

Optimizing customer experience from remote workplaces

CX strategy leaders



E Source

Fall 2020 E Source Customer
Experience Leadership Council

Today's agenda

- Introductions and icebreaker (15 minutes)
- Presentation: Virtual CX workshops (10 minutes)
- Panel discussion (35 minutes)
- Break (5 minutes)
- Breakout and report out: Strategizing for the remote workspace (35 minutes)
- Wrap up (15 minutes)

Welcome back and icebreaker





From the front lines: CX workshops

Effective workshops

Valuable objectives

- Jump-start a CX initiative
- Teach a skill
- Identify gaps in performance and delivery
- Ideate on CX solutions
- Prioritize recommendations
- Create a sense of common purpose or CX vision

Effective workshops

Redefined delivery



A few questions to start...

pollev.com/esource1

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Polling

- Have you hosted or participated in a fully remote CX-focused workshop?
 - Yes
 - No
- What was the objective of the workshop?
- Were the objectives achieved?
 - Yes
 - No

Optimizing CX remotely

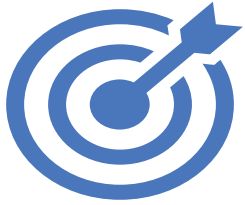
Our recent workshop experience—nothing is out of the question

- Customer intent statement
- Customer life-cycle and journey inventory
- Customer journey mapping
- Personas
- Large customer account scoring, tiering, strategizing
- Rebranding internal kickoff
- Supervisor-coach program roll-out

Workshop prep is critical

- Test your technology and get a “producer” to manage technology
- Do your research on individual and team hot buttons and priorities
- Assign a notetaker in advance
- Decide whether to record and what to do with the recording afterward

Workshop agenda



Clearly define objectives

- Jump-start an initiative
- Teach a skill
- Identify gaps in performance
- Ideate on solutions
- Prioritize recommendations
- Create a sense of common purpose



Break up objectives

- Don't expect to accomplish everything in one session
- Consider creating single-purpose sessions
- Spread over a few weeks, if necessary

Workshop timing



Keep the tasks fresh

- Mix large group discussion and breakouts
- Change tasks often
- Encourage participants to use their web cams and prep participants to speak
- Give breaks regularly—physically move, leave, and/or turn off the camera



Clear and concise follow-up

- Summarize the event
- Clearly outline next steps, ownership, and timing
- Follow up

Key takeaways

- CX work is possible virtually! Nothing is out of the question
- Best practices apply to virtual and in-person workshops
- Virtual requires a bit more planning because you lose the luxury of side conversations before, during, and after the session
- Technology can enhance or hinder the experience

8 ways
to make **interactive virtual events**
more engaging during COVID-19

- 1 Test your tech.**
In-house technical difficulties are forgivable, but they're also frustrating for participants. Test all your equipment a few days before the event to work out any bugs. Then shortly before you begin your session, test it all again.
- 2 Create and adjust your agenda deliberately.**
All-day workshopping sessions are great for in-person events, but in the virtual world, you need to spread that out over a couple weeks. We've found 2-hour sessions to be the most effective, with a 10-minute break scheduled about 90 minutes in.
- 3 Set expectations in advance.**
In all your communications about the event, be sure to include that you expect people to be on camera and on time.
- 4 Get active.**
If the host is sitting there with low energy, it's hard for participants to feel engaged. Having your camera on while you take notes on a whiteboard is a great way to model the appropriate level of active participation. Remember to take a photo of the board to share the notes afterward.
- 5 Designate a notetaker for the session.**
The notetaker shouldn't be an active participant. This will help the facilitator and participants focus their energy on the task at hand.
- 6 Use an icebreaker before each session.**
Your icebreaker question can be relevant to the topic you're covering, or it can just be a fun way to get attendees relaxed, comfortable, and ready to participate. Not everyone needs to participate in the icebreaker each time.
- 7 Use "pirate polling" early in the session to get everyone involved.**
A simple way to invite participation is to ask a yes or no question, to which participants can respond aye or nay all at once. This will get them used to muting and unmuting, as well as to adding their voice to the conversation.
- 8 Have a polling tool ready as a backup.**
Have polls ready to go from tools such as Poll Everywhere, Mentimeter, or even the polling functionality built into your videoconferencing platform. Allow attendees to submit answers anonymously, but after the poll, ask about responses and see if anyone is willing to share more.

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An aerial view of a city with a complex network of glowing white lines overlaid, representing a digital or communication network. The lines connect various points across the cityscape, which includes several tall skyscrapers and a dense urban layout. The overall color scheme is a cool blue and green gradient.

Panel discussion

Panel

- How have you adjusted or recalibrated your CX management efforts due to being virtual/remote?
 - Crises tend to make us all focus on tactics. How have you kept CX strategy relevant and moving forward during this crisis? How have you had to adapt (either yourself or the strategy)?
 - Have you discovered any useful tools or resources?
- How have you worked across silos in a remote world to develop strategic plans for the future?
- How have you kept employees engaged in CX and delivering experiences in this new work reality?
- How have you kept CX top of mind, shared voice-of-the-customer feedback and metrics, and conducted journey mapping or other CX activities (creating intent statements, etc.) remotely?
- What's the next thing on your CX management or optimization roadmap?
- Do you have any recommendations for others trying to advocate for and manage CX remotely?

An aerial view of a city with a network of glowing white lines connecting various points, overlaid on a blue-tinted background. The lines form a complex web of arcs and straight paths, suggesting a digital or communication network. The city buildings and infrastructure are visible in the background, rendered in a monochromatic blue color.

Break

An aerial view of a city with a network of glowing white lines connecting various points, symbolizing connectivity or data flow. The lines are overlaid on a blue-tinted cityscape.

Breakouts

Breakout discussion

- Objectives
 - Help you identify effective ways to keep CX top of mind across the organization
- Logistics
 - Select someone to report out
 - 20 minutes to discuss in breakouts
 - Report out to the large group after

Breakout discussion

- How have you kept CX strategy relevant and moving forward while remote? How have adapted, either yourself or the strategy?
- What's the next thing on your CX roadmap – what remote activities will you prioritize?
- Do you have any recommendations for others trying to advocate for and manage CX remotely?

An aerial view of a city with a network of glowing white lines connecting various points, overlaid on a blue-tinted background. The lines form a complex web of arcs and straight paths, suggesting a global or digital network. The city buildings and infrastructure are visible in the background, rendered in a monochromatic blue color.

Report out

An aerial view of a city skyline, likely San Francisco, with a dense network of glowing white lines and arcs overlaid, representing a network or data flow. The lines connect various points across the city, creating a complex web. The background is a blue-tinted aerial photograph of the city.

Wrap up



V I R T U A L
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