Building a CX Playbook for your firm

Would a McDonald's employee turn to the shift leader and say, "How do you think we ought to cook the fries today?" Probably not. Why change something that has worked before.

In the world of Client Experience (CX), your team's understanding of what their response should be in different situations is probably not as clear cut as the McDonald's employee. The good news – it can be.

In the world of scale operations, if you cannot put it on paper, you probably cannot communicate it and do it. Having a CX Playbook allows you to operationalize the CX initiatives you want in your firm and provide a roadmap for your employees.

For each element discussed in the playbook, it is important to begin with what success looks like and how the firm measures it. It is important that the guidelines neither be overly prescriptive nor insufficiently prescriptive. The playbook's objective is to understand, based on the firm's culture and CX goals, how they should respond in situations (internally and externally) that are known to arise. The playbook is not a substitute for strong leadership. A strong CX Playbook will be a balance of important standards and guidelines with value given to leadership and employee creativity.

What are the common elements of a CX Playbook?

The mind must categorize experience to navigate complexity. Otherwise every experience would pose its own unique thinking challenge. You wouldn't ever get out the door in the morning because you would constantly have to remember that the round thing in your hand is edible, can be toasted, is good with cream cheese, etc. Better to have a category called 'bagel.' What are the 'bagels' of your firm's CX Playbook?

Clear Definition

Having a clear definition of your firm's CX Culture is an important first step in building your CX Playbook. Every firm will have a different definition and there are no 'right' or 'wrong' definitions. The important element is that you have one and that your team understands what it is. Elements to consider when creating your firm's definition:

Delivering a strong client experience goes beyond 'being nice.' CX is not about saying yes to whatever your client asks you to do. That approach can, at times, hurt the overall CX your client experiences. True CX means you and your team are willing to have hard conversations when necessary for the good of the client.

Make sure your team understands what their response should be in different situations. Give them guidelines. One strategy to involve your team in developing appropriate responses to different situations is to *Storyboard* the things that 'can go wrong.' Agree on options for how to handle such problems 'before' they arise. Being proactive gives your team ways to say no (when necessary) in a positive way.

Leadership

Leaders play an important role in developing and executing your CX Playbook. Your team is watching you and they will follow your example. If you walk into the office and greet your employees with a distracted "Good Morning" because you have 50 things on your mind and the day hasn't even begun, your team will model this behavior to your clients. Instead of welcoming a conversation with clients even when they are busy, they are more likely to be only half listening and may come across to the client as if they don't appreciate the distraction.

Employees need to see leadership 'walking the talk' on CX or it will create friction and reduce team buy-in for building the CX Culture. If as a leader you tell your team that Client Experience is important, then it is important to find a way to measure implementation (or trends) in client perceptions of your CX delivery. This can be a VoC tool such as CFT, phone interviews, etc. Measure on those metrics and reward on those metrics (as much as P/L).

What metrics is your firm using to measure consistent delivery of your CX culture? For McDonald York, our strategy is to integrate Client Feedback Tool (CFT) metrics on the P/L Dashboard – not the scores but the number of feedback requests (surveys) sent and the percent follow up.

Look at the overall metrics P/L and CX when doing a post-mortem on a project. Be intentional about both elements of the success of a project. Look at what goes on 'behind the scenes' of the P/L statement.

Consider a Dashboard at your weekly team meetings or your Project Manager meetings that evaluate the following on each project: AR, Schedule Status, P/L, Feedback, CX. This will give a holistic view of the project and place emphasis on all elements of the project. Identify best practices, update your CX Playbook, and provide training for your team. This ensures important expertise does not walk out the door when an employee leaves the company.

Consider celebrating the individual that gets a score of less than 4.0 (CFT scale that indicates Met Expectations) when it was followed by a great conversation. Get your team excited about asking for feedback from their clients. Part of building a CX Culture is that you WANT information from your clients (positive and negative). It's what you do with the information that will drive a positive CX Culture (and perception).

Look at trends in client perceptions over time. Evaluate the trends.

Client Personas

Knowing who your clients are, what their drivers, their needs, their fears, their questions, their anxieties, their goals, the list goes on is as important as understanding your firm's mission and CX Culture goal.

What commonalities exist among your clients? Going back to Storyboarding, what are the typical 'things that can go wrong' or the frequently heard questions that clients have had working with your firm. This helps you stay laser-focused on initiatives that will benefit your clients. Empathy Mapping and Journey Mapping are two excellent tools to use to ensure you draw out these questions and emotions.

Refining personas, in the same way as your CX Playbook, is an ongoing process. Make sure everyone on the team has input into their creation and access to results.

Balance

Work to find the right balance between your firm's brand needs and your clients' needs. Understand your client personas and find the right balance between a strong and differentiating brand and delivering a client experience that delights.

