

CONNECTING THE DOTS:

ALIGNING BX, CX & EX

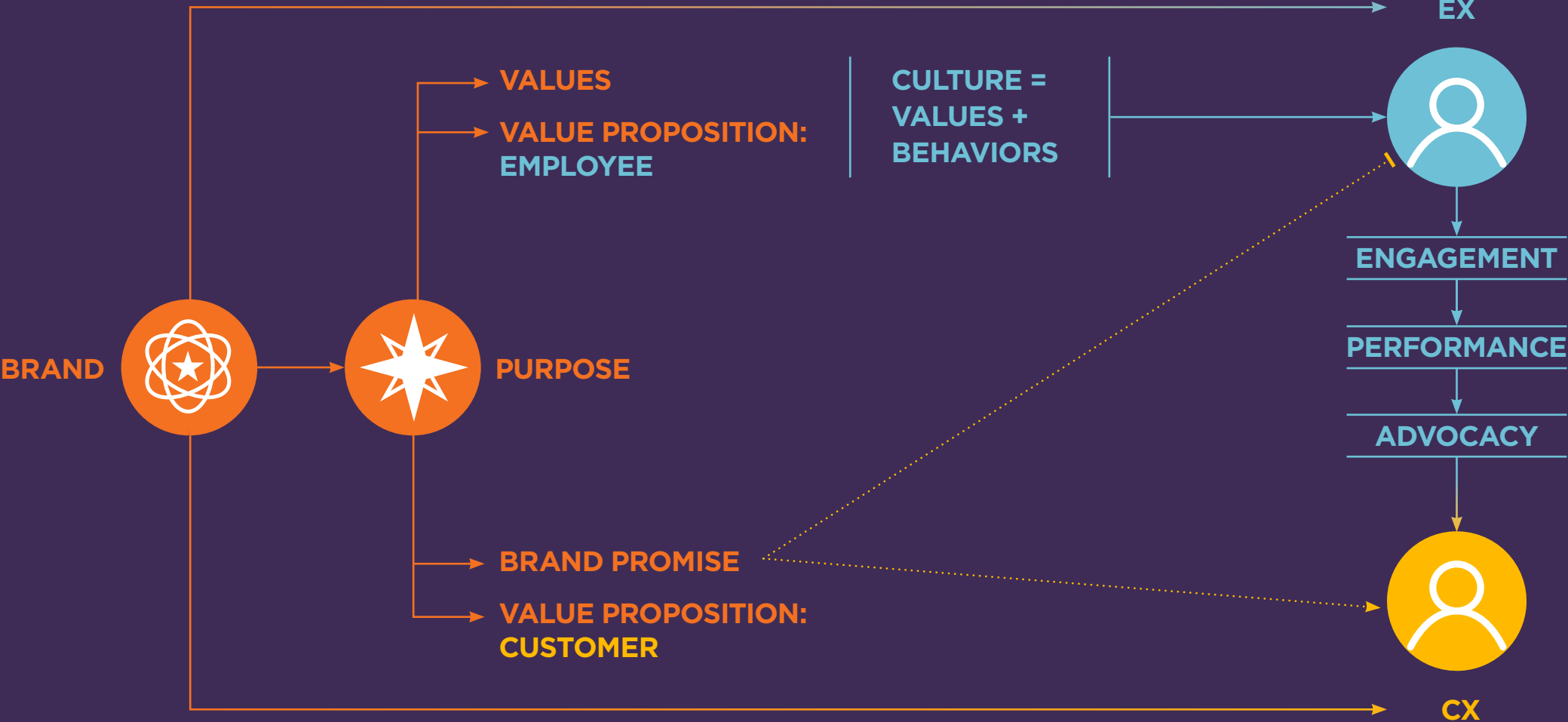
IDA CHEINMAN, SUBSTANCE151

@idacheinman @substance151



EXPERIENCE =

BX + CX + EX



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

NICOLE RENNIE

Founder, FORWARD storystudio

BOHLER - BRAND PURPOSE

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

BRAND VALUES

A CODE BY WHICH YOUR
BRAND LIVES

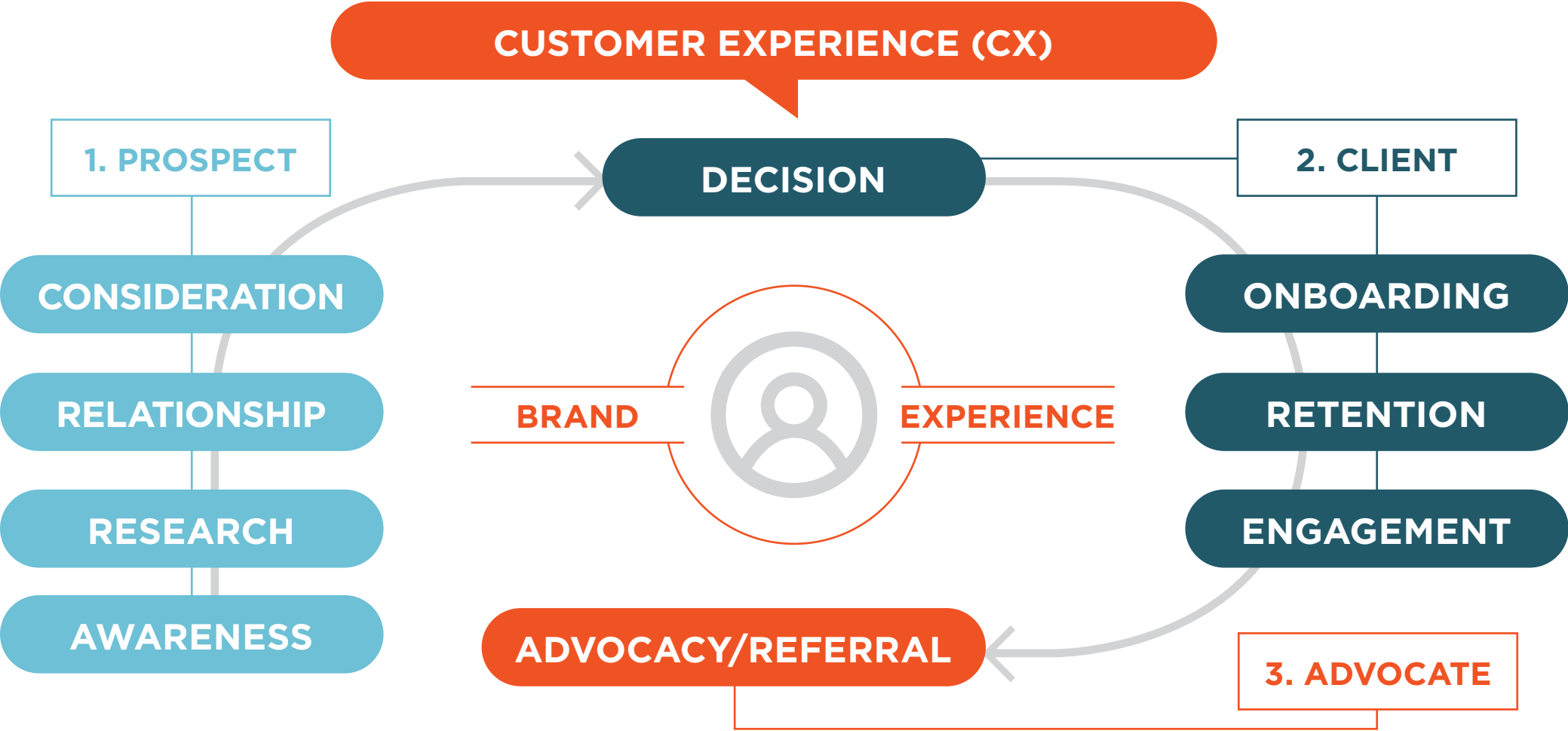
VALUES → BEHAVIORS → ACTIONS

CX=

RELEVANCE

CUSTOMER RESEARCH AND PERSONAS

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



ACTION PLAN FOR EACH PERSONA/EACH CX JOURNEY PHASE

PERSONA: X (NEEDS, THOUGHTS, ATTITUDES, BEHAVIORS, STATE OF MIND, ETC.)					
PHASE: RETENTION	OWNER	CUSTOMER NEEDS	ACTIONS	CUSTOMER FEELS	GAPS
Education/Webinars	Marketing	Industry trends, best practices	One per quarter	Confident, in the know, supported	
Thought Leadership	Marketing	Tips, trends, Q&A, case studies	Weekly email, blog, social	Informed, primed to succeed	
Project Management	PM	Communications, responsiveness	Weekly status reports, updates	Valued, taken care of, supported	
Invoicing	Finance	Transparency, accuracy, details	Timely, detailed invoices	Trust	
Etc.	Department	Customer Needs	What/when	Desired feeling	

