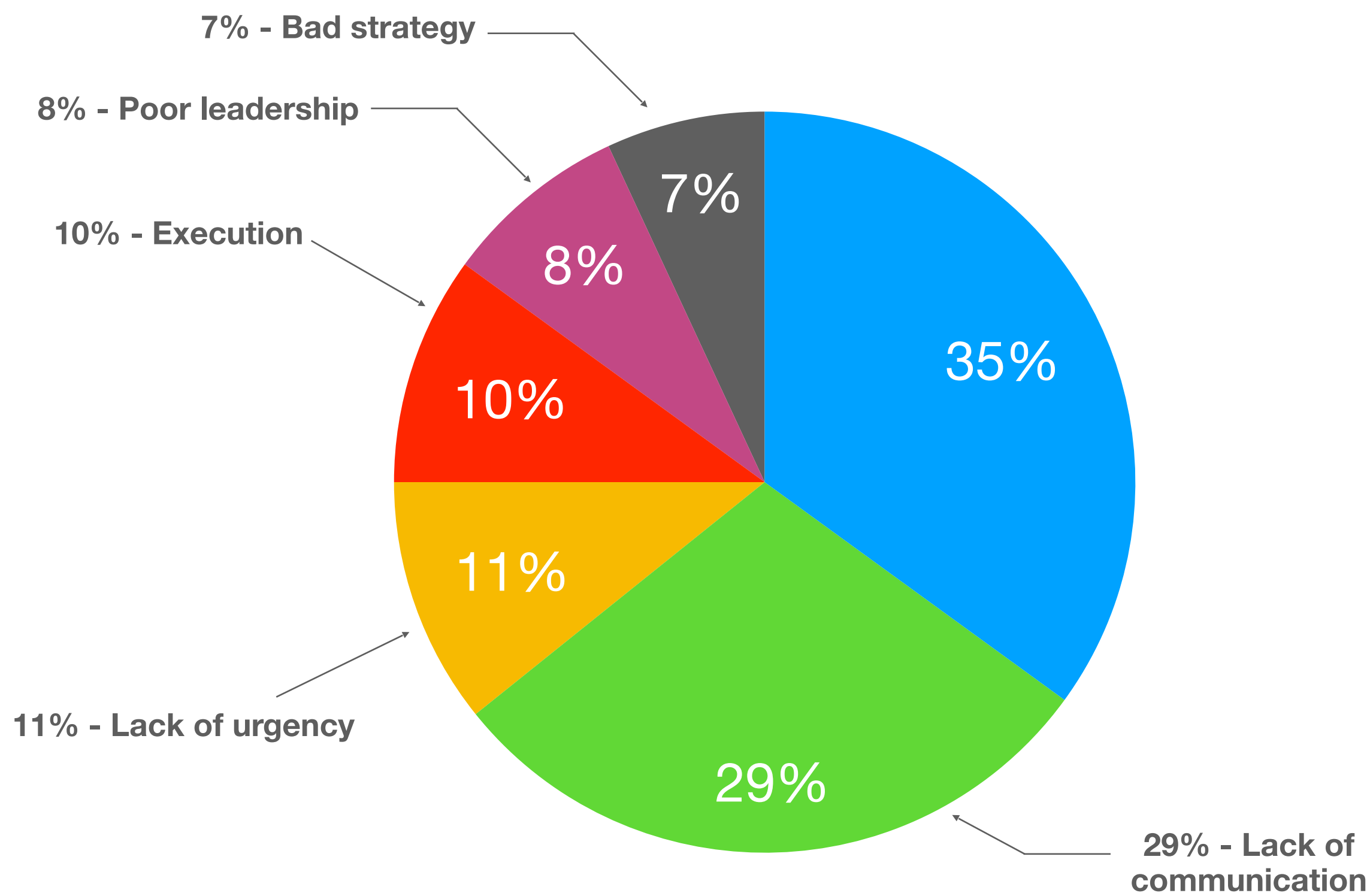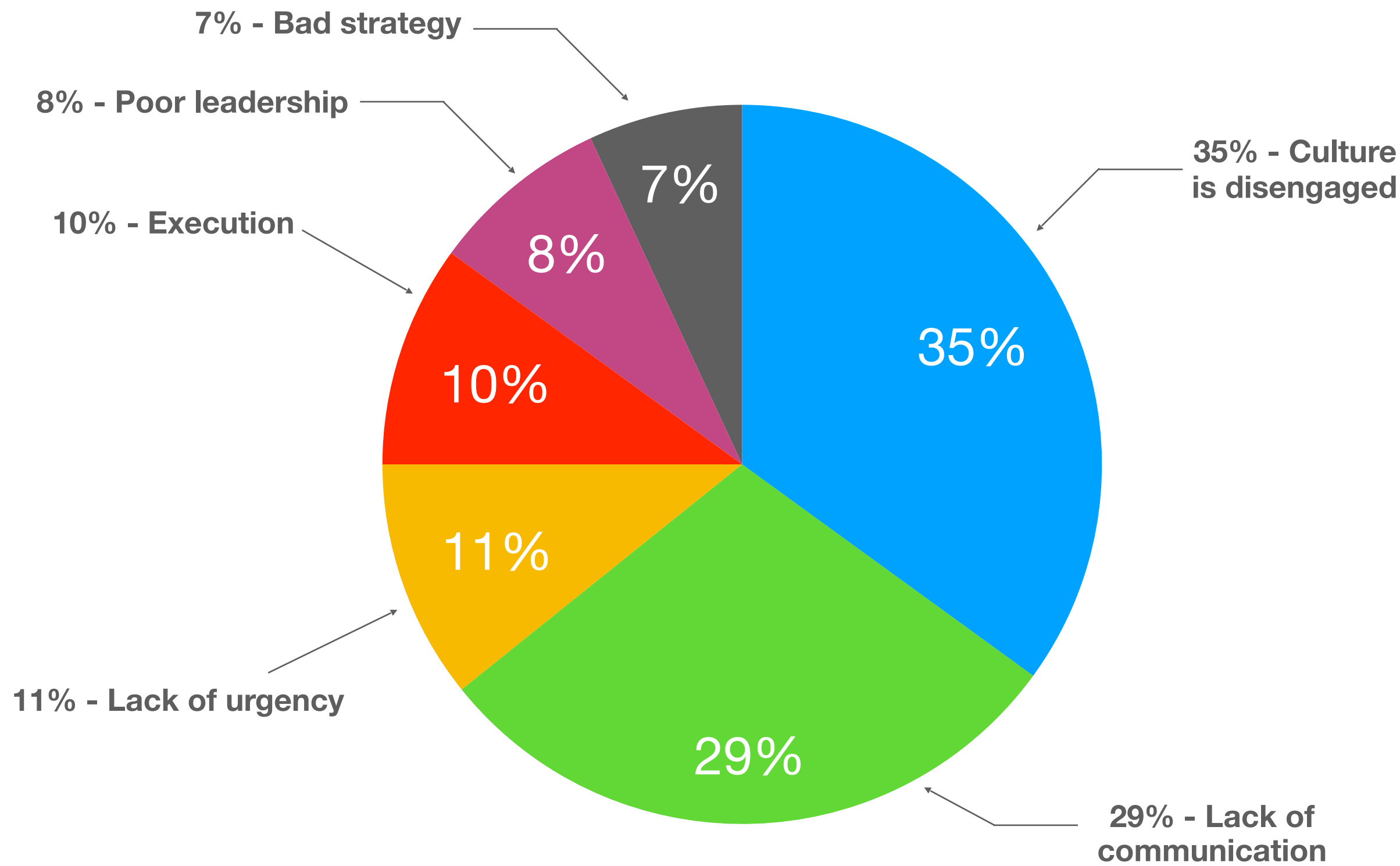