

CrossRef DOI of original article:

# The Three Most Critical Aspects for Implementing Holistic Customer Experience at Scale

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*Received: 1 January 1970 Accepted: 1 January 1970 Published: 1 January 1970*

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## Abstract

Businesses are increasingly challenged by increasing competition, changing customer preferences and industry dynamics. Moreover, proliferation of channels and customer touchpoints have added to the complexity of keeping up with these constant changes. Only organizations who are nimble enough to understand, evaluate and react to these dynamic requirements can drive innovation and growth. This means organizations must be creative in their consumer engagement strategies across the marketing funnel to enhance overall customer experience, measure the performance and establish the loopback to constantly refine the strategies. The following paper outlines concepts to help consumer businesses accelerate customer experience management. The objective of the paper is to lay out guiding principles that organizations can use as part of their business processes to create, deliver, and measure personalized customer experiences that will drive growth, loyalty, and satisfaction.

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*Index terms*— customer experience, customer journey map, measurement, acquisition, personalization, strategy, user acquisition

## 1 I. Introduction

Customers form the foundation of a successful business. Therefore, it is imperative for organizations to maintain an ongoing relationship with the customers and provide them with enhanced experiences no matter where the customer is engaging with the business -social media, AR/VR, email, forums, apps, in-store, or call center. Moreover, customers expect brands to understand their needs, interests, and preferences and deliver content, products, and offers that are relevant and personalized. Grand View Research shows that the CX management market in the US reached \$2.9B in 2021 and is expected to grow 15.3% every year from 2022 to 2030, making the customer experience a key pillar for businesses. Moreover, research by Amplify shows that 49% of consumers have left a brand in the past year due to poor customer experience, and 86% would leave a brand after as few as two poor experiences. As a result, there is immense pressure on organizations to deliver engaging customer experiences and emphasizes the importance of delivering excellent customer experiences.

Often, brands are extremely focused on a particular aspect of experience, e.g., acquisition, conversion, or retention. As a result, campaigns, budget, and measurement are too dependent on the focus area. For example, paid media is a crucial touchpoint with the customer. But often, the media team sits separately from the rest of the brand, work is mainly outsourced to agencies, and the campaigns are solely focused on awareness or customer acquisition. Similar siloes exist within email, site, app, and in-store channels. Moreover, these teams do not have a unified view of data, insights, or content, and each team uses its own data or segments for targeting. This results in a disjointed customer experience.

The below methodology provides a unique framework for brands to align on objectives and metrics to deliver a consistent and coherent customer experience across owned and paid touchpoints. It is critical to approach customer experience management holistically and follow the three-step process outlined below. The framework will provide organizations a way to understand data that they need, insights that they should gather, and measurement systems that they should establish. The outlined methodology will allow an organization to break down the siloes around customer experience management and enable teams to design, activate, and measure

## 2 B) ACTIVATE CUSTOMER EXPERIENCE ACROSS TOUCHPOINTS AT

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45 experiences at scale. Year 2022 ( ) Customer experience management is a tricky thing to accomplish as it  
46 requires investment in technology, resources, and processes. But brands who undergo this journey have seen  
47 tremendous benefits in terms of revenue, customer retention, and employee satisfaction. Investment in these  
48 capabilities increases their digital maturity, make the brands more customer centric and elevate the customer  
49 experience from batch and blast to an individual level. Customer experience is increasingly becoming a pivotal  
50 vector to differentiate against the competition. Gone are the days when price or product was enough to win  
51 customers. In today's dynamic market, it is crucial for companies to develop and nurture relationships with  
52 their customers. As a result, customer experience (CX) strategy has been the focus of businesses. A customer  
53 experience strategy defines an approach to elevate customer experience to meet business objectives. Defining,  
54 planning, and executing a good customer strategy requires brands to understand customer needs, behaviors, and  
55 preferences, generate insights, and deliver exceptional experiences to meet those expectations.

56 Marketers should not design customer experience in silo, but should consider every interaction across channel,  
57 device, and touchpoints. Therefore, the customer experience management should design must include with every  
58 interaction throughout the journey funnel: Attract, Engage, Convert, Retain, and Nurture.

59 ? Attract -How are customers becoming aware of the business and its products or services? ? Engage -How  
60 are customers engaging and evaluating multiple offerings that would cater to their needs? ? Convert -How many  
61 customers are taking the action tied to business objective? (e.g., sign-ups, app installs, purchase, etc.)

62 ? Retain -How many return customers does the business get? How many customers churn? ? Advocate -How  
63 many customers are advocating for the business to other people?

