CX GOVERNANCE DESIGN FRAMEWORK FOR PROFESSIONAL SERVICES FIRMS

Client Experience Governance Leadership Primer
(A Component of CX Governance Framework)

+

CX Pilots

CX PILOTS

12 WEEK RESET: ESTABLISHING CX GOVERNANCE

ENVISION				ALIGN				ENABLE			
WEEK 1	WEEK 2	WEEK 3	WEEK 4	WEEK 5	WEEK 6	WEEK 7	WEEK 8	WEEK 9	WEEK 10	WEEK 11	WEEK 12

Business Analysis & Validation (Weeks 1–3)

Strategic Scenario Development (Weeks 5–7)

Roadmap Development (Weeks 9–11)

Client Experience Assessment (Weeks 2–4)

Client Personas & Journey Mapping (Weeks 6–8)

Client Experience Program Planning (Weeks 10–12)

Current State Digital/CX Capabilities (Weeks 3–4)

Future State Digital/CX Capabilities (Weeks 7–8)

Governance & Org Considerations (Weeks 11–12)

Initiative Scope, Prioritization, Quick Wins (Weeks 7–8)

Digital + Content Program Embed (Weeks 11–12)

Legend:
- ● Weekly Status Meeting
- ● Stakeholders Meeting
- ● Executive Team Meeting
- ◆ Facilitated Workshop

AGENDA

- Becoming a more modern, digital, relationship-based firm focused around the client experience

- Working together in pursuit of our digital, client experience vision

- Solidify our plan for operating a firm-wide transformation

- Embedding the transformation into our culture and ensuring a successful program launch

Becoming a more modern, digital, relationship-based firm focused around the client experience

CX PILOTS

COMMON KEY INSIGHTS

- All our clients are digital. It's convenient for them. And they are waiting for us.

- Every client relationship means more than the sum of their interactions and transactions with us.

- Firm clients make more emotional decisions than rational. (Counterintuitive.)

- Quantity doesn't equal quality.

- We consider ourselves digital but we aren't moving at the speed of digital.

- Our opportunities to instill more trust, comfort, empathy and foresight into the experience is boundless.
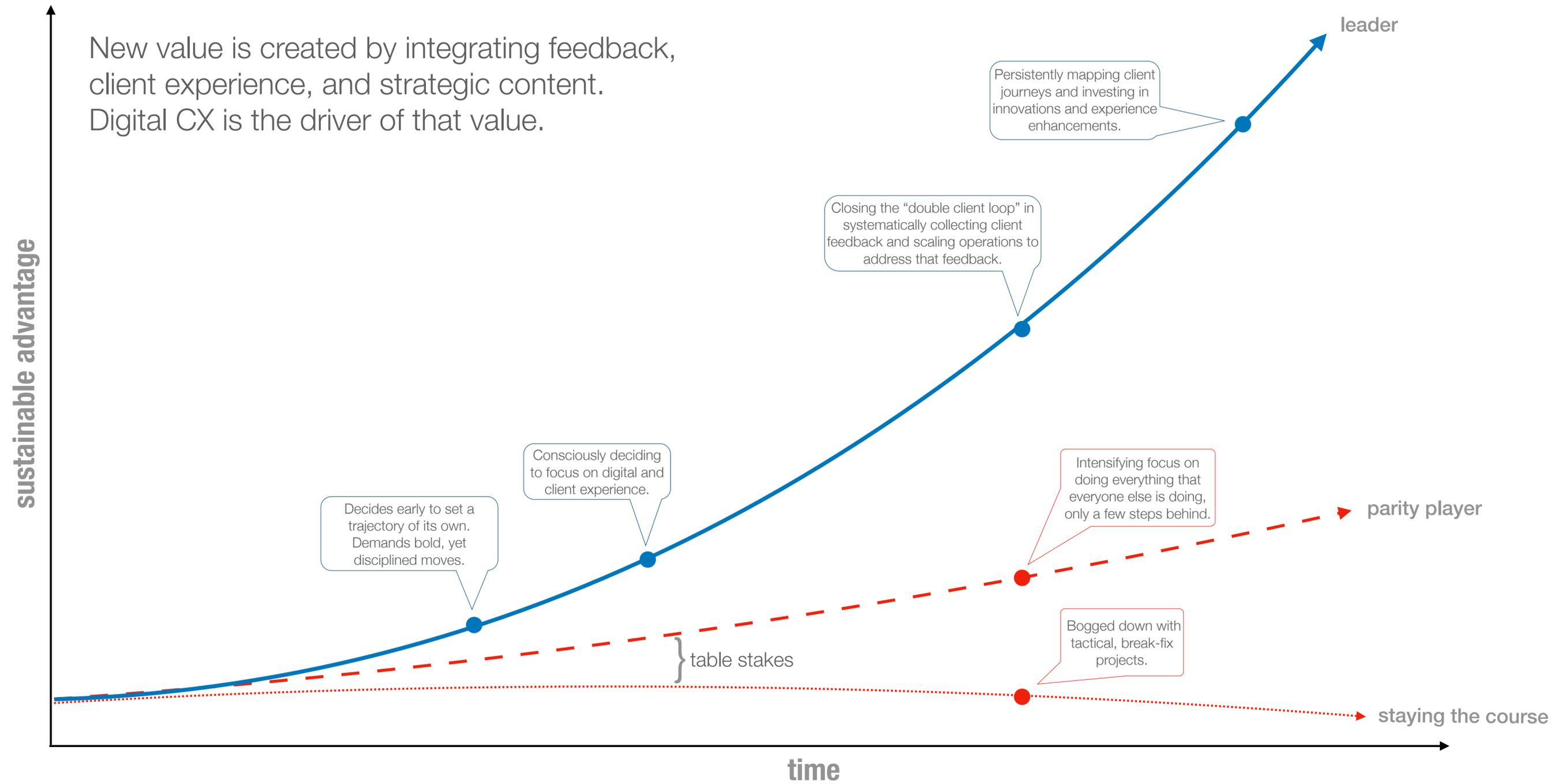
CX PILOTS

