



How to Build Your Integrated Customer Experience Program

10 Steps



A Foreword from InMoment:



This will guide, revitalize, or may even save your business. At the very least, we hope not to bore you, because it's important. We aren't just saying that. **It's important.**

The time it takes you to read this is time you'll never get back—we're both aware of that. But it's also the 20-30 minutes that could change everything; for you, for your business. Give us this time and we promise it'll pay dividends, in customer acquisition, retention, and growth.

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Introduction

As you're probably aware by now, the business landscape is undergoing some groundbreaking changes, due in large part to the advent of artificial intelligence. Under its framework, customer expectations are evolving: **they want more, at a hyper-personalized level, and quickly.**

The behemoths (Google, Microsoft, and the rest of the usual suspects) are on the move—plotting their position, marking their territory, and staking their claim in this new land of customer experience and artificial intelligence. They're aware that the landscape is somewhat veiled and precarious, but they have enough resources to fail comfortably if plans go south. They do, however, feel an obligation to keep up with their opposition.

The enemy never sleeps, after all.

Following closely behind are the early adopters (the Inc. 5000 Companies list, for example). They know the path ahead is uncertain, but the stakes are high and the trove is, *seemingly*, limitless. They're *fair-weather pioneers* in large part—willing to put their money where their mouth is, but only when they know the ground is steady enough to tread and their cost-benefit analysis is in the green. Many of them have already taken the leap.

The rest of the herd will follow when it's financially or pragmatically feasible, or when there's no other option. Those too slow to adapt to this quantum leap in adopting this technology will almost certainly be left behind.

When the ground settles, and the dust clears, will your business be standing on top of the rubble, or a casualty below? We wouldn't wish the latter on any business, big or small, but we'd feel it negligent as a brand not to mention the fate of a notable portion of businesses in the coming decade. It's an expected but unfortuitous byproduct of an evolving era.

We have an innovative solution that we'd like to share. Some are aware it exists, others are not; others, still, have heard of it but don't understand its significance.

We're talking about *integrated CX*, or *integrated Customer Experience*.

What is it?

Integrated CX takes customer signals (customer conversations) from every available source, fuses them together, interprets the data, and then generates predictive analytics for anticipating customer behaviors—with nearly every step powered by AI. It translates insights into actions, enabling businesses to proactively improve customer experiences and drive outcomes. It's a new and holistic approach for an industry that has historically relied solely on survey data for decades with a unilateral purview.

Customer Signals:



Surveys



Social Mentions



Financial Data



Call Center Data



Market Research



Transactional Data



Reviews



Operational Data

If that was at all confusing, we'll make it easier: Integrated CX looks at *everything* instead of just one one data source (survey data). Survey data is still useful, don't get us wrong (this is what we were founded on, after all), but it's not enough anymore.

You need to look at *everything* if you want to understand *everything*. Most businesses have these customer signals hitting their radars from different sources, day and night, but with no way to unify or understand them. We'll dive more into each one later.

Why is any of this important?

- 1 If you're only getting data from a *single source*, you're ignoring everything else.
- 2 If you're getting data from *every source*, but not structuring this data in a way you can interpret, you won't understand the bigger picture.
- 3 If you don't have a holistic view, how are you supposed to make a holistic strategy of which the view informs? You can't. No, really.

With all of that in mind, it's time to set you up for success. Let's build your CX strategy together. With the right effort and proper care, your CX program will flourish, and you will champion a new era of prosperity and innovation for you and your business in the coming years.



The 10 Steps to Build Your Integrated CX Program

A quick note:

If you want to bypass forming this strategy on your own, InMoment can create a comprehensive, integrated CX program for your brand, from start to finish. If not, carry on.

Step 1

Establish Clear Objectives

Like the beginning of any strategy, you need to start by planning—and thoroughly. We like to call this “designing with the end in mind.”

Define clear, measurable objectives for your CX strategy. Here are some good ones to start with:

- ✓ Improving customer satisfaction scores
- ✓ Reducing churn rate
- ✓ Increasing customer lifetime value
- ✓ Enhancing brand reputation
- ✓ And More

You’ve probably heard of the acronym, but make it easy for yourself and start by using SMART. **Specific, measurable, achievable, relevant, time-bound**—all of your objectives need to pass through those filters to ensure your goals are well-defined and attainable.

