

**CONNECTING THE DOTS:**

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# **MARKETING'S ROLE IN BX, CX & EX**

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@idacheinman @substance151

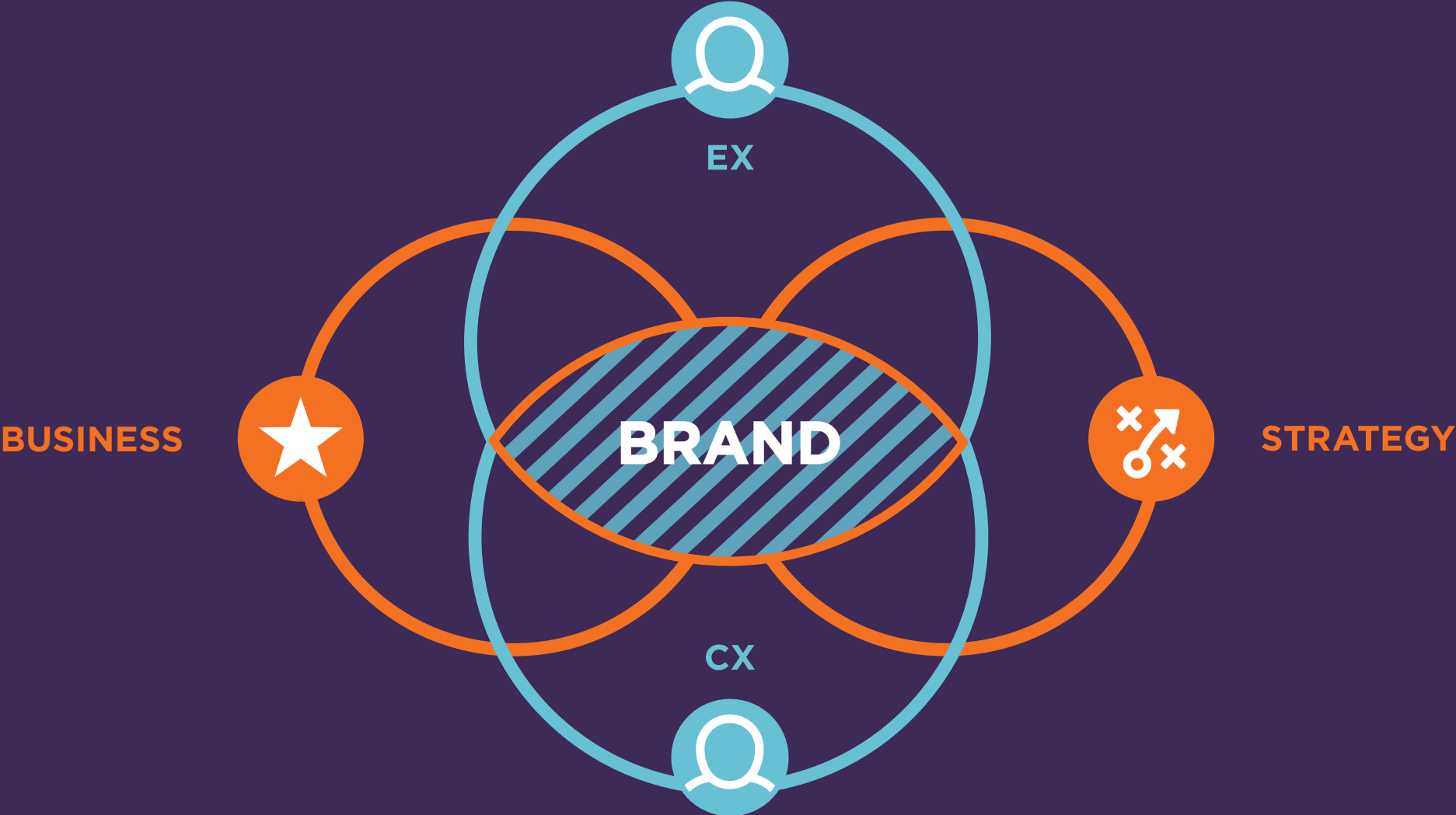


## EXPERIENCE-LED COMPANIES

**HAVE 1.6X HIGHER BRAND AWARENESS,  
1.5X HIGHER EMPLOYEE SATISFACTION,  
1.7X HIGHER CUSTOMER RETENTION &  
1.9X ROI.**

