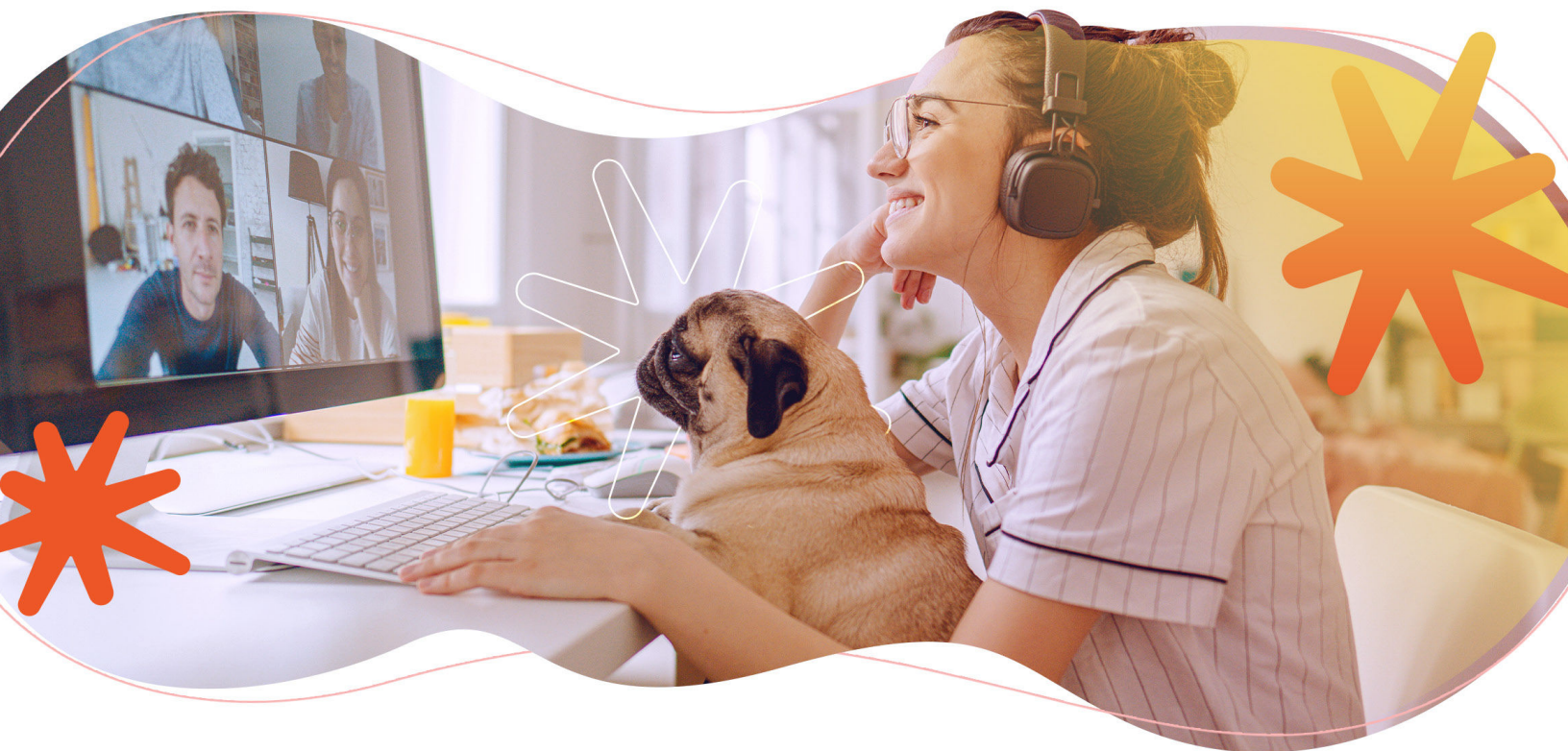※ Bloomfire

The Essential Guide to
Upleveling Your CX Maturity

Strategic advice from industry leaders
and customer-centric brands

The Changing Landscape of Customer Experience

It's official: customer experience (CX) has surpassed both price and product as a key brand differentiator for businesses. In fact, a 2021 survey of business professionals found that almost 46% rank customer experience as their top priority for the next five years, compared to 34% and 20% for product and price respectively.[1]

Investing in the customer experience—that is, the sum of experiences at every touchpoint of the customer journey—has a tangible impact on the bottom line. According to McKinsey, optimizing the customer journey leads to average revenue gains of 5 to 10% while reducing costs by 15 to 25%.[2]

Business leaders are focusing on CX strategies to:

- ⊘ **Maintain and gain revenue**
- ⊘ **Grow loyalty and advocacy with their customer base**
- ⊘ **Keep up with market dynamics (and gain a competitive advantage)**

While business leaders have increasingly been turning their attention to customer experience over the past decade, the coronavirus pandemic accelerated and amplified the need for resilient CX strategies. The pandemic caused customer behaviors, needs, and expectations to shift rapidly, and businesses had to scramble to keep up, all while adapting to remote work and other new protocols to keep employees safe.