COMMON COMPETITOR'S CX AGENDA

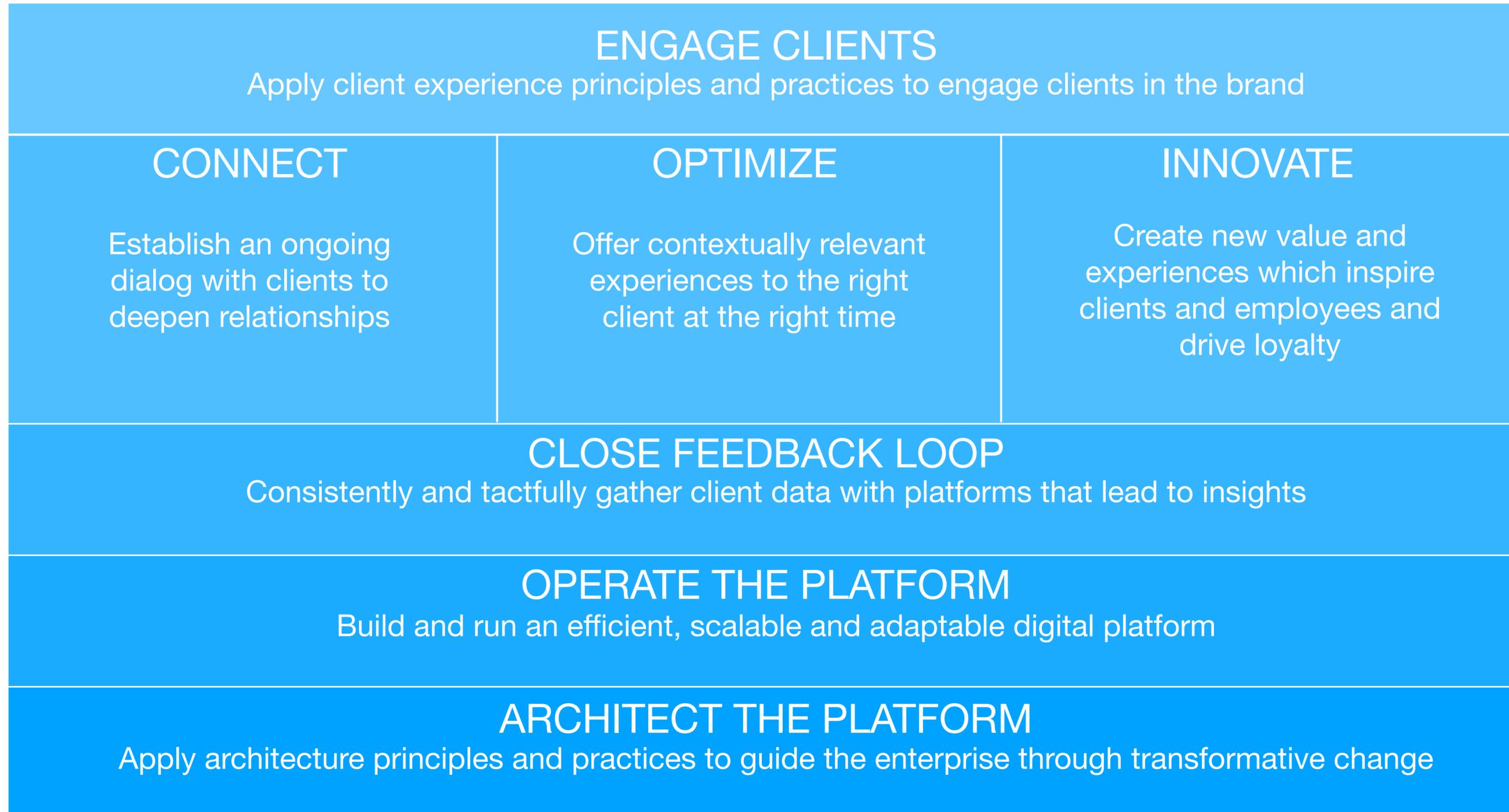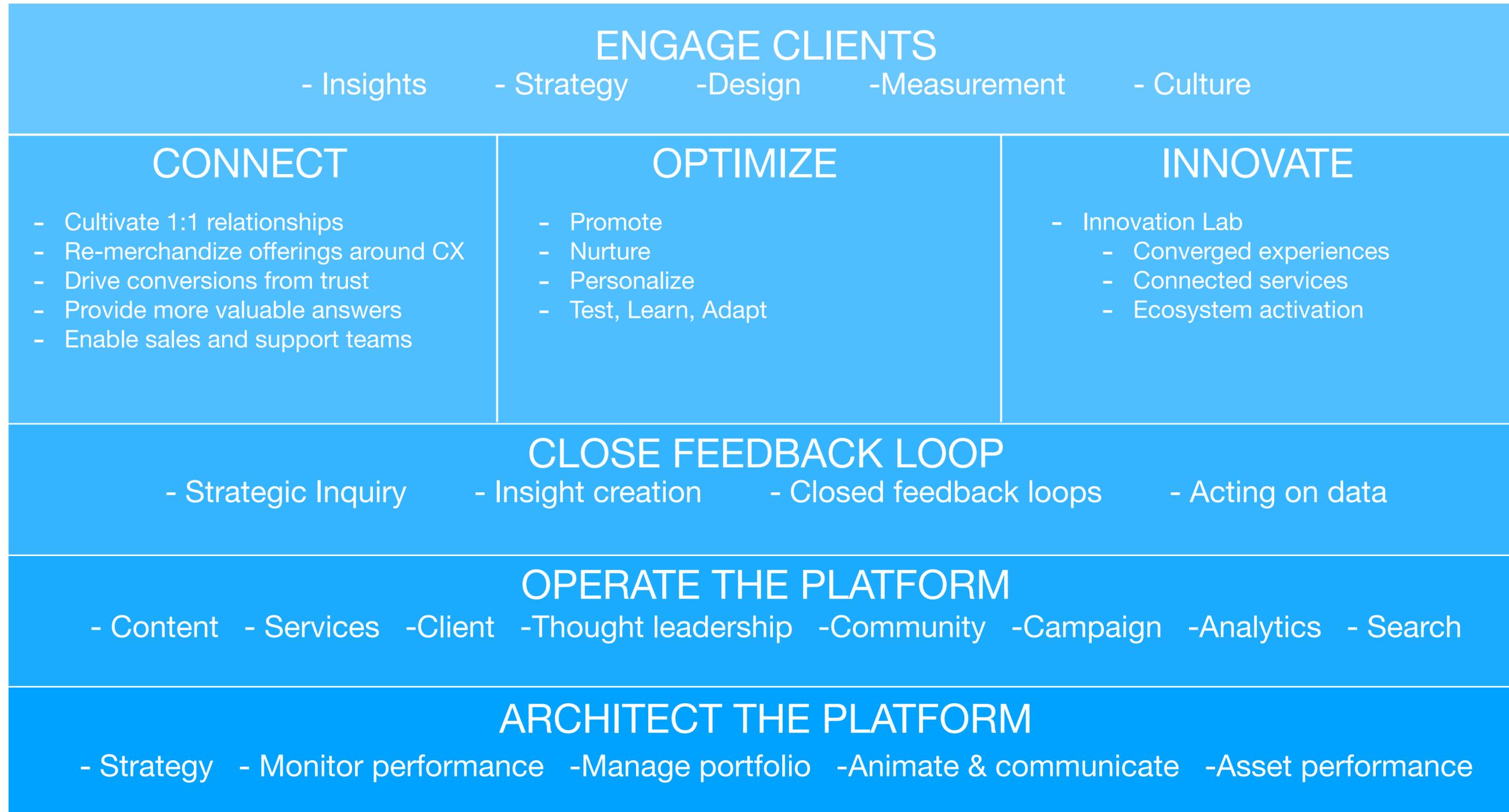|		
Scale Digital Delivery & Adoption	Enhance Online Experience	Accelerate Core Business
Accelerate Solutions Discovery	Drive Efficiency & Growth	Focus Amplifying Your Best Stories
Shift to Online Demand Generation	Improve Client Experiences	Build a Digital Platform that Enables
Deliver on Brand Promise	Shift from Strategy to Execution	Improve Employee Engagement
Innovate out to the Edges	Expand Breadth & Depth of Value Chain	Increase Performance Measures
Incorporate Performance Incentives	Increase Power of Content	Map Every Client Experience