64 The customer buying process has evolved significantly over a period. It is non-linear, involves multiple  
65 touchpoints (online and offline), and has become extremely complex. Customers interact with the brand across  
66 multiple touchpoints, channels, and devices throughout the journey stages. In fact, due to the proliferation of  
67 digital channels and touchpoints, a typical customer gets exposed to a brand or product across multiple points in  
68 the buying lifecycle. Therefore, it has become imperative for brands to engage and nurture customers seamlessly  
69 across touchpoints. Customers are taking over control of their buying journey and expect brands to meet their  
70 needs and preferences. Brands must be prepared to meet customers where they are, provide the next-best offer  
71 and next-best action, and deliver a personalized experience that is unique to an individual. Consumers expect  
72 the companies they interact with to know them and anticipate their needs. Meeting these expectations can be  
73 challenging because it requires combining data from multiple solutions within their tech stacks to get a clear  
74 picture of an individual customer and act on those real-time insights to deliver a truly connected experience.

75 Therefore, marketers should consider customer needs, preferences, and behavior across various journey stages  
76 while designing customer experience management model.

### 77 2 b) Activate Customer Experience Across Touchpoints at

78 Scale A customer interacts with the brand or products across various touchpoints. The interactions can be a  
79 result of marketing campaigns or through word of mouth and is not the same for each customer. Some customers  
80 learn about the brand through paid media channels, e.g., social media, while others might learn about it through  
81 organic search or see a store on their way to work. Therefore, it is critical that different crossfunctional teams  
82 collaborate to provide the best experience a customer can have across these touchpoints.

83 Activating customer experience across touchpoints at scale is providing consistent and seamless experience  
84 to your customers across different touchpoints. It involves understanding customer personas and journeys and  
85 leveraging data and realtime insights to tailor experiences at an individual level. It also requires organizations  
86 to democratize data and, align KPIs across different teams, and take a customer centric approach to provide the  
87 best possible experience to the customer based on their needs, preferences, and behaviors. Customer Journey  
88 Orchestration is the next level of optimization and personalization strategies, and tactics companies usually  
89 deploy. It is all about leveraging data across the journey touchpoints, channels, and sources to personalize every  
90 moment in the entire experience across the journey funnel. This is a challenging task to accomplish since it  
91 involves organizational shift in mindset, adopting agile ways of working, and pushing the boundaries to achieve  
92 a unified goal. A lot of time, companies have siloed systems and functions that inhibit activating consistent  
93 and seamless experiences across touchpoints, channels, and devices. For example, marketing, channels, customer  
94 experience, testing and personalization teams have different objectives, measure different KPIs, and use data  
95 from disparate systems. Moreover, these teams sometimes fall under different orgs and departments (e.g., CMO,  
96 CDO) leading to different objectives. As a result, the customer experience is disjointed, leading to low customer  
97 satisfaction.

98 Year 2022 ( ) Case Study: Let us look at a case study to understand how a mortgage provider improved  
99 customer experience using journey orchestration.

100 ? Challenge: A leading mortgage provider noticed increased mortgage journey costs while a low selfservice  
101 percentage. ? Solution: the CX team analyzed the journeys and identified issues within the refinancing journey.  
102 They noticed that first call resolution (CFR) had fallen from 65% to 30%, and call volume had increased  
103 significantly. Root cause analysis indicated that most of the calls were while someone was uploading documents  
104 using the iOS mobile app.

105 The CX team worked with IT to fix the app and with marketing to create audiences of segments who are  
106 facing the issue and are in the refinance journey to send automated notifications with a workaround and update

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107 on the resolution. ? Impact: As a result, the company increased the mobile refinancing journey completion rate  
108 and reduced the call center volume.

### 109 3 c) Measure Customer Experience Effectiveness Across Touch- 110 points

111 Organizations have understood that customer experience is essential in engaging customers and driving loyalty.  
112 However, research has shown a direct correlation between customer experience and business growth. As  
113 organizations focus on improving customer experience and move on the maturity curve, they will start seeing  
114 revenue growth and a significant improvement on other metrics.

115 Typically, organizations look at increasing revenue as they advance (go further to the right) on the customer  
116 experience maturity. As a result, measuring the performance is extremely critical because:

117 ? Companies usually start small, and realizing value keeps the team motivated ? Measuring success helps with  
118 the business case and getting buy-in or securing budget ? Drives adoption across the organization Year 2022 (  
119 ) Exceptional customer experience performance measurement systems and processes are rooted in key metrics  
120 that help with not only understanding the overall impact on revenue but also with evaluating other areas, such  
121 as customer satisfaction and campaign performance across journey touchpoints.

122 Although there are a lot of metrics that you can track to evaluate performance, there are seven key metrics  
123 that organizations can start with to measure customer experience. Usually, brands will use these in conjunction  
124 to measure insights from different points of journey touchpoints and have a holistic view of the overall customer  
125 experience.

