# Table of Contents

**Introduction to the CXPA CX Book of Knowledge** .................................................................15  
**Foreword** ...........................................................................................................................................17  
**A Word of Thanks** ............................................................................................................................19  

## Part I: Customer Insights and Understanding  
21

**Every effort that creates value starts with the customer** .................................................................24  

**Building a Customer Insights and Understanding Program** .........................................................26  
  - What is a VOC Program? ..................................................................................................................26  
  - Why build a program? ......................................................................................................................27  
  - Where to start? ................................................................................................................................27  
  - What is a Journey Map? .................................................................................................................28  
    - What are the benefits of a Journey Map? ......................................................................................28  
    - Journey Map example ...............................................................................................................29  
  - What is a Persona? .........................................................................................................................29  
    - How to create a Persona? ............................................................................................................30  
    - How many Personas? ..................................................................................................................31  
    - How to connect Personas to Journey Maps? .............................................................................32  
  - Which journeys should be mapped? ...............................................................................................32  
  - Who should participate in Journey Mapping? ..............................................................................33  
  - What data should be connected to a map? ....................................................................................34  
  - How should data gaps be identified? ............................................................................................35  
  - What are the data points saying? ..................................................................................................36  
  - How should work be prioritized? ..................................................................................................37  
  - How should progress be shared? ..................................................................................................37  
  - What practices should be adopted to continue the work? ..........................................................38  
  - Assessing technology needs .........................................................................................................38  

**Monitoring, Observing, and Listening to Customers** .................................................................40  
  - Collecting and actioning customer understanding ........................................................................40  
    - Determining whom to ask ...........................................................................................................40  
    - How a company goes to market ...............................................................................................41
What type of employee feedback should we collect and analyze? ............................................... 62
Why should companies collect employee feedback? ........................................................................ 58

Benefit 3: Improve the Rigor of Supporting Customer and Employee Technology

Assessing technology needs

Thoughts on tone and context

Important Players

Do not just ask to ask

Establishing quarantine period rules

Thoughts on engaging third-party vendors.

Customer data privacy considerations

Closing advice on capturing customer feedback

What if you didn’t actually ask?

Prevent gaming of the system

Decide whom to inform

Shine a Light on Customer Feedback with an Employee Lens .................................................. 58

Why should companies collect employee feedback?

Benefit 1: Surfacing Potential Customer Differentiators

Benefit 2: Employee Empowerment

Benefit 3: Improve the Rigor of Supporting Customer and Employee Technology

What type of employee feedback should we collect and analyze?

Prepare to collect and analyze

Who should collect employee customer experience feedback?

Important Players

When should we collect employee feedback?

How should employee feedback collection take place?

Implement

Assessing technology needs

Identify Customer Experience Gaps to Deepen Customer Experience ..................................... 67

What is the customer experience gap?