Once you choose your objectives as your framework for success, you’ll have clearer guidelines of which to build your program.

Brand Example:



Chevron Federal Credit Union

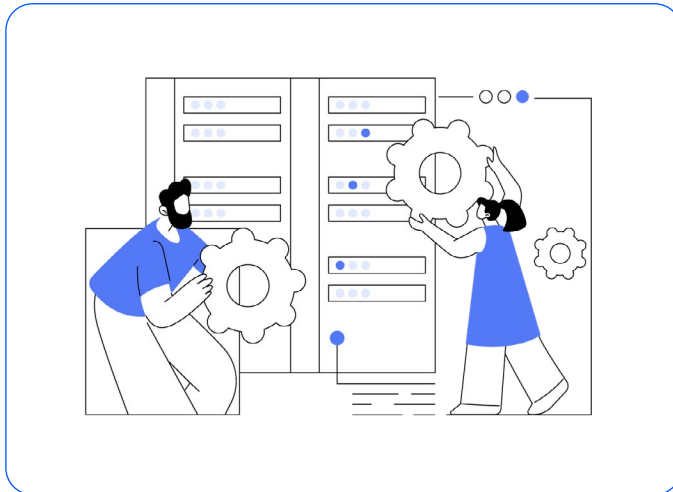
Non-profit, member-owned Credit Union, 110, 000 members in 3 States

Aligning CX Objectives with Business Goals: Chevron FCU started their integrated CX journey by carefully exploring and defining specific objectives for their program—grounded in core business goals and priorities.

“We wanted to make sure our efforts represented and reflected the broadest possible perspective,” Jon Berlin said. “We spent months making sure we were having the right conversations with all of the right people across the organization. We asked our functional groups and the executive teams about what was most important to them. [...] Taking a step back and viewing our customer experience program from a higher level gave us the perspective we needed to make the right planning decisions.”

Step 2

Collect and Connect Data From Everywhere



Even if you're capturing data from multiple sources, like surveys, our integrated CX approach suggests there are always more sources out there you need to consider. It's rare for any business to have a data set that truly captures all of their signals. Any data source left untapped is a missed opportunity. Let's go over each one.

Call Center/Customer Service Data: This is all the information collected through customer service interactions. . It includes call recordings, chat transcripts (human and bot), customer queries, complaints, feedback, and any other details captured during customer service calls. Analyzing call center data helps businesses understand common customer issues across the entire universe of interactions, assess the quality of service provided, and identify areas for improvement in products or services. It can also provide insights into customer sentiment and preferences.

Surveys are a direct method of collecting customer feedback. We've all taken them—or at least, we've been asked to take them and chosen not to respond. They're conducted through a lot of channels, such as email, online forms, phone calls, or even in person. They typically include a series of questions

designed to gather specific information about the customer's experience, satisfaction, expectations, and perceptions of the product or service. This data is valuable for gauging customer satisfaction, understanding customer needs, and identifying trends or gaps in the customer experience. Surveys are valuable because they represent a 1:1 interaction and are usually timely to the interaction which gives more accurate sentiment.

Brand Example:

