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From Customer Experience to Connected Experience

The Executive's Guide to Breaking Silos & Delivering Business Results

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Introduction

With enterprises across industries facing continued uncertainty, CEOs are hyper focused on three core areas: driving revenue, reducing costs, and improving their organizational cultures to attract and retain top talent. Since 2020, businesses have faced ongoing challenges, from pandemic disruptions and global supply chain issues to managing accelerated digital transformation and the shift to remote working. They are up against more than ever, and trying to do more with less.

Regardless of the current environment, consumers expect organizations to deliver the best products, services, and experiences, while boardrooms demand businesses continue to meet their objectives to maximize shareholder value.

The only strategic initiative today that has the potential to significantly deliver on all three of the CEO's core business objectives and meet consumer expectations: connecting experience across every team, technology, and touchpoint. This is how enterprise organizations can drive revenue growth, profitability, and talent retention.

But this transformation is not for the faint of heart. It takes an enterprise-wide effort to become this experience-centric, requiring buy-in, commitment, and leadership from the entire C-suite.

The catalyst for this change is often the emerging role of the chief experience officer — the CXO, or similarly, the chief customer officer — but it can be driven by anyone in the C-suite, or the company's most senior leader focused on customer experience. These leaders can bring the entire enterprise together, drive transformational change, and deliver mission-critical results beyond Net Promoter Score (NPS®) and employee satisfaction.

Due to organizational structures and department silos, companies are inherently biased toward thinking only about customer experience by channel or business unit, often analyzing and optimizing separate functions such as the contact center or digital channels in isolation instead of taking a more holistic approach. But that is not the customer's actual experience. For them, the overall brand experience is made up of each and every point of interaction in their buying journey.

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For example, the hotel guest's journey begins the moment they first search for a hotel property online, and is inclusive of all the steps they take along the way, from researching and booking to checking in, visiting, checking out, and reviewing the property post-stay. They are not thinking about the brand's digital experience as being separate from the contact center experience when they call to ask about their loyalty status — it's all one experience with the brand.
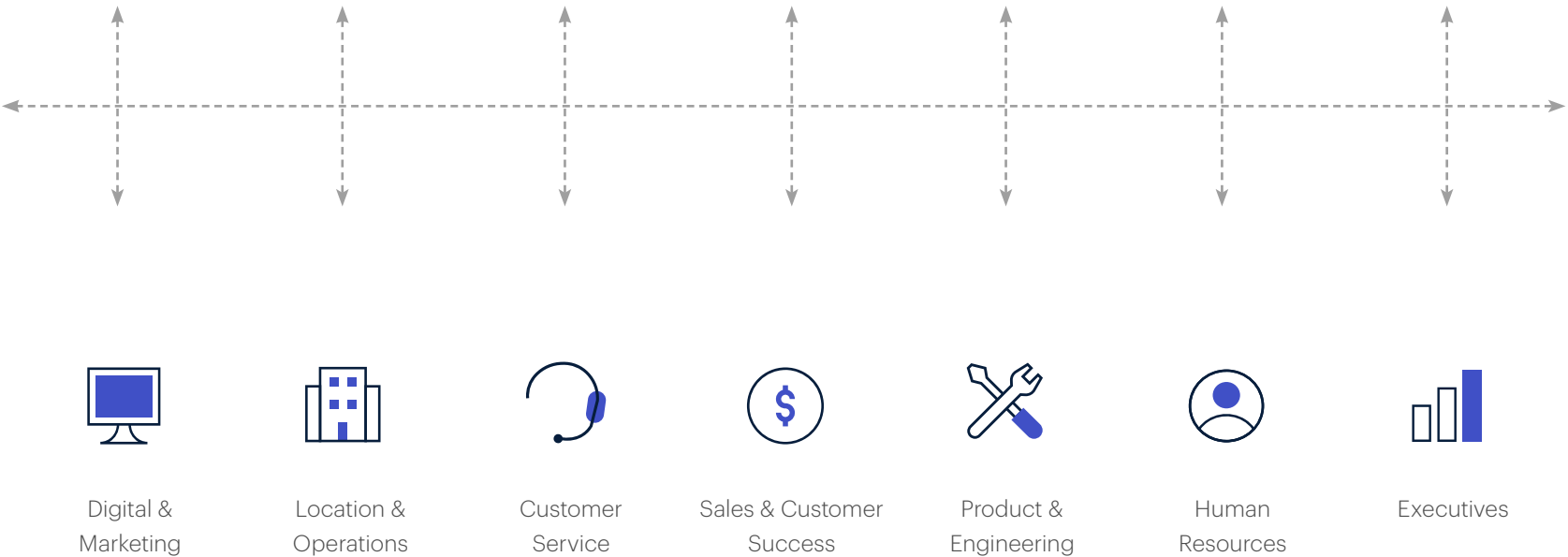
Customers expect a seamless experience across all of these touchpoints. They want brands to know them across channels and provide frictionless interactions.

The only way to meet the expectations of tomorrow's consumers is to become an experience-centric organization today.

