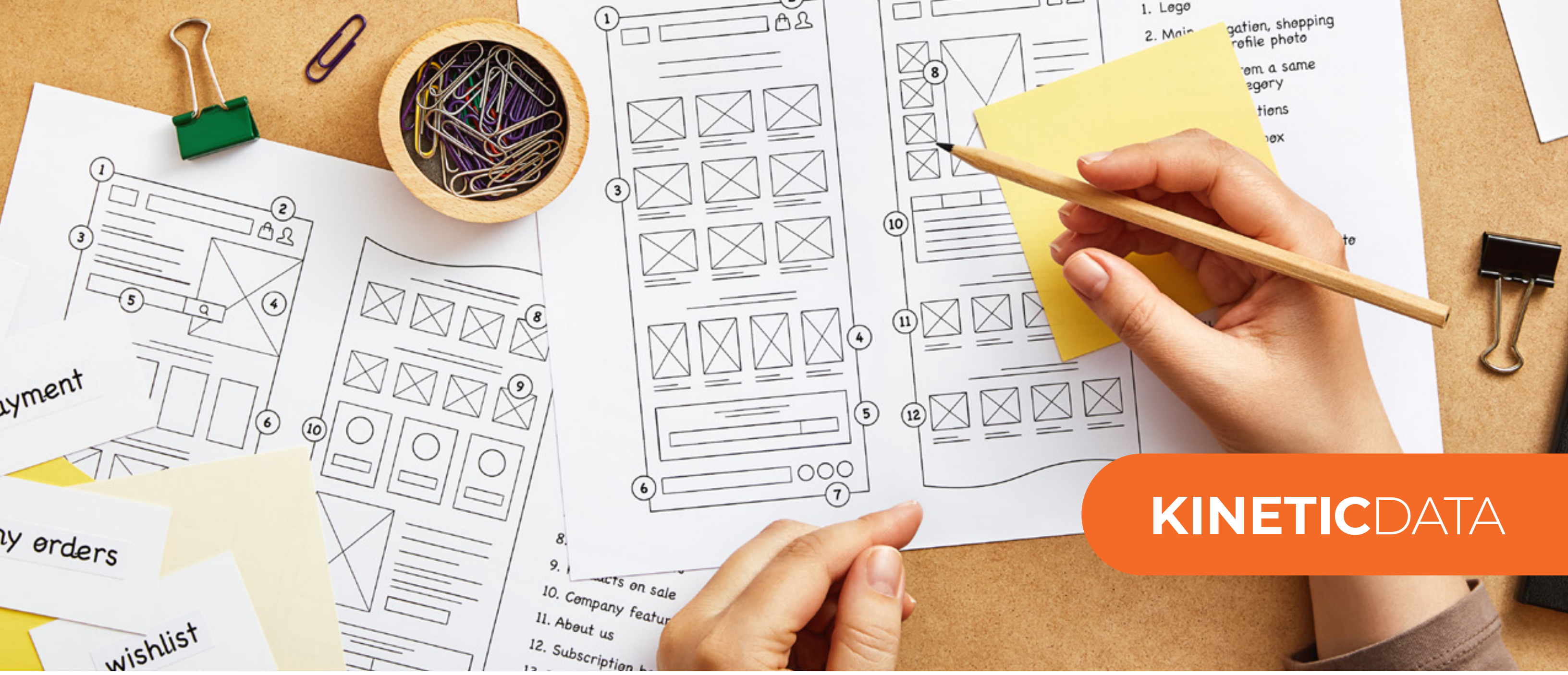

90-Day Guide to Success as a Chief Experience Officer

Achieving Success as a Chief Experience Officer: Your First 90-Days Framework

Ready to kickstart your journey as a Chief Experience Officer with confidence and clarity? We've crafted this comprehensive guide for your pivotal first 90 days. It's packed with actionable steps, key considerations, and strategic insights to help you navigate the complexities of evaluating and optimizing your tech stack, enhancing user experience, and aligning your digital strategy with business goals.