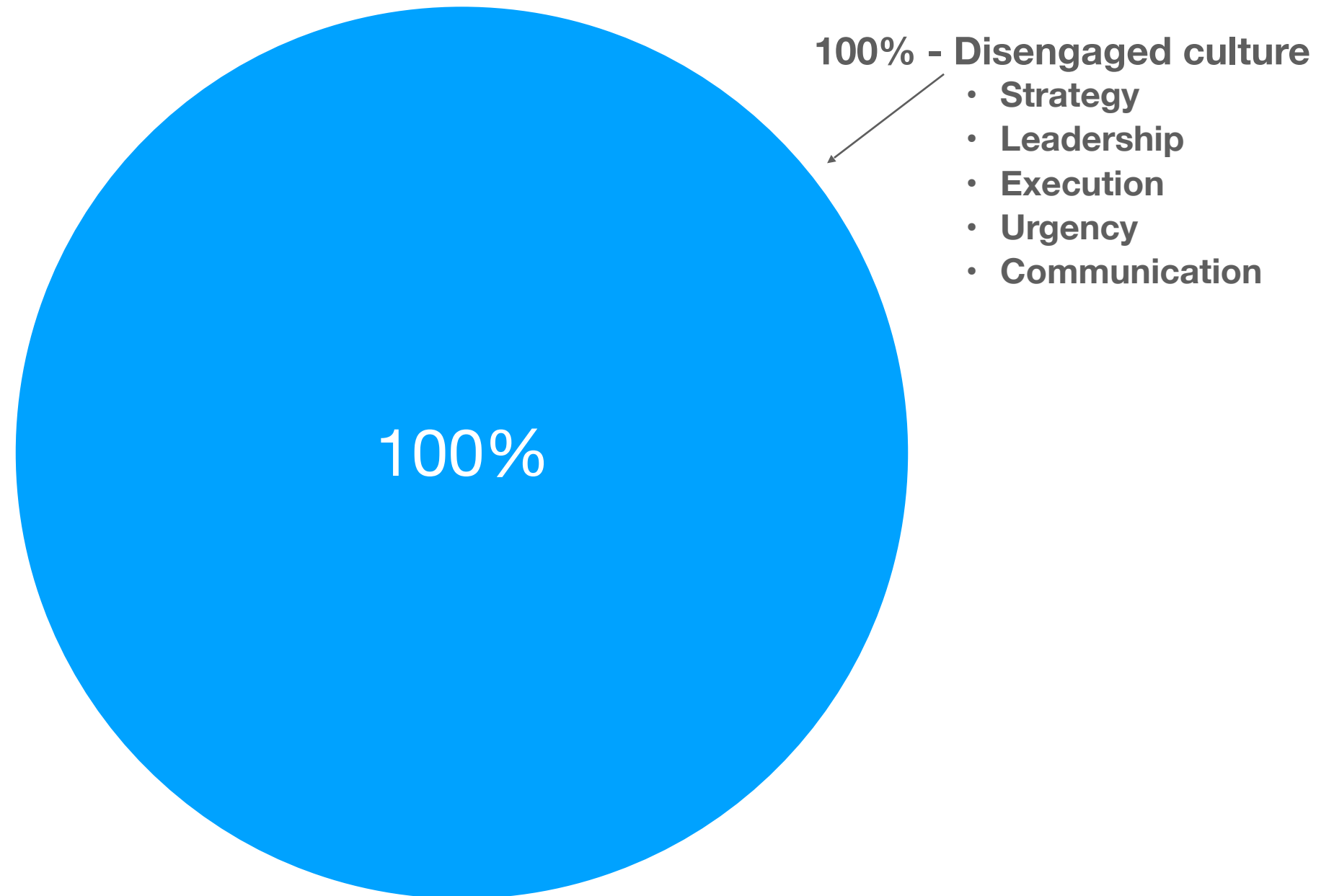
CX
CULTURE