In This Guide

In 2021, we partnered with 451 Research, part of S&P Global Market Intelligence, on a survey of 300 business leaders across CX functions—customer service, marketing, sales, and customer insights— to better understand how organizations have adapted their CX strategies and what they're focusing on going forward. One thing that became apparent from the resulting report, *Five Best Practices to Future-Proof the Customer Experience*, was that we're not going back to the pre-pandemic world of CX. 92% of respondents said 2020 fundamentally changed the way customers engage with their brand, while 45% said they believe customer experience has significantly changed for the long term.

Businesses must work to build a customer experience that is consistently excellent and can withstand disruptions as big as a global pandemic. On their journey, they are encountering both challenges and opportunities around CX governance and management, knowledge and insights distribution, and cross-functional collaboration.

Our 2021 CX operations study with 451 Research uncovered five best practices that business leaders are using to increase their CX maturity:

1   Establishing clear ownership of the CX vision and strategy across the organization

2   Centralizing CX knowledge and insights to provide a holistic view of the customer

3   Taking a proactive approach to internally sharing market research and customer insights

4   Improving cross-functional collaboration around the CX strategy

5   Improving the remote and hybrid employee experience

In this white paper, we'll take a closer look at each of these five best practices and share additional recommendations and success stories from CX thought leaders and Bloomfire customers.

1

Own Your Customer Experience

Your entire organization contributes to the overall customer experience, but if everybody owns CX, how do you determine which teams are responsible for specific actions and outcomes?

In our 2021 CX operations study conducted with 451 Research, part of S&P Global Market Intelligence, 89% of respondents reported that one department had "a leading role in the planning and delivery of their CX strategy." However, "a leading role doesn't mean a leadership role, demonstrated by the fact that each CX group assumes they play a bigger role than their colleagues think they do."

In the study, each CX-impacting group estimated that they played a bigger role in owning the CX strategy than their colleagues across other groups believed. For example, 62% of marketing department respondents stated that they owned their organization's CX strategy, while only 30% of other CX teams reported this to be true. The discrepancies were even bigger for other departments: 66% of customer service respondents reported owning the CX strategy while only 19% of other respondents believed that the customer service department owned it, and 56% of sales department respondents claimed ownership while only 5% of other respondents believed the CX strategy lived with the sales team.

Which department within your organization has the primary responsibility for customer experience?

Department		
Marketing	62%	
	30%	
Customer service	66%	
	19%	
Sales	56%	
	5%	

Base: 300 CX professionals | Source: 451 Research and Bloomfire custom study

While each group that assumes ownership may make positive contributions to the overall customer experience, a lack of clear ownership prevents organizations from establishing a holistic and consistent CX vision. This can lead to disjointed and frustrating experiences for customers, increasing the risk of churn. Additionally, groups may miss opportunities to collaborate cross-functionally on large-scale CX initiatives because they don't have visibility into what other groups are working on.

Tips for Owning Your Customer Experience

Ensure CX Has a Seat at the Leadership Table

A successful CX strategy requires buy in from the top down, and that means having CX representation at the executive level. Encouragingly, many enterprises seem to have already made this investment: according to Gartner's 2019 Customer Experience Management Survey, nearly 90% of businesses have a Chief Experience Officer, Chief Customer Officer, or equivalent.[3]

This leader should be responsible for overseeing the cross-functional governance of CX and breaking down silos between the different departments that play a role in the overall customer experience. While the CX vision and strategy framework may start at the top, it needs to be communicated clearly throughout the organization, with each department and team member understanding how they contribute to that vision.

Create a Customer Feedback Loop

Your customers may provide feedback across a wide range of channels, including surveys, review sites, interviews, online communities, and social media. Different groups within your organization may own different channels, and customer feedback is at risk of becoming siloed within these groups. When this happens, your organization may miss valuable trends and insights emerging across channels—and, as a result, miss opportunities to improve the customer experience.

When you centralize customer feedback and make it accessible to all internal stakeholders, you create a feedback loop that your organization can act on to optimize your products, services, and overall CX.

Map Customer Journeys and Touchpoints

If your organization hasn't already developed customer journey maps (or hasn't revisited your existing journey maps in a while), this is a crucial step to ensure every department understands the role they play at different touchpoints. It can also help you identify gaps or processes where CX ownership is unclear, giving your organization the opportunity to establish clear governance and build processes to fill the gaps.

Document Your CX Vision—And Make It Highly Visible

If you don't yet have one, your organization should establish a CX vision: an aspirational statement that all employees can strive for and that stands as the banner over all customer experience decisions. According to Qualtrics, your CX vision should be clear, repeatable at all levels of the organization, and tied to specific goals and objectives.[4]

Once your organization has established a CX vision, it should be documented and preserved somewhere all employees can access it, such as a company-wide knowledge management platform. This will keep everyone aligned and clear on the role their department plays in achieving that CX vision. New hires will be able to see the CX vision on day one, and all employees will be able to revisit the vision whenever they want, reinforcing the organization's commitment to the customer.

Promote CX Knowledge Sharing Across Teams

Different teams are involved at different stages of the customer journey and often have knowledge that could benefit other functional groups. However, in many organizations, teams fail to share their customer knowledge cross-functionally, and each team ends up possessing a piece of the puzzle rather than a holistic view. For example, customer service representatives might encounter a common product-related issue in customer phone calls. They may have a documented solution in their department's knowledge base, but if they don't share the issue with their organization's product development teams, those teams won't know there is a common problem that might be remedied by making adjustments to the product.

