Foreword

In Fall 2020, a number of us had a discussion on the CXPA forum about the concept of a “CX Playbook,” a resource that could help practitioners do our jobs in a more consistent way. When I asked if there was interest in creating such a resource, more than two hundred people responded. That discussion eventually transformed into the CX Book of Knowledge project, with the support of CXPA’s leadership.

As we worked on the project, we pivoted from the idea of a Playbook to a Book of Knowledge. We made this change to better align with the role that a published body of knowledge can have on the advancement of a profession. Having been a project manager in previous roles, I was familiar with the Project Management Institute and the PMI Project Management Book of Knowledge, now in its Seventh edition. I had seen firsthand the impact that publishing a Body of Knowledge (BoK) could have, and hope that our CX BoK will help raise the profile of our profession so that CX is more often seen as a profession as Project Management is today. We also felt that while we can publish a universal reference on CX concepts, a CX playbook needs to fit the culture of the organization for which it is designed. A Playbook written for a Command & Control culture would be difficult to adapt for a Collaborative organization, for example.

I am grateful for the learning opportunities leading this project has provided to me. For example, this project demonstrated that there is great strength and insight that comes from bringing many voices together. To ensure that the CXPA CX Book of Knowledge serves the diverse needs of companies, non-profits, and consultants in the CX field, each of the five writing teams had two co-leads which were intentionally composed of one consultant or service provider, and one CX practitioner. These authors benefited from a wide range of additional volunteer contributors including authors, reviewers, and support officers from a wide range of industries, experience levels, and geographic regions. We structured our work on the CXPA CX Framework but pushed ourselves to consider and incorporate additional information at more granular levels and from adjacent fields.

A frequent question asked (and sometimes by me to myself) was “Is it possible for this project to ever be completed?” Of course, the answer is no — if the questioner meant to ask if we can ever fully document the body of knowledge that a CX practitioner needs to know in the face of ever-evolving customer expectations. But the answer is yes — if you mean can we publish the first-ever community-authored CX Book of Knowledge. Make no mistake – this is only the beginning. We have taken a “First Edition” approach – that is, we believe this will be the first edition of many to come. We know there are gaps: if you perceive a gap, please reach out. There will be a second (and a third) edition and we would love for you to be involved!

Finally, I am grateful to the talented team of authors, contributors, and reviewers that have made this book come to life. I am also especially thankful to CXPA Member Megan Fehn who served as Chief Support Officer for the project, scheduling meetings, taking notes, and generally ensuring that work stayed on track. To each of you, thank you – WE DID IT!
And to you, the reader: I hope that you find value within this work and that we are all able to continue to build our collective knowledge as a profession. Please keep creating better customer experiences that make the world a better place through better outcomes for organizations, their employees, and customers.

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