By connecting experience across the enterprise, organizations can turn insights into impact and drive the results that matter most to the CEO — achieving revenue gains, generating cost savings, and elevating company cultures.
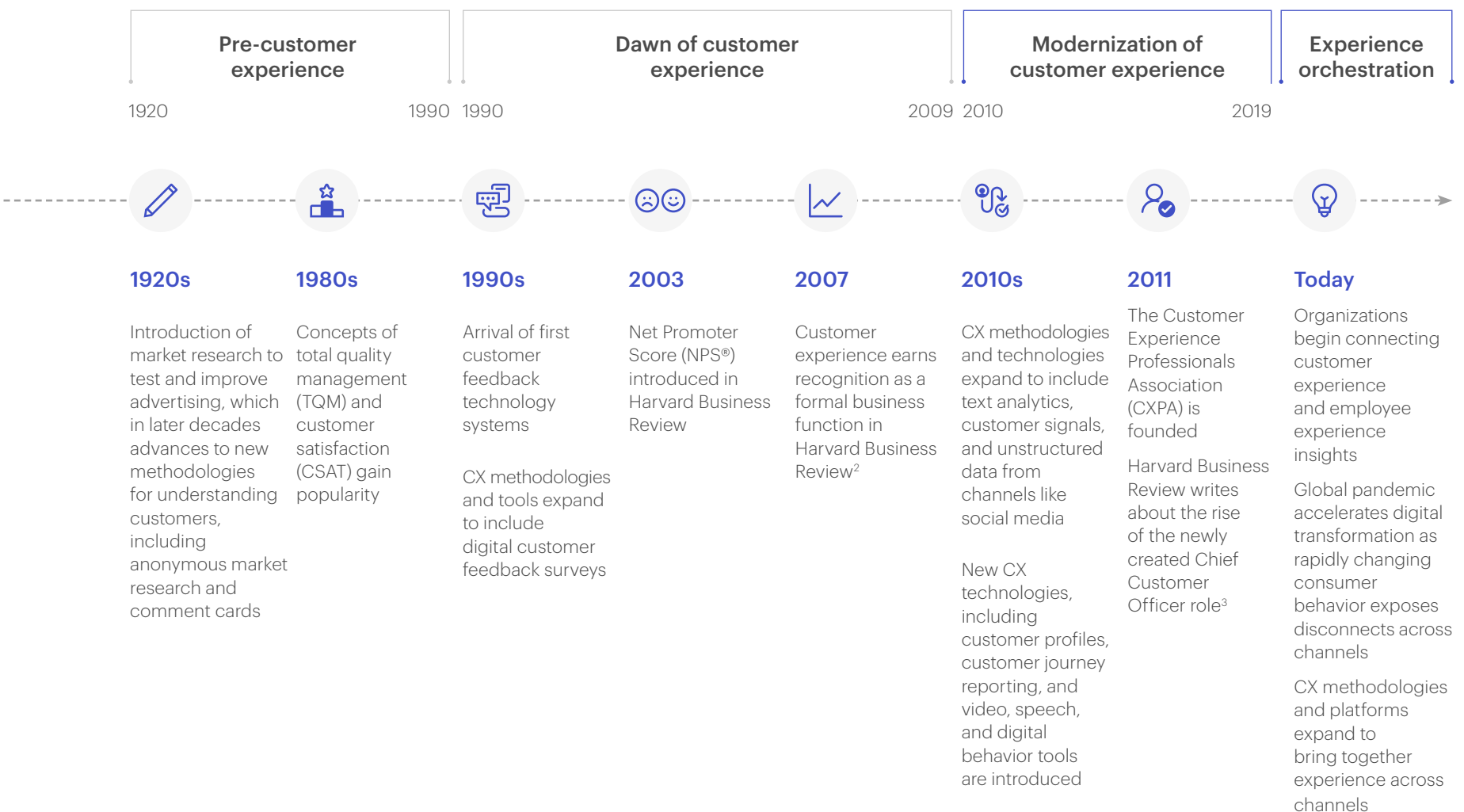
In this guide, we'll explain everything leaders need to know to get started, from exploring what connected experiences are, why they matter, and how you can break down silos to deliver a connected experience that drives the results that matter most to your business.

Connect experiences across the business

| Digital & Marketing | Location & Operations | Customer Service | Sales & Customer Success | Product & Engineering | Human Resources | Executives |

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Part I: The evolution of experience

From the dawn of customer experience to the future of experience, a timeline[1]

Pre-customer experience	Dawn of customer experience	Modernization of customer experience	Experience orchestration
1920 1990	1990 2009	2010 2019	

1920s
Introduction of market research to test and improve advertising, which in later decades advances to new methodologies for understanding customers, including anonymous market research and comment cards

1980s
Concepts of total quality management (TQM) and customer satisfaction (CSAT) gain popularity

1990s
Arrival of first customer feedback technology systems

CX methodologies and tools expand to include digital customer feedback surveys

2003
Net Promoter Score (NPS®) introduced in Harvard Business Review

2007
Customer experience earns recognition as a formal business function in Harvard Business Review[2]

2010s
CX methodologies and technologies expand to include text analytics, customer signals, and unstructured data from channels like social media

New CX technologies, including customer profiles, customer journey reporting, and video, speech, and digital behavior tools are introduced

2011
The Customer Experience Professionals Association (CXPA) is founded

Harvard Business Review writes about the rise of the newly created Chief Customer Officer role[3]

Today
Organizations begin connecting customer experience and employee experience insights

Global pandemic accelerates digital transformation as rapidly changing consumer behavior exposes disconnects across channels

CX methodologies and platforms expand to bring together experience across channels

[1] https://customerthink.com/a-brief-history-of-customer-experience
[2] https://hbr.org/2007/02/understanding-customer-experience
[3] https://hbr.org/2011/04/the-rise-of-the-chief-customer

Part II: The future of experience

Most likely, your company understands the importance of customer and employee experience and probably has teams and technology in place to capture and analyze feedback from your customers and employees. Your business is also likely monitoring and measuring website behavior, and sampling and analyzing some contact center interactions.