climate, weather, storms

annual baseball game outing

what is culture?

worldview, snapshot, loud noises

soup, cake, filters

culture is a process

not just ambassadors

culture club, implementation team

front lines

back/corner office, filter, degrees of separation,

methodology, accountability

it's everybody

clarify roles through empathy

empathy

2. team + focus

INTERACTION

MODALITY

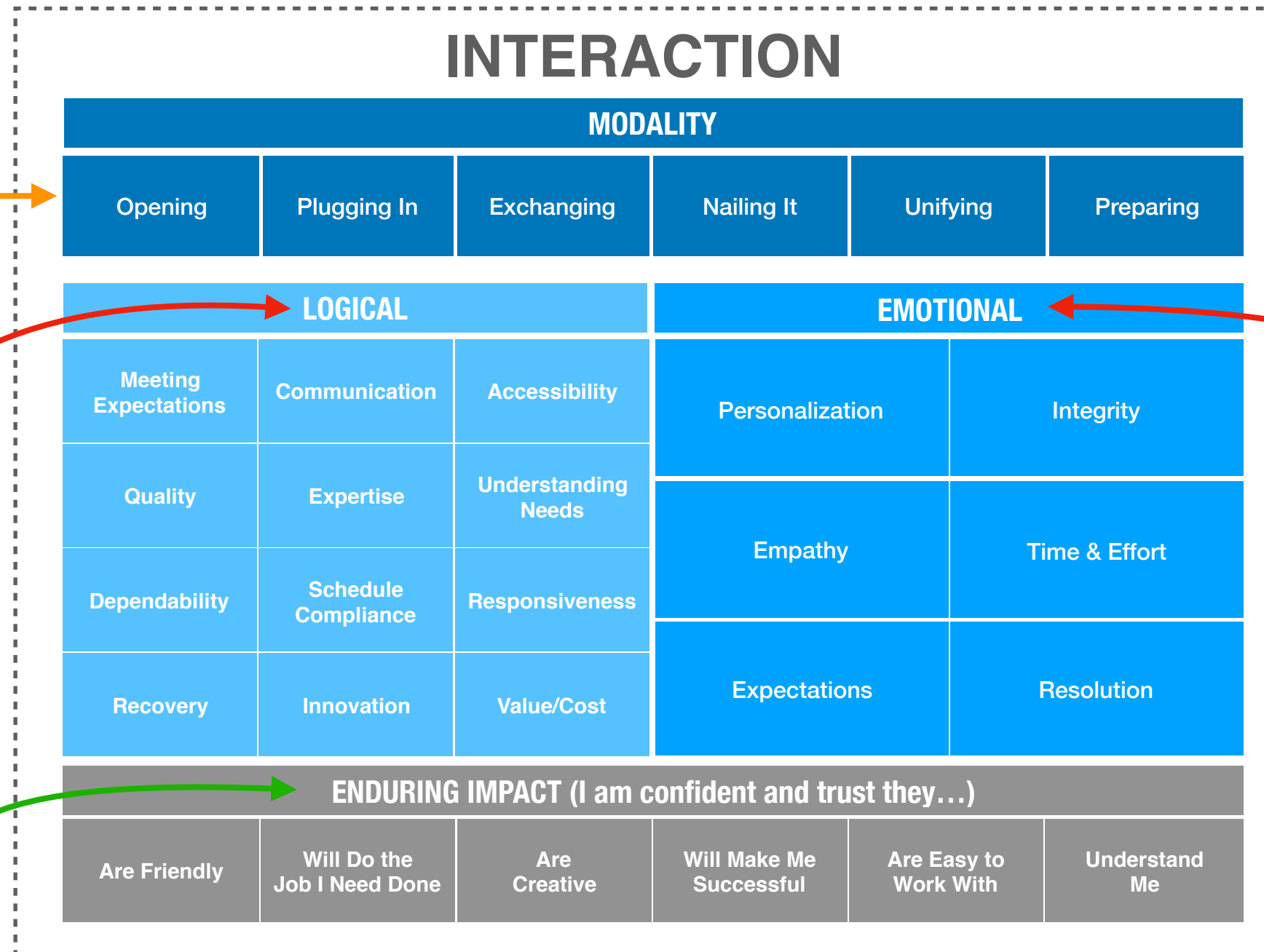| Opening	Plugging In	Exchanging	Nailing It	Unifying	Preparing

