

CBR Deck Template

CUSTOMER LOGO

x

qualtrics^{XM}

Sample Agenda

TOPICS	PRESENTER/FACILITATOR	DURATION
1. Welcome & Introductions		5%
2. Partnership Overview & Progress Review		15%
3. Validation of Client Strategic Priorities		10%
4. Product/Program Adoption & Value Opportunities		15%
5. Deep Dive(s) on Focus Topics		20%
6. Open Discussion & Feedback		15%
7. Collaborative Planning & Goal Setting		15%
8.Roadmap Presentation		5%

Welcome and Introductions

Who you're meeting with



Name
Role



Name
Role



Name
Role



Name
Role



Name
Role

Partnership Overview & Progress Review

“Program on a Page”

Where we will listen	Who sees the data	What they will see	How we will action	Business impact
• Touchpoint 1 • Touchpoint 2 • Touch point 3: • Touchpoint 4:	Stakeholder / Business Unit	• Insight • Insight • Insight	• Expected Action • Expected Action	• Business Result • Business Result
	Stakeholder / Business Unit	• Insight • Insight • Insight	• Expected Action • Expected Action	• Business Result • Business Result
	Stakeholder / Business Unit	• Insight • Insight • Insight	• Expected Action • Expected Action	• Business Result • Business Result
	Stakeholder / Business Unit	• Insight • Insight • Insight	• Expected Action • Expected Action	• Business Result • Business Result

Phase 1 = 

Phase 2 = 

Validation of Client Strategic Priorities

XM Vision

Business Objectives

How XM will drive Business Objectives

XM Program Vision



XM Vision

Business Objectives

How XM will drive Business Objectives

XM Program Vision

Increase revenue via share-of-wallet gains for 'frequent flyers'

- ↑ trips/year of frequent fliers
- ↑ customer CSAT

- Satisfied customers are 2.3x more likely to spend more
- 22% of customers who have a very poor experience will stop traveling with that airline completely
- Avion Air has built foundational, transactional CX programs that enable teams to understand when frequent fliers have poor experiences

- + CX evolves into holistic listening, with real-time reporting for both relational and transactional experiences
- + Avion Air consistently follows up with frequent fliers that self-report any poor experience

Run an efficient & cost-effective experience management program

- ↓ administrative overhead
- ↓ human error

- The most efficient XM Programs automate recurring tasks required to collect feedback and drive action
- Automation reduces the internal cost of running programs as well as the cost associated with manual errors
- Avion Air administrators spend ~4 hours per week manually uploading or scrubbing contact lists for ingestion into XiD

- + Develop automations for key program components, including survey distribution, dashboard sharing, and action alerts

Understand the impact flight crew experience has on traveler experience

- ↑ customer CSAT
- ↑ Employee Engagement
- ↓ undesirable attrition

- Employee Engagement and enablement is widely accepted to impact the customers served by those employees – in addition to retention
- By developing a program to understand and improve the experience of flight crews, Avion Air will be able to understand the unique correlation between employee experience and traveler experience as well as take action to make improvements

- + Establish parallel EX program to monitor travel crew experience and help drive improvements to customer experience



CX Program Architecture for Avion Air

Clearly illustrates how a XM Program was built and its connection to business objectives – easy to identify opportunities to make improvements

Business Overview

Program Overview

XM Goal

XM programs

Listen

Understand

Act

Increase revenue via share-of-wallet gains

Travel Experience

KPI: CSAT

KPI: NPS

Customer Service Experience

KPI Agent CSAT

Customer finishes travel

O-Data
Origin
Destination
Flight Numbers
Customer ID
Flight Duration

XiD
Contract Import
Automation
(runs every hour)

XiD

Recent Travel Contact List

Customer Experience Contact List

Manual Import

Agent Interaction Closes

O-Data
Wait time
Call time
Agent Name
Reason for Call

Combine
O-Data +
X-Data

Travel Experience Survey

XiD Survey Distribution Automation
(Runs every hour)

Customer Service Experience Survey (CSES)

CX Dashboards

Text IQ

TES

CES

Stats IQ

TES

CX Spotlight Insights

Inner-Loop Follow up

Low CSAT / High Spend

Action Planning

Low CSAT

Outer-Loop Reporting

Slack Message Sent to Supervisor

Closed Loop Ticketing

WHAT IS OUR PLAN TO BE SUCCESSFUL?

