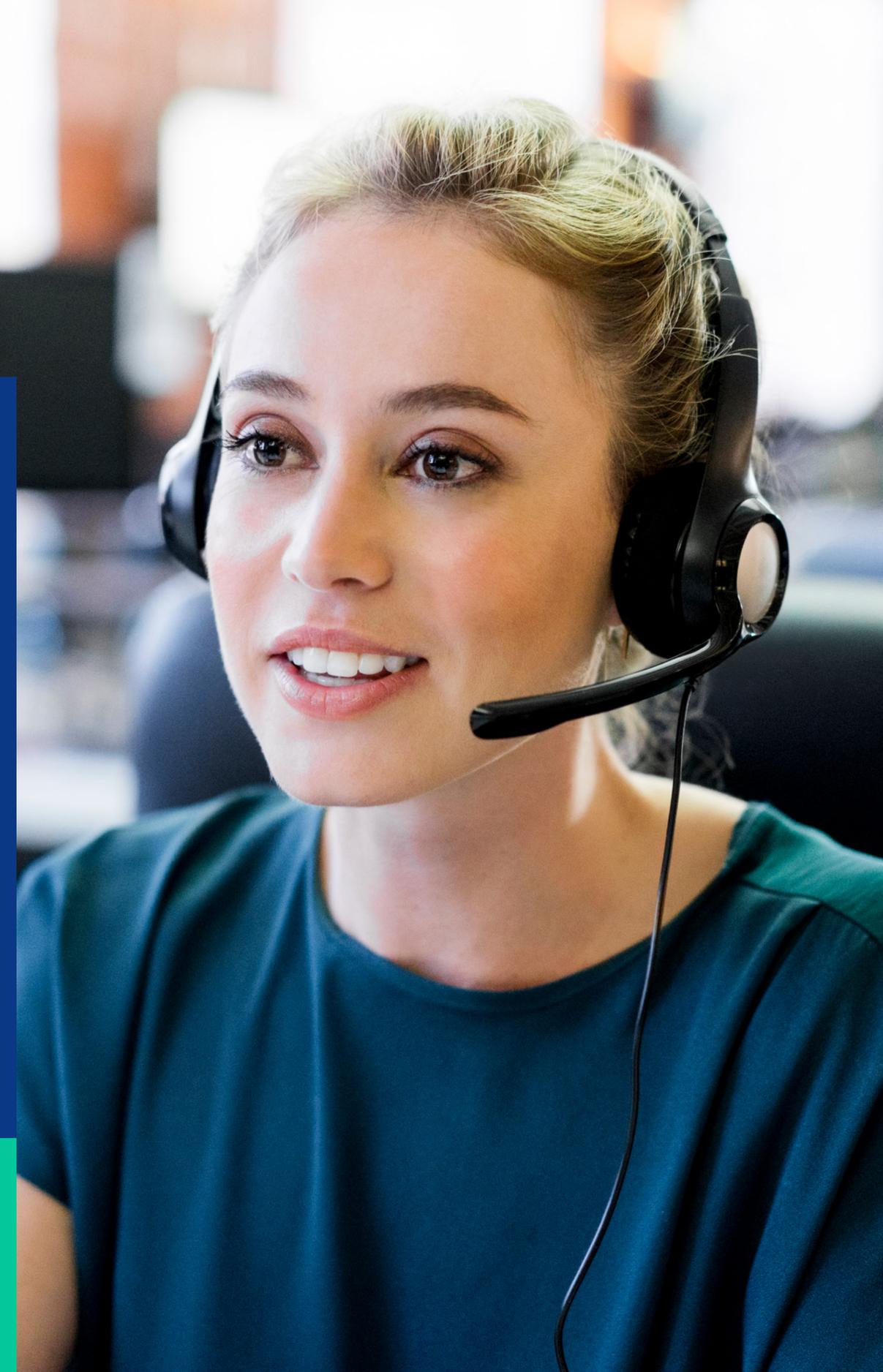


EBOOK

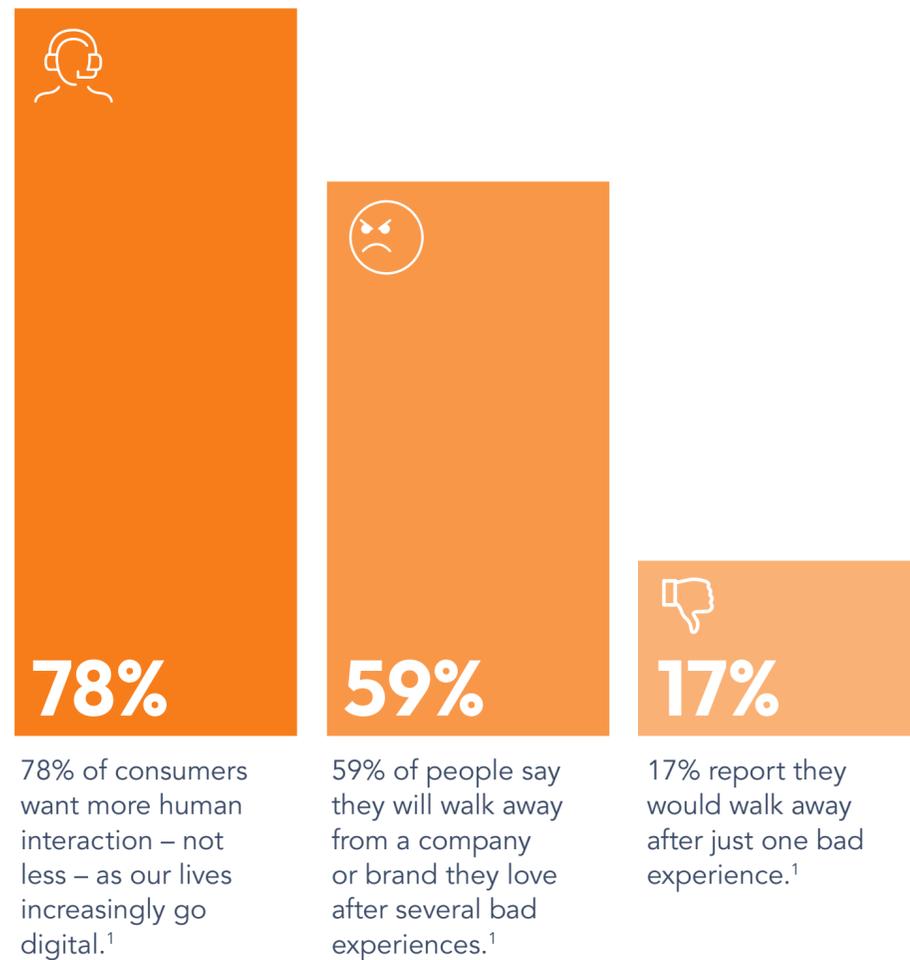
# Best practices in CX Measurement

Understand your digital customer experience  
to target the right improvements.