cx pilots

CX PILOTS

CHARTING ADVANTAGE

New value is created by integrating feedback, client experience, and strategic content. Digital CX is the driver of that value.

leader

Persistently mapping client journeys and investing in innovations and experience enhancements.

Closing the "double client loop" in systematically collecting client feedback and scaling operations to address that feedback.

Consciously deciding to focus on digital and client experience.

Intensifying focus on doing everything that everyone else is doing, only a few steps behind.

parity player

Decides early to set a trajectory of its own. Demands bold, yet disciplined moves.

Bogged down with tactical, break-fix projects.

} table stakes

staying the course

sustainable advantage

time

CX PILOTS

SETTING PRELIMINARY CX GOALS

GOALS	POTENTIAL KPIs
Drive efficiency and growth through current business model	**SHIFT**: % of clients/prospects who want to engage online **LIFT**: conversion rate of prospects to clients **SUPPORT**: success rate of clients, effort score
Accelerate core business systems of engagement	**OPPORTUNITIES**: from digital interactions, through more strategic and engaging content, partner solutions
Increase measurement effectiveness of client experience	**OPPORTUNITIES**: sentiments/perceptions/desires from client feedback, higher success rate with proposals
Increase certainty of strategic content that engages/enables	**CERTAINTY**: increased effectiveness of content that spurs curiosity, engagement and drives conversion
Increase revenue/margin via enhanced client experience	**SUCCESS**: increased effectiveness of content that spurs curiosity, engagement and drives conversion
Deliver on the brand promise	**EXPERIENCE**: measurably enhanced client experience, staff engagement, increase in brand equity
Spur innovation aligned with future client needs	**GROWTH**: increased client lifetime value, increase in revenue from new clients,

CX PILOTS

ENVISION THE CX STRATEGIC FRAMEWORK

ENGAGE CLIENTS
Apply client experience principles and practices to engage clients in the brand

CONNECT

Establish an ongoing dialog with clients to deepen relationships

OPTIMIZE

Offer contextually relevant experiences to the right client at the right time

INNOVATE

Create new value and experiences which inspire clients and employees and drive loyalty

CLOSE FEEDBACK LOOP
Consistently and tactfully gather client data with platforms that lead to insights

OPERATE THE PLATFORM
Build and run an efficient, scalable and adaptable digital platform

ARCHITECT THE PLATFORM
Apply architecture principles and practices to guide the enterprise through transformative change

CX PILOTS

ENVISION THE CX STRATEGIC FRAMEWORK: DETAILS

ENGAGE CLIENTS

- Insights   - Strategy   -Design   -Measurement   - Culture

CONNECT

- Cultivate 1:1 relationships
- Re-merchandize offerings around CX
- Drive conversions from trust
- Provide more valuable answers
- Enable sales and support teams

OPTIMIZE

- Promote
- Nurture
- Personalize
- Test, Learn, Adapt

INNOVATE

- Innovation Lab
  - Converged experiences
  - Connected services
  - Ecosystem activation

CLOSE FEEDBACK LOOP

- Strategic Inquiry   - Insight creation   - Closed feedback loops   - Acting on data

OPERATE THE PLATFORM

- Content   - Services   -Client   -Thought leadership   -Community   -Campaign   -Analytics   - Search

ARCHITECT THE PLATFORM

- Strategy   - Monitor performance   -Manage portfolio   -Animate & communicate   -Asset performance

CX PILOTS

GOVERN TO DIFFERENTIATE

The future tells us that the *perception* of your value will eventually reach parity—which is why business leaders are telling us to drive differentiation on the basis of client experience.

SUPPORT
Showcasing service-specific information and tools to support point-in-time needs and questions.

