Align Employees To Customer Success Drive CX Excellence

forbes.com/sites/deniselyohn/2019/06/03/align-employees-to-customer-success-drive-cx-excellence

Customer experience (CX) excellence can seem daunting. But it doesn't have to be, according to <u>CX leader Devon Westerholm</u>. In her current role as CX Director of Advocacy at <u>Dropbox</u> and in past CX leadership positions at <u>Adobe Systems</u> and solar power company <u>SunPower Corporation</u>, Westerholm has produced numerous CX wins. A simple, yet significant theme that consistently runs through her work reveals the key to CX excellence: align employee success with customer success.

Align employee success with customer success to achieve customer experience excellence.
Getty

Employee and customer success alignment makes sense. After all customers and employees want the same things: a smooth, seamless experience; as few problems or challenges as possible; and successful use of the product or service. CX leaders just need to make the linkage between employee and customer success clear and accessible.

Three Ways to Align Employee and Customer Success

In an interview, Westerholm described three ways she developed and leveraged the connection between employee and customer success.

Connect the dots. Customers want a consistent and cohesive experience regardless of the stage in their journey with a company and the person or function they interact with – and employees actually want the same thing. Smooth handoffs between departments or steps of the customer journey not only produce better, more pleasant employee: customer interactions; they also allow employees to do their jobs instead of having to try to fill in the gaps, fix problems that arise and/or cover for their colleagues. Ensuring that the shared benefits of addressing customer pain points are clear and salient helps to align employees with customers.

At SunPower, Westerholm worked with marketing, sales, construction, finance, and other department leaders to shine a light on the need for smoother customer handoffs. They borrowed from manufacturing the concept of "control points" to identify the key points in the customer journey where it was essential to control the risk of a poor experience. They created a management dashboard that reported on the status of each control point and they assigned responsibility for it to a single person and their team. This enabled everyone to identify when handoffs were at risk and to clarify who was responsible for addressing the problem.

For example, they determined that reducing the time between the sale and installation of the solar panel drove customer satisfaction. But the company's processes required customer financing to be in place before installation could be scheduled and, once installation was scheduled, the warehouse to have all the parts available. Customers would get frustrated as delays seemed to mount at every point – and this in turn would upset employees. By using the control point dashboard, the responsible people and teams were able to anticipate and therefore prevent delays. Moreover, the dashboard inspired employees "to want to become the ones who were handing off happy, healthy customers to their colleagues," Westerholm explained, and "being acknowledged for their effort."

Appeal to employees' pride. Customers also want a hassle-free experience. When a problem arises or when their experience isn't as expected, they want a quick and complete resolution. If it's not, they complain and spread negative word of mouth – and that creates problems for employees. Employees want to do their jobs well, achieve their goals, and be proud of the CX their company provides. But they get fatigued by fire drills involved with reacting to frequent problems -- and they are frustrated by the waste and inefficiency involved in having resources directed toward solving problems instead of toward doing things right the first time. Appealing to employees' sense of pride and desire for excellence while working on eliminating customer problems, therefore, aligns both groups' interests.

At SunPower, it became clear during a time of increased customer complaints that employees were disheartened by the state of things -- and that setting up employees for success would also set up customers for success. So, in Westerholm's words, she and her team worked to "drive excellence through the lens of [employees'] expertise.

Instead of trying to get employees to rally around CX, Westerholm and her team "operationalized [changes] within the context of people's teams." She described how "that made all the difference in the world because there would be some people who didn't even think about [the changes] in terms of the CX." They simply thought, as she relayed it, "This is just me doing my job to the best of my ability and feeling good. At the end of the day I'm working at full capacity and I'm successful." She also found that reducing customer problems increased the predictability of SunPower's operations, which in turn led to reduced waste. Employees, she reported, took "a tremendous amount of pleasure" because the company became more efficient.

Simply giving employees access to customers usually increases employee engagement and therefore CX traction. At Dropbox, Westerholm and her team set up a "customer connection" day to help Dropbox employees better understand customers' problems as well as motivations. She described how "agent focus groups," in which customer service agents shared about the frustrations customers commonly expressed as well as what they demonstrated excitement for, were extremely motivating to employees because they were able to learn about the significant impact they were making on customers. "It's just really powerful hearing that direct from customers," she explained.

Shift the definition of success. Sometimes alignment of employee success and customer success is best achieved by reframing or broadening employees' definition of success. Although it might seem that the customer's ultimate goal is simply the successful use of the product or service, employees may not understand all that customers consider to be involved in that goal. Therefore Westerholm said that her approach was "to have whatever the customer defines as success also be what our employees consider success." In fact, she believed they needed to "be the same thing."

At Adobe, she worked with product developers to adopt the view of a first-time user and to identify what they would find too technical or complicated. By introducing that context for what success looked like for customers and ensuring employees adopted customers' view of success instead of their own, they prompted in developers "an extreme sense of personal satisfaction because what they built was what the customer wanted as opposed to something perhaps with a lot of bells and whistles that was maybe more satisfying for somebody who's an engineer."

SunPower employees needed their understanding of success to be expanded. Instead of viewing each step of the customer journey as discrete moments to deliver on, employees needed to see that they were all connected to the final goal of installation and successful

use of the product. So their success criteria could no longer be getting the solar panels from the plants through customs and into a holding distribution warehouse. Instead they expanded to the view that success included getting them from the distributors to dealers and then ultimately to customers.

And by linking employee bonuses to that ultimate success, SunPower prevented the operational changes needed to improve CX from being perceived as "something extra," an additional expectation of employees that they may or may not fulfill. Instead, the CX changes were simply about enabling employees to do their work and be compensated for being successful.

Requirements for Successful Alignment

Westerholm offered a few pieces of advice for CX managers who want to implement these three approaches and align employees to customer success drive CX excellence.

First, lay the cultural groundwork. "You don't want to map out some future state that people aren't bought into," she cautioned. If people feel as if they're being told what to do, it "discredits the entire program." So instilling a customer-centric culture and ensuring everyone feels responsible for CX are first steps that can't be skipped. Once that baseline culture is achieved, employees will readily accept new connections to and definitions of success – and in many cases, they themselves will develop them.

New metrics and/or prioritized metrics are also critical. Westerholm established metrics tied to customer success that all employees shared and she helped individual departments prioritize their metrics. Each department usually operates with its own long list of metrics. To focus on the alignment of employees with customers, it's necessary for departments to identify only one or two metrics that have the most impact on CX.

Most importantly Westerholm advised prioritizing the employee experience and enabling employees to deliver the ideal experience. She explained her work at SunPower this way: "We took away employee pain points and made it easier for them to do their job well." As such, they were able to implement CX programs without the resistance or inertia that hold back other organizations.

Simple, Not Easy

Westerholm has shown how the alignment of employees to customer success can lead to the achievement of CX excellence. The approach intuitively makes sense and seems simple – but simple doesn't mean easy. Discipline, commitment, and patience are required to connect the dots between customer and employee pain points, appeal to employees' sense of pride and drive for excellence, and shift the definition of success for employees.