Why do experience gaps occur?
Herzberg Two-Factor Theory.................................................................95
SERVQUAL..........................................................................................96
Elements of Value..................................................................................96
Strategic Management and Analysis Approaches.................................97
Triple Bottom Line ...............................................................................97
Business strategy frameworks and planning.........................................98
Frameworks and Approaches...............................................................98
“Traditional” Strategy Management.........................................................98
Kaplan Norton Balanced Scorecard.........................................................98
Hoshin Planning ..................................................................................99
International Organization for Standardization ......................................100
Excellence Models................................................................................101
European Foundation for Quality Management—based Models..............101
Malcolm Baldrige National Quality Award Model ...................................101
Environmental, social, and governance programs ..................................102
Quality Management Frameworks.........................................................102
Six Sigma .........................................................................................103
Lean .................................................................................................103
Total Quality Management ....................................................................104
Theory of Constraints .........................................................................104
“Outside In” vs. “Inside Out” ................................................................104
Intended customer experiences............................................................106
Importance of having an intended CX................................................106
One-to-One Marketing..........................................................................107
Evolution of customer segmentation......................................................107
Segment of One ..................................................................................108
Notions and concepts to consider when designing the intended CX..........109
Pain Points vs. Gain Points ..................................................................109
Kahneman Peak-End-Rule......................................................................110
Designing Human Experiences..............................................................110
Effortless CX ......................................................................................110
Design for emotions ............................................................................112
Engaging the senses to build memories .................................................113
Halo Effect .........................................................................................113
Nudging...............................................................................................114
Algorithmic Nudging ...........................................................................114
Brand promise/operational promise ......................................................115
Defining the desired experience and Baselining ....................................115
Omnichannel .......................................................................................116
Perceptions (Customer Feedback).........................................................116
Align the customer experience strategy to organizational strategy, goals, and attributes.................................................................117
CX Program Management ....................................................................117
Companies without a dedicated CX department ...................................117
Companies with a dedicated CX department ........................................118
Alignment to overall strategy, brand values, attributes............................118
Stakeholder Engagement and Communication ......................................119
Interdependencies across people, process, and technology .....................119
Units and Silo Thinking Impact...............................................................119
Unit responsibilities overlaps................................................................120
Accountability ....................................................................................120
Handoff and Integration.........................................................................120
Data Management.................................................................................120
Design Language..................................................................................120
Cross-functional teams.........................................................................121
Data formats and system architecture....................................................121
Customer-facing technologies...............................................................122
User Experience/User Interface..............................................................122
Performance (dashboard, alerts).............................................................122
Change Management and Integrated/User Testing ..................................123
Develop a plan for communicating the CX strategy to stakeholders........124
Objectives...........................................................................................124
Inform.................................................................................................124
Establish Expectations..........................................................................125
Internal Audiences ..............................................................................125
Impacted Employees............................................................................126
Building a CX Business Case ................................................................. 195
Why a Business Case is important ...................................................... 195
Key steps to build a business case ...................................................... 195
Tell a story .................................................................................................. 195
Establish a common definition of success ........................................... 195
Explain why the proposed Initiative will drive meaningful business and customer value
(both, not just one) .................................................................................. 196
CX professionals should flesh out possible root causes of the problem 196
Share possible solutions ......................................................................... 197
Anticipate any potential concerns ......................................................... 197
What other questions can be anticipated? ............................................. 197
Understand the organization’s funding model and work within that structure 198
Other ways to improve the odds of success ............................................. 198
Conclusion .................................................................................................. 199

References and Additional Resources .................................................... 200

Part IV: Experience Design, Improvement, & Innovation ........................... 205

What is Design? Why is it important? ....................................................... 208
What is Innovation? .................................................................................. 210
Why are experience design and innovation so important? .................... 211
The Role of Design, Innovation, and Implementation ......................... 212
History/Evolution of Design ..................................................................... 213
Experience Innovation .............................................................................. 216
What Is It? .................................................................................................. 216
Why Experience Innovation? ................................................................. 216
Summary .................................................................................................... 217

Strategy of Design: Where and When Design Happens ............................ 218
Design Strategy ........................................................................................ 218
Design Systems ......................................................................................... 218
Experience Design .................................................................................... 219
Types of Design ........................................................................................ 219
Design Process Frameworks and Methodologies .................................. 220
Human-Centered Design Process ............................................................ 222

Design-Thinking Methodology ................................................................. 224
Common mistakes in design thinking .................................................... 224
Problems and Solutions .......................................................................... 225
Design Sprints .......................................................................................... 225
A design-thinking mindset empowers innovation. .................................. 226
Behavioral Science and Design ................................................................. 227
Why is Behavioral Science important for Customer-Experience Practitioners? 227

Design Adoption and Roadmaps .............................................................. 229
Design as a Capability .............................................................................. 229
To enable the shift to Experience Design, Experience Management helps the
organization to learn .............................................................................. 229
Design Maturity Model ............................................................................ 229

Customer Experience (CX)/Experience Design (XD) Models .................... 230
Unrecognized ............................................................................................ 230
Interested .................................................................................................. 230
Invested .................................................................................................... 231
Committed ................................................................................................. 231
Engaged .................................................................................................... 231
Embedded ................................................................................................. 231

Innovation and Creativity .......................................................................... 232
Innovation .................................................................................................. 232
Innovative Customer Experience ............................................................. 232
Innovation, Disruption, and Continuous Improvement ......................... 232
Organizational Creativity Models ............................................................ 233

Implementation of Design ......................................................................... 234
Considerations for implementation ......................................................... 234
What is design implementation? ............................................................. 234
Building the Vision, Adoption and Accountability for Design .................. 235
Case study #1 – Adoption ......................................................................... 235
Case study #2 – Accountability ................................................................. 235
What do adoption and accountability look like in the end-to-end design process? 237
Discover ................................................................................................... 237
Define ....................................................................................................... 238
Part V: Culture and Accountability