EQUIP
Providing clients with the right services and information at the right time in order to accomplish their goals faster. Optimizing the path to satisfaction—includes service merchandizing, tools, content and outcomes storytelling.
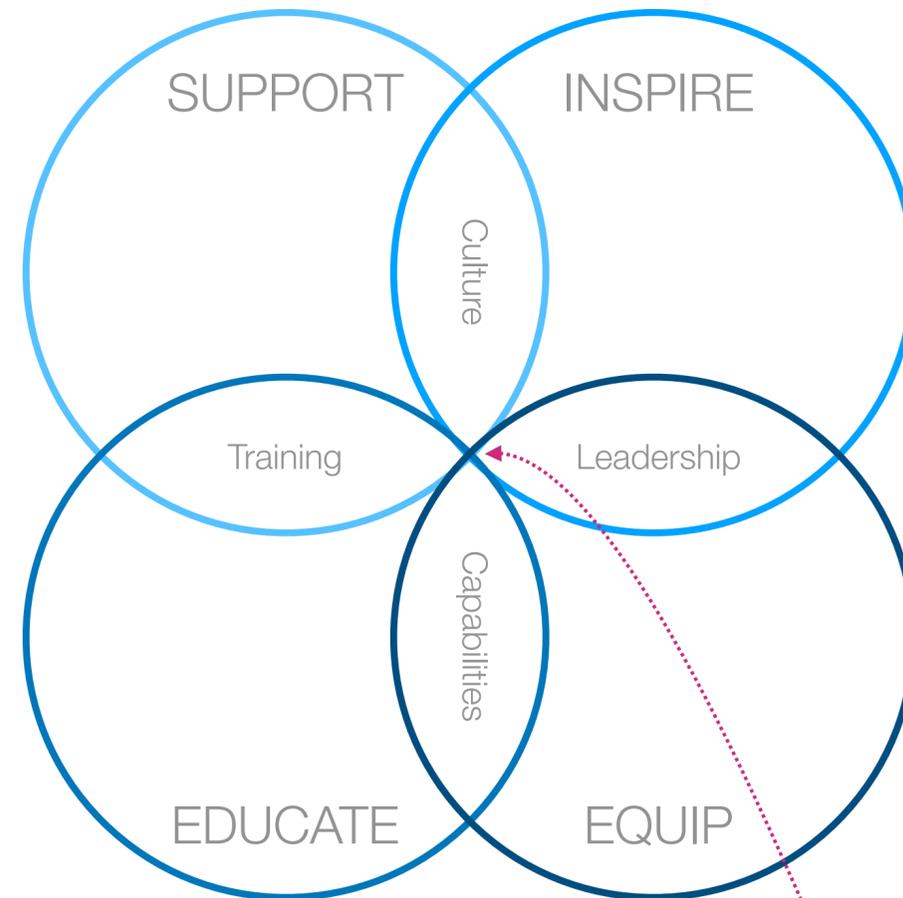
INSPIRE
Inspiring clients by showing the firm as innovators and global problem solvers and encouraging others to do the same. Living your firm's brand.

EDUCATE
Proactively providing information about advances in your field and how to use the firm's services and solutions effectively. Service usage, targeting learning, outcome configuration, and content are all included.
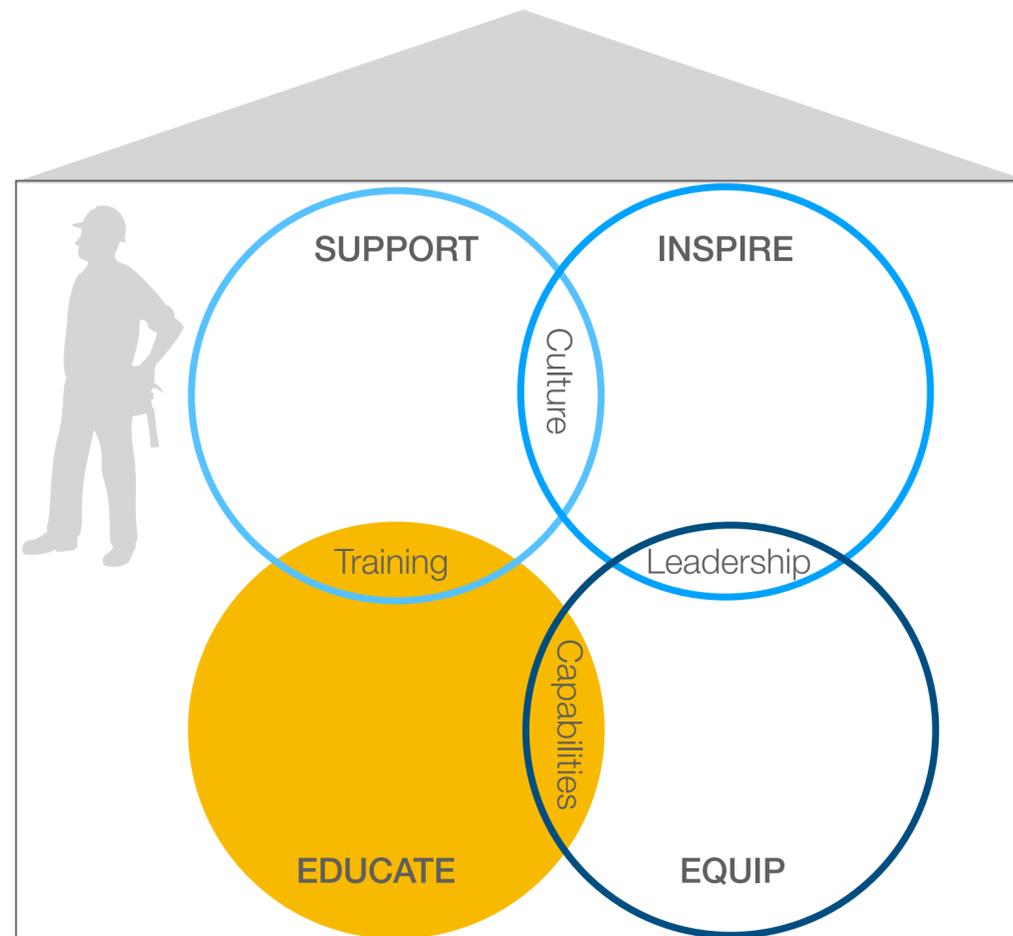

SUPPORT INSPIRE

Culture

Training Leadership

Capabilities

EDUCATE EQUIP

How are you preparing to differentiate at this intersection?

CX PILOTS

GOVERN TO DIFFERENTIATE: APPLYING THE CX ENGAGEMENT MODEL TO A USER TYPE

Audience

Audience A	Audience B	Audience C	Audience n
Municipality, current client	University, new client	New purchaser, current client	Student, job seeker

User-type
Goals/needs

A1	A2	A3	A4	B1	B2	B3	B4	C1	C2	C3	C4	n1	n2	n3	n4
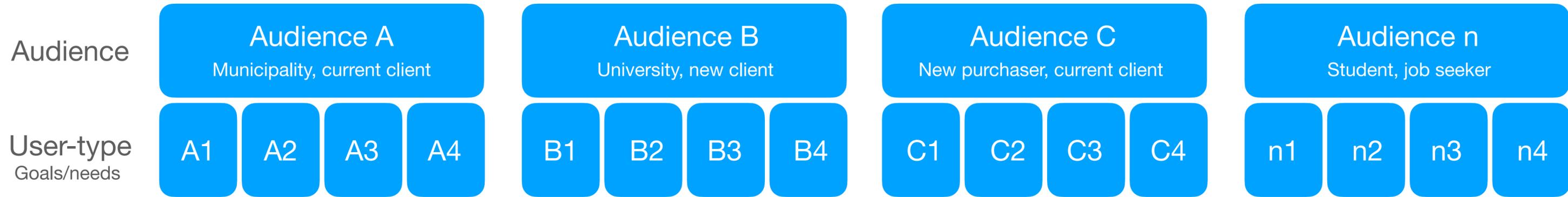
Identify priority elements and touch points, that is, where and how we will engage with this user type including marketing, sales, web, community, support, interactive content, mobile, partner stories, etc.