### 126 4 Net Promoter Score (NPS)

127 This is one of the most widely accepted metrics to measure the success of campaigns. Most brands will use NPS  
128 to understand and measure customers' overall perception of the products and brand.

### 129 5 Methodology:

130 The NPS is calculated by gathering direct inputs from customers, such as a survey.

### 131 6 Question:

132 The key question to ask is: "How likely are you to recommend the product/service/brand to friend or colleague?"  
133 The customer is asked to score on a scale from 0-10, where 0 = "Unlikely" and 10 = "Definitely".

### 134 7 Analysis:

135 The customers are then divided into three groups based on their response:

136 ? Promoters (9-10): these are primarily loyal customers who are passionate and enthusiastic about the  
137 product/service/brand and will continue to promote the company. They will continue to shop with the company  
138 and will share their experiences with others and encourage them to do the same. ? Passive or Neutral (7-8):  
139 These are tricky customers.

140 They are mostly satisfied but are not passionate or enthusiastic about spreading the good word about the  
141 product/service/brand. These customers won't talk negatively about the company but can be motivated o shop  
142 with competitive brands depending on offer, product, or experience. ? Detractors/Critics (0-6): These are  
143 unsatisfied customers and may be vocal about sharing negative experiences. These can harm the brand and can  
144 impede growth through their negative opinions.

145 Calculation: To calculate the NPS, we will subtract the percentage of Detractors/Critics from the percentage  
146 of promoters. We don't consider Passives/Neutral in the formula. NPS can be calculated as % Promoters -%  
147 Detractors as shown below????? ?????????????????? ?????????? = ? ?????????????? ??? ?????????????????? ?  
148 ?????????????? ??? ?????????????????????? ?????????????? ??? ?????????????? ?????????????????????????? ?  
149  $\times 100$

149 Example: To put this in context, let's take an example where a company surveyed 100 customers and received  
150 below responses:

151 ? 50 respondents rated among 9 and 10. These are classified as Promoters. ? 20 respondents rated among  
152 7 and 8. These are classified as Passives/Neutral. ? 30 respondents rated from 0 to 6. These are classified as  
153 Detractors.

154 After taking percentages, we get, 50% are Promoters, 20% are Passives and 30% are Detractors. Using the  
155 above formula,  $NPS = 50 - 30 = 20$ .

156 NPS may vary from -100 (all Detractors) to 100 (all Promoters) and can change over time. This metric  
157 corresponds to the level of effort a customer must go through to solve their problem e.g., find a product, take an  
158 action on the site, or get a question answered. CES often indicates how much effort customers are putting into  
159 interacting with the brand, service, or product and has a significant impact on driving loyalty and satisfaction. In  
160 fact, Harvard research has shown that level of effort a customer puts into finding a solution to their problem is a  
161 better indicator of customer loyalty than delighting the customer. Reducing friction points can reduce customer

## 11 CUSTOMER RETENTION RATE (CRR)

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162 service costs and attrition. Therefore, measuring the ease of a customer's experience can help improve customer  
163 service.

164 Methodology: Typically, this can be measured with a post-interaction survey to the customers asking about  
165 their recent experience. The response will be on a scale of low to high effort, and the calculation will be around  
166 average and score distribution. Question: To get the score, the survey must have a question "The company made  
167 it easy for me to find the answer to my problem"

168 The customers are asked to score from 1 to 5 or 1 to 7 depending on the objective. The company also can  
169 decide to set the score as 1 -strongly disagree and 5 or 7 -strongly agree.

170 Analysis: The responses can be collected in numerical value or emoticons. Based on the emoticons, the  
171 company can assign a numerical value and calculate the score. Calculation: CES can be calculated with a  
172 simple formula  $???\text{score} = \frac{\text{number of responses}}{\text{total number of responses}}$  Although there are multiple  
173 types of survey questions, a company can formulate, here are a few sample questions to ask in the survey:

174 ? How fast were you able to find a solution to your problem? Here the company can decide the numerical  
175 scale to use. ? How much effort did you put in to find the solution to the problem? Here the company can assign  
176 a numerical number to the level of effort. e.g., a lower score for less effort and a higher score for more effort.  
177 Alternatively, the company can also use emoticons for low, medium, and high-level effort and assign values to  
178 each for calculation. ? How easy was it to take a specific action related to an event, e.g., adding to cart, finding  
179 a product, or signing up.  
180

## 181 8 Customer Satisfaction (CSAT)

182 This metric helps measure customer satisfaction with the product, service, or brand. It also indicates whether the  
183 customer will churn and steps to take to retain the customer. However, companies should not use CSAT alone  
184 to make churn and retention decisions. In fact, they should use the customer satisfaction data to understand at  
185 a more granular level which parts of the product or service customer is satisfied or unsatisfied with and can be  
186 improved. For example, a customer can help with indicating satisfaction with a particular product feature by  
187 opening a support ticket or returning a product for a particular reason that can used by the business to optimize  
188 the experience.