Depending on the maturity level of your organization, however, these efforts are likely happening in silos, across different teams using disparate technologies. And because of that, it's extremely difficult to integrate critical data from systems across the enterprise to gain key customer and employee experience insights, let alone take action on them.

But as a senior executive or the chief experience officer, you have the power to advance how things have been done, breaking through the silos and bringing experience together across the organization to deliver not only a truly connected experience, but measurable business results.

What are connected experiences?

Every day, customers have experiences with brands throughout the customer journey, whether that's by visiting a website or app, interacting in person, or conversing via a phone call, SMS message, email, social media, or live chat session — or across a combination of these touchpoints.

Connected experiences result when organizations thoughtfully and purposefully ensure customers have a consistent experience throughout each and every one of these interactions.

On the back end, companies must align on and advance design principles that support these connected experiences. This requires thinking about journeys horizontally across a business and bringing together the right people, technology, and processes to deliver experiences that support and strengthen the brand. These efforts are inherently invisible to the customer, but the results are clear — a seamless, frictionless experience for the customer.
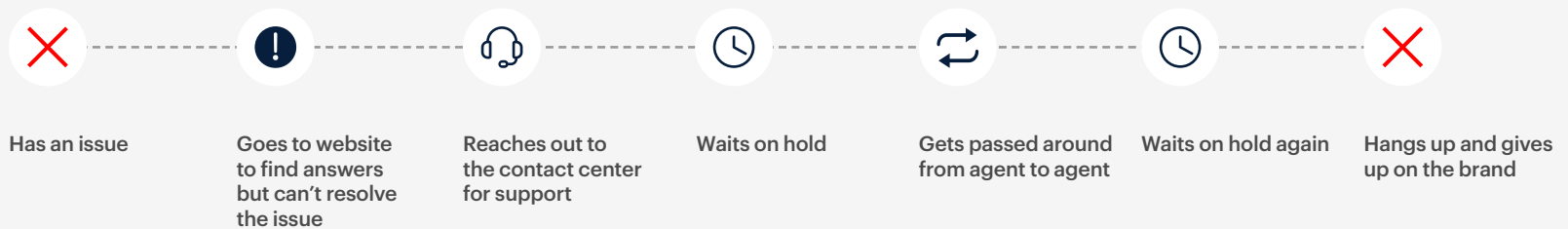
- From a customer perspective, connected experiences are designed so that the customer feels like they're interacting with one cohesive organization. They're receiving consistent messaging aligned to the company's mission and values.

- From a workforce perspective, connected experiences are possible when all employees are empowered to deliver experiences that align with the company's mission and values.

- From a business perspective, connected experiences are efficient, driving revenue and fueling cost savings by removing obstacles that create points of friction throughout the customer journey.

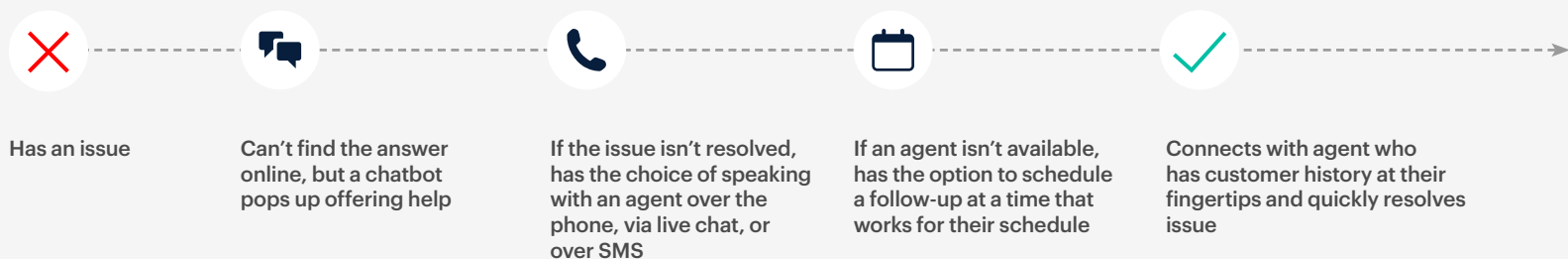Connected experiences are personalized — they're tailored to each customer.

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Connected experiences in action: See the difference

CUSTOMER A

| Has an issue | Goes to website to find answers but can't resolve the issue | Reaches out to the contact center for support | Waits on hold | Gets passed around from agent to agent | Waits on hold again | Hangs up and gives up on the brand |

CUSTOMER B

| Has an issue | Can't find the answer online, but a chatbot pops up offering help | If the issue isn't resolved, has the choice of speaking with an agent over the phone, via live chat, or over SMS | If an agent isn't available, has the option to schedule a follow-up at a time that works for their schedule | Connects with agent who has customer history at their fingertips and quickly resolves issue |

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Why connected experiences matter

Experiences that aren't designed, executed, and managed horizontally across the entire organization result in poor customer experiences.