Leadership is the Foundation

CX Strategy Requires a Mission, Vision, and Values
Mission and vision drive the organization

CEO and the CX leader align around organizational values
Establish a CX vision
CEOs and CX leaders align with employee enablement for consistent outcomes
Many Skills Are Needed for the CX Leader’s Role
Governing CX Efforts Cross Functionally Across the Organization
Organizational Development vs. HR
Customer-centric Organizational Models

CX Roadmaps Guide and Give Direction
CX Strategic Planning
Customer Engagement Journey Management
Customer Data, Intelligence, Analytics, and Insights
Design for Continuous Enhancement
Portfolio Management, Governance, and Standards Models

Prioritize and Identify Areas of Improvement
Establish who owns each step of the process
Steering Committee
CX leader
Product Management
Marketing/sales teams
Operations (including call center, Customer Success)
IT/Development
Finance
Define and determine if an organization is aligned and engaged to deliver impactful experiences
Change Management – Take your employees with you
ADKAR Change Management Framework
Kotter’s 8-Step Change Model
Celebrate People How They Want to Be Celebrated ........................................................................... 283
Celebrate Milestones and Reward Appropriately ............................................................................. 283
Celebrate People How They Want to Be Celebrated ........................................................................... 283
Extrinsic Motivation .......................................................................................................................... 284
Unconscious Motivation ..................................................................................................................... 284
Celebrate Quick Wins Regularly ......................................................................................................... 284
Reward Collaborative Success and Individual Effort ........................................................................... 285
Culture is Organic, Yet Impacted by the Seeds You Plant ................................................................... 286
Kübler-Ross Five Stage Model ........................................................................................................... 279
Rogers Adoption Curve ......................................................................................................................... 280
No one-size-fits-all approach to change management .......................................................................... 281
CHANGE AREAS NEEDING LEADERSHIP ATTENTION ................................................................. 282
Case for Change ...................................................................................................................................... 282
Managing Resistance .............................................................................................................................. 282
Chief Human Resources Officer (CHRO) .............................................................................................. 283
Model New Behaviors ............................................................................................................................. 283
Celebrate Milestones and Reward Appropriately ............................................................................. 283
Reward and Recognize to Motivate ....................................................................................................... 283
Employee Activation Creates Shared Values ......................................................................................... 287
Vision, Mission, Values are the Core ....................................................................................................... 288
Balance between measurement and metrics is critical .......................................................................... 289
Identify Priorities with Methods, Tools, and Tracking ......................................................................... 289
Balanced Scorecard .................................................................................................................................. 289
Leading and Lagging Indicators ................................................................................................................ 290
SMART Goals .......................................................................................................................................... 290
Objectives and Key Results (OKRs) ........................................................................................................ 291
Customer Health Index (CHI) .................................................................................................................. 292
KPI Ownership ........................................................................................................................................ 292
Organizational Design Provides Framework .......................................................................................... 292
Change Management Stabilizes Uncertainty ......................................................................................... 293
Leadership Outweighs Management ....................................................................................................... 294
Internal Communication Raises Awareness, Activates, and Is a Call to Action ................................... 294
Storyboarding .......................................................................................................................................... 294
Framing Effect .......................................................................................................................................... 296
SMART Goals .......................................................................................................................................... 290
Balanced Scorecard .................................................................................................................................. 289
KPI Ownership ........................................................................................................................................ 292
Culture is Organic, Yet Impacted by the Seeds You Plant ................................................................... 286
Extrinsic Motivation .............................................................................................................................. 284
Unconscious Motivation .......................................................................................................................... 284
Celebrate Quick Wins Regularly ............................................................................................................ 284
Reward Collaborative Success and Individual Effort ........................................................................... 285
Culture is Organic, Yet Impacted by the Seeds You Plant ................................................................... 286
Employee Activation Creates Shared Values ......................................................................................... 287
Vision, Mission, Values are the Core ....................................................................................................... 288
Balance between measurement and metrics is critical ........................................................................ 289
Identify Priorities with Methods, Tools, and Tracking ....................................................................... 289
Balanced Scorecard ............................................................................................................................... 289
Leading and Lagging Indicators .......................................................................................................... 290
SMART Goals ......................................................................................................................................... 290
Objectives and Key Results (OKRs) ....................................................................................................... 291
Customer Health Index (CHI) ............................................................................................................... 292
KPI Ownership ....................................................................................................................................... 292
Organizational Design Provides Framework ........................................................................................ 292
Change Management Stabilizes Uncertainty ....................................................................................... 293
Leadership Outweighs Management .................................................................................................... 294
Internal Communication Raises Awareness, Activates, and Is a Call to Action ................................ 294
Storyboarding ......................................................................................................................................... 294
Framing Effect ....................................................................................................................................... 296
TRANSFORMATION AND MASTERY WORK HAND IN HAND .......................................................... 303
Maturity Model Assessment is Key ......................................................................................................... 303
CX Maturity is a Leader’s Compass ......................................................................................................... 303
Setting a CX maturity level goal for success .......................................................................................... 304
Change Management Elevates Improvement and Maturity ............................................................... 306
Change management ties into customer experience ........................................................................... 307
Employee alignment is mandatory ........................................................................................................ 307
FedEx’s not-so-prescriptive “Purple Promise” ...................................................................................... 308
Engaging the back office at a pharmaceutical company ..................................................................... 308
Customer Journey Maps Drive Alignment ............................................................................................ 309
Rewards and recognition ....................................................................................................................... 309
Initiative Ownership Drives Improvement ............................................................................................ 310
Governor ................................................................................................................................................ 310
Experience Creators .............................................................................................................................. 311
Experience enablers ............................................................................................................................... 311
How one CX leader moved a bank to see CX in a new way ................................................................. 311
Assess your current EX and CX, then start ........................................................................................... 312
Measurement of Culture and Accountability Maximizes Employee Experience ................................ 313
EX must be strategically measured to complement CX ....................................................................... 313
The Direct Connection Between CX and EX ...................................................................................... 313
Determining What to Measure is Crucial .............................................................................................. 314
Two Metrics for Measuring Employee Experience ............................................................................ 315
KPI Ownership ...................................................................................................................................... 316
Get an Accurate Measurement of EX ................................................................................................. 318
Introduction to the CXPA CX Book of Knowledge