CX is the process of becoming confident about how to proactively prepare for and adaptively react to every client interaction along with knowing which messages to offer to each user type in each situation to ensure their specific experience is positive.

SUPPORT

INSPIRE

Culture

Training

Leadership

Capabilities

EDUCATE

EQUIP

EDUCATE

Proactively providing information about advances in your field and how to use the firm's services and solutions effectively. Service usage, targeting learning, outcome configuration, and content are all included.

CX PILOTS

THE CX PLATFORM ARCHETYPE

STRATEGY: Define the Digital Client Experience Strategy

- Objective & Vision Definition
- Digital CX Strategic Framework
- Benchmarking / Measurement Approach
- Client
- Digital Experience
- Organization & Culture
- Data & Analytics
- Transformation Roadmap & Portfolio Plan

PEOPLE: Govern the Digital Client Experience Strategy and Manage CX Transformation

| Transformation Roadmap Management | Governance | Change Management | Value Creation Office | Staff Engagement | Performance Management |

ALIGN

PROCESS: Design the Digital Client Experience Process

Global | Regional

- Inspire
- Educate
- Equip
- Support

PROMISE & DELIVER

Client Feedback / Research / Data Gathering

Design User Personas and Client Journeys

Overlay Value Segmentation

Define Adoption Targets

CONTENT

Web	Case Studies	Collateral	Webinars
Events	MR/PR	Sales	Training
Insights	Internal Intranet	Email	IR/AR

CCoE

| Measure | Build | Support | Improve |

DRIVE EXPERIENCE INNOVATION

| Design Thinking | Prototyping | Minimum Viable Product |

COMPETITIVE RESEARCH

SUPPORT

DRIVE DIGITAL ADOPTION

| Communicate | Educate | Motivate |

SUPPORT

MANAGE DIGITAL EXPERIENCE

| Deploy Capabilities | Test For Usability | Digital Optimization |

SUPPORT

DIGITAL CAPABILITIES: Enable Staff, Harness Collective Ambition, Groom Next-Gen Leaders

| Targeting Segmentation | Web Analytics | Search | Content Operations | Innovation Management | Emotional Intelligence | Ethnographic Research |
| Support, Service Community | Business Intelligence | Enterprise Data Management | Digital Asset Management | Client ID Management | Artificial Intelligence | CX/Revenue Economics |

| Strategy / Culture / Governance | Digital Process, Content & Execution | Innovation, Support & Management | Digital CX Capabilities |

CX PILOTS

Statistically, 75% of CX Transformation efforts fail to produce the intended results.

The question is, if virtually everyone is using the same approach to strategy and process, how could this be true?

THE ANSWER LIES IN GOVERNANCE.

CX PILOTS

CX PROGRAM GOVERNANCE DESIGN

THE OBJECTIVE OF GOVERNANCE:
- To proactively manage and evolve the firm's Client Experience
- To drive the firm's digital/CX transformation with deliberate urgency
- To realize the anticipated business benefits of the firm's digital/CX program
- To drive business growth through digital/CX
- To guide decision making out of confidence and certainty
- To promote collaboration, communication, alignment across the entire firm
- To leverage core disciplines (Client Experience, Modern Digital) across the enterprise

GUIDING PRINCIPLES
- Make it clear and simple
- Promote transparency
- Position as positive cultural change
- Keep it balanced
- Connect strategy to execution
- Promote accountability
- Measure and monitor performance
- Drive efficiency
- Reinforce action-orientation
- Be agile, adaptive

WHAT WILL WE DO?

Assess current state capabilities, develop a digital CX vision and plan initiatives to bridge the gaps.

1. Analyze current state
2. Develop digital/CX vision
3. Define required capabilities
4. Create a digital/CX roadmap and action plan

HOW WILL IT BE DONE?

Define a governance model to guide decision making and promote collaboration between teams.

1. Identify existing governance models and frameworks
2. Determine the objectives of governance for the firm, design reset
3. Redesign the governance model
4. Determine the level of interaction with existing governance models

WHO WILL DO IT?

Build a resource plan to enable execution of the firm's digital/CX program embedded into the culture.

1. Identify the current digital/CX organization
2. Design the target digital/CX organization
3. Define the specific points of accountability and align to roles

CX PILOTS

CRITICAL COMPONENTS OF DIGITAL/CX PROGRAM GOVERNANCE

SPONSORSHIP
Senior executive champions of the firm's Digital/CX Program

STRATEGIC DIRECTION
Cross-functional leadership team providing strategic direction and guidance

INTEGRATION OF CORE DISCIPLINES
Positioning Client Experience and Digital Centers of Excellence to guide strategy and execution

PROGRAM EXECUTION
Executing the firm's CX and Digital strategy through planned projects and adaptive teams

STEADY FLOW OF CLIENT FEEDBACK
Persistently harvest client feedback to provide directional confidence of the Digital/CX change

CX PILOTS

DIGITAL/CX GOVERNANCE MODEL

Digital/CX Governance is a teaming structure for operationalizing the firm's digital/CX strategy.

EXECUTIVE SPONSORS

DIGITAL / CX LEADERSHIP COUNCIL

CLIENT EXPERIENCE CoE

DIGITAL CoE

DIGITAL / CX TRANSFORMATION TEAM

ADAPTIVE TEAMS

PROJECT TEAMS

CX PILOTS

DIGITAL/CX GOVERNANCE MODEL

Digital/CX Governance model provides a blueprint for how the firm will work together in pursuit of the Digital/CX vision.