Modality: the **staging and timing** wrapped around each interaction.

LOGICAL

Meeting Expectations	Communication	Accessibility
Quality	Expertise	Understanding Needs
Dependability	Schedule Compliance	Responsiveness
Recovery	Innovation	Value/Cost

Logical: the **'mechanical rigor' we apply to each interaction.**

EMOTIONAL

Personalization	Integrity
Empathy	Time & Effort
Expectations	Resolution

Emotional: the **'psychological rigor' we apply to each interaction.**

ENDURING IMPACT (I am confident and trust they…)

Are Friendly	Will Do the Job I Need Done	Are Creative	Will Make Me Successful	Are Easy to Work With	Understand Me

Enduring Impact: these are the things that stay in the client's memory.

3. EX + CX = ♥

purpose, relationship management

viable and accessible tools

intention

accountability, training

expectation-setting

3. EX + CX = ♥

the story

alignment
safety
coalitions
connections
relationships
understanding
trust

Firm-wide CX Maturity Survey {Scale 1-7}
WAVE 2/Comparative Analysis ('18 - '19)

1. My company views client experience as important relative to all other initiatives.

2018 Score: 5.92
2019 Score: 6.15
Difference: +0.23

Notes: Expected positive level of growth.

2. My company holds the belief that client experience can substantially differentiate us.

2018 Score: 6.08
2019 Score: 6.43
Difference: +0.35

Notes: Expected positive level of growth.

3. My company views client experience more as a journey than a project.

2018 Score: 5.51
2019 Score: 5.98
Difference: +0.46

Notes: Expected positive level of growth.

4. My company has a CX strategy and roadmap that I understand.

2018 Score: 4.51
2019 Score: 4.58
Difference: +0.06

Notes: While this score is slightly above average, it reflects the lack of awareness of JP Morgan/Chase's CX Strategy.

5. My company is actively reaching out to clients to gain their experiential world view relative to our services.

2018 Score: 4.87
2019 Score: 5.10
Difference: +0.23

Notes: Expected positive level of growth.

6. My company is effectively inventorying and mapping all interactions we have with our clients.

2018 Score: 4.80
2019 Score: 4.79
Difference: -0.01

Notes: While this score is still above average, it is one of two dimensions that experienced negative growth. This is counterintuitive given how many people helped with the SWIM initiative. It appears that more people need to see the SWIM work and understand the value of the exercise to the firm.

7. My company effectively seeks external research and data to enrich the client experience.
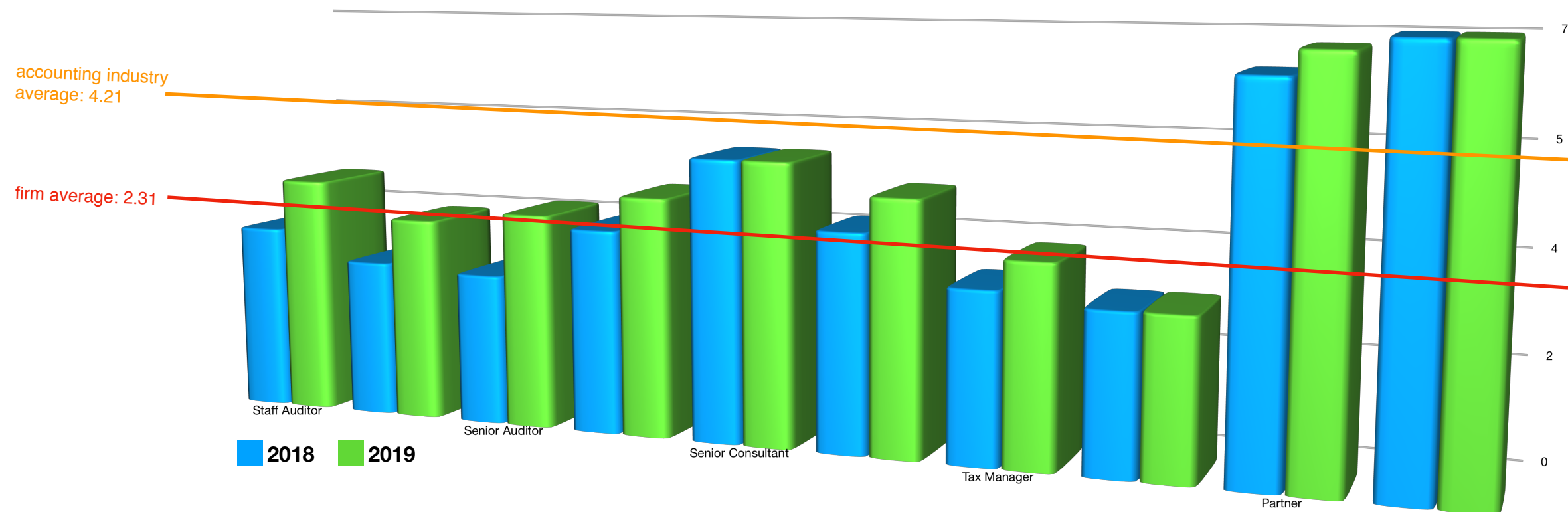
2018 Score: 4.67
2019 Score: 5.03
Difference: +0.36