Source: Forrester

EXPERIENCE =  
BX + CX + EX



**“ THE BRANDS THAT STAND OUT  
AND THRIVE CREATE A SHARED  
PURPOSE WITH CUSTOMERS AND  
EMPLOYEES.**

**NICOLE RENNIE**

Founder, FORWARD storystudio

## **STANTEC – BRAND PURPOSE**

**“ WE ARE DEFINED BY WHAT WE  
STAND FOR, WHAT WE BELIEVE,  
AND WHY WE DO WHAT WE DO.**

## **STANTEC – BRAND PURPOSE**

**“ WE MAKE A DIFFERENCE IN THE  
WORLD BY CREATING COMMUNI-  
TIES. THIS IS OUR PURPOSE.”**

## **BOHLER – BRAND PURPOSE**

**“ WE EMPOWER THE AMBITIOUS  
TO BECOME THE ACCOMPLISHED.**



**“ LEADING FROM A PLACE OF  
PURPOSE CREATES UNRIVALED  
RESULTS FOR EVERYONE WE  
SERVE.**

**ADAM VOLANTH**

President & CEO, Bohler Engineering

## **BRAND VALUES**

**GUIDING PRINCIPLES BEHIND YOUR  
CORPORATE BEHAVIORS, DECISIONS  
AND ACTIONS.**



Talk Less,  
Do More

Design is about rolling  
up your sleeves  
and making things.

Make Others  
Successful

Going out of your way  
to help others succeed  
is the secret sauce.

Learn  
From  
Failure

Ask for forgiveness,  
not permission.

Embrace  
Ambiguity

Get comfortable with  
uncomfortable-ness.

Be  
Optimistic

Believing that something  
is possible will  
somehow make it so.

Collaborate

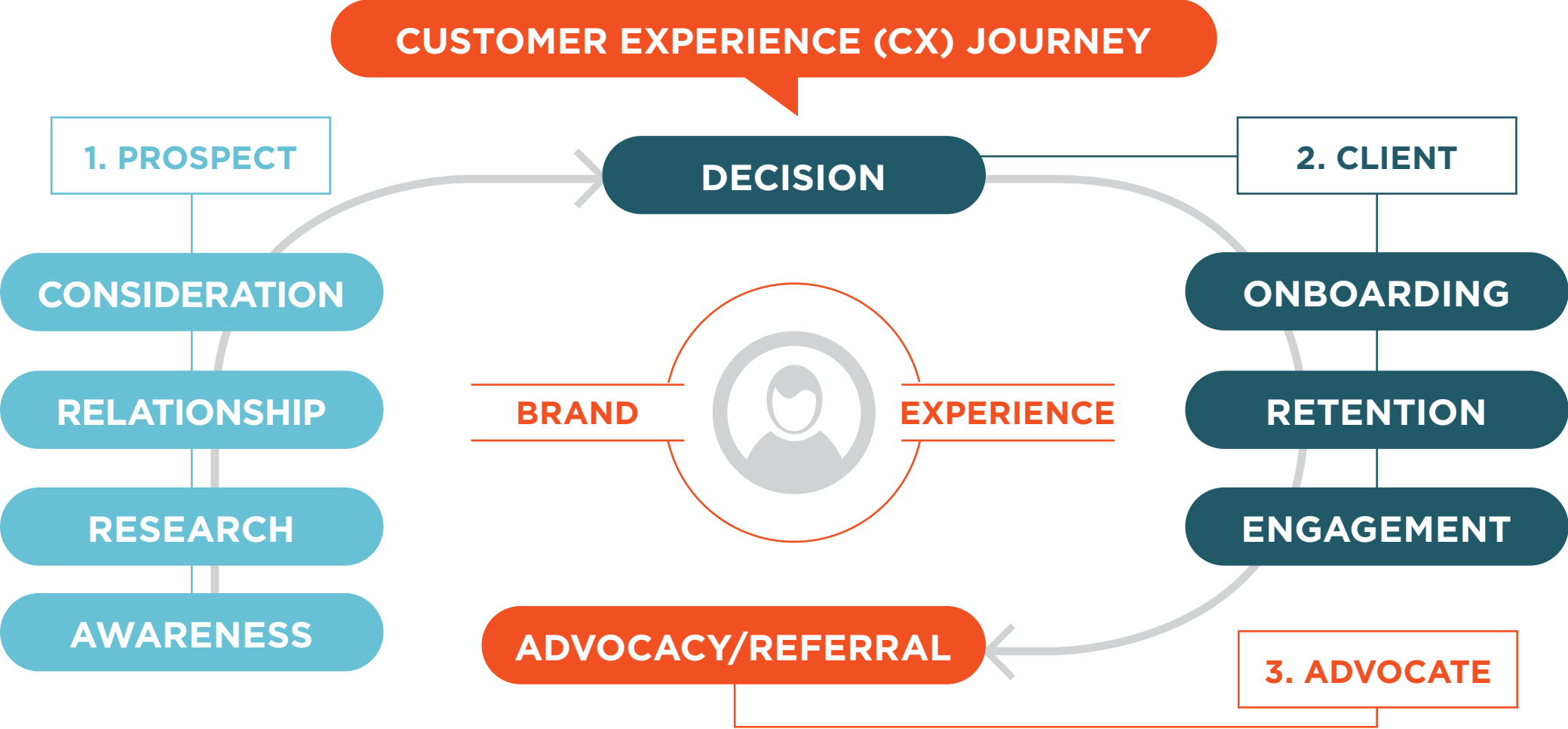
The most powerful asset  
we have in our arsenal  
is the word “we.”