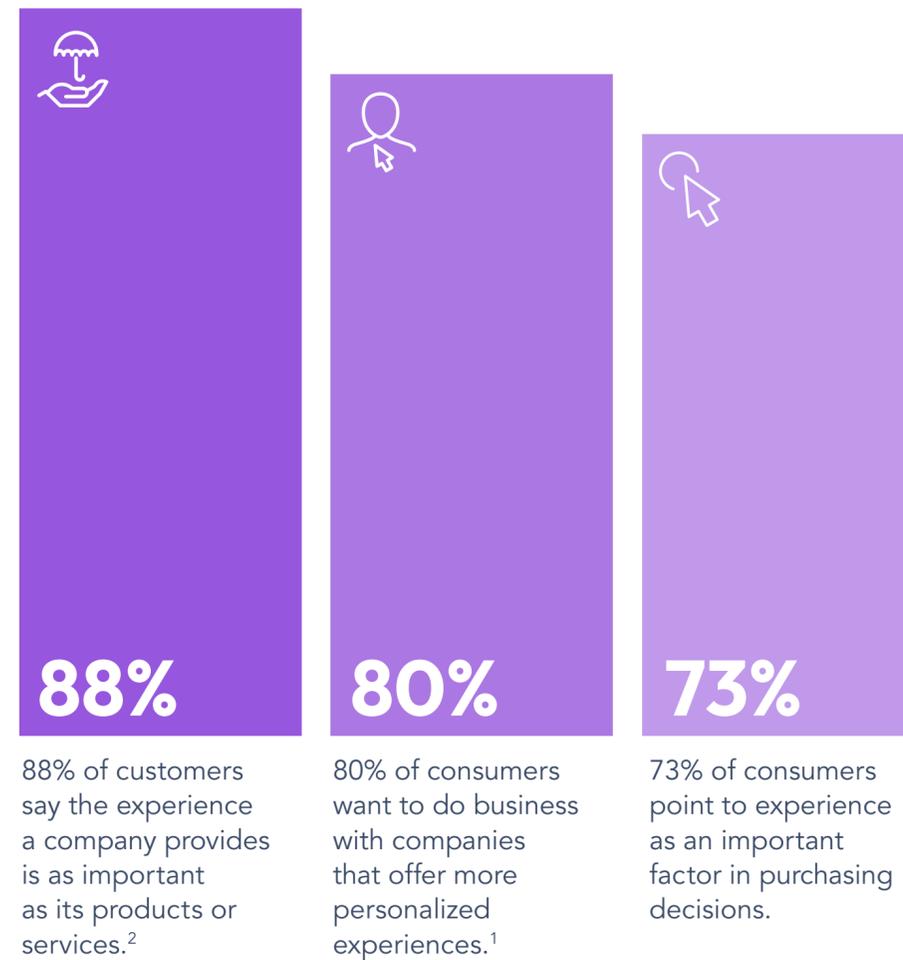


# Why do companies focus on improving customer experience in their digital worlds?

## Because it's what consumers want.



## Companies are competing on it.



## It can be a strategic advantage.



<sup>1</sup> PWC  
<sup>2</sup> Salesforce

# The big picture: What Guided CX means for your customers and your business



**PAGE 4**

**Evaluating the mountain**

CX measurement challenges and how to overcome them.

- Measurement: We know we need it. But how do we do it?
- The challenge in measuring CX is in how we implement and manage the process
- Best practices in measuring CX



**PAGE 7**

**Establishing the basecamp**

Baselining CX measurement: what are most companies doing to measure CX ROI?

- How do you measure CX performance?
- How long have most companies measured their CX?
- How do you measure CX success?
- What do executives care about?



**PAGE 10**

**Consulting the sherpa**

What are some best-practice approaches you can implement today?

- What is a journey?
- Why journeys?
- Best practice: Measuring customer journeys
- Choosing a journey



**PAGE 12**

**Charting the course**

Choosing areas where CX improvements will have the highest impact.

- Where is "Doing it Together" better than DIY?
- Where are the high-value moments, where frustration and abandonment are high?
- Where can I give customers what they value most?
- Examples of journeys across the customer lifecycle impacted by Glance



**PAGE 15**

**Celebrating the summit**

What are some typical results companies are experiencing from CX improvements?

- Why do companies choose visual engagement software?
- Why do companies add video?
- Impact the selling process
- Improve cost of service and support
- Boost revenue generation
- Increase resiliency

# Evaluating the mountain

Measurement is critical to managing customer experience. Baselineing your starting point helps you demonstrate that the changes you make are having an impact. Those changes must also be measurable to understand their efficacy and to make a case for continued investment.

But measuring customer experience is a challenge.



# Your CX measurement journey starts here

## Pitfalls along the way:

We know we should measure CX. The challenge is in how we implement and manage that process:

Many different departments and teams from all parts of the organization impact the customer lifecycle in different ways. They may seldom communicate or establish a common definition for CX success, and they may all bring their own metrics, approaches, and technologies. They very infrequently have a single, executive sponsor to oversee them, nor do they make sure they are baselined for a starting point or have established goals to work toward that span the organization. As a result, we can't often identify key relationships among metrics - is there causation, or even correlation, and if we're seeking to lift one metric, how do we know which of the others affect it, or are affected by it?