Notes: Expected positive level of growth.

8. My company effectively seeks information (data/research/news) about our clients to help increase client intimacy.

2018 Score: 4.21
2019 Score: 4.95
Difference: +0.74

Notes: Expected positive level of growth.

HOW TO DETECT A LACK OF CULTURAL ADOPTION OF CX

accounting industry average: 4.21

firm average: 2.31

Staff Auditor
Senior Auditor
Senior Consultant
Tax Manager
Partner

■ 2018 ■ 2019

36. I feel my company's leadership understands and supports CX in way I trust will make the initiative successful.

2018 Score: 2.29
2019 Score: 2.31
YoY Difference: +0.02

Industry Average: 4.21
Firm Average: 2.31
Dimension GAP: -1.9

Notes: Virtually no growth over one year indicating a critical gap in the culture's perception of executive sponsorship. The work done over the course of the year to highlight executive-level of support fell flat. Secondly, the Dimension Gap is significant—needs to be prioritized.

Who believes leadership is being supportive?

accounting industry average: 4.21

firm average: 2.31

2018   2019

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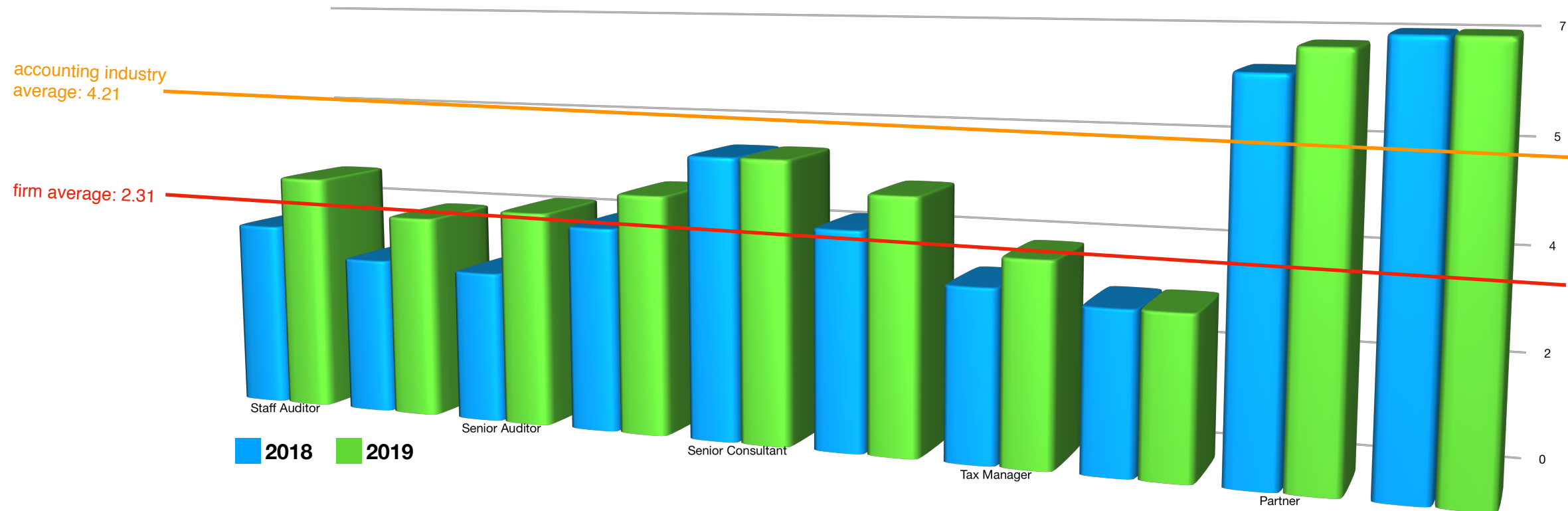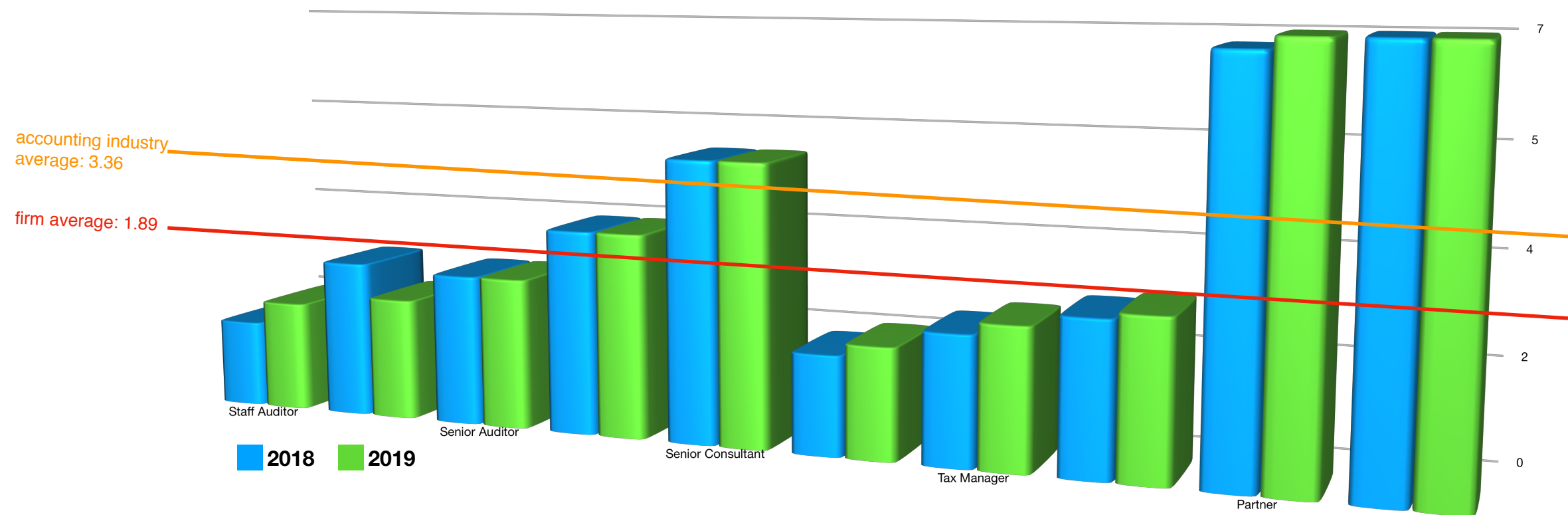2018 Score: 2.29
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43. CX feels firmly embedded into the culture of our firm.