189 Methodology: To calculate CSAT, a company can send a short survey with a targeted question to the customers  
190 after their interaction with the product, or service. The question is around asking the customers about their  
191 satisfaction on a scale of 1-10. Question: To get the score, the survey must have a question "How satisfied were  
192 you with your recent interaction with your company?"

193 Here the customers can score on a scale of 1-10 or from very dissatisfied to very satisfied or can be star ratings  
194 from 1-5.

## 195 9 Analysis:

196 The responses collected can all be converted into a quantitative score no matter what method was used.  
197 Calculation: CSAT can be calculated with a simple formula

198 **10**  $???\text{score} = \frac{\text{number of responses}}{\text{total number of responses}}$  **4.**

## 201 Customer Lifetime Value (CLV)

202 This is a key metric to track as part of the overall customer experience management program. Companies can use  
203 CLV to measure the value of a customer over a period, not just based on purchase but on the overall relationship.  
204 CLV represents the net present value of the profit that a customer generates across the relationship with the  
205 business.  $CLV = \frac{\text{Customer Revenue} - \text{Customer Costs}}{\text{Retention Rate} \times \text{Discount Rate}}$   
206 -customer costs ? R -retention rate ? d -discount rate ? AC -Customer Acquisition Costs

## 207 11 Customer Retention Rate (CRR)

208 This metric tells you how many customers stay with the company over a period of time. It is relevant and  
209 connected to the churn rate. Retention is helpful because you know when the customers are more likely to  
210 stop using or paying for the product or service. This can also be modeled and applied to different audience  
211 cohorts and used to create specific tactics for these cohorts. The Customer Retention Rate can be calculated  
212 as follows:  $CRR = \frac{\text{Number of Customers at End of Period}}{\text{Number of Customers at Start of Period}}$   
213  $CRR = \frac{\text{Number of Customers at End of Period}}{\text{Number of Customers at Start of Period}} \times 100$   
214

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## 12 Customer Churn Rate (CCR)

Businesses usually spend a lot more on acquiring new customers than retaining them. Therefore, it is imperative for firms to keep an eye out on the churn rate. The lower the churn rate, the more loyal the customers are. Retention rate and churn rate go hand in hand since you can see where the retention rate is dropping off, which users are churning, and how can you retain them.

## 13 $$\frac{\text{Number of Customers Churned}}{\text{Total Number of Customers}} \times 100 = ?$$

# of customers churned / total number of customers × 100

## 14 Repeat Customer Rate (RCR)

This is a metric that can be applied to most businesses, especially that are not SaaS. Usually, companies spend a lot of money on acquiring customers and spend a lot of time on making sure that they are driving repeat purchases. Therefore, repeat customer rate becomes important, especially because you do not want the customer to go to a competitor. More and more retailers are now introducing new tactics to keep the customers coming back returning to them, such as save and subscribe, auto-replenishment, etc. They are also encouraging users to sign up for the app since app users have higher clv than non-app users and the app has a better link to loyalty.

## 15 $$\frac{\text{Number of Repeat Customers}}{\text{Total Number of Customers}} = ?$$

Number of repeat customers / total number of customers

## 16 d) Reporting and Dashboards

While setting up metrics and measurement system is essential, it is valuable only if the insights are relayed to the teams and executives to take necessary action. Therefore, companies set up various types of dashboards and reports for teams to analyze, understand and act promptly. These reports can sit in visualization tools such as Tableau or PowerBI and can be scheduled to be delivered via email or text, depending on the cadence and urgency. A sample dashboard is shown below:

## 17 Case Study 1 Focused on Customer Lifetime Value

Challenge: a suburban bank was facing a challenge with effectively allocating budgets across the east and west coasts. They were spending marketing dollars evenly across the coasts but were not getting the best value for the spend.

Solution: the bank analyzed data and gathered insights that most of their customers belonged to two specific postal codes, one from the east and one from the west. Upon calculating the Customer Lifetime Value (CLV), they also found that customers on the east had 30% of the customer base but were spending 4x that of customers on the west. This insight led to a change in the allocation of media spend effectively.

Impact: by updating the spend allocation, they got more value for the same spend.

Case Study 2 focused on Customer Churn Challenge: US telecom operator could not accurately identify customers who are likely to churn for the company to be effective with targeting efforts.

## 18 Solution:

The telecom company created a series of predictive algorithms based on customer behavior, and demographics to create churn prediction models.