Businesses that truly want to be customer-centric need to implement processes and technologies that empower employees to document and communicate their CX knowledge across departments. This typically starts with establishing a single source of truth for CX knowledge, which we'll explore in greater depth in the next section.

Sharing a CX Success Statement

It's not enough to share the organization's CX vision and hope for the best. Employees need to understand how becoming customer-centric will serve not only customers but the organization overall. It's important to share a CX Success Statement as well as a vision. What will it look like when customers are experiencing what we envision? How will we know if we're successful, or what we need to do differently? I really love specific communication to tell customer's stories, too. Some organizations share a customer story of the week, and others invite customers in to share with boards and executive committees. Those stories—straight from customers themselves—are powerful ways to engage employees throughout the organization and help them internalize what customer experience really means.

And customer experience needs to be treated like the important business strategy it is. C-Suite leaders must lead with CX, not against it. CEOs and other executives have to see CX as a way of doing business, not a nice thing to talk about. To get cross-functional support, share how CX supports individual team goals as well as the overall vision, values, and goals of the organization. When customer experience is done well, literally everyone in the organization wins. Revenue goes up and service costs go down. Employees are happier and stay with the organization longer. And customers refer other customers. There's literally no part of the organization that doesn't get better with great customer experience. That has to come from the top, so the CEO and other executives need to communicate their vision on a regular basis. CX means great things for leaders, employees, and customers!

- Jeannie Walters, CEO and Founder, Experience Investigators

Insperity Eliminates Knowledge Silos to Strengthen Client Experience

Insperity uses Bloomfire as a knowledge sharing and collaboration platform for the Services Operations team. Our previous platform housed content in a static manner; it did not allow for collaboration or cross-posting of content between departments. Each department had a section of the site and duplicated Service processes, forms, brochures, and information that was important to their team. Since each department was working in a silo, when one piece of information changed, the primary content owner wasn't updating all duplicate content within the site. The duplicate instances quickly became outdated, and it took a significant amount of time and email communications to update the site.

Insperity migrated their Service Operations content to Bloomfire so all Service departments share knowledge within the same community. Now, content owners can update their content in real-time and cross-post to each group (i.e. department). Community Owners can run reports to see where duplicate forms and documents exist.

Breaking down knowledge silos with Bloomfire has positively impacted our client experience in a few key ways:

- ⊘ Time savings. Content owners now have the autonomy to create and publish content without going through a central governance team. This saves time both in the creation of content, as fewer people must work on posts, and on getting information out to the field service providers who are servicing clients.

- ⊘ Accuracy of content. Now, users can quickly flag content that is outdated or conflicts with other posts. This feature in Bloomfire increases visibility into content that has been created—and how it needs to change.

- ⊘ Sharing tribal knowledge. Bloomfire has also democratized the sharing of information. Now, field service professionals across all regions can provide valuable insight into how they are servicing clients.

- Lisa Jasper, Director of Performance Improvement, Insperity
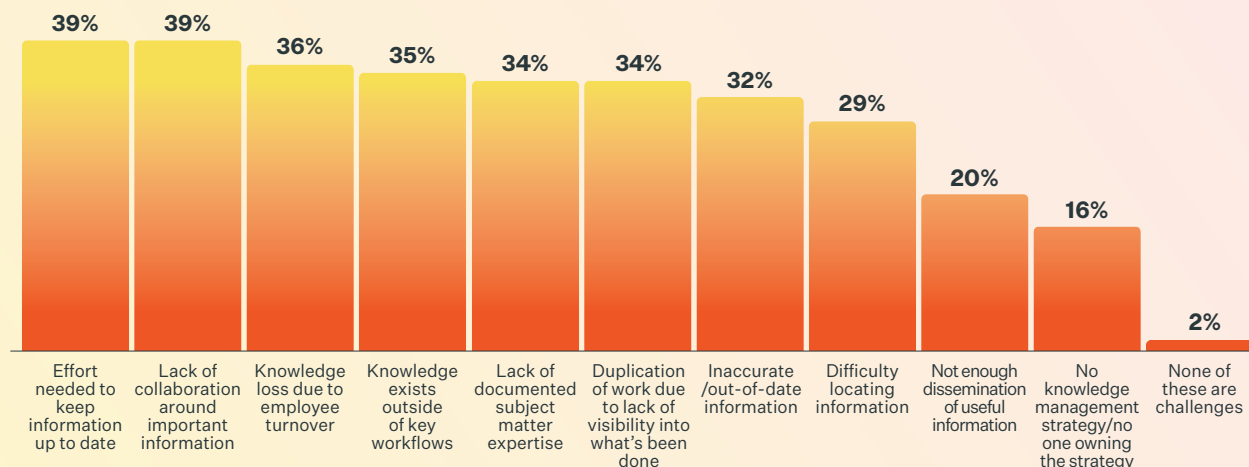
2

Establish Your Single Source of Truth

If your business doesn't have a single source of truth for CX knowledge, you risk delivering inconsistent experiences and muddled messaging to your customers. These poor experiences can be costly: one in three customers will abandon a brand they previously liked after a single negative interaction, according to research from PwC.[5] That same study found that 92% of customers will abandon a brand after two to three negative experiences.