It's an unfortunate reality for most brands across most industries that experiences are designed and optimized individually across different business units.

Take financial service brands, for example. The banking customer experience is typically broken down by the bank's internal divisions, with separate teams overseeing credit cards, mortgages, auto loans, wealth management, and so on. As a result, banks miss the opportunity to serve holistic experiences for customers. Within the bank, employees may not even be aware that a wealth customer also has an application in process for a mortgage or that a customer who is visiting a branch in person is doing so because they had issues using the bank's app.

76%
of customers expect consistent experiences across departments

73%
of customers will switch brands if they don't get it[4]

Aligning teams, systems, and processes in support of connecting experiences is vital today to not only retain your top customers and employees, but to drive truly transformative change.

[4] https://www.salesforce.com/resources/articles/customer-expectations

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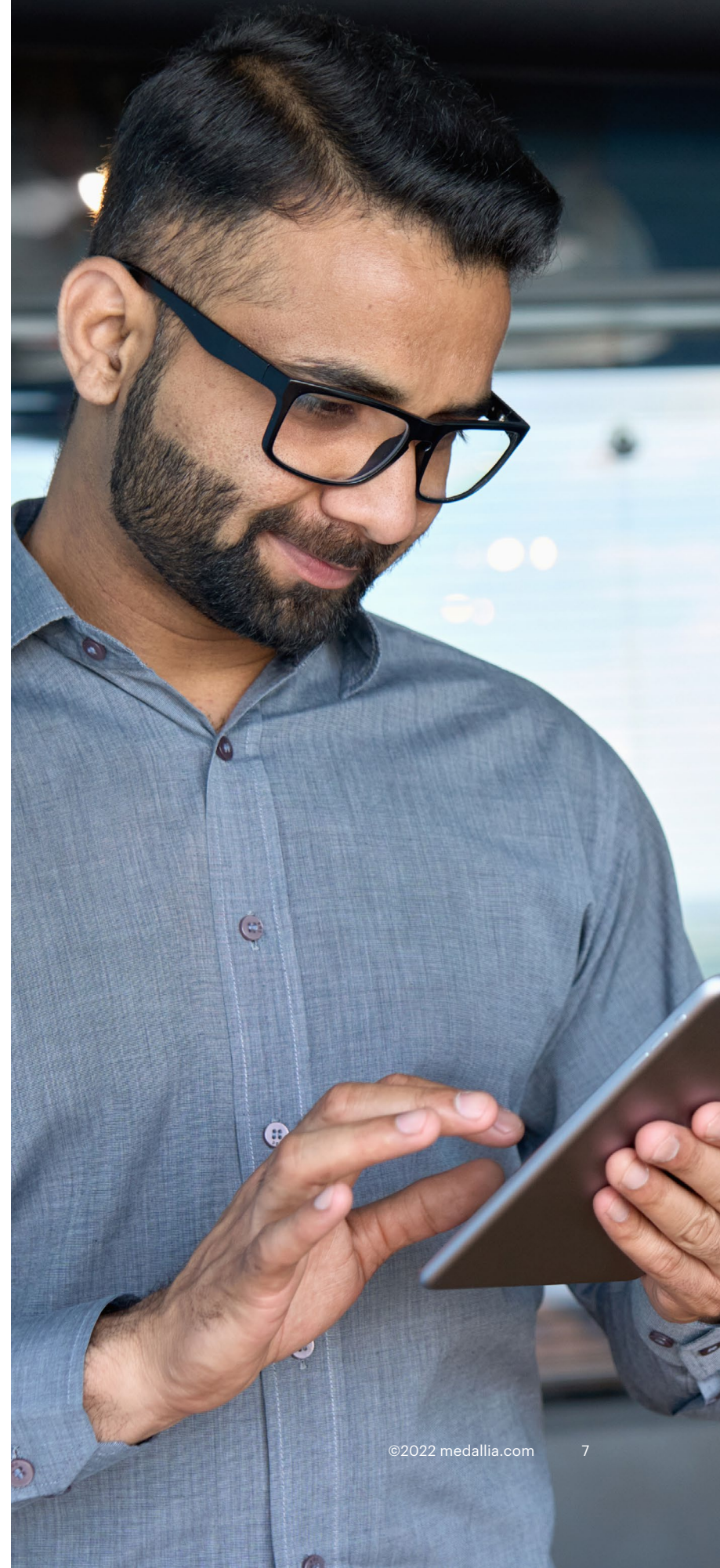
The truth about siloed customer experiences

What the customer experiences

What the company sees

Sign Up

The form contains 4 errors

- Name can't be blank
- Email is invalid
- Password must contain an uppercase letter
- Password is too short