Foot Locker

Retail, 2600 stores, 26 countries

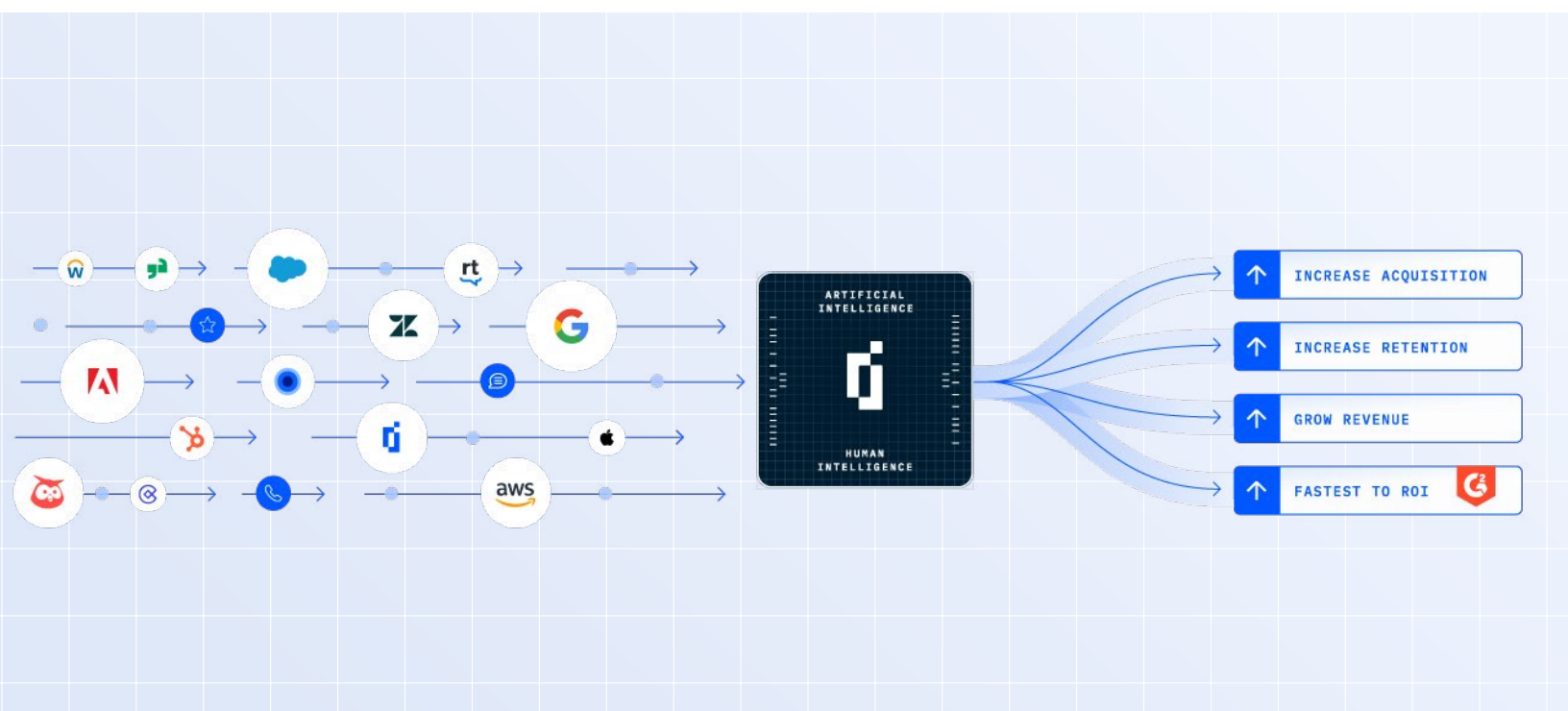
Corralling Mounds of Customer Feedback: Foot Locker pulled their data streams into one source of truth looking for uniform analytics, better operational efficiency, and more customer insight. Foot Locker's program has gone from a single, post-transaction survey to collecting and analyzing feedback from their ecommerce website, mobile voice, agent notes, social media, traditional surveys, email, and chat. They have streamlined and simplified their data analysis by eliminating unusable or inaccessible information, which has led to enhancing data quality, and they are capturing key complaints, topics, themes, sentiment, and intentions across all forms of feedback. Foot Locker remains No. 4 on Forbes' most engaged companies list.

Reviews & Social are customer reviews and ratings, competitive learning, brand monitoring, and mentions. Most of us have left a review if we had an exceptional (or awful) experience with a product or service. Monitoring and analyzing customer reviews and social media posts provide real-time insights. This channel is particularly valuable for understanding public perception, managing online reputation, and engaging with customers directly to address their concerns or appreciate their positive feedback.

Market Research includes brand tracking, competitive analyses, and benchmarking. They're used as comparative models to get an accurate picture of where your business is positioned within the market.

Transactional, Financial, and Operational customer data is the data you already have; but if you don't combine it with the other data signals, you could be asking your customers for it each time. All of these data signals need to be unified for a complete understanding of your customers.

According to Forrester, 80% of the world's data is unstructured, and expected to double in 2024. With that in mind, it's now more important than ever for businesses to collect, unify, and interpret this data. We'll get into the very best solution for this in the next section.



Step 3

Understand and Interpret the Data

Now that you've set up your customer feedback sources, and understand their implications, you need a way to integrate and analyze the unstructured data. Traditional methods of data analysis fall short when signals are coming in from a myriad of channels. InMoment Advanced AI is the answer.