Given the high cost of negative experiences and business leaders' insistence on their commitment to CX, it's somewhat surprising to learn that the majority of businesses have not centralized their CX knowledge. According to our 2021 CX operations study with 451 Research, part of S&P Global Market Research, 74% of businesses do not have a single source of truth that is available company-wide and across the customer journey. Additionally, 45% of respondents said that fewer than half of their decisions are made using data.

Two commonalities across the most mature CX organizations in the study—the top 12%—were that most if not all of their CX decisions are data-driven, and they centralize knowledge to deliver right-time access into workflows.

To reach this level of CX maturity, organizations need to overcome several common knowledge management challenges:

What are the biggest challenges you face when it comes to generating and managing knowledge across the channels and stakeholder groups composing the customer journey?

Challenge	%
Effort needed to keep information up to date	39%
Lack of collaboration around important information	39%
Knowledge loss due to employee turnover	36%
Knowledge exists outside of key workflows	35%
Lack of documented subject matter expertise	34%
Duplication of work due to lack of visibility into what's been done	34%
Inaccurate /out-of-date information	32%
Difficulty locating information	29%
Not enough dissemination of useful information	20%
No knowledge management strategy/no one owning the strategy	16%
None of these are challenges	2%

Base: 300 CX professionals | Source: 451 Research and Bloomfire custom study

Knowledge Management Needs

⚠️ **Knowledge must be accessible in employees' daily workflows.**

This often requires integrating technologies so that employees can quickly find and act on knowledge from their organization's single source of truth in the flow of work. Fast access to knowledge is important across all departments, but it's especially critical for customer-facing employees who must be able to find the information they need to assist customers in real time.

⚠️ **Subject matter expertise must be preserved and made actionable.**

In many organizations, subject matter experts (SMEs) find themselves responding to the same questions and drive-by requests over and over again. This isn't sustainable, especially if subject matter experts leave the organization or are even just unavailable when their colleague needs information. Instead, organizations need to adopt processes and technologies that allow SMEs to easily document and share their knowledge in a digestible format.

⚠️ **Employees must be empowered to share knowledge.**

Employees should feel they have the psychological safety necessary to contribute to their organization's collective knowledge. Employees should have a clear understanding of what information to contribute to their company's centralized knowledge source and what other channels they should use to share what they know.

⚠️ **Information must be kept up to date.**

Information can change quickly, and if an organization doesn't keep their knowledge base up to date, there's a risk of employees acting on inaccurate knowledge--or sharing that outdated information with customers.

activeprospect

Active Prospect Uses Bloomfire to Centralize Knowledge for Employees and Customers

As a rapidly growing organization, we decided that it was also time to grow our knowledge base—especially after pivoting to a remote-first environment and adapting to virtual employee training. One of the first criteria added to the top of our knowledge base requirements was that it had to be available to both customers AND employees.

Too many times as a Knowledge Manager, I've seen companies struggle with multiple knowledge bases and the inefficiencies (not to mention the drain on resources and budget) that occur with keeping everything updated and relevant in multiple locations. It is more cost-effective—and maintainable—to have one knowledge base serving multiple communities. The determination to improve our knowledge management processes while also improving our customers' experience made selecting Bloomfire as our new system an easy choice.

The benefits of having one knowledge base that is shared by both an internal community and an external community show themselves in even the smallest of details:

- ⊘ We are using the same terminology as our customers. There is no internal naming vs. external naming that could confuse both newly hired employees and customers speaking to senior employees. We all speak the same language.

- ⊘ We are more familiar with the content and can more quickly refer customers to the specific content they need.

- ⊘ Customers see multiple employee faces as content authors, an important tenet of Knowledge Centered Support. This serves two main purposes: it increases customers' confidence in the Support Team, and it humanizes the community as a place of people sharing knowledge.

Knowledge management is a vital part of our customer experience as it elevates the simple act of sharing knowledge into a collaborative relationship with our customers. We are not talking at them; we are talking with them. In fact, it's not only true that knowledge management improves our customers' experiences, but it is also certain that our customers' voices improve our knowledge management processes and strategies. Customers' questions highlight what topics need to be better documented; their likes, views, and searches provide trends that guide our video and webinar planning; and their participation in our beta feedback groups directly impacts how and why we evolve our products.

- **Courtney Langdon, Certified Knowledge Manager, Active Prospect**

REGENERON

Regeneron Simplifies Access to Aggregate Knowledge of the Company

One of the most impactful best practices I can offer for sharing knowledge and insights across stakeholder groups is to select a platform that allows you to share and access knowledge as easily as possible. In 2020, our insights and market access teams at Regeneron recognized that our biggest challenge wasn't a lack of data, tools, or resources: it was that these were scattered across too many silos and teams, and only a few people knew about any one of them. In fact, there were many cases where people would be working on projects without knowing that the relevant work had already been advanced or that there were several purchases from prior years that could have been leveraged. In other cases, team members would have to go through a chain of people to find the right information, which could take days or weeks.

With the volume and complexity of our knowledge assets growing, we chose Bloomfire as our knowledge management solution. We were looking for a solution that, first and foremost, would be easy for everyone to use right away. We didn't want to have any barriers to entry: we wanted stakeholders to be able to jump into the platform and start learning, even if they didn't know the exact terminology to search for or the subject matter expert to turn to. Essentially, we're simplifying access to the aggregate knowledge of the organization—and that in turn is helping our organization stay aligned around our customers.