Still feeling a bit apprehensive about stepping into the role of a Chief Experience Officer and making a meaningful impact? We've got your back. The role of CXO is still relatively fresh in the industry, which means support might be lacking, but the exciting part is: it's a blank canvas waiting for your creative touch. There's an immense opportunity to shape and define this role in a way that aligns perfectly with your vision and the needs of the organization. **This guide is designed to get you started on a journey to success.**

WEEK 1-2

Orientation and Understanding

While this phase may seem mundane, it's undeniably vital. These weeks lay the groundwork for your entire tenure, setting the stage for transformative change and seamless experiences. In the following days, you'll delve into the intricate web of technological infrastructure, uncover insights from employees across the organization, and ensure the bedrock of security and compliance is steadfast. So, let's roll up our sleeves and dive into the foundational tasks that will pave the way for unparalleled experiences and organizational success!

1. **Assess Existing Tools and Technologies:** Conduct an inventory of the tools and technologies currently used across departments for customer experience management, such as CRM systems, feedback platforms, and analytics tools.

   Use these questions to help guide your journey:

   - What are your project management tools? How do your employees stay on task?
   - Do you currently have any automation tools available? What are they?
   - Do each of your departments have their own unique solutions? Is there any overlap?
   - Where is data being collected and stored? Is there any duplication of entry? Make notes!
   - Is the data collected good data or is the potential of human error costly?
   - How is feedback currently being gathered from your employees about the different tools in the organization?

2. **Meet with IT and Operations Teams:** Before making rash decisions about your organization's tech stack, engage with IT and operations teams to gain insights into the technical infrastructure supporting customer experience initiatives.

   Get their feedback by asking the following questions:

   - What tools do you use to help you do your job efficiently?
   - Which tools do you wish you did not have to know?
   - Which tools are we leveraging effectively? Which ones do you wish we invested more into? Why?
   - What asks are you hearing from end-users repeatedly? What is keeping us from addressing the problem? Time, lack of resources, or not having the right tools?
   - Where are most of the bottlenecks occurring?

   You might even want to have your teams show you how they use the tools to help evaluate the user experience.

3. **Review Change Management Processes:** This one may seem a little obvious, but understanding the organization's existing change management processes and their success is the key to further change success. Delve into how change is managed at your organization and interview different departments about how they felt the rollout of the last initial change went. This can give insight into what to expect in future changes.

   Take the time to do your research about Change Management:

   - Change is about the people and not the technology. You must get emotional buy-in to be successful with any implementations. People will find ways to lean on old habits. Remember a time in your life when you tried to change a habit. What worked for you?
   - Consider which areas in the organization are hardest to change. What are the limitations and restrictions? Are these slowing down the organization in any way?

4. **Evaluate Data Security and Compliance:** Review data security protocols and compliance requirements for customer data handling to ensure alignment with industry standards and regulations. A better understanding of how data is managed in your organization will help guide choices if you are considering consolidating any of your current tech stacks. Some fail-safes put in place years ago may no longer be necessary with updates in technology.

   Use these questions to help guide you:

   - How are we handling sensitive information?
   - When was the last time we evaluated our technology and did maintenance?
   - Is it possible that, during the implementation of technology, there is something we were going to return to at a later date and never got back around to?
   - Is any of our technology end-of-life? Are there plans to remediate that in the near future?
   - How are we confirming the data we have is accurate?

5. **Identify Integration Opportunities:** Hopefully, while going through the exercises above, you have been looking for opportunities to integrate existing tools and systems to create a more seamless and unified experience for customers and employees.

   Review the following:

   - How many different systems do you have to log into daily to do your job?
   - How many different systems do you have to go to get the information and data you need?
   - Do you need to disrupt people during the day to access information that is otherwise unavailable to you?

WEEK 3-6

Strategy Development

As we move into week 3, your journey will transition from groundwork to action, focusing on crafting a robust technology strategy. These weeks are all about laying the foundation for technological innovation and optimization, ensuring that your tools and systems align seamlessly with your vision for exceptional customer experiences.

From developing a comprehensive roadmap to assessing the need for new tools and conducting thorough vendor evaluations, these weeks are packed with strategic initiatives that will shape the future of your organization's digital landscape. So, let's dive in and chart a course towards technological excellence and unparalleled customer satisfaction!

