

Canopus CX Self-Assessment Check Sheet

How to use this check sheet

- This is a qualitative assessment. Hence you should take an unbiased view during evaluation.
- There are 2 parts in this assessment. First contains 16 questions and you can evaluate where your organization stands in each of those areas.
- Second part contains, ideally expected responses which can be used for comparison.

Terms of usage

- This self-assessment is meant as a guidance and cannot replace expert led assessment.
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Canopus CX Self-Assessment Check Sheet

1. Is CX aligned to key business priorities?
2. What are key customer related priorities?
3. Who is accountable for driving CX in the organization?
4. What CX related metrics are being measured?
5. Are customer facing policies defined and supportive of CX culture?
6. What initiatives or projects or improvements have happened in the past & are they still sustained?
7. Is customer facing communication refined?
8. How is VOC being captured, analysed & actioned?
9. How data/analytics is used for decision making related to customers?
10. Is there a structured & proactive effort taken to retain customers?
11. Has customer journey been mapped?
12. What is the awareness level of employees on CX?
13. How is skill development of customer facing employees taken care?
14. Are there demonstratable practices to drive CX culture?
15. Technology enablement and its adoption?
16. How are CX design principles/practices used in product, services & process design?

For detailed expert driven assessment and validation of CX culture contact: suba@collaborat.com

Desired Response: Canopus CX Self-Assessment Check Sheet

1. Is CX aligned to key business priorities?

CX goals have to be aligned to current business priorities. It can't be isolated from reality

2. What are key customer related priorities?

There should be factual insights on where customer related improvements are needed and there should be consensus among leadership on these priorities.

3. Who is accountable for driving CX in the organization?

Accountability for driving CX should be clearly defined and cannot be positioned as a jointly owned initiative. Terms of Engagement of leadership should be clear.

4. What CX related metrics are being measured?

Sufficient CX related metrics should be defined, data must be collected and published regularly. Refer to www.collaborat.com for CX related metrics.

5. Are customer facing policies defined and supportive of CX culture?

Company policies across the organization (HR, Finance, IT, Customer Management) should be supportive of customer needs and practically implementable.

6. What initiatives or projects or improvements have happened in the past & are they still sustained?

Improvements done in the past to improve Customer Service or Experience should have been sustained and horizontally translated across the organization.

7. Is customer facing communication refined?

Ideally all written and verbal communication should be accurate, timely, adequate and consistent. Business processes to management customer communication should exist.

8. How is VOC being captured, analysed & actioned?

VOC should be captured regularly in an unbiased manner, analysed to identify specific patterns, insights and necessary short & long term actions should be taken in a timely manner.

9. How data/analytics is used for decision making related to customers?

There should be established practices to ensure leaders take decisions based on facts or data. They should be capable of analyzing, identifying insights and relating that to situation on hand.

10. Is there a structured & proactive effort taken to retain customers?

A structured and definitive approach should exist in the organization to proactively retain customers, that is not restricted to reactive retention management. Core reasons for customer churn should be studied, analysed and acted systematically.

11. Has customer journey been mapped?

Customer Journey should have been mapped – end to end as well as for each episode and must be used to re-design the processes.

12. What is the awareness level of employees on CX?

Employees should not only understand CX principles but willingly demonstrate behaviors that drive superior customer experience. For more details on behaviors expected for all employees refer to 7 Acts of Customer Centric Pro© in www.collaborat.com

13. How is skill development of customer facing employees taken care?

Skill needed for each role to manage customers, customer data, associated skills and behaviors should have been identified and upskilling programs must be taking place.

14. Are there demonstratable practices to drive CX culture?

Organization should be running definitive campaigns that are appropriate to the company, and its culture, which will drive the right culture. Conscious effort to drive the culture must be happening and with participation from employees, vendors and channel partners.

15. Technology enablement and its adoption?

Appropriate technology to improve customer experience should be present and its adoption among employees must be high. There should a well defined program to identify such needs, validate them, pilot and deploy them.

16. How are CX design principles/practices used in product, services & process design?

Design of products, services and processes should be using principles of design thinking where both functional and emotional value proposition are identified and incorporated in the design.

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