2018 Score: 1.86   Industry Average: 3.36
2019 Score: 1.89   Firm Average: 1.89
YoY Difference: +0.03   **Dimension GAP: -1.47**

Notes: A characteristic symptom of asymmetrical perceptions of cultural adoption along leadership lines. The rank and file do not feel CX is working. Needs to addressed from a point of leadership only after leadership sees this data.

Who believes CX is working?
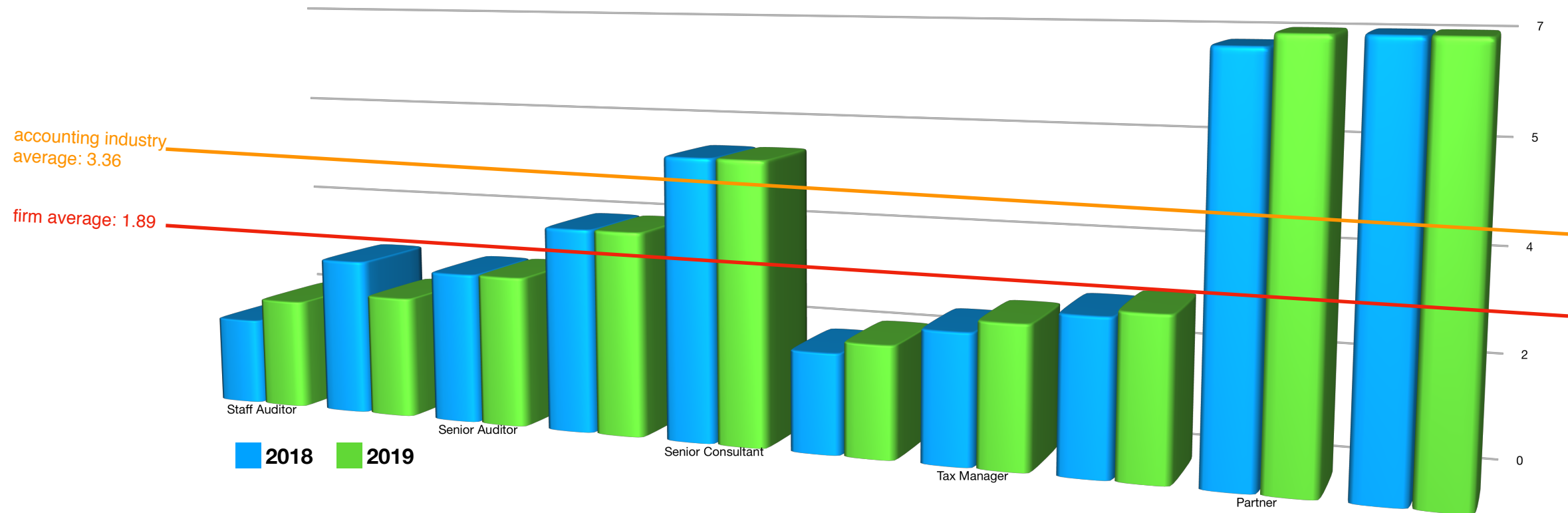
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2018 | 2019