Name

Email
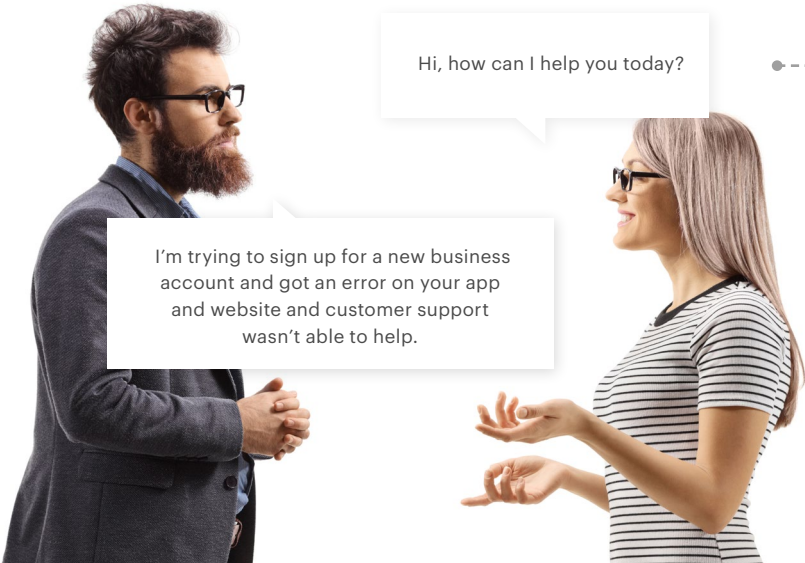
Password

Create my Account

A website experience issue

An app experience issue
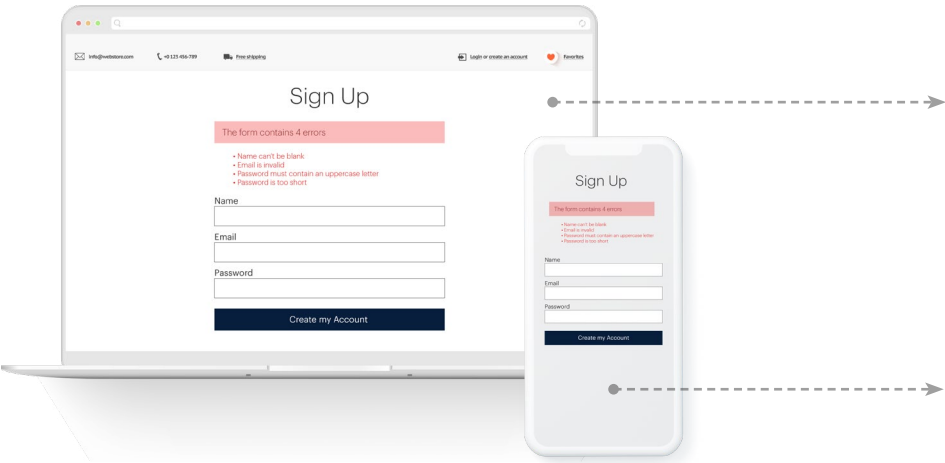
Hi, how can I help you today?

Your app and website aren't working, and I need to sign up for a new business account.

A contact center experience issue

Unfortunately, I can't help. You'll need to visit us in person.

Hi, how can I help you today?

I'm trying to sign up for a new business account and got an error on your app and website and customer support wasn't able to help.

Until businesses connect experiences across the journey, organizations will remain in the dark about points of friction and will be unable to improve the customer experience.

While businesses may be trying to optimize experiences within silos — such as improving the app experience or the contact center experience — rarely is there a single person or team taking responsibility for connecting experiences so that the customer has a better experience across the brand.

The same is true across industries. In healthcare settings, patients may have one type of experience when interacting with a provider's app or website to schedule appointments and view medical records, and then a completely different one with the support staff during the check-in process and when interacting with the organization's nurses, physicians, or other healthcare professionals. There may yet be further disconnects when dealing with other departments over the phone, such as when reaching out to the billing department after a visit is complete.

Within other industries such as hospitality, restaurants, and automotive, silos between corporate brands, distribution partners, and franchises can further fracture experiences.

When experiences aren't connected, there's greater operational risk for businesses, slower time to insights, and extra costs for the organization.

Many companies today are making technology decisions based on organizational structures, with tools tied to business units.

As a result, customer experience and employee experience tech stacks are disconnected. These siloed platforms expose organizations to operational risk, prevent leaders from analyzing and optimizing experiences, increase expenses, and require extra oversight and governance.