Take  
Ownership

Individual ownership  
supports collective responsibility.  
Own that.

**CX=**

**RELEVANCE**



## **MARKETING RESEARCH ACROSS THE CX JOURNEY**

- + MEANINGFUL CUSTOMER PERSONAS**
- + NEEDS, WANTS AND EXPECTATIONS**
- + QUESTIONS, OBJECTIONS, “MOMENTS OF TRUTH”**

**“ ANALYTICS SHOW US WHAT IS  
HAPPENING; QUALITATIVE  
RESEARCH AIMS TO DETERMINE  
THE WHY.**

**MELISSA EGGLESTON**

Director of UX, Teamworks



# CUSTOMER TOUCHPOINT AUDIT

CX JOURNEY PHASES	AWARENESS	CONSIDERATION	ETC.
Touchpoints	Website/Blog Events/Tradeshows Email/Social Media Marketing PR/Influencers Industry Publications Referrals Search	Website/Blog Whitepapers/Case Studies Email LinkedIn Groups/ Online Forums In-Person Meetings References	

# ACTION PLAN FOR EACH CX JOURNEY PHASE

PERSONA: X [NEEDS, THOUGHTS, ATTITUDES, BEHAVIORS; STATE OF MIND; ETC.]				
PHASE: RETENTION	OWNER	CUSTOMER NEEDS	ACTIONS	CUSTOMER FEELS
Whitepapers	Marketing	Industry trends, best practices	One per quarter	Confident, in the know, supported
Blog	Marketing	Tips, trends, Q&A	Four per month	Informed, primed to succeed
PM	PM	Communications, responsiveness	Weekly status reports, updates	Valued, taken care of, supported
Invoicing	Finance	Transparency, accuracy, details	Timely, detailed invoices	Trust
Etc.		Customer Needs	What/when	Desired feeling