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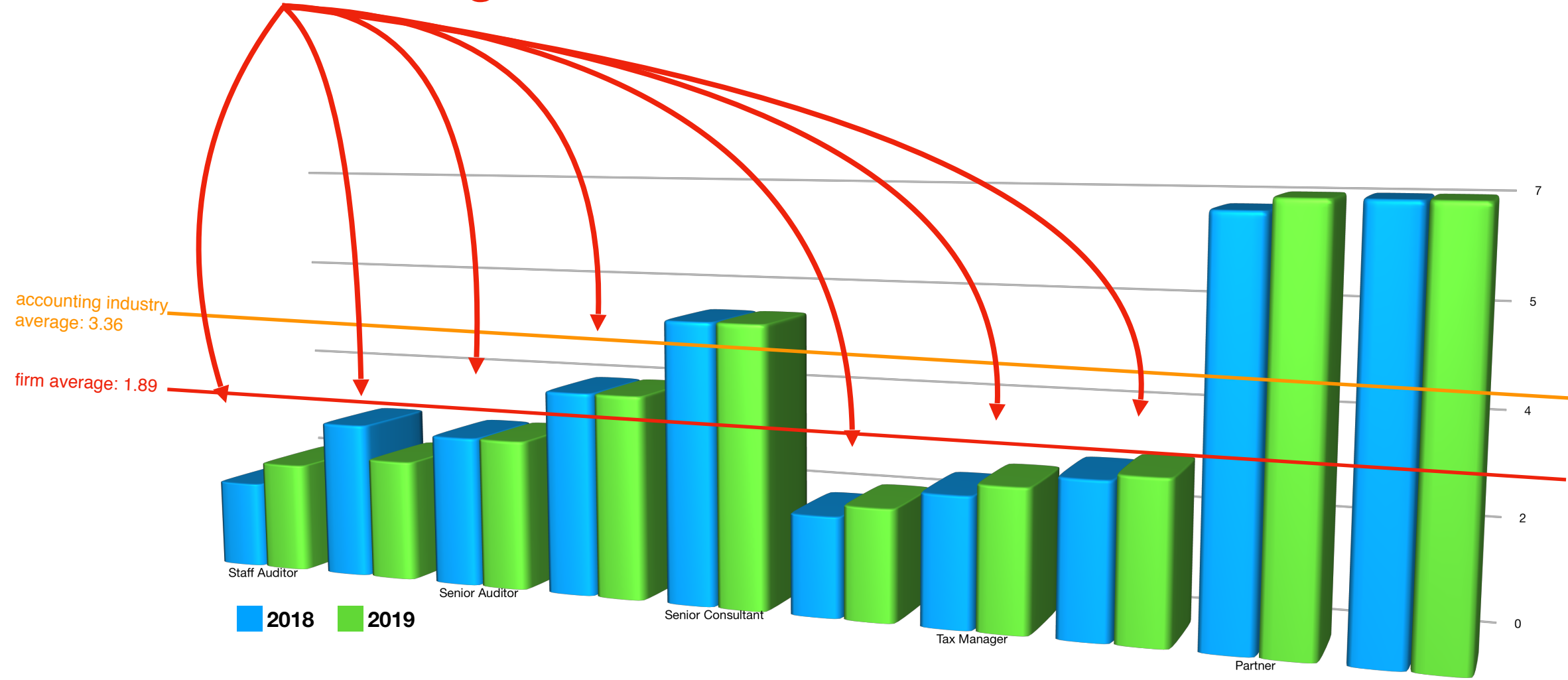
Who doesn't believe CX is working?

