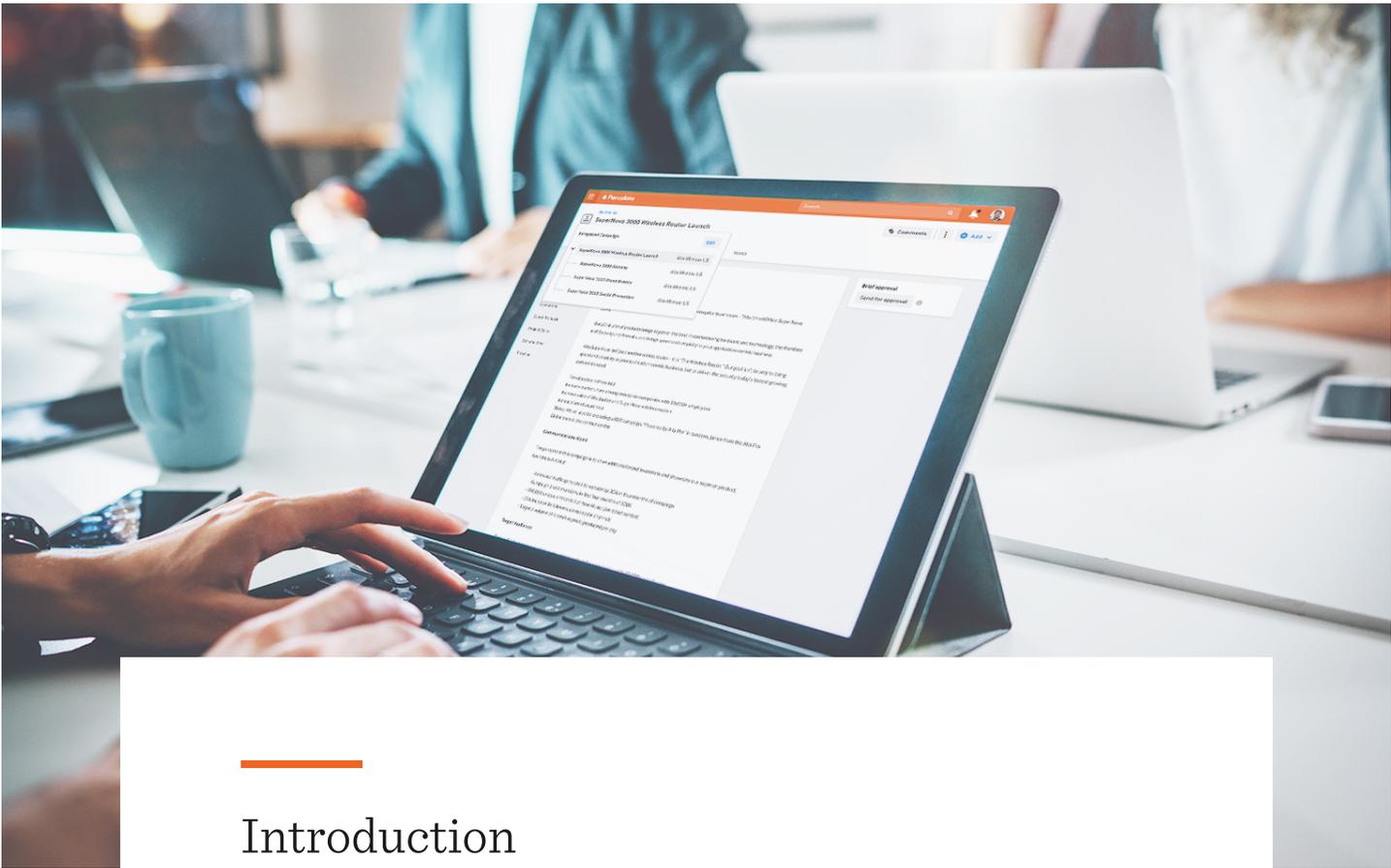


# Effectively Measuring Customer Experience: A Template



---

## Introduction

At the start of 2019, Gartner predicted that investment in customer experience (CX) will drop significantly in the coming years — largely because marketing organizations struggle with effectively measuring its value, and with translating that value into ROI numbers for the c-suite.

While this is a clear call-to-action for marketing to prioritize reporting on CX metrics, in many organizations there is another problem that needs to be solved first. Gartner also found that “many CMOs regard CX as an ephemeral concept,” rather than a well-defined initiative. Without a clear definition of what CX means in their organization, marketing teams will struggle to measure it.

Defining CX is a significant step, and one that requires participation from stakeholders across the organization. We've put together a sample process to help you embark on the journey, and position your team for continued CX success.

# Step 1

**Look at your root challenges.** Your company is focused CX for a reason — presumably to address certain challenges you've encountered in marketing. The first step to aligning on CX is to examine and agree on what you're trying to do.

It's important to be honest at this stage on what your team is doing well, and where there are opportunities to improve. Have a candid session with the other leaders in your company, and identify the challenges that you want to solve with CX.

# Step 2

**Translate challenges into aims.** Once the challenges you want to address have been identified, the next step is to translate them into concrete objectives, or aims, for your program.

For example, if one of your identified challenges is content engagement, you might make an aim around increasing engagement for your target personas. This step may sound obvious, but there's value in explicitly writing out what the team is trying to do. It creates a record others can refer back to, and a guiding light in making the decisions that come after that.

# Step 3

**Determine your approaches.** Once you've listed your objectives, you can determine the tactical actions that will enable you to achieve them. This may be as simple as increasing production volume, or it may be a more complex initiative to reexamine channel strategy or workflow process.

The most important thing at this stage is to have your customer's journey clearly defined, so that you can map your approaches to what your customer is trying to accomplish at each stage. Naturally we as marketers have goals we want to achieve during the customer's journey, but the guiding principle of CX is to focus our efforts around the customer's point of view.

When thinking through your approaches, be sure to consider each action through the lens of your customer, and clearly tie them to the aims you listed previously.

## Step 4

**Decide how to measure.** With a course of action decided, the next question is how to measure your efforts. Consider the metrics you have available, and which ones track the most closely to your objectives. You will most likely want to avoid vanity metrics like follower count, and focus on measuring things that contribute to actions you want customers to take.

Be sure to also identify how your metrics tie back to spending, to make it easier to determine your ROI.

## Step 5

**Identify success.** The final step is deciding how to interpret your metrics, and what results are considered successful. Make sure to involve all relevant stakeholders in this step so that there is agreement across the org on expected outcomes.

---

# Aligning Your Customer Experience Axioms

In order to effectively measure the results of your customer experience marketing initiative, you first need to agree internally on what customer experience means for your company. Use the template below to help put together a defined, aligned plan for CX, with quantifiable success.