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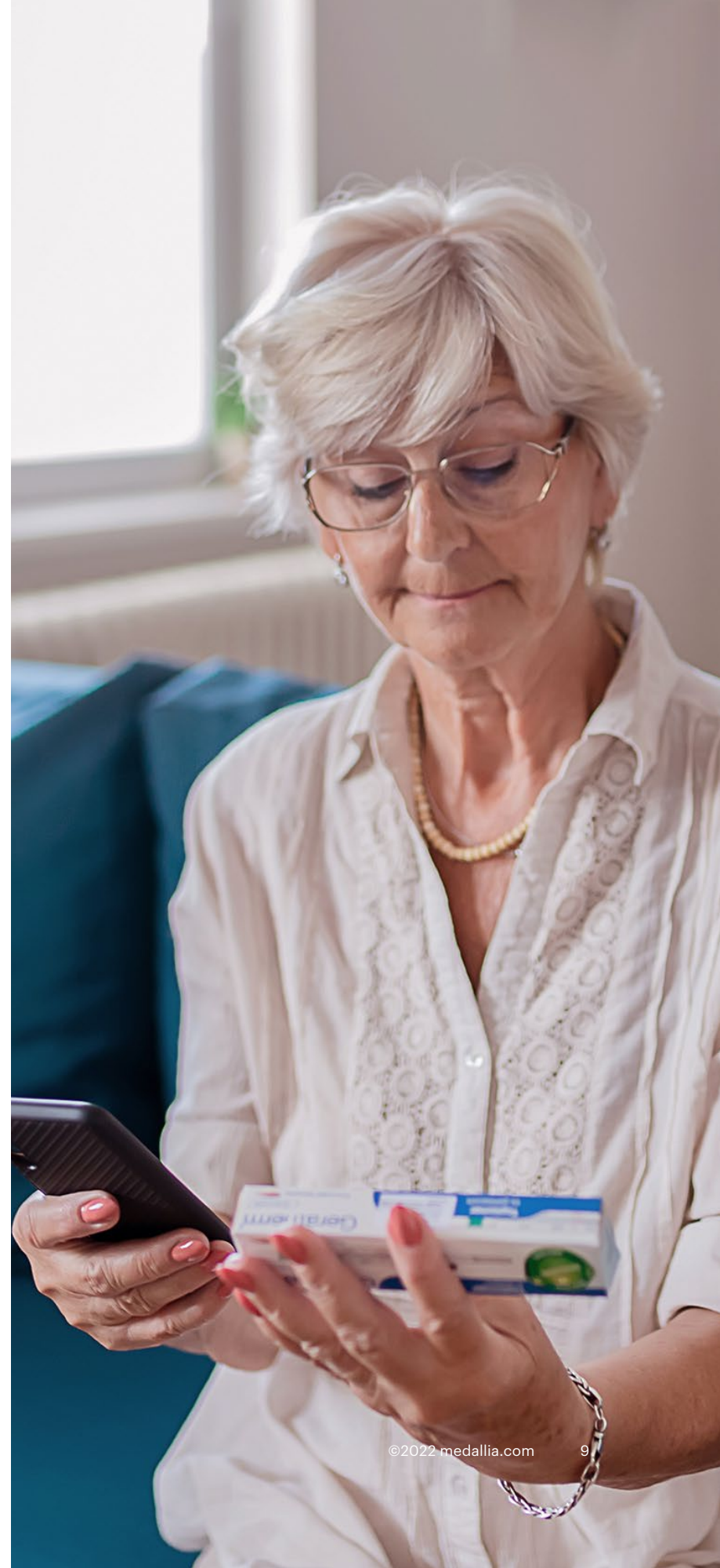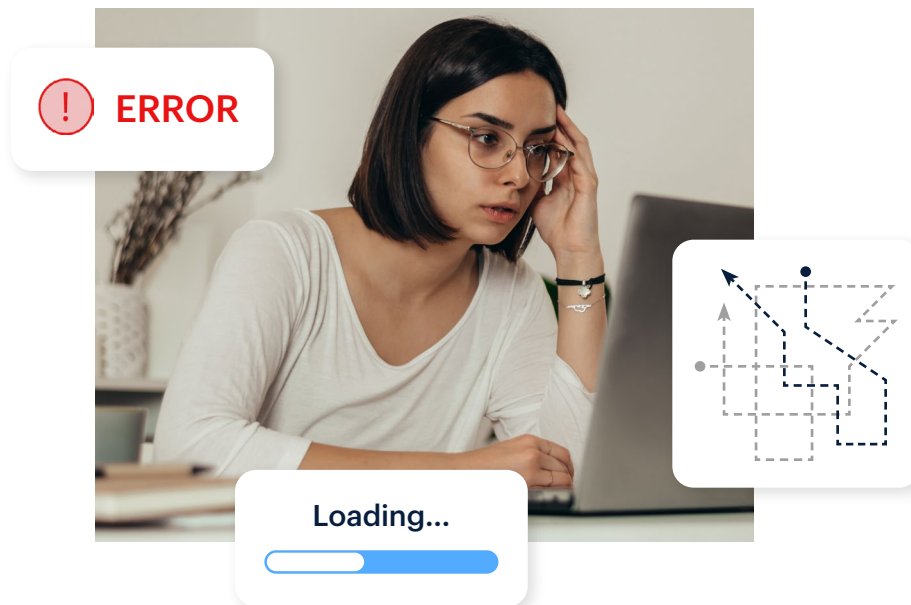
Why Companies Are Consolidating Their Customer and Employee Experience Tech Stacks Now

01. To reduce operational risk — the more systems in play, the greater the risk, given the complexity of the compliance involved and the greater number of resources needed to manage systems and keep them secure and up to date.

02. To get a more accurate, single view of customer and employee experience — too often different tech systems aren't set up to share information and pass data seamlessly.

03. To reduce the cost of technology by reducing the number of platforms the organization is investing in.

04. To streamline data governance and access.

05. To reduce the time from insight to action by streamlining data-sharing and processing across the org.

Breaking down silos between departments and changing organizational structures takes a lot of work. However, making sure your technology systems can talk to each other to ensure a free flow of information is a lighter lift, and one that's critical to breaking down customer and employee experience barriers.

Disconnected experiences: breakdowns between in-person, digital, and the contact center

When data is siloed, each team that touches the customer experience isn't sharing their insights with relevant teams. That's a missed opportunity, since contact centers, digital, and in-person teams each offer a wealth of information for other areas of the business.

When a customer reaches out to customer support and says, "I tried to do this on your website" or "I couldn't get this to work on your app," those aren't just contact center data points, they're digital experience data points. Similarly, if a customer comes to an in-person location to return a damaged or incorrect item they received from an online order, that's data that should be shared. But traditionally, the contact center, digital team, and physical locations (retail stores, banks, hotels, and so forth) each select their own tools. And the various systems aren't necessarily connected.