I'd add that, in general and for many, the term "knowledge management" implies files, directories, taxonomies, and document repositories—which quickly become unwieldy. The term is much broader in scope and I have certainly appreciated being able to leverage Bloomfire's experience in the change management aspect of setting up the platform.

(All opinions are my own!)

- **Derek Fetzer, Director, Customer Insights & Market Access, Regeneron Pharmaceuticals**

3

Get Proactive with Customer Insights

It's not possible for businesses (or anyone) to predict the future, but market research and customer insights can uncover customer trends and behaviors--and their potential future impact--so that business leaders can make informed decisions.

In a keynote presentation at The Market Research Event (TMRE) 2020, Kantar North America's Chief Knowledge Officer, Jay Walker Smith, stated that research and insights professionals had to act as firefighters at the beginning of the coronavirus pandemic. Research teams were asked to deliver fast insights into customer behavior at a time when customer behavior was changing rapidly. With the world in flux, the focus for many CX leaders was understanding the current state and meeting customers where they were.

Now, research teams have the opportunity to shift from being firefighters to what Smith calls "firestarters:" future-focused teams who deliver proactive insights that move the customer experience forward and help the business grow.

For many research functions, becoming firestarters goes beyond simply gathering more data. According to 451 Research, part of S&P Global Market Intelligence, "Our custom survey shows that only a third of businesses feel they need more customer data; more of a concern for a bigger proportion of businesses is how to operationalize available data and knowledge assets across the customer journey."

> ## "We're simplifying access to the aggregate knowledge of the organization—and that in turn is helping our organization stay aligned around our customers."
>
> **- Derek Fetzer, Director,
> Customer Insights & Market Access,
> Regeneron Pharmaceuticals**

To truly become a proactive, CX-driven organization, research and insights teams must adopt strategies to impactfully distribute their findings to the decision-makers who need them. Research teams must also consider how to deliver their insights in the formats best suited to various stakeholder groups and leave those groups with clear, actionable takeaways.

Tips for Increasing the Impact of Insights

Make Insights Accessible On Demand

It's not enough to present the results of a research project to a room of stakeholders and hope they retain all the important details. Insights teams need to store finalized research documents, such as reports, data visualizations, and slide decks, in a centralized research library that stakeholders can access on demand. This will allow them to revisit existing research and apply it to their decision-making process when relevant—all without having to track down an insights team member to provide access.

Modify Your Format to Resonate with Different Audiences

While one line manager may commission a research study, the potential audience for the findings is often much larger, spanning multiple functional groups or lines of business. When sharing their findings with multiple groups, it's valuable for insights teams to tailor their communications to highlight the key benefits and takeaways for each group. It can also be valuable to tailor the presentation format based on the audience: for example, an executive might be most interested in getting the high-level story through a slide deck, while a line manager might prefer the level of detail available in the full written report.

Make Your Action Items Clear

Insights teams should never leave their audience saying, "What comes next?" The insights team has the opportunity to serve as a strategic advisor by sharing recommended action items based on their findings. These action items should be preserved along with all other research documentation in a centralized research library so stakeholders can revisit them as needed.

Model the Desired Behavior

If stakeholders aren't used to turning to a centralized research library and applying insights to their decision-making process, the insights team can proactively encourage this new behavior until it becomes routine. Strategies might include doing "roadshows" to different departments to present the latest research results, sending a weekly insights newsletter with links to read more in the research library, and giving employees a forum to ask questions about insights.

Communicating Insights to Drive Stakeholder Action

When sharing insights to earn buy-in for action, it can feel quite natural to fall back on data and facts to prove your point. However, without sharing the why behind your data, stakeholders may not understand the effects of the proposed changes and may be unable to act. Stories go beyond facts to create understanding at a deeper and more human level. Stories let people feel your point.

To make that work, set your story in the future and make it about how today's stakeholders made the right decisions and took the right actions. By changing the time frame and perspective, you make them the heroes, and they will process what you say differently (maybe more in your favor). Here's a tip: If you're looking for action, only tell 90% of the story. End with a question that your key stakeholders must engage with to answer. This twist makes them think through the positive aspects of change first. And it works.

- **Mike Wittenstein, Founder and Managing Partner, StoryMiners**

Dexcom

Dexcom Enables Stakeholders to Self-Serve Research and Insights

The biggest challenge with sharing research across our company is the volume of stakeholders and research projects. Because there are so many stakeholders who could benefit from research and because this list of stakeholders continues to grow, it's difficult for our research team to make sure the right people have visibility to the right research. Additionally, the high volume of projects is nearly impossible to sort through without filters and an advanced search function, so we need a solution that allows for such self-serve features.

Our ultimate goal as a research team is to empower stakeholders across the company to easily find research themselves. By creating an organized, well structured, self-serving repository, we hope to set up our stakeholders for success when searching for the information they need.