CX + EX

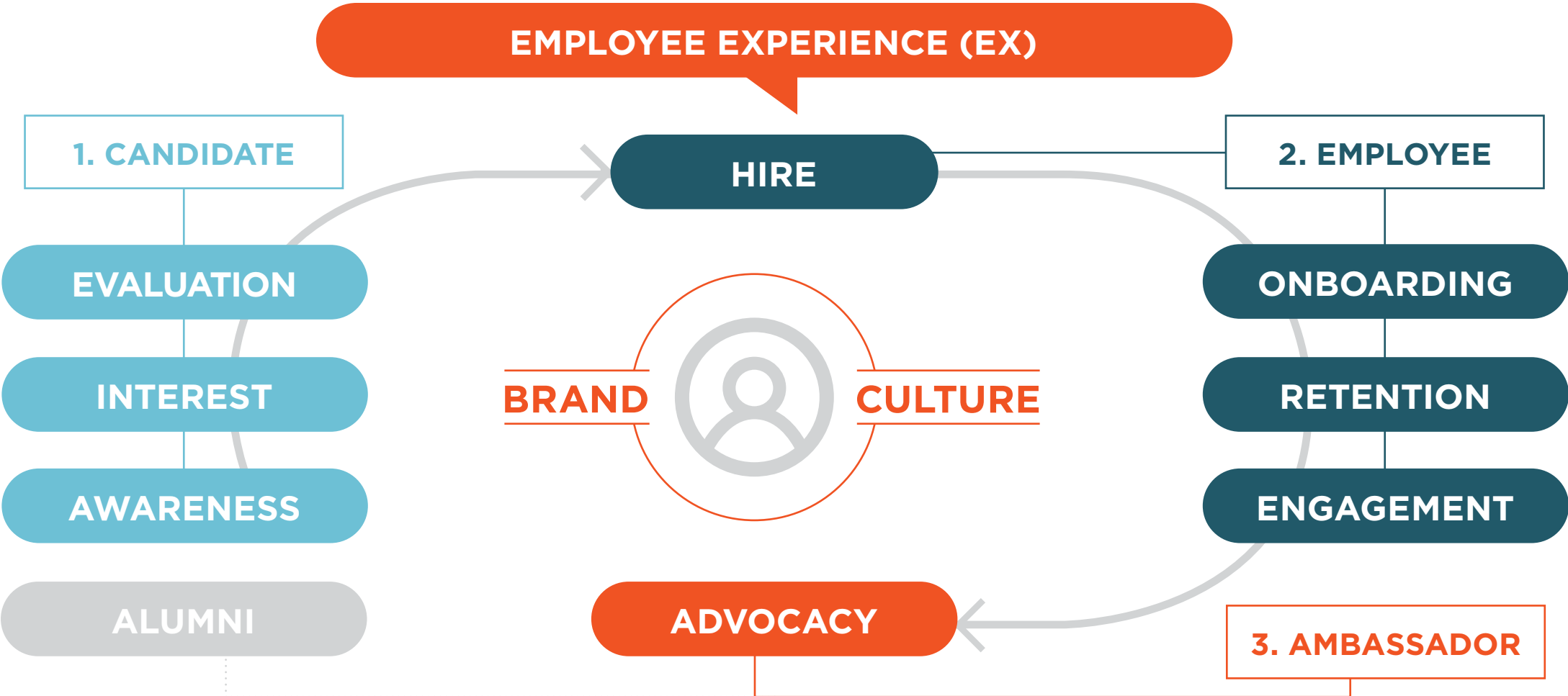
**CX WILL FAIL WITHOUT ENGAGED
EMPLOYEES.**