1. **Develop Your Technology Roadmap:** This is a hefty ask that will consume most of your time and require a lot of collaboration. Start by working with your IT and department heads to dive in deeper from your first initial interviews with the team. It is time to use all that helpful feedback to start prioritizing your easy wins and long-term projects.

   To create your roadmap, you must first understand where you currently are and where you want to go. **This means answering the following questions:**

   - What is currently working very well at your organization?
   - Where does the organization want to be in the next six months? A year?
   - What are the goals of the organization? Trying to save cost? Improve user experience? Assure security compliance? Pursue modernization?
   - Are there any pressing issues you discovered in the first few weeks that should immediately be addressed?
   - What are the common themes you are hearing from the different department heads?

   Once you understand where you are currently and the organization's expectations, you can begin crafting your roadmap.

2. **Assess the Need for New Tools:** You should always try to use the tools your organization already possesses before you introduce new technology to the ecosystem. Training employees and updating workflows can be extremely costly, even if the new tool promises cost and time savings. Consider the long-term effects on the company if you add or change the technology.

   Here are our recommendations for how to assess your organization's needs for new tools:

   - Are there any technological gaps that none of your current solutions fill?
   - Are there specific pain points or inefficiencies that cannot be addressed by any of your current tools?
   - Are there redundancies that could be consolidated into a better tool?

- What is the growth and scalability potential of your current tech stack?
- What is the impact of adding, removing, or replacing a tool to the overall productivity, efficiency, and experience of the users?
- Analyze the cost-benefit ratio of investing in new technology versus maintain status quo.
- What would be the expected outcomes of purchasing new technology?

Sometimes you don't have the right tool for the job, and right now your organization has been making do with either manual processes or by utilizing a tool that was not made to effectively handle that business process. There are a lot of considerations that should be taken into account and how they will affect the day-to-day lives of your users.

3. **Vendor Evaluation:** These evaluations should happen for current and potential new tools. Take time to meet with the different vendors that affect your user experiences to better understand their business model and ensure a productive partnership.

   Here are some factors to consider:

   - What is the current contract and cost associated with the tool they provide? Is your organization receiving the expected ROI by using this product?
   - What is the overall satisfaction level among the users that use this vendor's tools? Are there positive reviews or testimonials that speak to the quality of experience provided by this vendor?
   - What is the level of customization and flexibility offered by the tool? Does it allow for tailored solutions to meet specific business needs and preferences? At what cost?
   - Does the vendor provide training and resources to help users maximize the effectiveness of the tool?
   - How responsive is the vendor's customer support team? Do they promptly address inquiries, concerns, and technical issues?

4. **Change Management Planning:** This one requires a lot of input and buy-in from different departments. Change will only be successful when users understand why and how change is happening. Always put yourself in the other person's shoes: What's in it for me?

   What your change management plan should include:

   - The scope and timeline for the change initiative
   - All key stakeholders identified and their roles in the change process defined
   - Documented expected Key Performance Indicators
   - A communication strategy that keeps stakeholders informed and engaged throughout the change process
   - Establishing how training and support will be addressed to help employees adapt to the change
   - Specifying how progress will be monitored and feedback gathered to identify issues or challenges
   - A process for rolling out the change to the whole organization (we recommend gradually)

Always Be Mindful of your Data Governance Framework

Our security officer said it would go a long way if the new CXO reached out to them before adapting or changing any technology, so we figured we would add this in! It is very likely your organization already has a framework they want you to work within while implementing processes. Make your IT and security teams happy by discussing your changes with them!

In addition, while Stage 2 processes provide more visibility than Stage 1, that visibility is still limited. It's difficult to see where steps may be missed, where errors may occur, and where bottlenecks are slowing process completion.

WEEK 7-10

Implementation and Execution

You made it to the part of your journey where you get to dive deep into the heart of customer experience transformation! You finally get to take all your research and strategic planning and turn it into action.

You are stepping into the realm of hands-on implementation, where you will be launching pilot programs to test innovative solutions, provide comprehensive training and onboarding to empower your teams, and uncover customizations to enhance user experience and satisfaction.