How does it do it?

- 1 First, it pulls in your data from the entirety of your digital footprint. Every customer signal from across the web with your brand attached to it is unified into a holistic dashboard.
- 2 It then uses its sophisticated sentiment analysis, decoding not just the overt messaging from these signals, but also the subtle undertones of customer feedback. Whether it's excitement, frustration, or indifference, AI picks up this emotional intent, offering a granular view of customer sentiment about your brand.
- 3 Next, predictive analytics come into play. By analyzing historical data, it anticipates future trends and customer behaviors, allowing businesses to be *proactive rather than reactive*. This foresight is invaluable in preventing potential issues and capitalizing on emerging opportunities.

This unified view is more than a mere aggregation of data, but the synthesis of all of your customer voices into a single, comprehensible narrative.

Patterns and trends that are invisible in isolated data silos become clear when examined in conjunction.

For instance, a dip in NPS scores might correlate with specific call center complaints, pointing to a systemic issue that needs addressing. This level of analysis is critical for businesses to understand their current standing and predict and shape future customer experiences.

All of these customer signals merge together to form what you could think of as the public opinion of your brand—in totality. Integrated CX synchronizes all of them to create a holistic view, and uses AI to understand and interpret *everything*.

Brand Example:



Amenities Management & Meeting Services Company

Setting a Foundation for Business Decisions: Using InMoment technology and expertise, Arch Amenities integrates feedback collection, advanced analytics, and reputation management technology to significantly transform experiences for their customers and the industry at-large.

“Having the right foundational technology and insight expertise from the InMoment team is crucial to our mission of developing innovative amenity services that cultivate meaningful experiences,” says Mike Flannigan, Chief Growth Officer, Arch Amenities. “Utilizing Advanced AI and Reputation Management for our reviews and ratings allows us to facilitate connections among facility users while enriching well-being and vitality—a necessity in today’s society.”

Step 4

Create Seamless Experiences

Developing seamless experiences is about having flawless execution, across the entire path a customer takes when dealing with a brand. It's about tracing this path, from their initial contact with your brand to various touch-points like website visits, purchases, customer service interactions, post-purchase feedback, and even after they have churned or left you as a customer. This process isn't just about plotting points on a graph, but more about understanding the emotional and tactical journeys of the customer at each stage. With this data at hand, you can take action, creating seamless experiences for your customers.

The key is to identify and analyze every interaction your customer has with your brand with an objective lens - not biased by those that created the journey. This could range from the moment they hear about your company in an ad to the after-sales service they receive. At each touch-point, ask:

- ✓ What are the customer's expectations?
- ✓ Are these being met or exceeded?
- ✓ Where are the friction points?
- ✓ Are we doing everything we can to create a customer for life and a promoter for our brand?

This level of scrutiny highlights operational gaps and actionable opportunities for overcoming them. The insights gained from journey mapping are invaluable. They help pinpoint exactly where customers are getting the most value and where they're facing challenges.

By understanding the customer's journey in its entirety, you can identify new avenues to enhance this journey, through personalized marketing, streamlined processes, or innovative product features—to name a few.

Brand Example:

L A  B O Y

Retail, Nation's Largest Producer of Sofas, Loveseats, Chairs and Ottomans

Aligning with Today's Consumers:

La-Z-Boy is approaching its 100 year anniversary and is reinvigorating its brand into one that's aligned with today's new consumer. They created a CX hub that **integrates customer data across all channels**, and understands the importance of breaking down internal data silos and sharing feedback analysis of customer trends throughout the organization. Our collaboration was set up to provide their customers a consistent experience **eliminating friction points in the customer journey** and understanding the **sentiment and intention of La-Z-Boy customers** through every interaction with the brand.

Step 5

Hyper-Personalized Experiences

Offering experiences that are tailored to each customer is more important than ever. Forrester implores businesses to “Look for consumers to be cautious in 2024; they won’t stop spending but will expect to maximize economic value.” Part of maximizing this value is a push toward more personalized, individualized experiences for consumers—**everyone wants to feel special.**

Utilize the power of AI and machine learning to analyze the integrated customer data collected from the various feedback signals mentioned. This analysis will help you understand individual customer preferences, behaviors, and needs at a granular level.

