

Gartner for Marketers

Sample Action Plan: Customer Experience Strategy and Design

The Action Plan is a collaborative, living document that you'll create with your Gartner team. Each plan is customized to reflect your specific objectives.

Our analysts work with you to focus on the areas with the greatest potential impact on your business. You'll then use the Action Plan as a touchstone to measure progress against goals and course-correct if necessary.

Put your customer experience plan into action!

Call us at 1-866-592-5144 or email us at gml@gartner.com



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Gartner



Customer Experience Strategy and Design: Create a Digitally Led Customer Experience

How your Gartner partnership will provide continuous, long-term support

Client Objective 1

Increase sales by building a customer experience that sets us apart from our competitors

Client Initiatives

- Develop customer segments/personas and create a more personal and targeted customer experience
- Leverage the findings to increase sales/make better-informed decisions with the marketing budget
- Identify and source agency partners to support the customer experience initiative
- Develop a forward-thinking customer experience environment and enable testing and validation of new techniques

Action Plan and Gartner Resources

- Use the **Marketing Maturity Assessment** to help you understand your organization's current customer experience efforts and outline what actions are needed to reach the next level
- **Establish a unified vision and architecture** to bring together the cross-functional resources needed to provide exceptional branded moments at every customer touchpoint
- **Develop rich customer personas** using our **toolkits and frameworks** based on a top-down and bottom-up view of your customer by using first-party knowledge and other research techniques
- **Layer in data** as the context that ensures customer experiences are relevant and timely
- Guide you in driving a successful customer experience strategy by providing **frameworks and research** that define the key customer experience foundations your marketing organization needs to master
- Provide **Trend reports** on customer experience leadership patterns and best practices to better inform your decision making
- **Recommend** campaign management and customer segmentation **vendors**, and provide objective insight on their proposals
- Work with you on the building blocks of the customer experience **content supply chain** as your customer experience continues to evolve

Customer Experience: Turning Loyal Customers into Advocates



How your Gartner partnership will provide continuous, long-term support

Client Objective 2

Increase customer retention and acquisition by improving our customer loyalty program

Client Initiatives



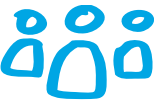
- Assess current loyalty strategy and build a business case to refresh the current strategy with best practices
- Develop an advocacy program that is based on best practices and proven by data
- Review the current marketing platform to evaluate the solution against our goals and needs
- Learn best practices in understanding customer retention and acquisition data
- Create a feedback loop that drives continuous improvement to the advocacy program

Action Plan and Gartner Resources

- Use the **Marketing Maturity Assessment** to help you understand your organization's current customer loyalty efforts and outline what actions are needed to reach the next level
- **Define** what you need to do to reach your goals and provide guidance in **building a business case** for advocacy marketing
- Collaborate with our analysts to use customer data to add lift to **advocacy investments**
- **Review** current analytics to **spot defections early** and increase customer retention
- Work with our analysts to inject "**Loyad**"-generated content into personalized customer communications, and use Loyads as your champions against negative reviews
- **Evaluate advocacy marketing platform** (either homegrown or from a third-party vendor)
- **Implement an advocacy marketing solution** to segment the advocacy testimony of loyal customers to drive content to prospects who value long-term relationships
- **Review strategy and results quarterly** to continually improve advocacy program

Sample Engagement Plan for the First 90 Days



| | 1-30 | | | | | 31-60 | | | | 61-90 | | |
|--|--|---|---|---|--|--|--|---|---|--|----|-----------------|
| Weeks | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| ▲ Key milestones ▲ Service interactions | ▲ Kickoff | | | | | ▲ 30-day check-in | | | | ▲ Portfolio review | | ▲ 90-day review |
|  Written research and tools | Identify research reports to baseline team's understanding | Review digital and CX plans, priorities, documents, corporate goals, and next steps | | | | Review findings from Spend Survey and other relevant surveys | | Toolkit: Compare your investment with peers in marketing spend and maturity | | | | |
|  Subject matter experts | Prioritize next steps and gaps mapped to customer experience strategy | | | | Learn best practices from across industries around content creation and curation | | Talk to analysts and perform technology landscape scan for vendors, agencies and service providers | | | Talk to an analyst expert to get actionable advice contextualized to your priorities | | |
|  Peers | Engage for best-in-class sales and marketing support models and structures | | | | | After the first 90 days, we'll continue to collaborate to address your highest priorities, helping you save time, reduce risk and lead with confidence. | | | | | | |