**CX + EX**

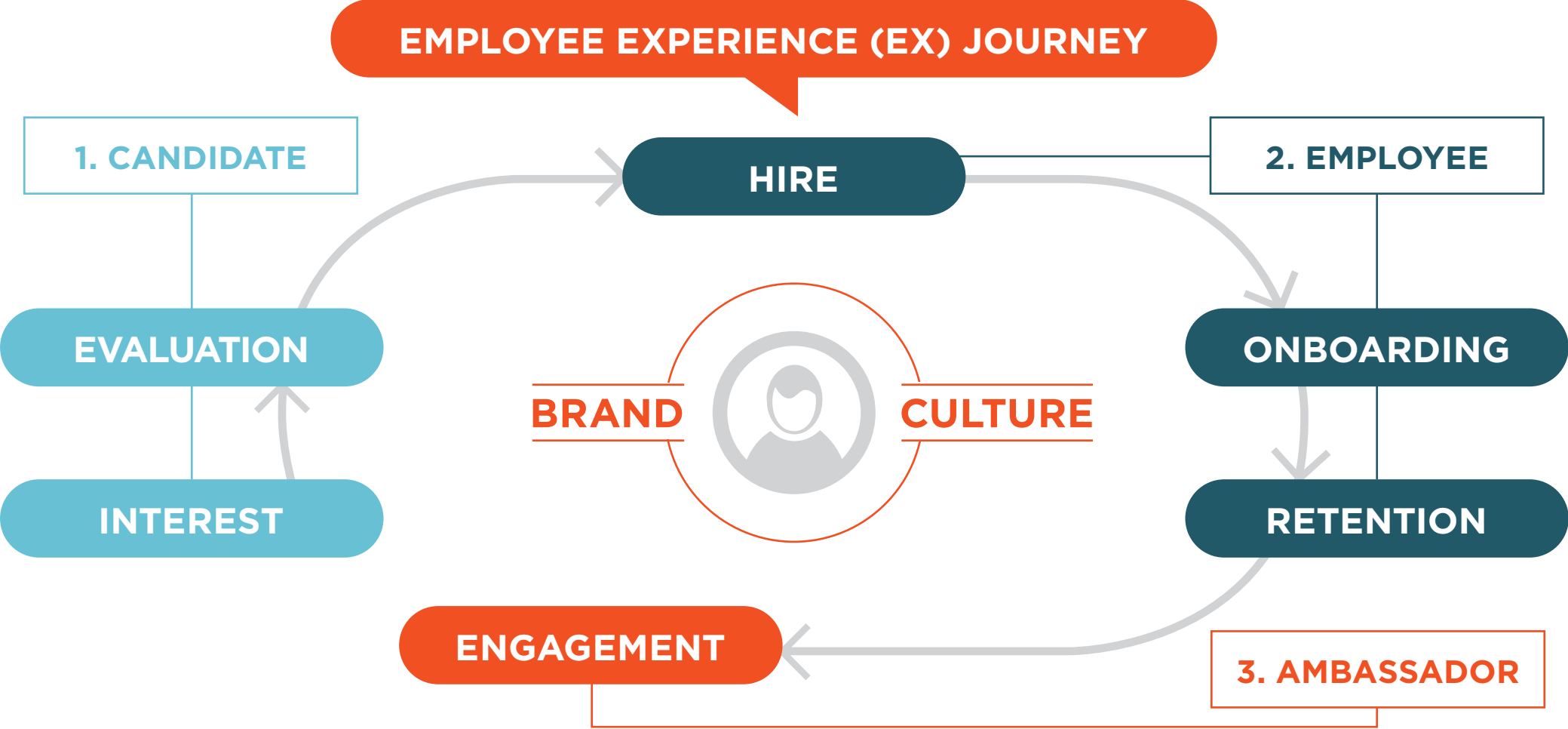
**CX WILL FAIL WITHOUT ENGAGED  
EMPLOYEES.**

Source: Customer Think

**EXPERIENCE =  
ENGAGEMENT**

## **CULTURE**

**CUSTOMERS CAN'T LOVE A COMPANY  
THAT EMPLOYEES HATE.**



## **CANDIDATE STAGE**

- + FIRM AND JOB SEARCH**
- + APPLICATION PROCESS**
- + INTERVIEW PROCESS**
- + OFFER AND CONTRACT**

## **NEW HIRE STAGE**

- + WELCOME ABOARD!**
- + ONBOARDING**
- + WELCOME KITS**



## **EMPLOYEE STAGE**

- + POLICIES AND PROCEDURES**
- + GROWTH AND PROMOTION**
- + VALUES-BASED REWARDS SYSTEM**

## **AMBASSADOR STAGE**

- + INTERNAL COMMUNICATIONS**
- + LIVING THE BRAND**
- + BRAND EDUCATION AND ENGAGEMENT**



# TODAY'S REALITY

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**BX:**  
**BRAND EXPERIENCE**