Even if we have the data (scattered though it may be) - are we using it? Is data truly driving decisions, or are they just going into the void? Are these learnings "close enough" to actionable next-steps, or are they so far removed that we're not sure what to do about them? Is someone truly responsible, and can we point to who that is and give them the action to go and improve the situation?

Are we only paying lip service to customer-centricity, or do our metrics truly reflect that the customer is the priority?

## Finding the path to best practices

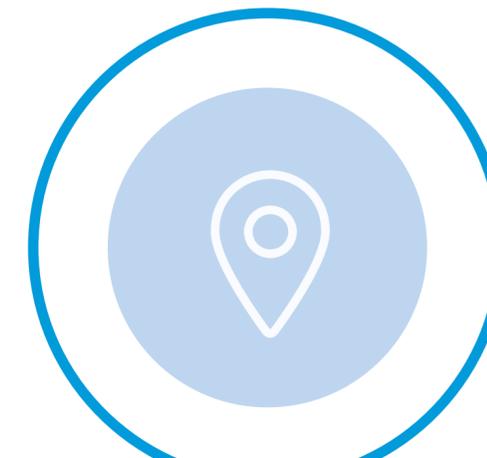
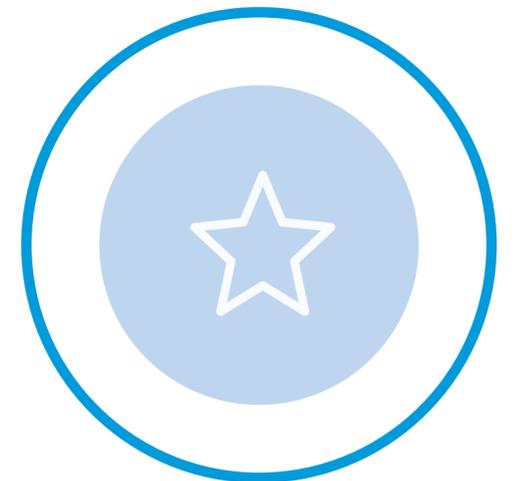
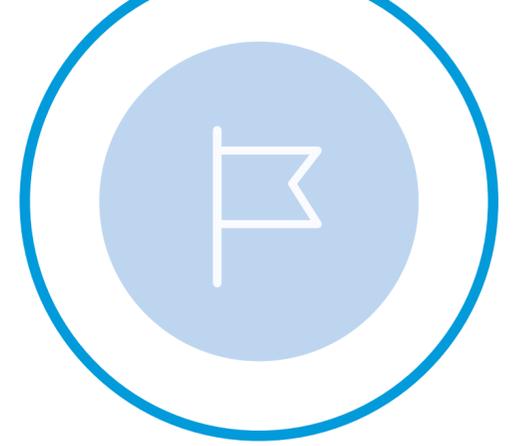
Best practices would seem to recommend:

- One executive sponsor to unify and oversee the efficacy of CX across all teams
- One set of organizational metrics tying micro-level changes to macro-level results
- One defined strategy to baseline CX and measure improvement

But these are often years-long goals requiring costly organizational changes.

## What can you do today?

This eBook will help guide you from where you are today to the small steps you can start with - even in light of current organizational realities - to measure CX, improve it, and maybe even improve your organization's CX culture.



# Finding the path to best practices

## Measurement: We know we need it. But how do we do it?

Digital interactions are a reality we're all facing no matter what industry we're in. Measuring digital customer experience is essential to improving it. And improving it is central to driving business results. Put another way, if we don't know what's going on, the resulting experience for customers could be detrimental – and you may not even know why.

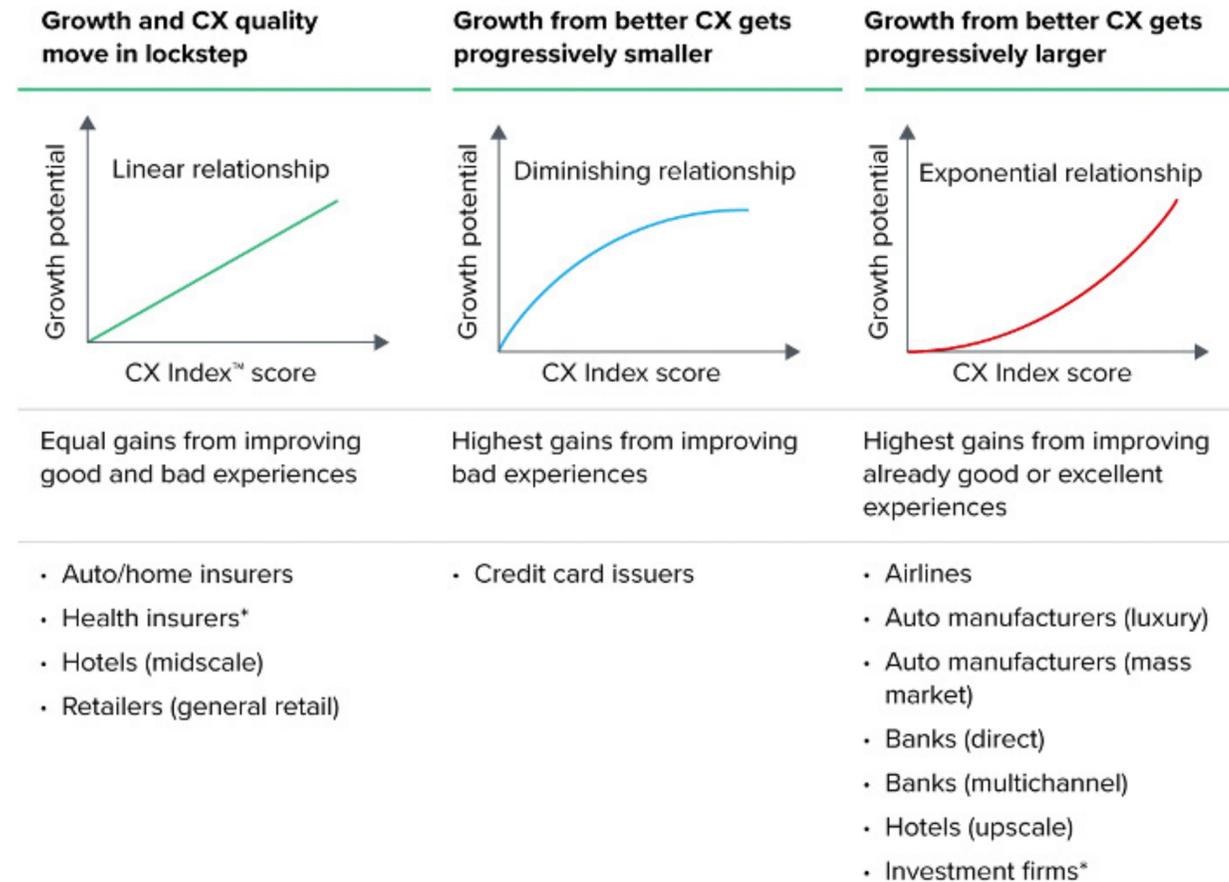
One thing research tells us? Different industries will be impacted in different ways by CX improvements.