Impact: As a result, the company not only increased accuracy of predicting customers who are about to churn but also was able to save over 60% on acquisition costs through targeted marketing efforts. Case Study 3 focused on Net Promoter Score Challenge: Hotel Tonight did not have insights into a customer who had a terrible experience since such customers rarely take the time to write to the company.

## 19 Solution:

The company decided to collect feedback from the customers using the NPS survey and used it to prioritize future feature enhancements. They also supplemented it with industry trends and other insights with the NPS survey to enhance the experience. Impact: As a result, Hotel Tonight was able to overtime increase the NPS score to 75

## 20 b) Benefits of Improving Customer Experience

Enhancing customer experience leads to business growth, customer retention, and loyalty. Below are a few key advantages of focusing on customer experience management and measurement:

? Increased customer acquisition: excellent customer experience leads to satisfied customers willing to recommend the brand to their friends and families. Therefore, companies are focusing on enhancing customer

267 experience to build trust and encourage customers to share the experience through word of mouth. This, coupled  
 268 with media targeting, is an effective way to drive customer acquisition.

### 21 ? Elevated engagement and increased conversions:

270 improved experience drives better engagement rates and increased conversions. A happy customer is more likely  
 271 to engage and buy from the brand than a prospect or a new customer. Therefore, it is important for the company  
 272 to build long-lasting relationships and trust with the customers.

## 22 IV. Conclusion

274 The concepts around strategy, orchestration, and measurement of customer experience management can be  
 275 applied to any organization irrespective of the business model, size, and maturity. Organizations can readily adopt  
 276 the framework, and apply the different measurement strategies based on their objectives to evaluate performance  
 277 across various stages of the customer experience funnel to drive business growth and profitability. The findings  
 278 will be of tremendous value to marketers and practitioners looking to plan and implement a customer experience  
 279 management program. They can use this as a guide and plan out their program from strategy to orchestration  
 280 and measurement. The frameworks, practices, and methodologies highlighted will advance the knowledge and  
 281 understanding of marketers on which measurement strategies to implement based on their strategy and objectives.

282 There are various ways to get started, but the companies can consider the points highlighted in this study to  
 283 begin gradually, test and learn throughout the process and adopt and evolve as needed before driving adoption  
 284 throughout the organization.

### 23 a) Limitations and Scope for Future Research

286 This study consists of excellent theoretical and conceptual frameworks and techniques that organizations can  
 287 adopt and implement. However, there is still scope for further research, addressing ideas not touched in this  
 288 study.

289 The measurement techniques and key metrics are not comprehensive. Further study can highlight additional  
 290 metrics, such as active users, free to paid subscribers, etc., that can be included in the customer experience  
 291 management framework.

292 Further studies could also leverage additional data from organizations on how they have implemented these  
 293 frameworks and outline detailed strategies and outcomes.

294 Finally, more research is needed to understand how different metrics, such as NPS, CSAT, CLV, Retention,  
 295 etc., work in tandem and what is the effect of improvement in one or more metrics on overall customer experience  
 management.<sup>1</sup>

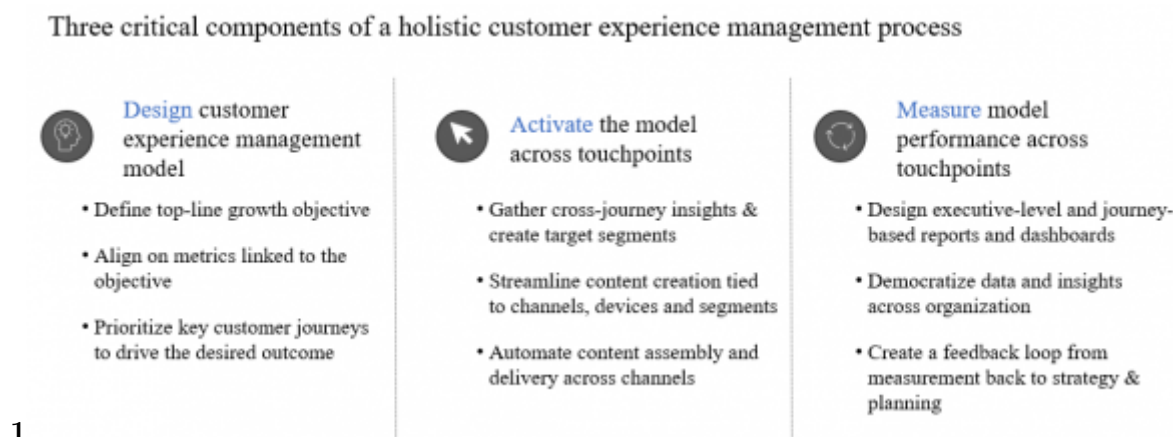
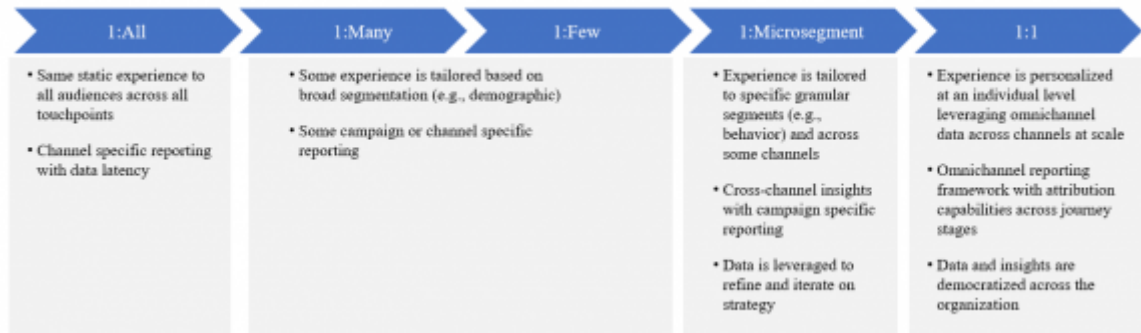