EXECUTIVE SPONSORS
- Champion the firm's Digital/CX Program
- Articulate Digital/CX vision and goals
- Monitor performance

- Update strategy
- Share scorecard
- Escalate issues

- Approve strategy and plan
- Allocate funds

DIGITAL / CX LEADERSHIP COUNCIL
- Own Digital/CX Strategy and program plan
- Establish policies, standards and guidelines
- Monitor program execution results

inform

guide

CLIENT EXPERIENCE CoE

DIGITAL CoE

- Approve projects
- Allocate resources

- Propose projects
- Share status
- Identify issues

DIGITAL / CX TRANSFORMATION TEAM
- Monitor firm's Digital/CX program and adaptive team results
- Propose, prioritize and align new projects in support of the program
- Decide execution path either through project or adoptive teams

- Guide execution
- Ensure resource/plan alignment

- Report status
- Identify issues

ADAPTIVE TEAMS
- Continually improve client experience
- Translate insights into action
- Identify and fix points of improvement

PROJECT TEAMS
- Plan and execute projects
- Report project status

CX PILOTS

DIGITAL/CX GOVERNANCE MODEL

Executive sponsors are the visible champions of the firm's Digital/CX transformation. As champions, they articulate a compelling vision and goals for the firm and ensure all parties remain accountable.

Primary Purpose:	Sponsorship
Primary Purpose:	• Champion the firm's Digital/CX program • Establish program vision and goals • Approve digital strategy & program plan • Secure funding for digital program • Commission and support Digital/CX Governance • Monitor overall performance of firm's Digital/CX program
Participants:	CEO, COO, CFO, CMO, CIO, CHRO
Meeting Frequency:	Quarterly

INPUTS

- The firm's Digital/CX program status
- Corporate strategy
- New business developments
- Digital/CX strategy, program plan
- Funding requests

AGENDA

- The firm's Digital/CX program status >> Operations review
- Updated Digital/CX strategy and plan
- Funding and resource allocation
- Areas of impact to Digital/CX

OUTPUTS

- The firm's Digital/CX vision and goals
- Digital/CX strategy and program plan validation
- Firm's Digital/CX funding approval
- Established points of performance measurement

CX PILOTS

DIGITAL/CX GOVERNANCE MODEL

The **Digital/CX Leadership Council** provides ongoing direction and guidance for the firm's Digital/CX transformation. They guide the annual strategic planning process and ensure that policies, practices and resources are aligned to achieve the vision and goals established for the firm's Digital/CX program.

Primary Purpose:	Strategic direction and guidance
Primary Purpose:	• Guide development of Digital/CX strategy and program plan • Ensure effectiveness of Digital/CX governance model; adjust as needed • Allocate resources to execute Digital/CX strategy • Identify emerging opportunities and risks • Establish policies, standards and guidelines • Monitor digital execution results
Participants:	CEO, Business stakeholders, CX CoE lead, Digital CoE lead, Digital marketing lead, Project management lead
Meeting Frequency:	Monthly

INPUTS

- The firm's Digital/CX program status
- Digital/CX strategy, proposed plans
- Items requiring guidance/decisons

AGENDA

- The firm's Digital/CX status review
- Emerging opportunities and risks
- Digital/CX strategy and plan
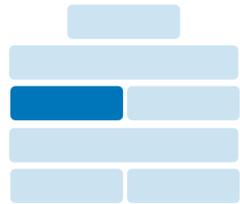- Special topics (e/g: client feedback insights readout)

OUTPUTS

- The firm's Digital/CX strategy and program plan
- Digital/CX scorecard (updated monthly)
- Digital/CX policies, standards, guidelines
- Decisions on escalated items
- Resource allocation

CX PILOTS

DIGITAL/CX GOVERNANCE MODEL

The **Client Experience CoE** (Center of Excellence) develops the capabilities and centralizes the resources required to deliver the best-in-class Client Experience. They also serve to inform strategy and guide execution.

Primary Purpose:	Develop Client Experience capabilities
Primary Purpose:	• Develop capabilities required to deliver best-in-class client experience • Inform Digital/CX Leadership Council in strategy development • Identify opportunities and threats – from a client experience perspective • Guide Digital Transformation Team, Adaptive Teams and Project Teams in execution
Participants:	CX CoE lead, project management lead, CX CoE team: (Insight, Strategy, Design, Measurement, Culture)
Meeting Frequency:	Bi-weekly

Client Experience CoE Capabilities

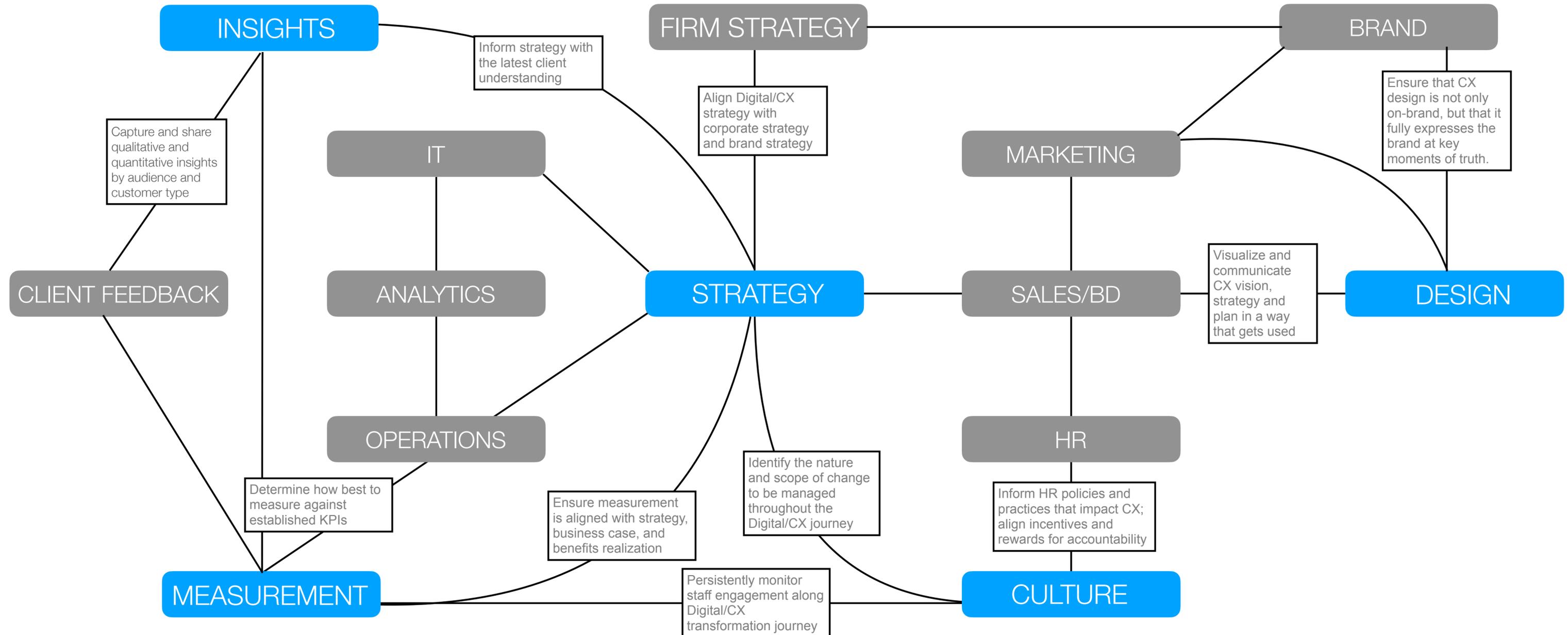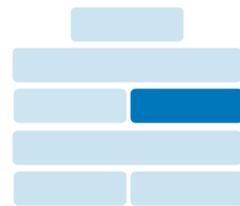| INSIGHTS	STRATEGY	DESIGN	MEASUREMENT	CULTURE
The set of practices required to create a clear, consistent, and accurate **picture of target clients and the experiences they want**, keeping a constant pulse on changing customer expectations through actionable client feedback	The set of practices required to define a **clear vision of the experience the firm seeks to deliver**, linking it to the company's brand and using it to guide the activities of the organization	The set of practices required to **determine the end-to-end client experience across all solutions, products, services and channels** based on client needs and brand values	The set of practices required to **measure client experience quality on an ongoing basis** across the entire firm and the use of that data to drive continuous improvement; also **measures success of the Digital/CX program**	The programs, communications and training required to **create and maintain a culture** in which delivering a great client experience is **embedded in the organization's DNA**