This phase is all about putting your plans into motion, fostering a culture of continuous improvement, and delivering tangible results that elevate your organization's customer experience to new heights. So, let's roll up our sleeves and embark on this exciting phase together!

1. **Pilot Testing:** Trying to change everything all at once is a sure-fire way to change nothing. We recommend taking your time and adopting a pilot model to ensure long-term success with your employees and users. To create your roadmap, you must first understand where you currently are and where you want to go.

   Tips to implementing a successful pilot:

   - Have a clear scope of the pilot program, including who is the target audience, timeframe of the program, resources that will be available, and how success will be measured
   - Identify users who are adaptable to new technologies and are happy to build hype (bonus points if they also like teaching others!)
   - Select representatives that ensure a diverse user experience
   - Gather feedback from participants through surveys, interviews, usage analysis to understand their experiences, pain points, and suggestions for improvement
   - Iterate on the pilot program based on feedback received

- Evaluate the success of the pilot program against predefined objectives and success metrics
- Analyze the impact the pilot program had on key performance indicators, such as user engagement, customer satisfaction, and revenue generation
- Develop a plan for scaling the pilot program to a larger audience (remember those happy, adaptable users? Be sure to ask them!)

2. **Training and Onboarding:** Do not expect to introduce new tools and processes without taking into account the training and effort for onboarding users into this new way of doing things. Make sure all users will have access to the tools they need to quickly get their answers and their work done. There is a good chance you will be breaking users of established habits, so the more resources you can provide, the better it will be for everyone.

> **Quick Tip:** At the end of the day, everyone wants to get their job done to the best of their abilities. To sell people on change, you have to sell them on how it will make their jobs easier.

3. **Customization and Configuration:** This is where you can have a little fun, especially if you followed our guidelines for establishing new tools and evaluating vendors. Take the time to work with vendors and IT teams to customize and configure new tools to meet the specific needs and requirements of the organization.

4. **Data Migration and Integration:** Do not skimp on planning for data migrations and integrations. Depending on the type of data, different security policies in place, and the tools you are using, data migration can be a tricky step to conquer seamlessly. Take the time to work with your IT departments, security, and vendors to have a plan in place before you officially move your technology intro production.

5. **Continuous Monitoring and Optimization:** You never truly leave this stage in your customer experience journey. There are always improvements that can be made! Continue to monitor the performance of new tools and technologies, gather user feedback, and make necessary adjustments to optimize their effectiveness in improving the customer experience.

WEEK 11-12

Evaluation and Planning Ahead

Welcome to week 11 and beyond of your journey as a Chief Experience Officer! As you transition into this phase, it's important to take a step back and reflect on the progress you've made. While the past 10 weeks may have felt like a whirlwind of activity, it's essential to acknowledge that meaningful change takes time and patience. This journey has been a testament to the fact that transforming user experience is not a sprint but a marathon.

As you enter this phase, you'll now shift your focus towards evaluation and refinement. Take the time to assess the impact of your initiatives, evaluate the effectiveness of your strategies, and identify areas for improvements. It's also a time to recognize that the journey of a CXO is ongoing - there's no magic formula or quick fix for achieving success.

It is worth noting that our initial 90-day framework was simply a starting point - a guide to help navigate the complexities of the CX landscape. Whether it takes 90 days, 6 months, or longer, the principles and strategies outlined in this framework will continue to serve as a valuable tool for making a positive impact on your organization.

About Kinetic Data

Kinetic Data is a dual-use software company specializing in enterprise workflow automation, specifically for self-service user experiences. Our Digital Experience Platform (DXP) was designed based on our two decades of experience with large government agencies and commercial enterprises, enabling platform modernization and workflow integration projects. We approach business technology transformation differently than many software companies. We believe in enabling organizations to leverage their existing investments in critical systems, technologies, and processes by simplifying digital user experiences in a self-service model that decouples best-of-breed capabilities from business specific requirements, allowing end-to-end workflow automation that reduces complexity and overhead.

For more information, visit KineticData.com.