FORRESTER

How Customer Experience Drives Business Growth, 2022

FIGURE 2

### Forrester's Models Show Three Patterns Of Relationships Between CX And Business Impact

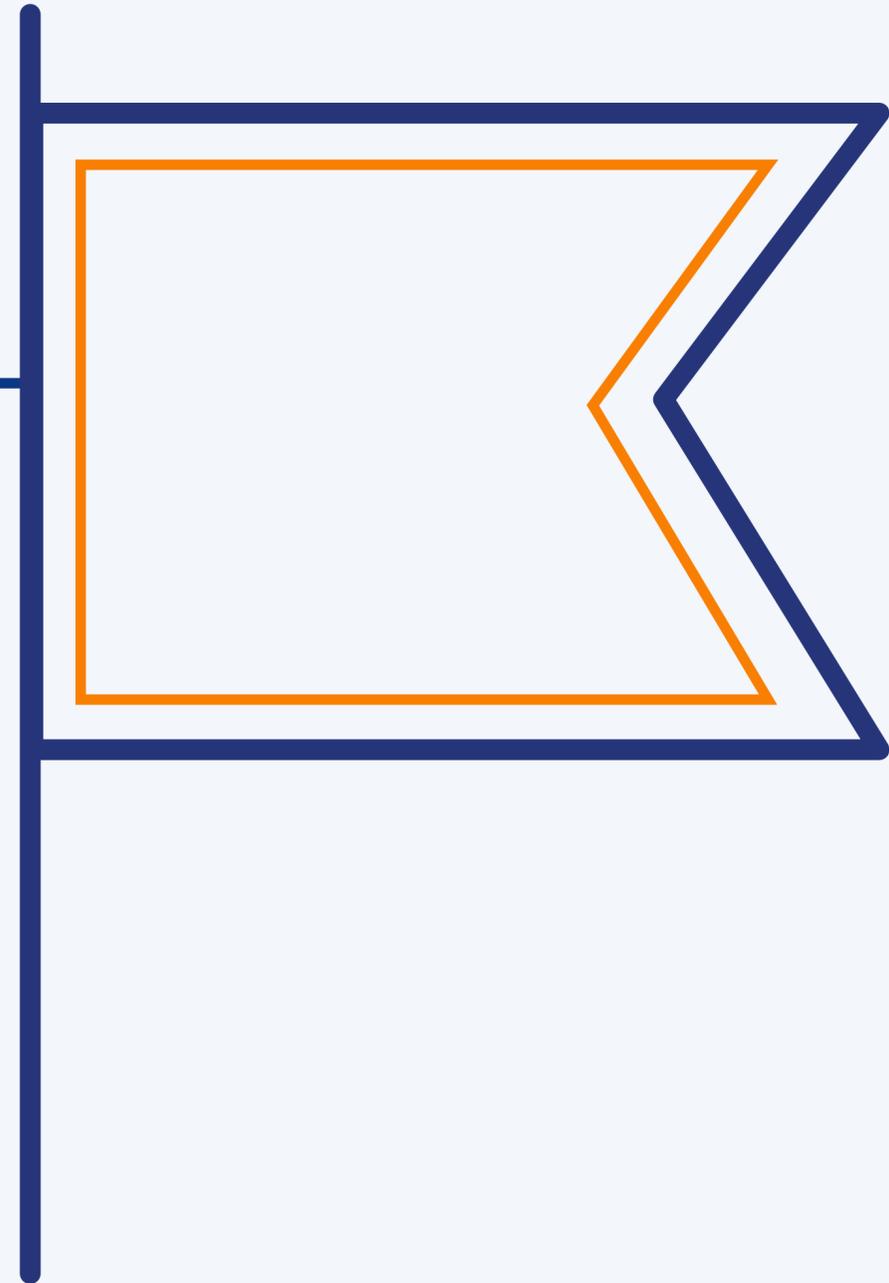


\*For health insurers, the models show the relationship between customer experience (CX) and membership. For investment firms, the models show the relationship between CX and invested assets. For all other industries, the models show the relationship between CX and revenue.

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited. "How Customer Experience Drives Business Growth, 2022." Forrester Report. June 6, 2022.