Since the start of the pandemic, as organizations have accelerated their digital transformation efforts, issues like this arise time and again: digital teams change something within a company's website or app without keeping the contact center team and in-person locations informed. The digital team, unaware of any issues, continues monitoring their KPIs in a silo while the contact center faces a rise in calls when issues related to the change come up, and the brand's physical locations see a surge in returns that they don't have the insights to understand.

Is that a win for the business? It may be a win for the digital team, but it could be a loss for the contact center and physical locations at the expense of the customer. That's why unifying experiences is essential — otherwise, organizations lack visibility to breakdowns in the customer experience and miss opportunities to make things better for customers and employees.

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5 Reasons Companies Fail to Connect Experiences

01. No one owns the entire experience

02. Customer experience and employee experience data aren't centralized

03. Leadership is unsure about what efforts to prioritize

04. Frontline teams have limited access to the CX insights needed to do their job better

05. Businesses lack alignment and accountability across functions

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Part III: How to advance your experience efforts

Whether you're taking over the customer experience function at a new employer or at your existing organization, you may find you're leading your team through a time of great change.

You likely have to bring many separate functions together — digital, design thinking, traditional CX (such as VoC analytics), transformation and agile groups, and in some cases, customer operations — and develop a cohesive understanding of the customer.

It's up to you to create the strategy to drive and improve customer experience across all touchpoints. Here's your roadmap to get started.

Phase 1: Gather information about the state of CX within your organization

- Which teams are involved? Who are the leaders on those teams?

- Who are the partners and stakeholders, internally and externally, that need to be engaged?

- What customer communications exist, and who is sending them?

- What technologies are being used?

- What types of experience data exists? Where does this data live?

- What is the nature of data accessibility and usability across all of these functions?

- How much data will be lost or gained by bringing these data sources together?

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Phase 2: Get the entire C-suite on board

Connecting experiences is a team effort — the CX team alone cannot do it all. The whole enterprise needs to be focused on delivering best-in-class experiences. By coming together to collaborate on connecting experiences as a cohesive organization, each individual department's efforts have the power to become transformative.

As the CXO or senior executive driving this transformation, it's on you to bring everyone together to solve problems and advance change. To set yourself up for success, be sure to put these best practices into action.

Don't focus on CX metrics

As someone who's likely spent their career in customer experience, it's natural to explain the value of experience using CX-specific metrics like NPS®, customer satisfaction, and customer effort scores. These are vital within the customer experience function, but at this C-suite level, they aren't your friends.

While these measures have merit and can influence bottom-line business outcomes, you will be much more likely to persuade leadership if you can frame the benefits and opportunities of bringing experience together across the enterprise by tying the work of CX with business outcomes, demonstrating the business value that CX is capable of driving, and tailoring your messaging based on each individual executive's needs and objectives.

Instead, focus on your business top goals, objectives, and KPIs

Think about customer problems as business problems and align these to the strategy of the leader of that line of business.

- What is each C-level leader trying to achieve?

- What does the business want to achieve?

- What's the corporate-wide strategy?

- What are the core company objectives?

- What is the organization trying to accomplish?

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Speak the right language with each C-level officer

Make the pitch to the...	Explain how working together to break down silos and connect experiences will help...
CEO	• Support the organization's top business objectives — driving revenue, reducing costs, and improving the organizational culture • Design experiences consistent with customer expectations • Increase conversions and repeat transactions • Solve complex business problems that not only benefit the customer, but the business, too
CFO	• Ensure your team is aligning your CX efforts to financial outcomes • Measure the value of experience
CTO/CIO	• Minimize technology investments, reducing costs and risks to the company while increasing value and advancing the company's technology stack • Empower the technology team with the right user insights to create the right products for customers • Consolidate the digital journey for customers, making it easier to complete conversions
COO	• Run the business as efficiently as possible • Ensure the organization is engaging customers in cost-effective ways that drive profitability for the business • Design better tools and processes to boost employee productivity • Create products customers want in as little time as possible
CMO	• Attract more customers through more effective marketing • Maximize acquisition and engagement in the most budget-friendly way that optimizes value
CHRO	• Empower employees to create experiences that boost revenue, culture, and DEIB goals • Solve both EX and CX — efforts that must happen in parallel to be successful • Reveal what's happening with customers and employees at scale • Improve the employee experience and increase engagement scores • Identify the employee behaviors that deliver the best experiences
CRO	• Enable salespeople to create the experiences customers expect • Identify revenue leaks and pinpoint opportunities to increase revenue

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Phase 3: Create a cross-functional group to deliver results

Assemble a cross-functional group to discuss experience regularly

Bring together a group of leaders representing all of the relevant business units whose work touches customer and employee experiences.

- Reflect on the experience your organization is delivering

- Review what the business is doing to drive outcomes and what's working and what's not

- Create a shared vision on next steps

- Set up a governance within the cross-functional group

- Meet regularly and keep up to date on progress

- Solve experience issues together as problems arise

- Give stakeholders the chance to propose solutions based on their unique perspectives

- Ensure action is being taken by assigning owners to review proposed solutions and move forward with the best option

- Share what you're learning, what you're doing, strengths, opportunities to improve, and the results

Uncover the biggest opportunities for improvement

Pinpoint your organization's biggest pain points for which you have the most data.