Figure 1: Figure 1 :

<sup>1</sup>The Three Most Critical Aspects for Implementing Holistic Customer Experience at Scale

Customer experience maturity from batch and blast to individual-specific targeting



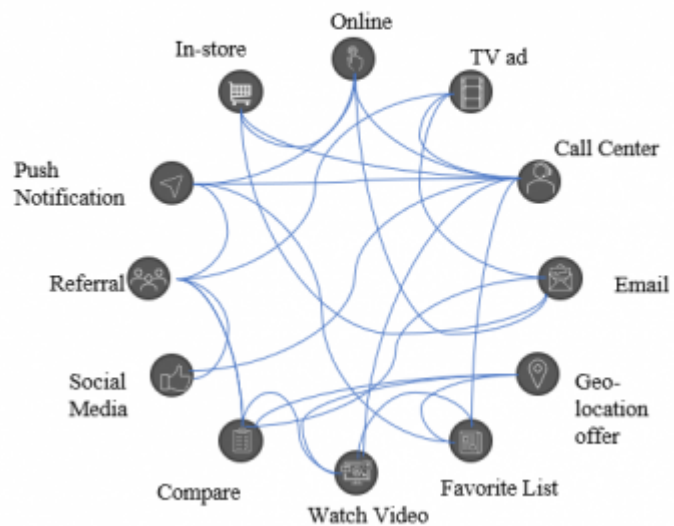
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Figure 2: Figure 2 :

Linear Customer Journey



Non-Linear Customer Journey



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Figure 3: Figure 3 :

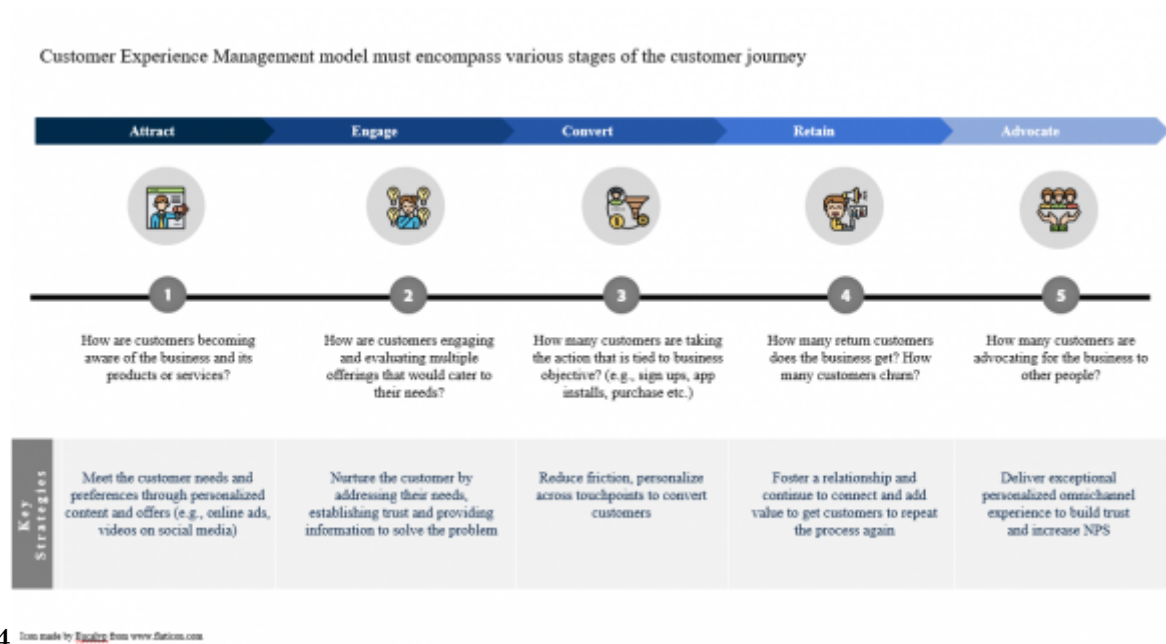


Figure 4: Figure 4 :