- **Adam Noar, Director, Market Research, Dexcom**

Capital One

Capital One Democratizes Insights to Drive Informed Decisions

With Bloomfire, we have been able to make insights available to everyone. We keep most of our research reports and other important customer insights stored in our Bloomfire community, which allows anybody in the enterprise to do their own research. Like the old parable says, we're teaching our users to fish, rather than just giving them a fish, which has reduced research redundancies and eliminated the need to send that mass email or Slack message asking about the existence of any reports. This repository of customer insights helps the marketing and product teams make quicker, smarter, and more informed decisions.

If I were to offer one best practice to companies that are trying to become more insights-centric, I would say make the insights available to everybody, and as easy to access as possible. While research is typically planned and executed for a specific team and/or business problem, you never know who will find the information relevant in the future. Eliminate the barriers and the silos around the research whenever possible, and make an effort to democratize the insights so that anybody has the opportunity to better understand the customer.

- **Tanner Frevert, CCX Insights and Customer Voice Manager, Capital One**

4

Enable Cross-Functional Collaboration

To become a customer-centric organization, businesses must ensure that employees across all departments have a holistic view of the customer. This requires teams to share what they know about the customer, as we discussed in a previous section, and collaborate on CX initiatives cross-functionally.

Business leaders are largely aware of the importance of cross-functional collaboration. In our CX operations study with 451 Research, part of S&P Global Market Intelligence, "Improved collaboration across the CX lifecycle features among the top three priorities for each of Marketing, Sales, and Services" respondents.

However, successfully collaborating across teams is easier said than done, and organizations face a range of common obstacles.

Common Cross-Functional Collaboration Challenges

⚠️ Decentralized Workforces

The rise of remote work has shone a light on the challenges of collaborating across decentralized teams. And with 80% of company leaders planning to allow employees to work remotely at least some of the time post-pandemic, it's a challenge that's likely to persist.[6] Many organizations that moved to a remote work model in 2020 are still fine-tuning their remote collaboration processes, trying to strike the right balance between real-time and asynchronous collaboration, and trying to prevent video call burnout.

⚠️ Siloed Subject Matter Expertise

While employees may find it relatively straightforward to reach out to subject matter experts on their own teams, it's often more challenging to track down SMEs across different departments or lines of business. And those SMEs likely possess CX expertise that could benefit the larger organization. The key, then, is having SMEs document and share what they know so that it doesn't become siloed.

⚠️ Lack of Visibility Into Other Teams' Work

When teams and departments don't have visibility into one another's work, there's a risk of duplication and wasted efforts. This can be an especially big challenge for organizations with research teams embedded across different lines of business. Different research teams may commission similar studies or even purchase secondary research another group already owns simply because they don't know what is currently available.

⚠️ Reluctance to Change Ways of Working

Employees may be set in their ways when it comes to completing certain processes or tasks—if they have a set of methods and tools that have always worked for them, they are likely to dig in their heels when asked to change. However, change may be required to facilitate cross-functional workflows and better collaboration.

⚠️ Different Systems of Record for Different Teams

Different teams may have different systems of record, and not every team will have access to the systems that other groups are using. Organizations need processes to pull information that everyone needs to know into a single platform so teams don't have to juggle dozens of logins, buy extra licenses that largely go unused, or track down gatekeepers from other teams.

Improving Cross-Functional Collaboration

Get Aligned Around Shared Goals

When working on cross-functional CX initiatives, teams must clearly outline and document their shared goals. They should also agree on key performance indicators (KPIs) to measure the success of their goals and determine ownership for all components of the initiative.

Provide Access to a Central Knowledge Management Platform

As we discussed in the second chapter, organizations need a single source of truth for all CX knowledge. All employees should have access to this platform so that there is one shared, holistic view of the customer.

Determine How—and When—to Collaborate

Cross-functional teams should discuss what platforms they will use for different types of communications (e.g., Slack for time-sensitive notifications, email for progress updates, knowledge management platform for finalized content). They should also determine when and how frequently they should meet as well as how they can collaborate asynchronously. (Remember: not everything needs to be a meeting.)

Measure and Report on the Impact of Cross-Functional CX Initiatives

Measuring the established KPIs and tracking progress against goals will allow cross-functional teams to demonstrate their impact. This can help increase leadership buy-in for future cross-functional initiatives and help all team members see how their efforts have contributed to the organization's overall customer experience.

Building a Culture of Open Collaboration

Knowledge management as a subject, technology, and strategy is one of the backbones for a successful employee experience and successful customer-facing team outcomes. A focus on developing an ethical culture and approach to manage and spread knowledge management culture is crucial to generate a great and open collaborative organization. This often starts at the top, with reliable and trustworthy leaders who advocate for knowledge sharing at every level of the organization. It also depends on the leadership team's ability to assign responsibility relevant to teams' and employees' strengths. Delegating and sharing responsibilities will assist companies in generating trust between teams and creating a culture of collaboration and knowledge engagement.