# Establishing the basecamp

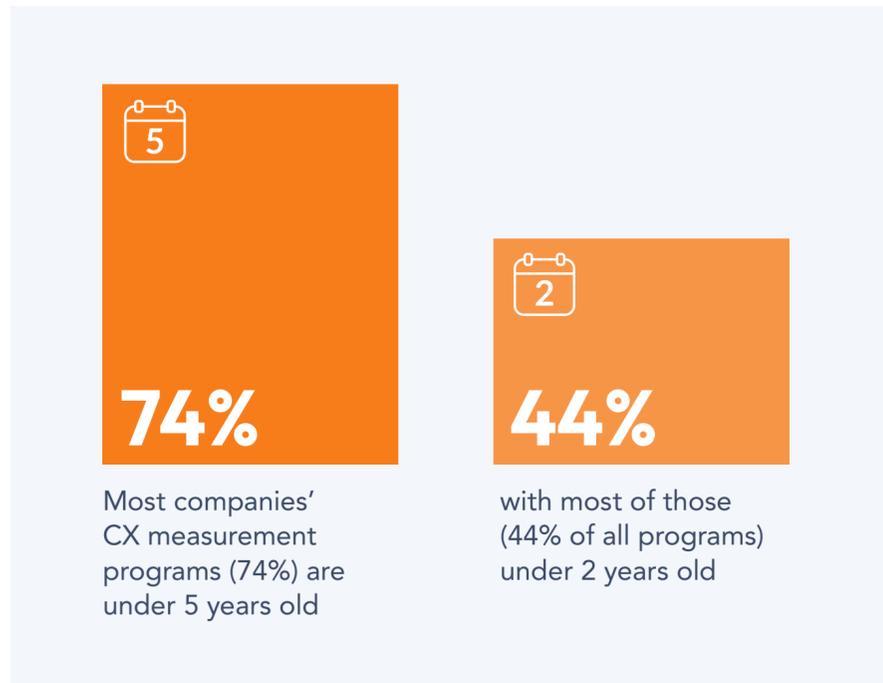
How does your company's CX measurement culture compare to everyone else's? And what should you be measuring?



# Check out these statistics from Forrester Research

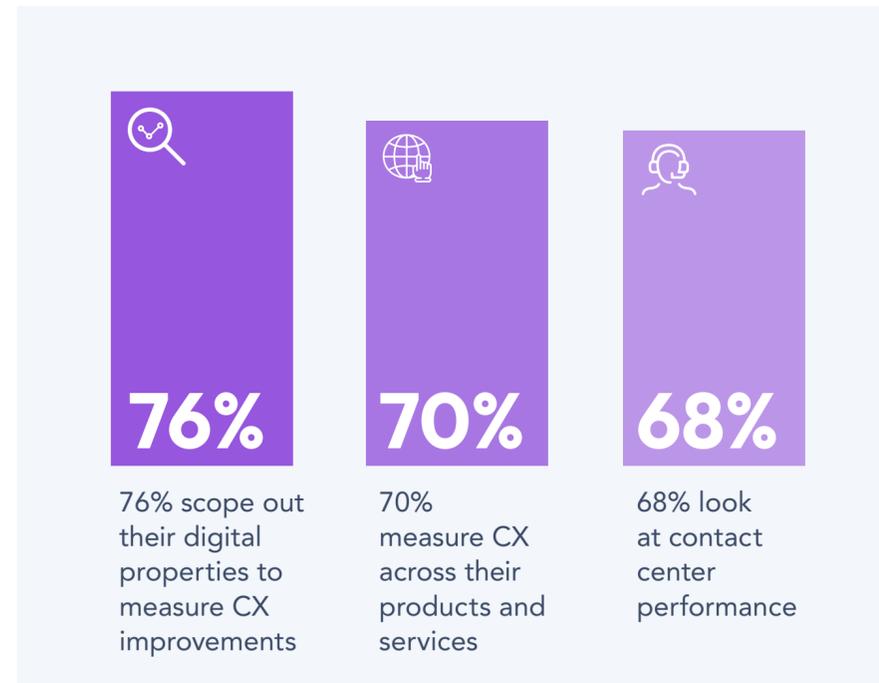
## How long have you measured CX?

According to Forrester, most companies' CX measurement programs are under 5 years old (74%), with most of those (44% of programs) under 2 years old. Of those surveyed, only 59% of programs rate the maturity level of their Voice of the Customer and/or CX measurement program to be medium to very high.<sup>3</sup>



## How do you measure CX success? Top 3:

76% of companies scope out their digital properties to measure CX improvements, 70% measure CX across their products and services, and 68% look at contact center performance. Email, customer interviews, and website popup / intercept surveys are the top methods (89%, 65%, and 46%, respectively). Passive methods? Complaints, customer emails, and social media posts (59%, 46%, and 42%).<sup>3</sup>



## What do executives care about?

NPS (44%), CSAT scores (17%), and customer retention or churn data (12%) are the top CX concerns among executives.<sup>3</sup> Interestingly, retention trended up in importance (2019-20) and both CSAT and NPS trended down.<sup>4</sup>



<sup>3</sup> Source: "The State Of CX Measurement And VoC Programs, 2020." Forrester Report. May 3, 2021.

<sup>4</sup> Source: "How To Select The Right CX Beacon Metric." Forrester Report. August 2, 2021.

<sup>SM</sup>Net Promoter, NPS, and the NPS-related emoticons are registered U.S. trademarks, and Net Promoter Score and Net Promoter System are service marks, of Bain & Company, Inc., Satmetrix Systems, Inc. and Fred Reichheld.

# Gearing Up: How do you measure CX performance?

There are different kinds of metrics across all of the different ways customers interact with - and feel about those interactions with - a company's digital experiences.

## Three types of measurement:

Interaction metrics look across all the ways a customer can interact with your company and measures what happens during these interactions.

Perception metrics measure how customers feel about those interactions, to see whether CX is delivering on customers' expectations.