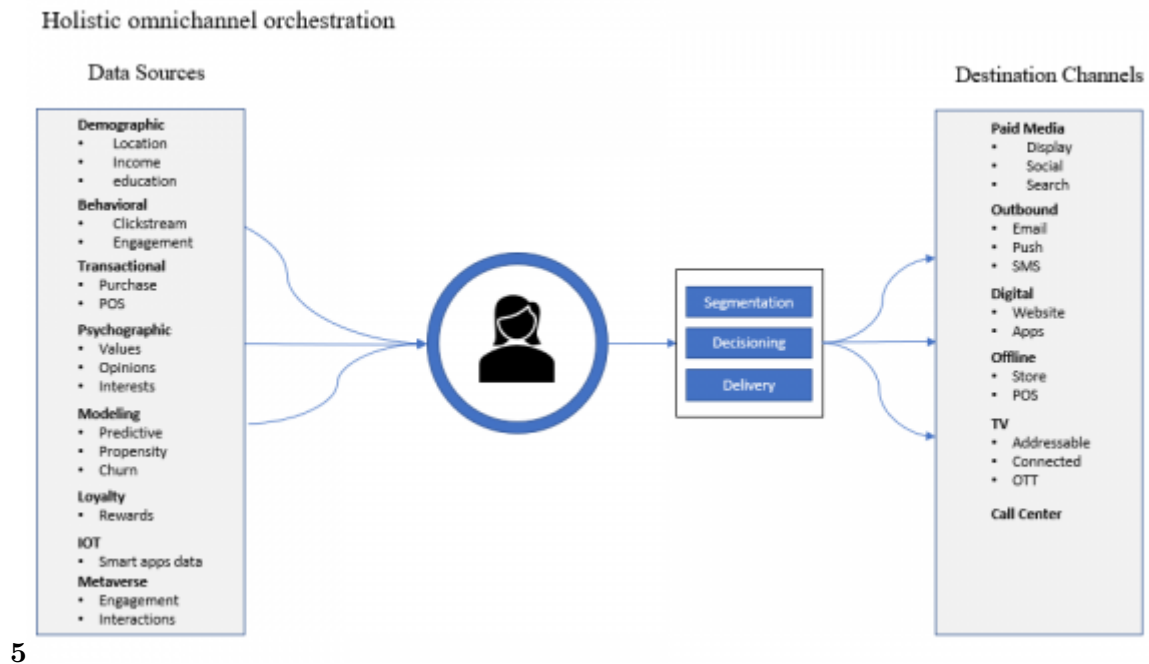
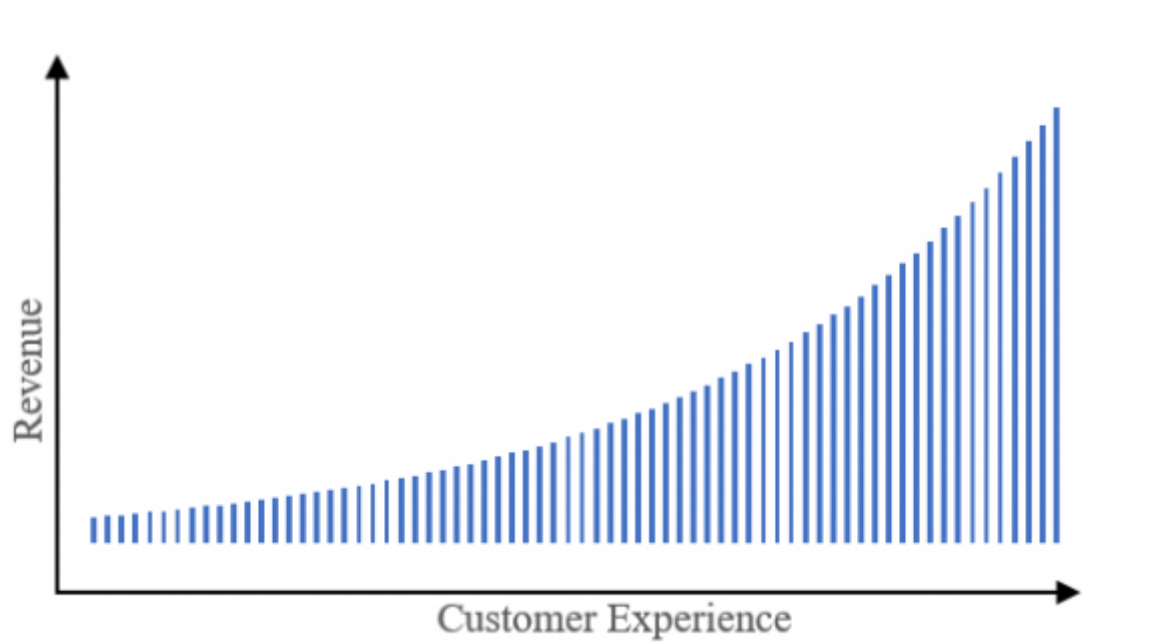