CX PILOTS

DIGITAL/CX GOVERNANCE INTEROPERABILITY

CX Governance entities (in blue boxes) interact regularly with each other and with all other key corporate functions.

INSIGHTS

FIRM STRATEGY

BRAND

Inform strategy with the latest client understanding

Capture and share qualitative and quantitative insights by audience and customer type

Align Digital/CX strategy with corporate strategy and brand strategy

Ensure that CX design is not only on-brand, but that it fully expresses the brand at key moments of truth.

IT

MARKETING

CLIENT FEEDBACK

ANALYTICS

STRATEGY

SALES/BD

DESIGN

Visualize and communicate CX vision, strategy and plan in a way that gets used

OPERATIONS

HR

Identify the nature and scope of change to be managed throughout the Digital/CX journey

Determine how best to measure against established KPIs

Ensure measurement is aligned with strategy, business case, and benefits realization

Inform HR policies and practices that impact CX; align incentives and rewards for accountability

MEASUREMENT

Persistently monitor staff engagement along Digital/CX transformation journey

CULTURE

CX PILOTS

DIGITAL/CX GOVERNANCE MODEL

The **Digital CoE** (Center of Excellence) develops the capabilities required to deliver the best-in-class Digital. They also serve to inform strategy and guide technology, data and platform execution.

Primary Purpose:	Develop digital/tech/data capabilities
Primary Purpose:	• Develop digital and technology capabilities required to guide enterprise through transformative change • Inform Digital/CX Leadership Council in strategy development • Identify opportunities and threats – from an technology perspective • Guide Digital/CX Transformation Team, Adaptive Teams and Project Teams in execution • Establish standards, guidelines and best-in-class practices for data, technology and platform management
Participants:	Digital CoE lead, Project management lead, Digital CoE team: (Strategy, Performance monitoring, Tech ops, Data management)
Meeting Frequency:	Bi-weekly

Digital CoE Capabilities

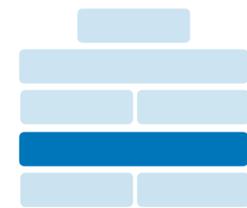| STRATEGY	MONITOR PERFORMANCE	TECHNOLOGY OPERATIONS	ANIMATE & COMMUNICATE	ASSET MANAGEMENT
Strategic directions of IT to meet business objectives in the medium and long term. Aligns CX strategy with adjacent business units	Provides a concrete and tangible milestone on the way to achieve CX outcomes in alignment with other Enterprise Architecture objectives	Operational processes to maintain and control coherence with IT standards within the enterprise	The setting up of a global community of Enterprise technology and data architects across the enterprise	Enrichment of standards, rules, reference architectures and standardized software components, which are core to the Digital/CX program

CX PILOTS

DIGITAL/CX GOVERNANCE MODEL

The **Digital/CX Transformation Team** is accountable for executing the firm's Digital/CX strategy and change management plan (if applicable). They oversee execution of the Digital/CX strategy and program plan through both planned projects as well as adaptive teams.

Primary Purpose:	Digital/CX program execution
Primary Purpose:	• Manage the firm's Digital/CX program; prioritize and align projects • Manage partners and outside service providers • Execute digital/CX strategy through project teams and adaptive teams • Accountable for the persistent collection of client feedback • Liaises with Marketing, Sales, Operations and HR to align Digital/CX content to client needs
Participants:	CX CoE lead, Digital CoE lead, Project management lead, Marketing director, Channel sales/BD director, HR manager, Operations manager, Strategic content lead, Client feedback lead, others TBD
Meeting Frequency:	Bi-weekly

INPUTS

• Digital/CX strategy and program plan

• Resources from CX CoE and Digital CoE: standards, guidelines, tools, etc.

• Program status from Digital PMOs

AGENDA

• Digital/CX program status update

• Update on adaptive teams

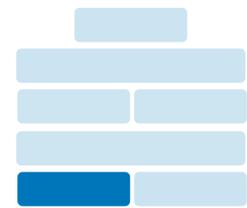• Project alignment and prioritization

• Resource requirements

OUTPUTS

• The firm's Digital/CX program status

• Adaptive teams update

• Proposed and prioritized projects

• Ongoing risks and mitigation plans

CX PILOTS

DIGITAL/CX GOVERNANCE MODEL

The **Adaptive Teams** drive continual improvement of the firm's client experience. They translate fresh client insights into action, often delivering results within days.

Primary Purpose:	Continuous improvement of client experience
Primary Purpose:	• Translate insights into actions from client feedback • Execute on new customer insights • Manage roster of pop-up projects escalated by other teams
Participants:	Self-directed adaptive team
Meeting Frequency:	Daily agile scrum approach

INPUTS

• Client insights

• Escalated/triaged projects

AGENDA

• Immediate results

• New insights

• Next actions

OUTPUTS

• Measurable enhancements to client experience

• Executed actions from key insights derived from client feedback

CX PILOTS

DIGITAL/CX GOVERNANCE MODEL

The **Project Teams** execute planned projects on-time, on-budget, on-strategy.