Armed with this insight, create dynamic customer profiles that evolve over time with each interaction. Use these profiles to tailor your marketing messages, product recommendations, and service offerings, making every customer feel uniquely valued.

Personalization extends beyond just addressing customers by their names in emails; it involves curating experiences, offers, and content that resonate with their specific desires and anticipations. This could mean personalized shopping suggestions based on past purchases, customized content in newsletters, or targeted promotions that align with their interests. A caveat here - be sure you get it right. It is one thing to get someone’s email wrong in an email. It is entirely different to suggest a product offering that is not appropriate such as “wine of the month” to an underage consumer.

The aim is to make every touchpoint along the customer journey feel like it's designed especially for them, thereby enhancing engagement, loyalty, and ultimately, conversion rates.

Brand Example:



American Sporting Goods & Outdoor Retailer, 70% of their business is from online sales

Meeting Customers Where They Are: Many times customers are leaving ratings and reviews online and it is an important touchpoint to incorporate into a true integrated cx strategy. Evo realized that, and implemented the InMoment Reputation Management tool. They are now performing well above industry standards related to managing their online reviews and ratings. The average industry response time is more than 5 days for most retail brands, and evo’s current average response time is 1.33 days, a 38% improvement. Evo is monitoring, managing, and engaging with over 6,160 reviews across its Seattle, Portland, and Denver locations, and 87% of evo’s **online reviews have a 5-star rating.**

Step 6

Brand Example:



Developer of Networking Solutions, 30,000 enterprise clients, annual revenue of US \$5 billion

Surfacing and Acting on Feedback

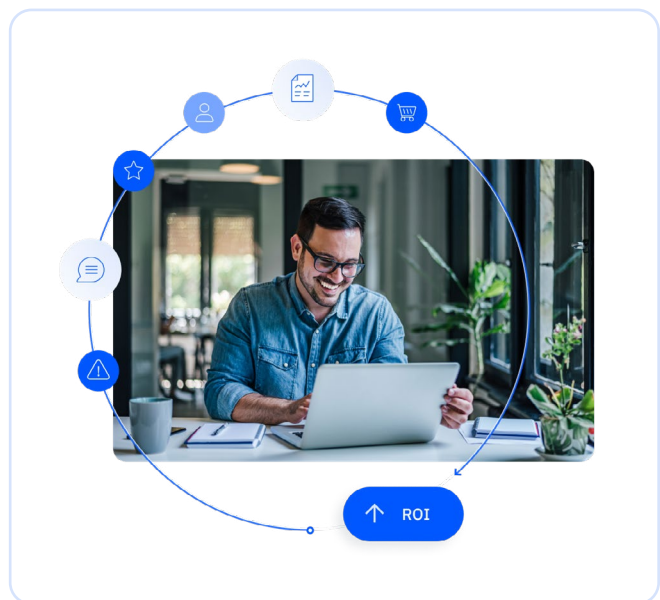
Immediately: Juniper Networks can automatically route customer feedback to its internal teams for action based on keyword triggers using their CX platform. They flag around **27% of their customer feedback for action**, with an **average resolution time of 1.9 days**. Once an issue is resolved, they inform the customer or prospect to **close the loop**, contributing to higher levels of satisfaction. They also flag any customer feedback containing the word “trial” for immediate review—helping to ensure that any friction in the all-important first phase of the prospect journey is removed as soon as possible.

Create a Closed Loop

Establishing a closed loop process is crucial to designing a world class customer feedback program. . This involves collecting feedback across all channels and analyzing it in real-time to identify issues and solve them as quickly as possible.

Implement systems and processes that allow for the swift identification and resolution of customer issues. Encourage and facilitate easy feedback submissions for customers at every interaction point, and ensure they feel their input is valued by taking proactive action. . This feedback loop should also include a mechanism for regularly thanking customers for their feedback and sharing the changes you've made based on their suggestions. This step of the closed loop process acknowledges the customer voice as being of critical importance to your brand.

This approach helps in fine-tune your products and services, and fosters a strong sense of community and co-creation among your customer base.



Step 7

Empower Your Team

Empowering your team is extremely important for delivering exceptional customer experiences. This step involves investing in comprehensive training programs that not only cover product knowledge and service protocols but also emphasize the importance of empathy, active listening, and personalized service.