- **Ricardo Saltz Gulko, Managing Director, eGlobalis, and Co-Founder, European Customer Experience Organization**

5

Empower CX Teams to Work Anywhere

When talking about employee collaboration across the customer journey, it's impossible to ignore our new reality: a majority of knowledge workers shifted to remote work in 2020, and many will continue working remotely at least some of the time for the long term.
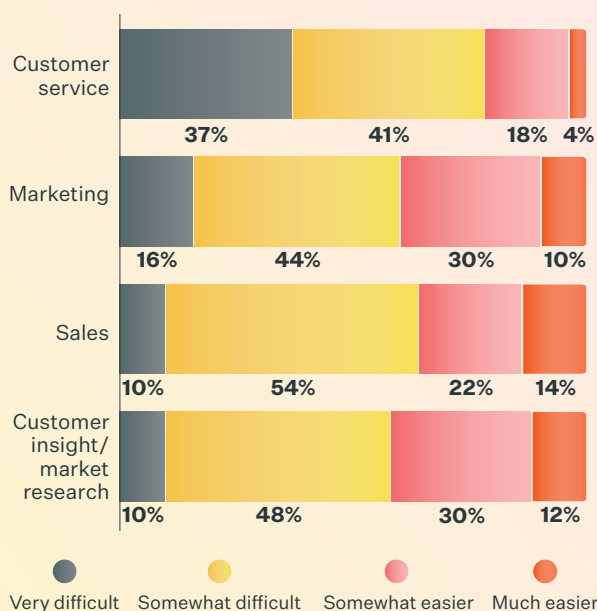
While remote work offers a wide range of benefits for both employers and employees, it also presents a unique set of challenges, especially when it comes to knowledge sharing and collaborative work. In fact, according to 451 Research, a part of S&P Global Market Research, 66% of CX professionals "believe more remote work will make collaboration across the customer journey more challenging."

For many organizations, remote work has shone a light on existing problems around the internal flow of information. When employees are in different locations (and potentially time zones), it's often more difficult to track down the appropriate information source in a timely manner. It's no longer an option to simply stop by a coworker's desk, and it's not always evident when subject matter experts are available to answer questions.

Additionally, remote work without an investment in maintaining company culture can lead to employee disengagement, which further hinders collaboration. In fact, in Buffer's 2021 State of Remote Work report,[7] remote workers ranked loneliness and difficulties with communication and collaboration as two of their top challenges.

Given the direct connection between employee experience and customer experience, businesses need to focus on the cultural initiatives, operational processes, and technologies that will allow teams to stay connected and successfully work from anywhere.

To what degree has the shift to remote work impacted your ability to work effectively with your colleagues across the channels and stakeholder groups that shape the customer journey?

Customer service
37% | 41% | 18% | 4%

Marketing
16% | 44% | 30% | 10%

Sales
10% | 54% | 22% | 14%

Customer insight/ market research
10% | 48% | 30% | 12%

● Very difficult ● Somewhat difficult ● Somewhat easier ● Much easier

Base: 300 CX professionals | Source: 451 Research and Bloomfire custom study

Tips for Enabling Hybrid Work

Provide Opportunities for Relationship Building

Remote employees may miss out on "watercooler moments"—those organic, informal interactions between employees in shared spaces such as the elevator or break room. While these moments might seem small, they can be important in building trust and strengthening relationships between coworkers. They can even lead to innovation, as employees may share ideas and perspectives with colleagues they don't normally work with.

Watercooler moments don't have to be lost in a remote work environment: they just have to be made intentional. Chat platforms like Slack and Microsoft Teams can provide virtual spaces for employees across teams to gather and talk informally, while video conferencing platforms like Zoom allow employees to meet without losing the information conveyed in body language and tone of voice. It can be valuable to schedule cross-functional team syncs and leave a few minutes at the beginning of the call for employees to make small talk—this will help strengthen trust and make the workplace more collaborative and productive.

Establish Communications Best Practices

Clear internal communication guidelines are critical with a decentralized workforce. Employees need to understand what communication channels are available to them and when to use each one. For example, Google Drive may be designated for work-in-progress, collaborative documents, while all finalized documentation is moved to a knowledge management platform, where it becomes easily accessible and searchable for everyone in the organization.

Remote employees cited difficulty unplugging from work as their top challenge in Buffer's 2021 State of Remote Work report, so it may also be valuable to set guidelines around the business hours and timeframe in which employees are reasonably expected to respond to communications. For example, organizations may choose to only use Slack or Microsoft Teams for communication during set business hours, or may set the expectation that emails should be responded to within one business day.

Recognize and Reward Contributions

In a remote environment, it can be easy for employees to start feeling as if their work is going unnoticed. Recognizing notable achievements, such as high ratings on customer service surveys or completing a research project, can help boost morale and show employees that they're making valuable contributions to the organization's CX, no matter where they're working.

Recognition and rewards can take many forms, from tangible gifts to shout outs in company meetings to awards programs. But no matter the form, rewards help show employees they are appreciated and motivates them to continue contributing to exceptional customer experiences.

Offer Ongoing Training and Professional Development

According to the 2019 LinkedIn Workforce Learning Report, 94% of employees would stay at a company longer if it invested in helping them learn.[8]

Offering ongoing workplace training is a win-win: it helps employees grow professionally and stay engaged with their work, and it helps organizations internally develop the skills and expertise required to achieve their CX goals.

In a remote or hybrid work environment, training must be offered through blended online learning: a mix of virtual instructor-led training and online learning modules that employees can complete at their own pace. All training materials (including recordings of instructor-led classes) should be added to an organization's knowledge base so that employees can access them as needed.