Source: Customer Think

**EXPERIENCE =
ENGAGEMENT**

CULTURE

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

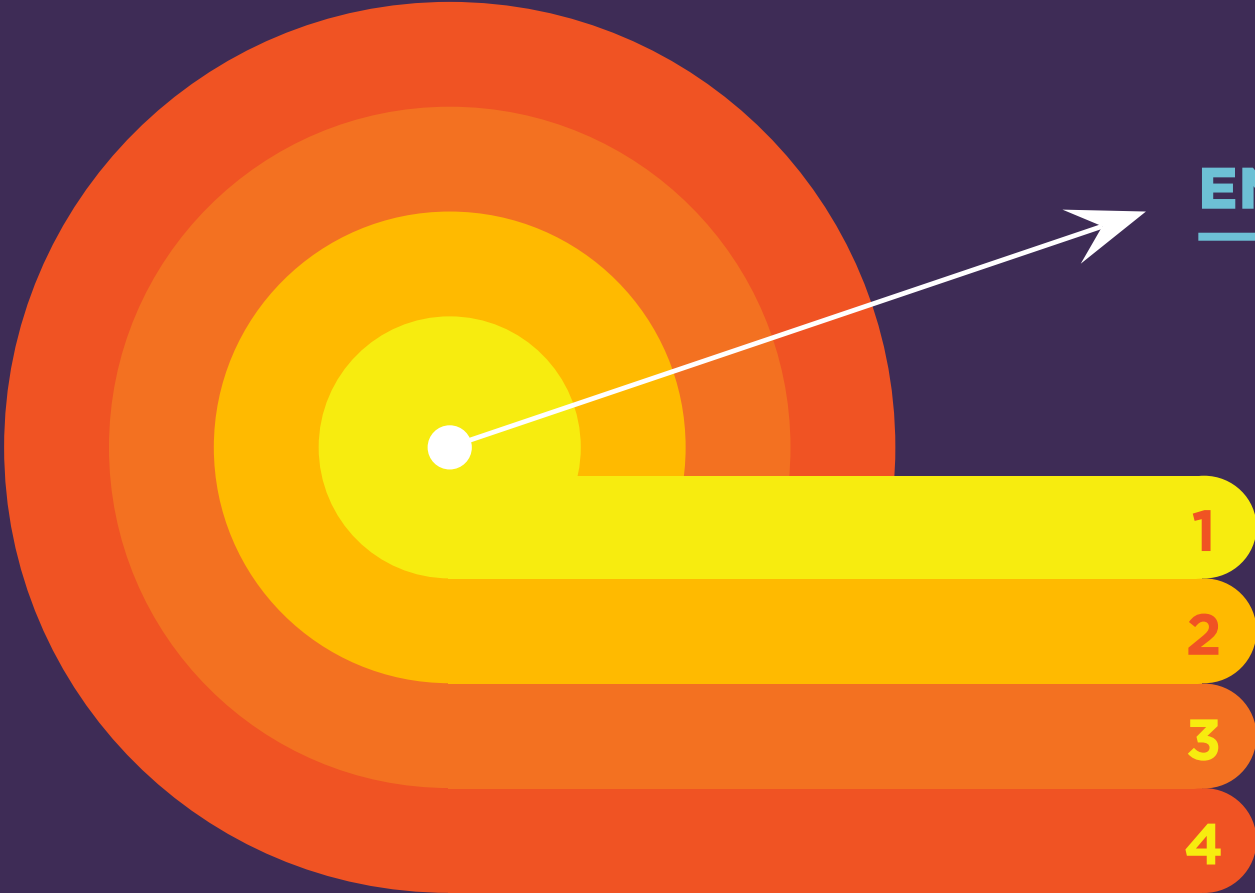


AT EVERY STAGE, ASK:

- + How do our brand and culture inform our EX?
- + Are our processes, communications, policies, environment and more align with our stated values?
- + Does the firm/leadership exhibit the type of behaviors we want our employees to practice with our customers?

BECOMING EXPERIENCE-LED IS:

- + An intentional, firm-wide change in thinking, processes, mindsets and behaviors.
- + Not about technology and tools (technology is an enabler, but not the driver).
- + A continual, ongoing state of improvement – not a project or a program.



ENSURING FIRM-WIDE BUY-IN

1

CORE EXPERIENCE TEAM

2

ALL FIRM'S LEADERSHIP

3

BRAND/CX/EX CHAMPIONS

4

ALL EMPLOYEES

QUESTIONS?

LIVE SESSION: AUGUST 28

CONTACT:

IDA CHEINMAN, PRINCIPAL/CREATIVE DIRECTOR

IDA@SUBSTANCE151.COM