Using an integrated CX approach that delves deep into the **employee** experience is a great place to start. This involves listening to employees on a continuous basis through direct solicitation feedback - engagement surveys and targeted mile stone surveys - and indirect feedback such as looking at data from Glassdoor. This approach to integrated EX allows you to stay up-to-date on the heartbeat of your business from the employee lens. Knowing their general feelings towards the company, their tribulations, feedback, and woes, you can take data-driven action to foster a culture on a momentous, upward trend.

We talked about this in our [2024 Consumer Trends Report](#), but the importance of the employee-customer link can't be overstated. When your team's feel supported, equipped, and listened to, they'll create more compelling brand experiences for your customers. They're your most valuable asset and the lifeblood of your organization—they need to be treated like it.

Recognizing and rewarding employees who go above and beyond to enhance the customer experience is crucial for motivating your team and reinforcing the value you place on exceptional service.

Brand Example:



alphabroder Supplies Imprintable Apparel and Accessories

A Testament to Action-Based Employee Engagement: As alphabroder continued to see success in their employee engagement journey, they implemented a wide variety of improvements based on results from their employee engagement survey that saw an 86% employee completion rate.

A few of the team's action-based efforts from employee feedback, alphabroder heard that associates wanted more transparency and better communication. This led to the company making communication a priority on every level. The team took action by introducing a brief company wide call hosted by the CEO, designed to be informational and motivational. Quarterly Business REviews (QBRs) were provided to build cross-departmental engagement, a digital company

Step 8

Measuring Success and Making Adjustments

The effectiveness of your CX strategy will be measured by the actions you take from building out an integrated CX program and by showing the impact on customer experience and financial metrics from what you build.

You will need to implement a robust analytics framework across traditional CX and financial metrics that not only reflect the customer experience but the financial value that results. Think about things like this:

Customer Experience Metrics	Financial Metrics
Customer / Overall Satisfaction (CSAT/OSAT)	Customer Lifetime Value
Net Promoter Score (NPS)	Cost to Serve
Customer Effort Score (CES)	New acquisition created
	Retention / Attrition

These metrics provide insights into the health of your customer relationships and the performance of your CX initiatives. While these metrics are primarily quantitative in nature, the qualitative feedback gathered through surveys, interviews, and social media provide the rich insights that help create the actions that drive these performance metrics.

Sharing this data across the enterprise enables multiple teams across your company to review these metrics, understand trends, highlight successes, and identify areas for improvement. In turn, the entire company will, over time, use this data to improve the customer experience by making iterative adjustments to processes, policies, and customer touchpoints.

Implementing this step ensures your CX program remains relevant, dynamic and responsive to changing customer expectations and market conditions.

Our most successful client programs incorporate a robust “measure and improve” methodology and leverage our platform to compile up-to-date metrics in real-time to inform their actions. InMoment is the number-one-rated in this sector.

Brand Example:



1000+ locations, 33 States, World's Largest Tire and Wheel Retailer

Setting Adaptive and Agile Metrics:

Discount Tire's version of Net Promoter Score—is reported during every quarterly business review, with a section dedicated specifically to the voice of the customer (e.g., comments and video feedback). The customer's voice is becoming more ingrained throughout the business, and more important at the highest levels of the company. Discount Tire and InMoment turn metric-based responses into targeted opportunities, which tells each store what areas to focus on for the most significant impact on customer satisfaction.

Step 9

Brand Example:



Fortune 200 company, 3 million customers in 10 States and District of Columbia

Helping Employees Catch the Vision: Elizabeth Killinger, EVP and President, NRG has been the driving force behind the company's customer-centric vision, leading a mindset shift from presuming customer-centricity costs money to establishing that making it easier and better for customers to do business with NRG is essential to long-term financial health.

A few of the teams action-based efforts, Elizabeth established a customer-focused culture framework with training programs and online learning, changed applicant screening questions to include several that help determine if potential employee candidates will embrace their customer-centric culture, implemented Customer First meetings with a board of cross-functional executives to discuss key performance metrics, and launched a CX Awards program that recognizes employees who go "above and beyond" for internal and external customers.