Accelerate Internal Digital Transformation Efforts

The coronavirus pandemic forced many businesses to accelerate their digital transformation efforts to improve digital experiences for customers. For instance, many businesses invested in improving their online and mobile shopping experiences or embraced technology to streamline the curbside pick-up process at brick-and-mortar locations. However, as remote and hybrid work continues post-pandemic, it's important for businesses to invest in internal digital transformation efforts that will allow their employees to work effectively and productively.

Particularly in hybrid work environments, where some employees may work from the office while others are remote, businesses will need to invest in technology and remote-first cultural initiatives to ensure equitable experiences for all employees. Every employee needs access to the same tools, communication channels, and training opportunities, regardless of where they are working.

Designing the Hybrid Work Experience

A great employee experience translates to a great customer experience. Whether a company is entirely on site, remote, or hybrid, the design, implementation, and sustainability of a successful workplace culture with great experiences needs to be holistic and systemic. The outcome to aim for is an employee experience that's unique, is psychologically safe, encourages engagement, and facilitates meaningful connection—not just between people, but with the company itself. To do all this, design the hybrid employee experience across the organization with the resources to sustain it. The new working model should be integrated into all areas of the business operations—from leadership and management practices to policies to processes, systems and technology. A framework like Design of Work Experience as explained in my book, *Culture Your Culture: Innovating Experiences @ Work*, provides the step-by-step to identify the critical requirements and co-create with employees. You need this to make the experience relevant and impactful to your unique circumstances.

A company must also ensure teams are appropriately well-designed for hybrid work. According to J. Richard Hackman in *Leading Teams: Setting the Stage for Great Performances*, business leaders must set clear goals, create tasks that are conducive to remote teamwork, identify the right skills and experiences for the task, and provide adequate resources as well as access to coaching and support as required.

At the individual level, the hybrid model works best if employees are given agency. They ought to have the ability to access the resources to get their job done and to feel supported personally and professionally. Offering continuous learning and development satisfies an employee's natural curiosity and desire for growth while making them more valuable to the organization as a talent. Most importantly, their employer should entrust them to have the choice of when, where, and how to work. When employees are empowered to make their own decisions day to day, they can work at their best.

-Karen Jaw-Madson, Principal, Co.-Design of Work Experience

Ameritas Empowers Customer-Facing Associates with On-Demand Access to Knowledge and Training

Our customer support teams recognized that we needed a knowledge management system that would allow us to be more efficient, provide a search tool that was quick and intuitive to use, and eliminate friction in the content creation process. We also knew we needed a solution that would allow us to capture and store knowledge in a wide range of formats, create training content that would be available on demand, and that would ultimately be as easy to use as possible.

We selected Bloomfire as our new knowledge management platform, and in the short time since launching this system, we've seen high levels of user engagement. Users have felt empowered to provide feedback through the platform, which allows us to continually make improvements. We anticipate that Bloomfire will make our customer-facing associates more efficient at their jobs by giving them one place to find answers to questions and allowing them to share feedback so they feel they are connected and part of the larger customer experience process.

We are also using our knowledge management platform to make our onboarding process for new customer-facing associates more efficient. One of our top goals is to make training videos that new hires can access on demand, and Bloomfire is making that happen. Videos help facilitate self-guided learning, which will improve and shorten our onboarding time--allowing new hires to ramp up and start assisting customers sooner.

- **Chelle Swanson, Performance & Process Improvement Specialist, Ameritas**

Building a Resilient Customer Experience

Making your organization's customer experience resilient isn't a one-time activity: it's an ongoing process that requires the integration of strategy, people, and technology. The connective tissue between all these components is knowledge engagement: the process of centralizing an organization's collective knowledge, making it actionable, and leveraging it to drive business outcomes.

The entire organization contributes to the customer experience. In order to successfully collaborate around a unified CX vision, employees across all departments must have a shared view of the customer, the ability to engage with and contribute to CX knowledge, and visibility into each department's role in achieving customer experience goals. By concentrating on strengthening organization-wide knowledge engagement, businesses can continue developing CX strategies that delight customers and withstand even the biggest disruptions.

Endnotes

1   https://www.superoffice.com/blog/customer-experience-statistics/

2   https://www.mckinsey.com/business-functions/operations/our-insights/the-ceo-guide-to-customer-experience

3   https://www.gartner.com/en/newsroom/press-releases/2020-02-10-gartner-says-nearly-90--of-organizations-now-have-a-c

4   https://www.qualtrics.com/experience-management/customer/building-a-customer-experience-vision/

5   https://www.pwc.com/future-of-cx

6   https://www.gartner.com/en/newsroom/press-releases/2020-07-14-gartner-survey-reveals-82-percent-of-company-leaders-plan-to-allow-employees-to-work-remotely-some-of-the-time

7   https://buffer.com/2021-state-of-remote-work

8   https://www.cnbc.com/2019/02/27/94percent-of-employees-would-stay-at-a-company-for-this-one-reason.html

About Bloomfire

Bloomfire is the leader in knowledge engagement, delivering an experience that connects teams and individuals with the information they need to excel at their jobs and contribute to exceptional customer experiences. Our cloud-based knowledge management platform gives people one centralized, searchable place to engage with shared knowledge and grow their organization's collective intelligence.

For more information or to schedule a demo, visit **www.bloomfire.com**.

✳ Bloomfire