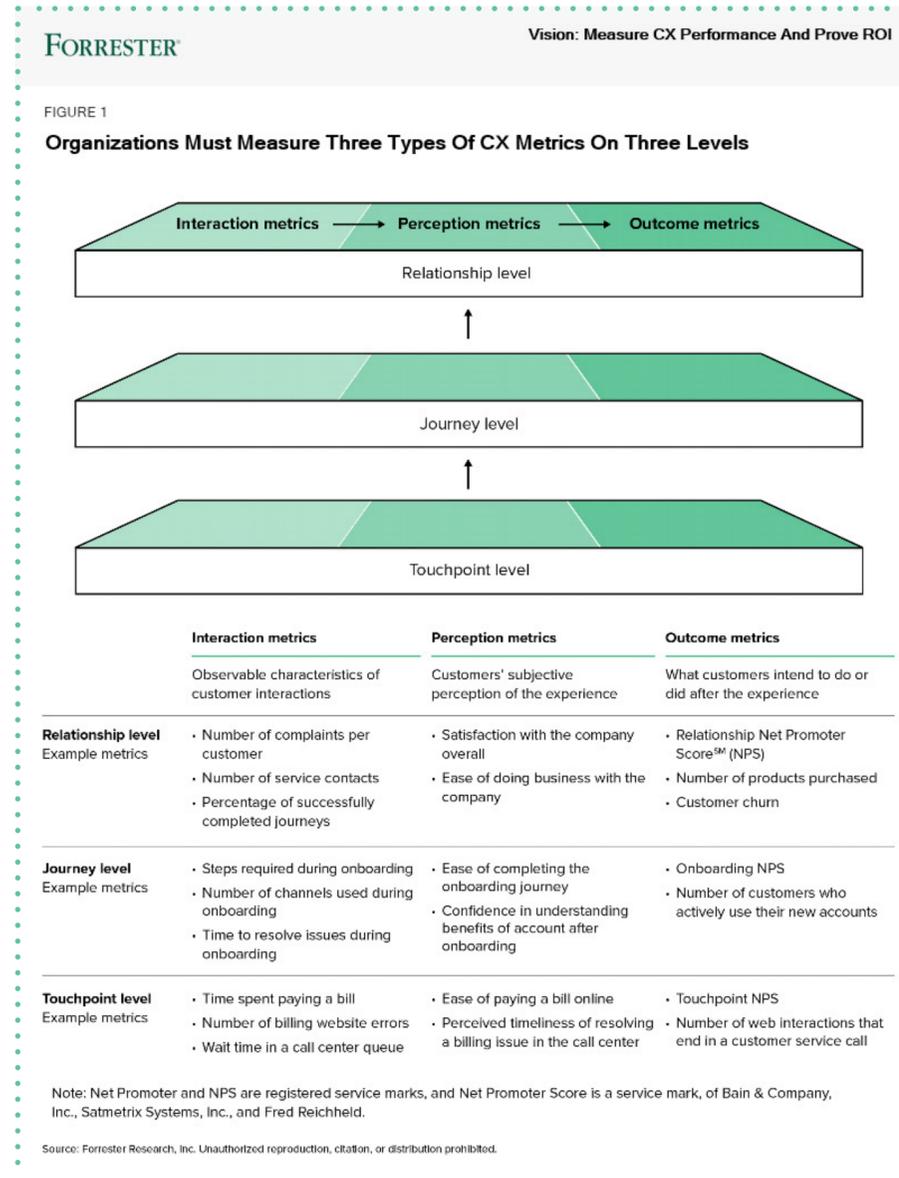
Outcome metrics measure what customers do as a result of their experience, and they are most commonly used to tie CX perception to measures of business success.

## Three levels of measurement:

Customers have uniquely tactical, individual Touchpoint-level interactions with companies, about which they have certain, measurable perceptions and resulting outcomes - good or not.

Put enough touchpoints together, and you have a Customer Journey - mapping to one, discrete goal the customer was trying to meet through their interaction with the company - applying for a mortgage, for example, or choosing an insurance provider.

And with one or more touchpoints, ideally organized into a completed (or at least well-begun) journey with a company, Relationship-level metrics can be captured, to see the overall health of the relationship between company and customer.



# Consulting the sherpa

Start here to learn best practices and choose the right CX journey to improve.

Baseline its performance and measure improvements as you make them.



# Best Practice: Measuring customer journeys

Experts recommend starting with a Customer Journey: a discrete, measurable path that represents one starting point, and one ending point, for a customer, with measurable "signals" along the way that can be impacted by better CX.

## What is a journey?

Journeys are comprised of digital touchpoints - measurable online or in-app interactions along the customer's path to completing the journey that you can use to gauge its success. And, Journeys result in measurable outcomes that can be used to demonstrate whether or not the journey was a success. Those outcomes equate to business results: completed transactions, successfully trained users, answered support questions.

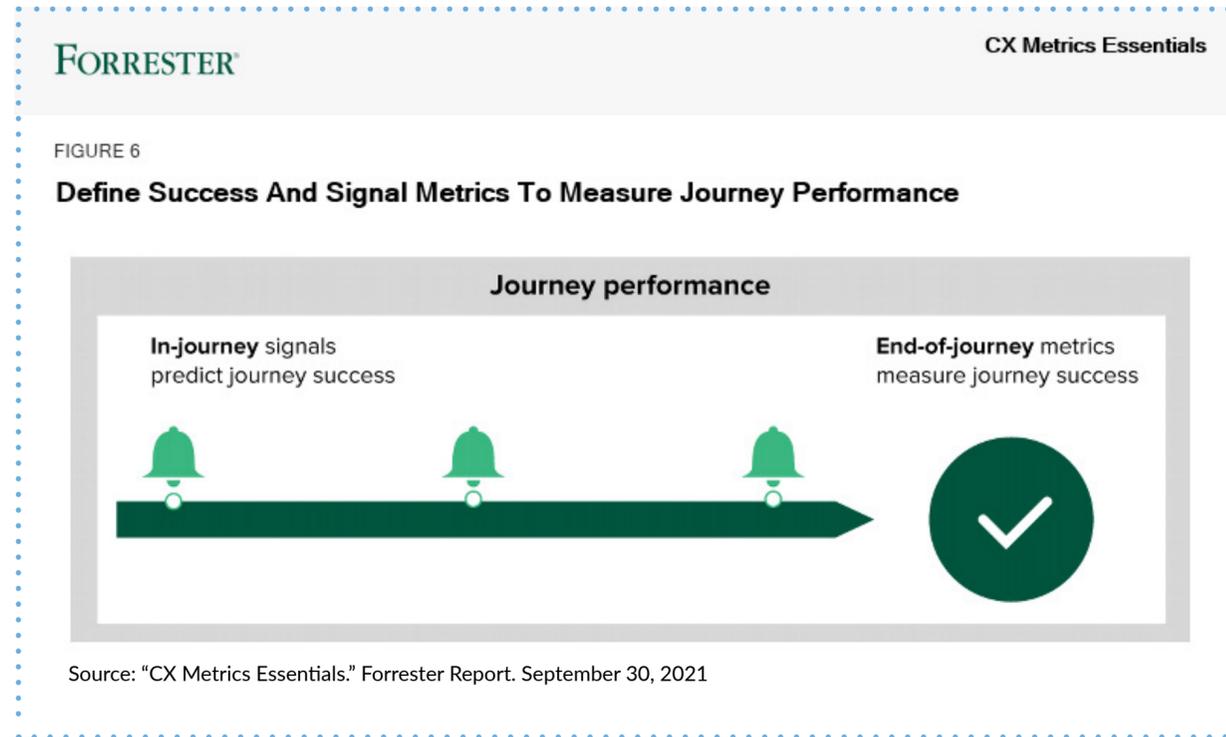
## Why journeys?