Building a Customer-Centric Culture

Many companies think they are extremely customer centric, but truly building a culture based on a customer-centric attitude is rarer than you'd imagine. We discussed this in our trends report this year, but the employee-customer link is more deeply rooted than you could possibly imagine. And, the link is truly a critical step in a successful CX strategy.

The logic behind it is simple:

Fostering a culture that prioritizes customer and employee satisfaction at all levels of the organization drives customer centricity. This requires leadership buy-in, cross-departmental collaboration, and recognizing employees who contribute significantly to customer experience improvements.

A customer-centric culture is about making a commitment at every level of the organization to see the world through the customers' eyes, and making their satisfaction and success the ultimate goal.

This leads to happier customers and drives employee engagement, as teams feel more connected to the mission and purpose of their work, resulting in a virtuous cycle of positive outcomes for both the business and its customers.

Step 10

Innovation and Continuous Improvement

Your final step to building a successful CX program is also one of the most important. Innovation and continuous improvement are the foundations for continuous success, and justification for the program's expense.

Resting on your laurels can quickly lead to obsolescence. Foster a culture of innovation within your organization, where new ideas are encouraged, and experimentation is the norm. To add to this: Embrace failure as a learning opportunity, refining your approach based on what works and what doesn't.

Stay ahead of emerging technologies, customer trends, and best practices in CX, integrating these insights into your strategy. Consider implementing advanced technologies like chatbots for 24/7 customer service, and reputation management tools.

Here is an example of where CX will continue to intersect with innovation. Forrester predicts that , "The key to many of 2024's improvements will be behind-the-scenes genAI that augments customer service agents' capabilities. This will help agents contribute to success on common top drivers of CX: answering questions faster and better, resolving problems on first contact, communicating clearly, and leaving the customer feeling respected.

This commitment to continuous improvement and innovation will ensure your CX strategy remains relevant and effective, driving sustained business growth and customer loyalty.

Brand Example:



Fifth Largest Wireless Carrier in the U.S., Coverage to Over 5M People

Committed to Industry Leading

Innovations: With intentions of modernization and quicker results, U.S. Cellular partnered with us with the intentions of modernizing their program to get feedback faster and to be more efficient. They wanted to provide the frontline a star level of call

center feedback in a more real-time fashion. U.S. Cellular's intention has been to serve and keep rural areas in mind; the places on the map otherwise neglected by exceptional coverage. Success in doing so is attributed in part to 4 customer care centers, the driven pride employees have for overall success, and leadership action.

A Final Word

We've given you a lot to think about. 10 steps may seem like a lot of work—and it is. But, with competition getting greater, customer expectations becoming higher every day, and technology speeding everything along, **customer experience** will be your differentiator.

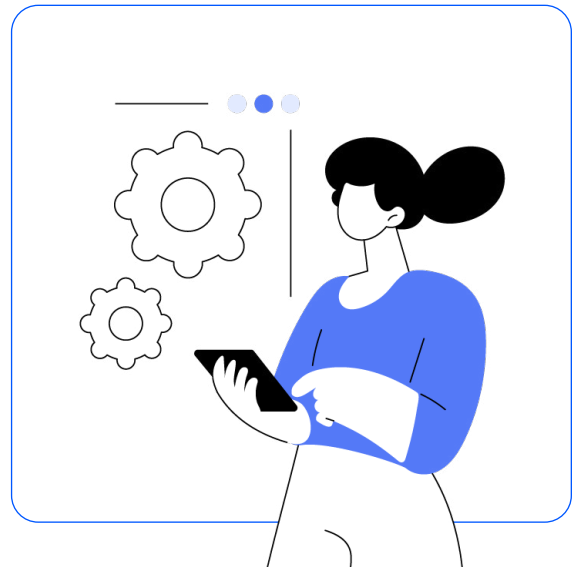
We have built our 10-step strategy based on our concept of integrated CX: Capture the customer voice everywhere they share it, leverage technology to aggregate the data, cull out the most important insights, and then take actions against those insights. Then measure—with traditional CX metrics and financial metrics to meet any CFO challenge.

Finally, recognize and leverage your employee voice to drive a world class organization that continuously innovates and delights your customers.

This shouldn't sound easy because it's not. But the rewards make the journey well worth it.

If you need a full-scale integrated CX solution, schedule a demo with us today. We'd love to be a part of YOUR team's journey!

—The InMoment Team



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