accounting industry average: 3.36

firm average: 1.89

Staff Auditor

Senior Auditor

Senior Consultant

Tax Manager

Partner

■ 2018 ■ 2019

7
5
4
2
0

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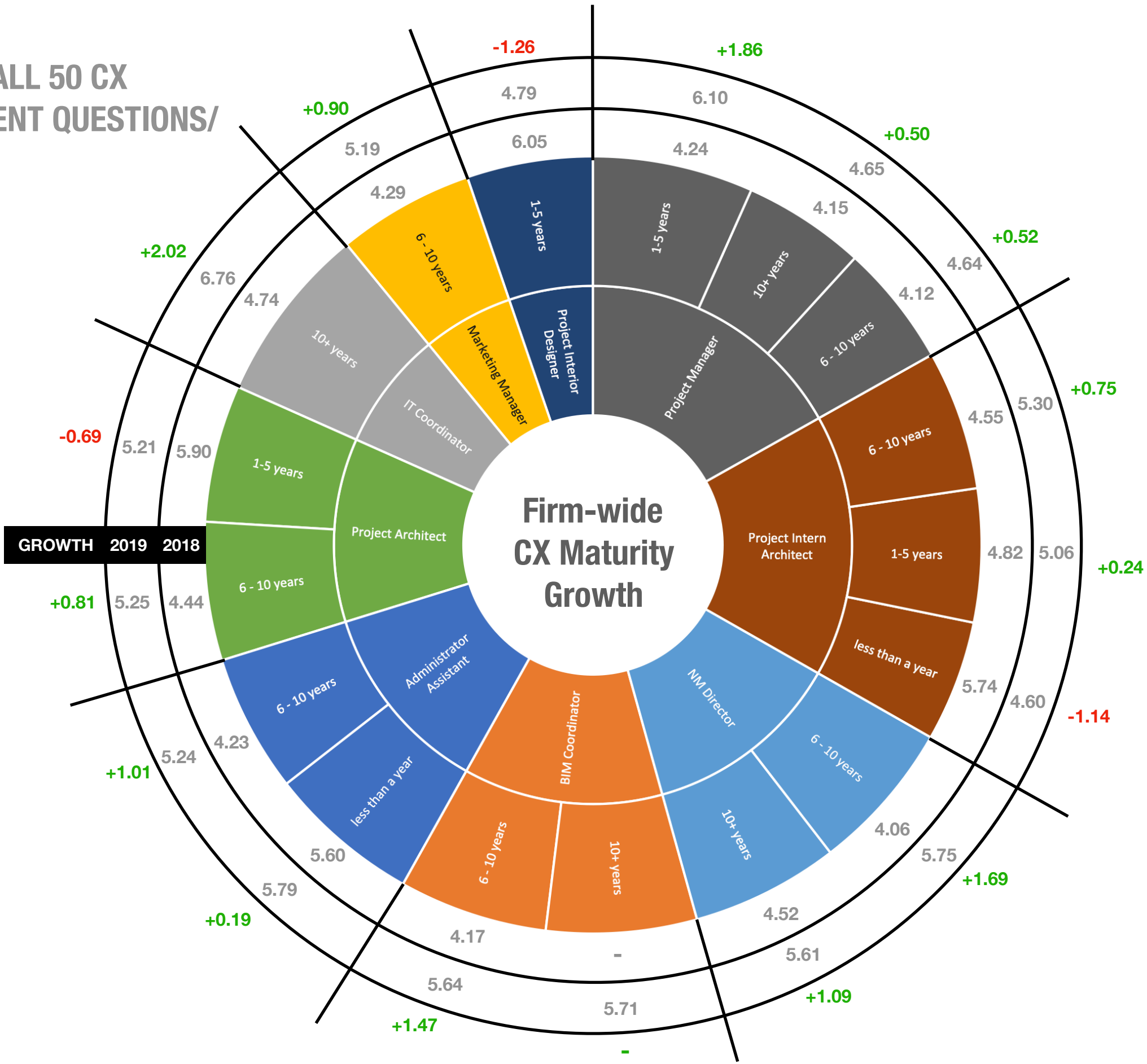
MEAN OF ALL 50 CX ASSESSMENT QUESTIONS/SCORES

Firm-wide CX Maturity Growth

GROWTH 2019 2018

Project Interior Designer
- 1-5 years: 6.05 / 4.79 → -1.26

Marketing Manager
- 6 - 10 years: 4.29 / 5.19 → +0.90

IT Coordinator
- 10+ years: 4.74 / 6.76 → +2.02

Project Architect
- 1-5 years: 5.90 / 5.21 → -0.69
- 6 - 10 years: 4.44 / 5.25 → +0.81

Administrator Assistant
- 6 - 10 years: 4.23 / 5.24 → +1.01
- less than a year: 5.60 / 5.79 → +0.19

BIM Coordinator
- 6 - 10 years: 4.17 / 5.64 → +1.47
- 10+ years: 5.71 / - → -

NM Director
- 10+ years: 4.52 / 5.61 → +1.09
- 6 - 10 years: 4.06 / 5.75 → +1.69

Project Intern Architect
- 6 - 10 years: 4.55 / 5.30 → +0.75
- 1-5 years: 4.82 / 5.06 → +0.24
- less than a year: 5.74 / 4.60 → -1.14

Project Manager
- 1-5 years: 4.24 / 6.10 → +1.86
- 10+ years: 4.65 / 4.15 → +0.50
- 6 - 10 years: 4.12 / 4.64 → +0.52

4. balance

what's in it for me?

4. balance

A full scale CX transformation unifies employees and clients through a methodology with accountability

connect people to other people

clarify purpose

accountability

teach better communication

serve the greater good

create a space where everyone's worldview is
allowed, embraced, respected

whatever people think it is

provinciality

empathy scarcity

worldview

personality, history, skills

subtractive

momentum

start

accountability

symbolism, theater

thank you for your attention
and energy this morning

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