- **Right-sized:** A journey has discrete start and end points. You can make a business impact by improving a customer's journey.
- **Customer-centric:** Journeys reflect what the customer is trying to achieve - not just the business. By improving a journey, you're helping customers meet their goals.
- **Signals:** Several measurable touchpoints along the journey can work as "signal metrics" to gauge success. Improvements can be quantified.

- **Outcomes:** Measurable results at the end of a journey demonstrate clearly whether it was completed - or not. Success (or failure) can be correlated to signal metrics for deeper insights
- **Impact:** Journeys can impact both customer and company: request a demo, complete a transaction, get trained, ask for support, complete an upgrade are all examples of journeys.

## Choosing a journey:

Where customer needs and business needs align, you have a great journey candidate for improvement. Where a customer need and a business need to not align, it might be time to reevaluate the business. Customers may want the interaction, and you can find new ways to make it valuable to the business. But don't annoy the customer with it. They want to spend as little time as possible here. McKinsey calls this evaluation process the value / irritant matrix. Here's an example using time spent on support calls ...



	To the customer: <i>Value</i>	<i>Irritant</i>
<i>Value</i>	<p>Time on call spent learning: customer can DIY &amp; company avoids future support calls.</p> <p>Focus on improving the learning experience.</p>	<p>Time on call spent selling: customer called for another reason, company uses the opportunity to pitch them.</p> <p>Avoid out-of-context pitches.</p>
<i>To the business: Irritant</i>	<p>Support call: customer has additional questions and keeps the company on the line longer.</p> <p>Consider providing self-service resources here.</p>	<p>Customer identifies a bug in the digital experience: both have a trying time resolving it.</p> <p>Consider automating bug reporting.</p>

# Charting the course

So where do you begin when selecting a Journey to Improve?

Choose the journey that will impact your customer lifecycle the most: improving painful moments like those with deep emotional impact, high rates of digital frustration, and high-value transactions for customers or the company.



# Where do you begin when selecting a journey to improve with Guided CX?

## #1 Where is “Doing it Together” better than DIY?

Customers are seeking value from their interaction with your digital environments. Four types of value customers seek, as cited by Forrester, are:

- Economic Value - is the process to get to what I want efficient, or is it wasting my time?
- Functional Value - is the process productive - do I believe I'll get the ROI I'm looking for, or does the process seem untrustworthy?
- Experiential Value - am I having a great experience in their digital property - is it pleasant, or is it annoying me?
- Symbolic Value - do I feel a sense of relationship with this company, or do I feel better disassociating myself from them?<sup>5</sup>

## #2 Where are the high-value moments, where frustration and abandonment are high?

Where do these feelings of “my time is being wasted”, “this is unproductive”, “this experience is unpleasant”, and “I don't feel connected with this brand” pop up? Are they indicated by a dropped call, length of time items are stuck

in a shopping cart, a halfway-filled out form?

These are perfect moments to meet your customers in your digital experiences and cobrowse or screenshare together to help them navigate more quickly, get to the results they're seeking, enjoy the experience of chatting with someone in live video chat, and demonstrate the feeling of belonging - that personalized touch that shows your company cares. And when these journeys are highly personal, emotional, of high-value to customers and companies - like their job, their finances, their home, their insurance, their health, their family - demonstrating this empathetic touch with the face-to-face connection of a real person sharing the digital space with them is the perfect way to ensure they don't abandon your site - or your brand.

## #3 Where can I give customers what they value most?

Delight is not all its cracked up to be. The emotions that drive customer loyalty, according to Forrester, are confidence, and a sense of being understood, respected, and valued. According to studies, “Making customers feel confident, understood, respected, and valued drives



loyalty.” Contrary to popular belief, “contentment, happiness, and delight don't consistently drive loyalty.” Even satisfaction, while desirable, “is not sufficient” by itself to drive loyalty ... though “disappointment destroys” it. Forrester recommends that companies “Focus on the moments that spark and shape emotions most,” including functional steps like paying, driving ease of understanding and reducing the amount of time spent in a journey.<sup>6</sup>