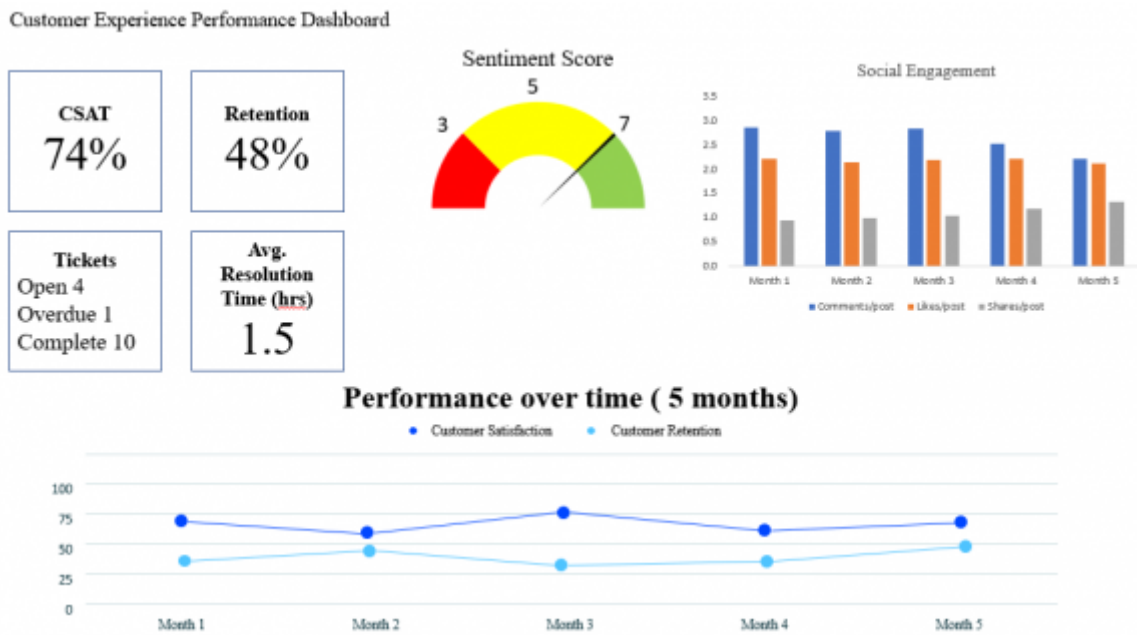
Figure 5: Figure 5 :





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Figure 6: Figure 6 :



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Figure 7: Figure 7 :

Figure 8: ?

? Effective media spend: capturing data from customers leads insights into what is working and what is not working. This helps the company to identify and reduce friction points and be more targeted with the media spend. As a result, the company can drive better results with the media spend and have a significant impact.

? Reduced cost of serving: overall better understanding of the customers leads to effective targeting, enhanced cross-sell and up sell opportunities that drive the overall cost down.

c) Key Considerations while Starting with Customer Experience Management

Customer experience is a key driver of value and growth for an organization. When getting started with customer experience management there are a few things to consider:

? Know your customers: Every business needs to gather data and insights to understand the needs and preferences of the customers. This is a critical

step in developing the strategy keeping in mind what would resonate with your customers. Right data can help build right segments and targeting campaigns to deliver personalized experiences.

? Define objectives and KPIs: Extremely important to define goals relevant to the company, business model, and maturity and support with right KPIs and achievable and measurable targets.

? Outline customer journey map: Based on the understanding of the customer, define a customer journey map. This will include different touchpoints, strategies and experiences based on actions, needs and preferences.

? Define a roadmap of capabilities: analyze existing capabilities, identify gaps and supplement with new capabilities aligned to the objectives. Define a roadmap on how these capabilities will be rolled out to deliver the targeted experiences.

? Measure performance data to

Impact:

Captu

Figure 9:

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