One hallmark of a profession is community agreement and recognition of a body of knowledge for the field. A consensus-based body of knowledge establishes an organizing structure for key terms, concepts, and processes that allow for conversation and development based on a common, accepted information base. A body of knowledge thus serves as an independent, authoritative resource for a field. It is with great pride that the Customer Experience Professionals Association publishes the first edition of The CXPA CX Book of Knowledge to serve as the official body of knowledge publication for the CX community.

The seeds of the CXPA CX Book of Knowledge were planted with job analysis studies conducted by CXPA in 2013 and 2020. These studies, led by a professional psychometric firm and overseen by a panel of international CX Experts, gathered detailed information about the tasks, skills, and competencies performed on the job by customer experience professionals.

The resulting CXPA CX Framework is organized into five core competency areas, which are reflected in the Certified Customer Experience Professional (CCXP) certification as well as the five sections of this publication:

- Customer Insights and Understanding
- Customer Experience Strategy
- Metrics, Measurement, and ROI
- Design, Implementation, and Innovation
- Culture and Accountability

Five author teams, involving more than 40 professionals from across geographic regions and industries, worked collaboratively to draft sections of the Book of Knowledge. Heather Gillbanks, CCXP, who conceived of this project, served as executive editor, leading a peer review by the full author team as well as a broader cross-section of the CXPA community. In total, more than 70 professionals had a role in the writing or review. As such, this publication represents a true community consensus document.

The publication of this book marks the beginning of the next chapter in the further development of the CX profession. It is our intent and hope that this book will be used by those with an interest in customer experience, including CX professionals, academic students, faculty, researchers, and the CXPA community to advance the practice and understanding of customer experience. It is only by dedicated work on the core competency areas addressed in this book that we can truly advance CX and achieve CXPA’s vision of “Exceptional outcomes inspired by empowered CX Professionals.”

As with any professional body of knowledge of such size and scope, this book may be utilized differently by professionals across industries and geographies. Individuals who are new to the field of CX — or are simply interested in learning more about the profession — may find it instructive to read the book cover-to-cover. On the other hand, those with experience as a CX professional...