Culture

As a leader, understand that your firm's CX Culture is an iterative process. It will grow and adapt over time as new information about your clients' needs surface. Set realistic change management goals for your firm. Include your CX Culture as a regular item on your Strategic Planning Agenda. Discuss (and celebrate with everyone) your CX successes and examine why some parts of the initiative did not execute as planned or deliver the desired CX outcomes.

A culture of Client Experience is one in which your team doesn't react to situations without considering of how 'their' response will impact the client. How (and what will it look like) to have a culture where team members consider how every decision impacts the clients' experience. Measure and create touchpoint quality. Include your strategy in your CX Playbook clearly identifying the number and types of touchpoints you want your clients to experience.

Create 'zipper' relationships. Identify ways for multiple team members to engage with your clients (as appropriate) all to create the experience of relationship.

Figure 1: Sample Zipper Relationships

Identify questions you want to ask as part of the CX Culture decision-making process. Some questions might include:

- How are we perceived by those inside (and outside) our firm?
- How do we answer the phones?
- What is our process for setting up (and holding) meetings?
- Do we allow ourselves to think 'transactional' in our interactions with our clients either because we know the client is price sensitive (or in some industries because you won the work on price) or because we're doing the same type of project/report that we've done for this client many times?
- How can we build the clients' experience beyond the transactional aspects of the project?

Employees (EX)

Make sure your team understands what their response should be in different situations. Give them guidelines. Keep the lines of communication open. Encourage all members of the team to ask questions if a situation comes up that has not previously been discussed. Be available.

Use the creation of Storyboards as a training opportunity. The conversation will lead to culture change without making a statement "we need a culture change."

Train new employees to perform within the CX Playbook guidelines, become part of the desired culture, and develop your firm's shared values.

Six Rules for an Effective Playbook

Developing and sustaining a strong CX Playbook (and CX Culture) is an iterative process. It takes time and consistent alignment with your firm's CX Culture definition and processes. These six rules can help you in the development and implementation of your CX Playbook.

Rule #1 - Balance prescription with latitude

This rule is both the most important and the most difficult to follow. Strike the right balance between prescription and latitude. If every situation has a prescribed response, you are more likely to get pushback from your team and you will impact their ability to use their strengths and find solutions. If there is too much latitude, your CX Playbook will have little impact on the results you are seeking to achieve.

Look back to our discussion under Culture: *A culture of Client Experience is one in which your team doesn't react to situations without considering of how 'their' response will impact the client. How (and what will it look like) to have a culture where team members consider how every decision impacts the clients' experience.*

Use meetings, training, and storyboarding to expose your team to the potential challenges and appropriate responses. Then give them a chance to use their decision-making experience and creativity to deliver results. (Always measure so you can course correct if needed).

Rule #2 – Be concise

To achieve the results you desire throughout your firm and to get everyone on the same cultural page, you must make a persuasive argument to your whole team. It can be tempting to try and capture everything in one document. This can be overwhelming and difficult to integrate into day-to-day behaviors. Consider having your CX Playbook concentrate at the level of policies, programs, and/or processes.

Consider bringing your CX Playbook to a meeting with your mid-level managers. Get their feedback. It is easy to be 'overly' comprehensive when we try not to leave out important information. As you try and figure out just how much detail needs to be included in your CX Playbook, try using Rule #3 as a filter.

Rule #3 – Make the playbook the law

One reason to be concise in creating your CX Playbook is that the playbook must become the law. If it is to become the law, it is essential to avoid including too many nuances and specifics that will require continually updates and be difficult to enforce. CX Playbooks should cover the most important elements of your CX initiative including your expectations for how your team will execute on them.

Rule #4 – Communicate

Spend time and attention on communication. Bring the CX Playbook to team meetings, training, situational project meetings. Use whatever means needed to keep the playbook front of mind. You simply cannot over communicate.

Rule #5 – Use a template where needed

If there are specific elements that you want used every time a contract, interview, proposal, short-list interview, onsite meeting, etc. is held, give your team a template in your CX Playbook to guide them. This will ensure that the important elements of your playbook are discussed and included as appropriate.

Rule #6 – Continue to improve your playbook

After developing your CX Playbook, it is important to define a process for updates and improvements. Remember CX Culture changes is an iterative process. Your CX Playbook needs to be a living document. The passage of time, client needs, and development of creative solutions will lead to improved practices. To accommodate changes, consider having each section of the playbook 'owned' by one of your firm leaders. He or she should coordinate changes as needed. In most cases, at least an annual checkpoint review is necessary.

Additional Resources:

Scott Madden Team Playbook White Paper
Elements of the Business Playbook – Talentism
Proposify Blog – Team Playbook