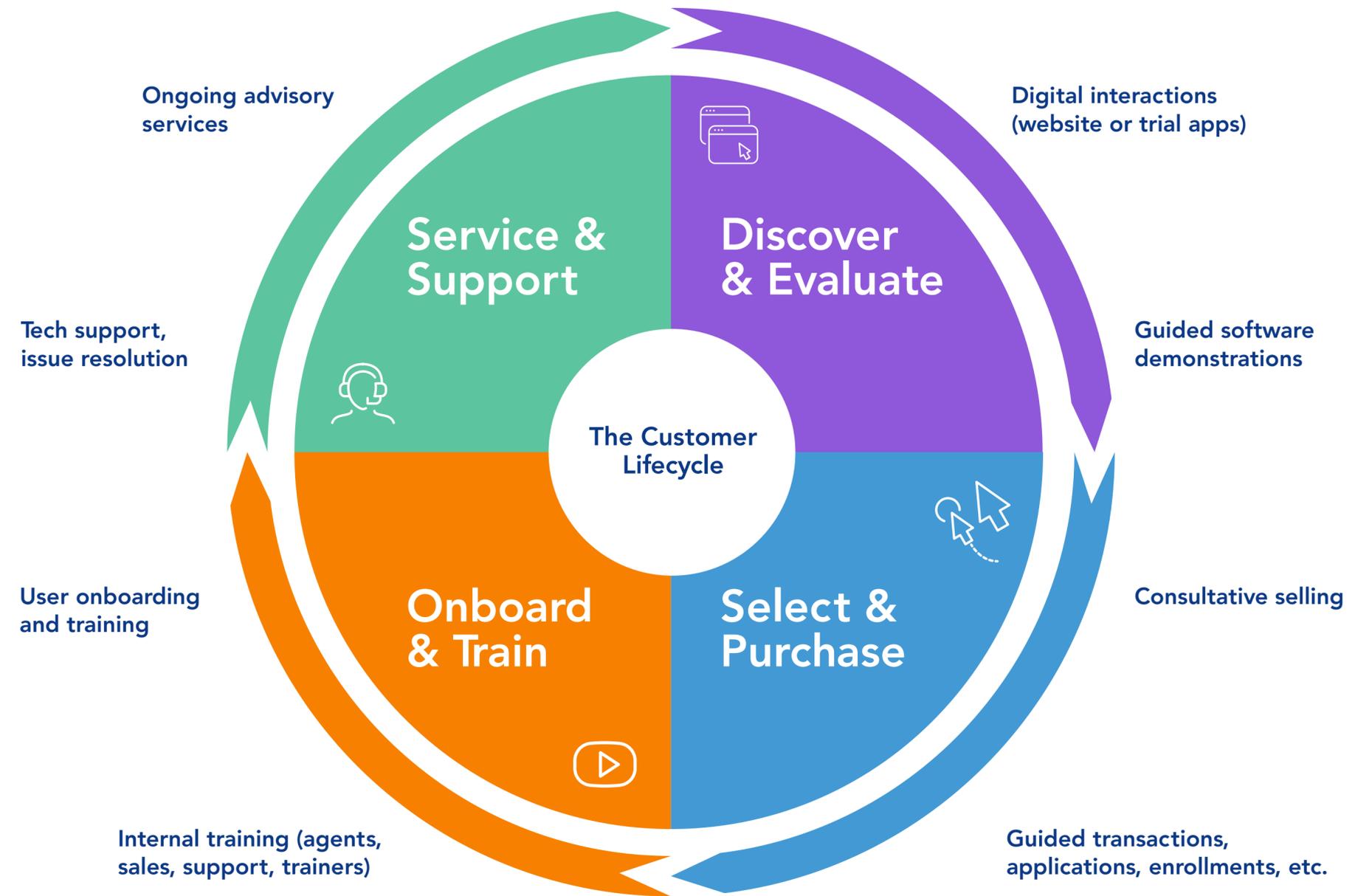
Guided CX with Glance facilitates ease of understanding and reduces time spent in a “DIY” journey by adding a human component - one that can improve customer confidence and help customers feel valued, respected, and understood - as an agent of the company reaches out directly into the digital space to help resolve their problems during key moments in the customer journey.

<sup>5</sup>Source: “Buyer Value: The Missing Link In Driving B2B Performance.” Forrester Report. December 22, 2021.

<sup>6</sup>Source: “The Emotions And Moments In The Customer Journey That Really Drive Loyalty.” Forrester Report. January 19, 2022.

# Examples of journeys across the customer lifecycle impacted by Glance.

Glance customers seek to improve customer journeys throughout the customer lifecycle. See how Glance customers seek to improve customer journeys throughout the customer lifestyle:



# Celebrating the summit

Companies that use Guided CX improve outcomes across their customer journeys make an impact with measurable results.



# Making an Impact on the Customer Journey

Customer experience improvements impact cost-savings, revenue generation, and business resiliency. So let's see what the market deems most important when measuring the business impact of CX improvements. In studies by Metrigy Research, along with results realized by Glance customers, companies' results and the business impact of Guided CX solutions are clear:

## Why do companies choose visual engagement software?

The results are in. According to Metrigy<sup>7</sup>, companies surveyed say their reasons are...



**TO IMPROVE CSAT**



**TO INCREASE REVENUE**



**TO IMPROVE TIME SPENT ON CALLS**



**TO DECREASE OVERALL COSTS**

## Other results cited by Glance customers

- Upsell / Cross-Sell Revenue
- FCR (First-Call Resolution)
- Improved Customer Effort
- Increased Customer Ease
- Reduced Customer Churn
- Improved Employee Satisfaction
- Increased Repeat Sales
- Higher Average Deal Size

# Results across the customer lifecycle with Glance Guided CX Solution

## Increase resiliency

- 18 point improvement in transaction Net Promotor Score (tNPS)  
– Intuit
- 13% increase in CSAT scores  
– A US Investment Firm
- 36.4% increase in customer ratings  
– Metrigy Research

## Improve service & support efficiency

- 50% increase in Average Handle Time (AHT)  
– Truckstop.com
- 10% improvement in case resolution rate  
– Intuit
- 27.3% increase in agent efficiencies  
– Metrigy Research



## Enhance the selling process

- 60% improvement in speed to purchase  
– Construct Connect
- 66% improvement in demo to new lead ratio  
– Construct Connect
- 40% improvement in lead conversion rate  
– Construct Connect

## Boost revenue generation

- \$15M revenue improvement from repeat customers  
– A Major Bank in NA
- \$18M revenue from better customer loyalty  
– A US Investment Firm
- 43.6% increase in revenue generation  
– Metrigy Research

GET STARTED

# Why Glance is different...



A frictionless experience for your customer

Provides a seamless, branded Guided Customer Experience that requires no downloads and launches in under 5 seconds.



And frictionless for your subject matter expert, too

Glance easily integrates with any CRM, agent desktop or contact center tech. Sharing sessions are automatically logged in your CRM for measuring impact on KPIs.



Protected by state of the art security for customer trust (and regulator reassurance)

Sensitive information is automatically masked, so your experts never see what they're not supposed to. Glance passes every InfoSec audit.



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