- Do you have access to operational, financial, and behavioral data, as well as CX metrics and survey data?

- What's happening on the employee side? Why are there breakdowns and friction?

- Why aren't team members using data and other capabilities to be able to deliver a better experience? Is there a training gap? Is there a skills gap?

- Finding the answers to these questions will help you hone in on quick wins, so you can show results more quickly

Build a strategy to drive desired business outcomes — and evaluate those efforts

Evaluate your CX tools and the teams under you, and figure out how to align these to deliver outcomes that align to the corporate strategy.

- Create a shared vision with your cross-functional group

- Define your ideal CX team structure and technology stack

- Pinpoint any gaps in technology and personnel

- Address these findings with your cross-functional team so you can drive change within the organization

- Identify the measures that will be used to understand whether your strategy is successful and delivers the desired business outcomes

- Evaluate your strategy and the results of your efforts against the metrics you're using to measure overall business success, whether that's net revenue, retention, or another KPI

- Iterate, test, learn, and deliver feedback and insights to the cross-functional group

Utilizing the CX toolkit to support the entire organization

Advancing the CX playbook and technology to other areas of the business one at a time can often be a process that many CX leaders get wrong. When looking to advance customer experience principles across the contact center, digital, or employee experience, you can't go to those individual leaders and start from the perspective, "I'm here to help you improve the customer experience." That may be your ultimate goal, but it's not theirs.

You have to understand those individual leaders' goals and objectives. Explain how leveraging the CX toolkit can help each stakeholder achieve their business objectives while improving team culture and efficiency.

For example, by connecting CX technology with the contact center and transcribing speech to text and analyzing it, the contact center leader can better understand sentiment. This helps them identify common themes and resolutions that make their agents more effective and happier, reducing time to resolution and increasing both customer satisfaction and agent retention. Similarly, the same CX toolkit can be applied to the workforce: by listening to and learning from employees, the HR leader can improve systems and processes to empower their employees to be more effective, productive, and happy.

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How breaking silos helped one enterprise deliver massive savings

Using the steps laid out here, the CXO of a large enterprise put together a cross-functional group, including representatives from legal, marketing, HR, and CX, to tackle one of the organization's biggest opportunities — a customer experience issue for which the team had a lot of data. This challenge was creating a great deal of friction for employees and customers alike.

The issue they uncovered? A vague company policy that was resulting in a surge of calls to the contact center.

The cross-functional team spent time exploring the company policy and had their chief legal officer weigh in on how much flexibility there was to make the language clearer. Together, they agreed to update the language, with marketing implementing the changes on the company website. The CX team, meanwhile, took the responsibility of communicating this change back to leadership and the broader CX team.

This is a great example of a situation where the data the organization had was strong (the contact center insights about the call volume and the specific issue driving the volume) and the pain point was high (the huge workload for the contact center and the frustration for the customers placing the calls).

Instead of reporting on an increase in NPS or CSAT, the CXO could specifically state how much they were able to reduce the call volume by and assign a clear dollar value.

Let's imagine contact center calls cost this organization $7 on average. If the team was able to reduce call volume by 200,000 annually, they could share that they saved the company $1.4 million in reduced calls.

	Siloed experiences	Connected experiences
Data and technology	• Data isn't centralized • Tech stacks are messy, complicated, and contribute to organizational cost and risk	• Tech stacks are optimized • Data gets analyzed in real time • Brands shorten time from insights to action
Business outcomes	• Customer experiences are broken • Organizations face greater costs, greater waste	• Organizations see improved savings, deliver greater revenue potential

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Centralize data, drive transformational change, and deliver better business results

Customer Experience

Measure, analyze, and orchestrate exceptional customer experiences

Sales & Customer Success

Fuel loyalty, retention, and upsell

Marketing & Digital

Deliver engaging omnichannel journeys at scale

Customer Service

Empower agents and reduce support costs

Connected Experience Suites

Research & Insights

Uncover key insights and trends to inform marketing and CX initiatives

Locations & Operations

Unlock the power of your people to create consistent, personalized experiences

Product

Identify opportunities to drive product-led growth and development

HR & People Analytics

Create a culture of empowerment and retain highly engaged employees

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Meet with a Medallia expert →

Our team of in-house experience experts is made up of leading professionals with deep real-world expertise within their respective industries.

We help PayPal, IBM, Hilton, and more of the world's leading brands deliver mission-critical results — changing culture, driving focused action, creating accountability, and achieving connecting experiences. Learn how you can bring experience together and drive the business results most important to your CEO.

About Medallia

Medallia is the pioneer and market leader in customer, employee, citizen, and patient experience. As the No. 1 enterprise experience platform, Medallia Experience Cloud is the experience system of record that makes all other applications customer and employee aware. The platform captures billions of experience signals across interactions including all voice, video, digital, IoT, social media, and corporate-messaging tools. Medallia uses proprietary artificial intelligence and machine learning technology to automatically reveal predictive insights that drive powerful business actions and outcomes. Medallia customers reduce churn, turn detractors into promoters and buyers, create in-the-moment cross-sell and up-sell opportunities, and drive revenue-impacting business decisions, providing clear and potent returns on investment. For more information visit www.medallia.com

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