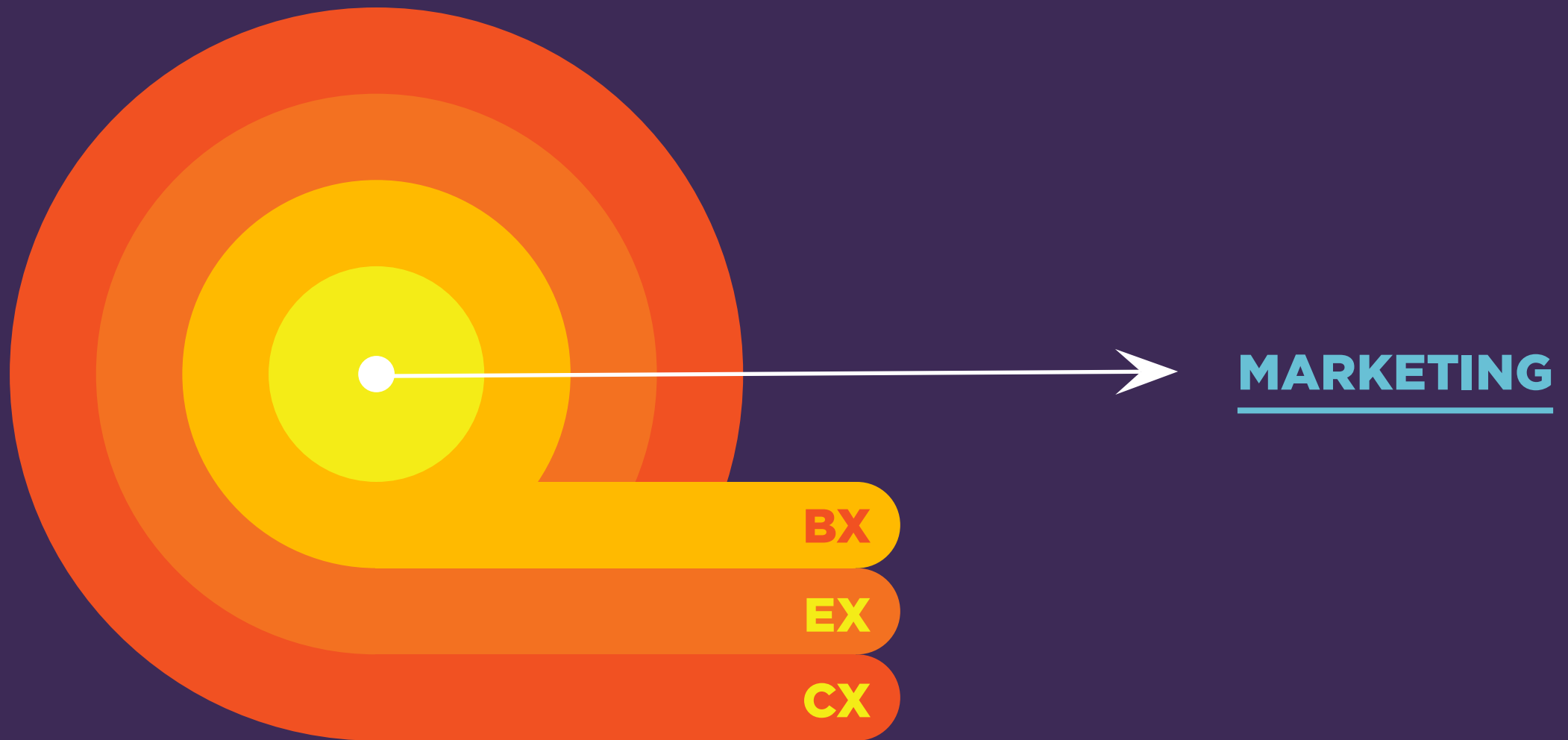
BRAND DEVELOPMENT,  
ACTIVATION, MANAGEMENT

**CX:**  
**CUSTOMER EXPERIENCE**

PROSPECT > CLIENT > ADVOCATE

**EX:**  
**EMPLOYEE EXPERIENCE**

EXPERIENCE JOURNEY,  
CULTURE, BRAND ENGAGEMENT



## **WHY SHOULD YOU WANT TO TAKE CHARGE? REASON 1**

**68% OF LEADERS SAY THEIR COMPANY  
IS INCREASINGLY COMPETING ON THE  
BASIS OF CX.**

Source: Salesforce Research

## **REASON 2**

**90% OF CX DECISION MAKERS AGREE  
THAT THE CMO SHOULD BE THE  
ADVOCATE FOR THEIR CUSTOMERS.**

Source: Accenture

### **REASON 3**

**CX MANAGEMENT IS THE PRIMARY  
BUSINESS STRATEGY FOR CREATING  
LOYAL CUSTOMER RELATIONSHIPS.**

Source: Customer Think



## **REASON 4**

**LOYAL REPEAT CUSTOMERS SPEND  
67% MORE THAN NEW CUSTOMERS.**

Source: Customer Think

## **REASON 5**

**76% OF EXECUTIVES SAY THAT  
IMPROVING CX AND EX IS A HIGH  
OR CRITICAL PRIORITY...**

**... AND MANY OF THOSE COMPANIES  
HAVE CREATED A C-LEVEL POSITION  
TO OVERSEE IT.**

Source: Forrester

**MARKETING IS BEST POSITIONED TO  
TAKE CHARGE.**

## **KEY TRAITS OF AN EXPERIENCE CHAMPION**

- + UNDERSTANDS COMPANY'S GOALS**
- + A COMMUNICATOR, A TEAM PLAYER**
- + ABLE TO DEVELOP PROCESSES**
- + UNDERSTANDS CUSTOMER DATA**
- + A LEADER, A CHANGE AGENT**

**“ CONSIDER ADDING THE “X” AND  
CREATING A CMXO. IT’S A STEP IN  
THE RIGHT DIRECTION.**

**SHEP HYKEN**

Customer Experience Expert

# QUESTIONS?

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**ADDITIONAL RESOURCES**