Primary Purpose:	Executing projects defined in the program plan
Primary Purpose:	• Create project plan aligned with NI Digital strategy and program plan • Identify and secure required resources • Identify and manage key questions, issues and risks • Execute project on-strategy, on-time, on-budget • Report project status
Participants:	Project leads, project team members
Meeting Frequency:	Weekly

INPUTS

- NI Digital strategy and program plan (including project description)
- Resources from CE CoE and EA CoE: standards, guidelines, tools, etc.

AGENDA

- Overall project status
- Workstream status
- Key questions, issues, risks
- Action items

OUTPUTS

- Project deliverables
- Project health monitoring
- Project status reports

CX PILOTS

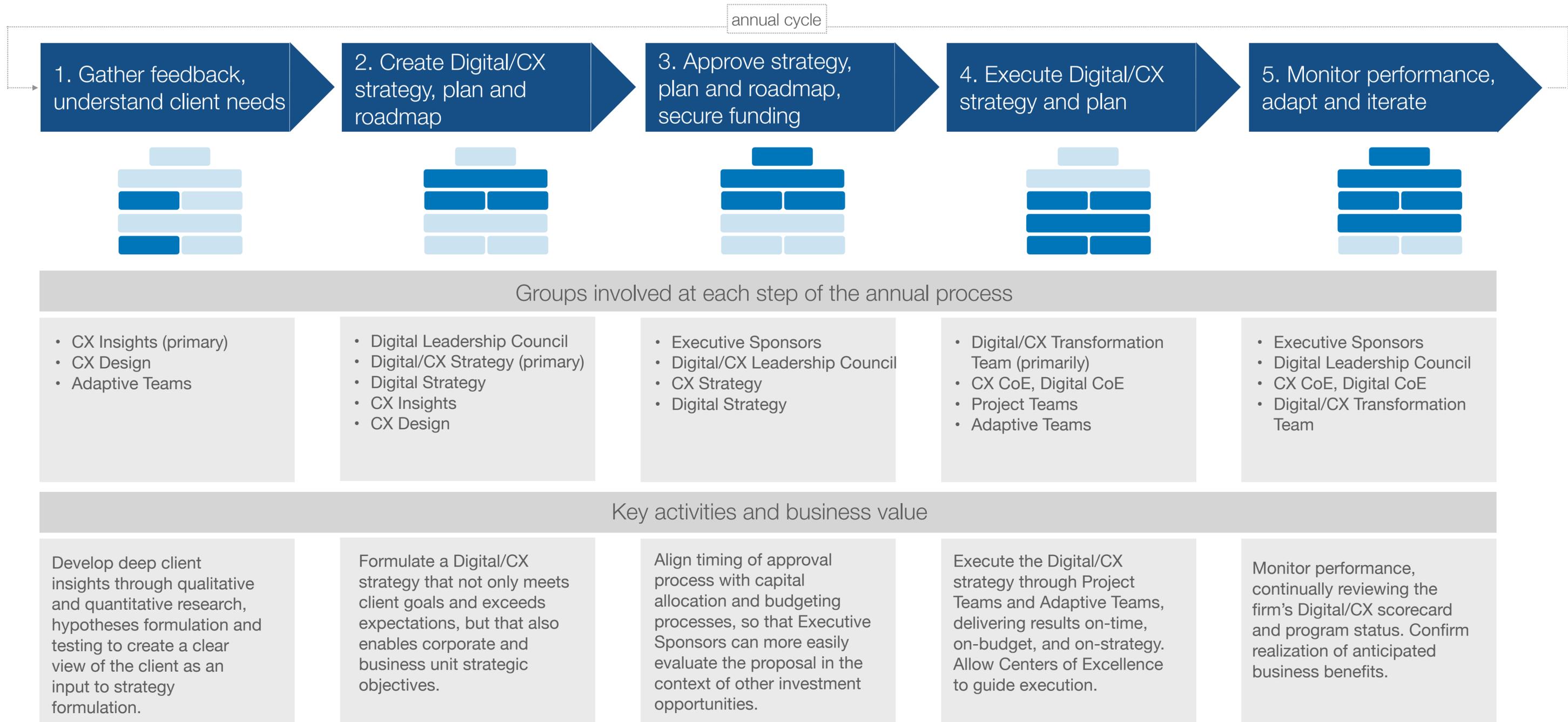# DIGITAL/CX GOVERNANCE MODEL

When fully activated, each component of the model will play a role in the annual process.

annual cycle

1. Gather feedback, understand client needs	2. Create Digital/CX strategy, plan and roadmap	3. Approve strategy, plan and roadmap, secure funding	4. Execute Digital/CX strategy and plan	5. Monitor performance, adapt and iterate

Groups involved at each step of the annual process

• CX Insights (primary) • CX Design • Adaptive Teams	• Digital Leadership Council • Digital/CX Strategy (primary) • Digital Strategy • CX Insights • CX Design	• Executive Sponsors • Digital/CX Leadership Council • CX Strategy • Digital Strategy	• Digital/CX Transformation Team (primarily) • CX CoE, Digital CoE • Project Teams • Adaptive Teams	• Executive Sponsors • Digital Leadership Council • CX CoE, Digital CoE • Digital/CX Transformation Team

Key activities and business value

Develop deep client insights through qualitative and quantitative research, hypotheses formulation and testing to create a clear view of the client as an input to strategy formulation.	Formulate a Digital/CX strategy that not only meets client goals and exceeds expectations, but that also enables corporate and business unit strategic objectives.	Align timing of approval process with capital allocation and budgeting processes, so that Executive Sponsors can more easily evaluate the proposal in the context of other investment opportunities.	Execute the Digital/CX strategy through Project Teams and Adaptive Teams, delivering results on-time, on-budget, and on-strategy. Allow Centers of Excellence to guide execution.	Monitor performance, continually reviewing the firm's Digital/CX scorecard and program status. Confirm realization of anticipated business benefits.

CX PILOTS

NOTES

What is more important to your **bottom line**
than the **experience**
your **clients**
and **employees**
have with your **firm**?

alignment

revenue

CX Pilots is a Client Experience consultancy that helps organizations simplify the path to experience-led business by co-designing client experience programs tailored to unique cultures that accelerate business outcomes.

Steven Keith
steven@cxpilots.com
(919) 771-5219

CX PILOTS