WE AIM TO HELP YOU TRACK YOUR PROGRESS AND DRIVE TOWARDS YOUR SUCCESS

GOAL	ACTION	ACTION OWNER	STATUS	THIS MONTH	NEXT 3 MONTHS	3-6 MONTHS OUT	6+ MONTHS
1 ENGAGEMENT	Conduct monthly check-ins with Success Team	Enter text	Ongoing				
	Check-in on Success Plan progress with larger audience	Enter text	Not Started				
2 ENTER TEXT	Enter text	Enter text	Not Started				
	Enter text	Enter text	Not Started				
	Enter text	Enter text	Not Started				
	Enter text	Enter text	Not Started				
	Enter text	Enter text	Not Started				
	Enter text	Enter text	Not Started				
3 ENTER TEXT	Enter text	Enter text	Not Started				
	Enter text	Enter text	Not Started				
4 ENTER TEXT	Enter text	Enter text	Not Started				
	Enter text	Enter text	Not Started				

XM Success Plan for Avion Air

Translates the 'Qualtrics Vision' – and improvement opportunities identified via Program Architecture – into clear strategic initiatives that the Success Team & Customer Program Team will align on and execute

Proposed Initiatives	Opportunity for Improvement	Milestones	Proposed Timeline
Build a Better Engine Automate contact list import and survey distribution tasks for service experience program	~5 hours per week + inevitable errors associated with manual work uploading contact lists and distributing reports	Review Qualtrics-enabled automation mechanisms w/ IT	this month
		Partner with IT to build and launch new automations	in 2-3 months
Air Traffic Control Build real-time aggregate reporting for call center leaders to understand broader themes and trends to improve overall service experience	Qualtrics Air currently does not have role-based aggregate dashboards set up for call center feedback program	Build dashboard mockup / demo for review and iteration	next month
		Pilot new dashboards in select regions	in 3-6 months
		Rollout new dashboards for global utilization	in 6-12 months
Project “Smooth Landing” Develop a ‘closed-loop follow up program’ associated with existing transactional ‘travel experience’ survey	Qualtrics Air currently does not have a mechanism to ‘make it right’ for individual travelers that self-report a poor experience	Review & demo alert options within Qualtrics xFlow	in 4-6 months
		Develop xFlows and pilot with select call center leaders	in 6-9 months
		Roll out xFlows for global utilization	in 9-12 months
Customer Radar Stand up a Relational CX feedback program to understand overall traveler experience and identify key moments that matter	Qualtrics Air has only implemented transactional feedback programs for 2 key moments; opportunity to invest in a overarching relational program to uncover blindspots and other key experiences in a traveler's journey	Develop new relational CX survey	in 12 months
		Build outer loop reporting and inner loop action mechanisms for relational CX feedback program	in 13-15 months
		Pilot new relational CX survey with key customer segment	in 15 months
		Roll out relational CX survey to all customers globally	in 15-18 months
EX-CX Connection Consider investing in a corresponding EX feedback program for flight crews	Qualtrics Air currently does not collect EX feedback in a way that's integrated with their CX program	Qualtrics team to present details on EX Suite and functionality	annual planning session (pre-renewal)

Program Prioritization: Impact and Complexity



For Consideration

Current State

Bottom of Receipt/Loyalty
Curbside & Delivery
Post-Event
Digital Surveys (Web/App)
Post-Call

Art of Possible

Modern Digital Listening

Expanded Closed Loop

Social/Reviews

Theatro
Calls
Chat

XM Business Review



Critical to
improve



Opportunity
to improve



No immediate
action

Regularly evaluates XM Programs against key success criteria; provides XM SMs a framework to celebrate recent success / impact / value as well as double-click on key opportunity areas to improve

Success Criteria	Progress Made / Program To Date	Current Program	Growth or Improvement Plan
Engaged Program Sponsor(s)			
Established Program Governance			
Aligned Roadmap			
Effective Data Ingestion			
Actionable Insights Delivered to Stakeholders			
Organization Taking Action			
Value from Insights & Action			

XM Business Review



Critical to improve



Opportunity to improve



No immediate action

Regularly evaluates XM Programs against key success criteria; provides XM SMs a framework to celebrate recent success / impact / value as well as double-click on key opportunity areas to improve

Success Criteria	Progress Made / Program To Date	Current Program	Growth or Improvement Plan
Engaged Program Sponsor(s)	Engaged leaders in several lines of business who sponsor action and the overall success of the partnership.		No immediate action
Established Program Governance	CX COE recently established to manage Qualtrics programs, provision new users and guide the organization toward responsible license management; each LOB has own Division		No immediate action
Aligned Roadmap	CX COE and Qualtrics aligned on near term roadmap in Q4 2022, with prioritized actions and a realistic timeline.		Establish semi-annual candence to formally review progress and adjust
Effective Data Ingestion	Transactional X-data collected across multiple key moments of the customer journey; XM Directory is well hydrated with operational data critical to analysis and action (e.g. annual spend, customer demographics)		Implement contact import automations to improve efficiency and scalability of survey distribution process
Actionable Insights Delivered to Stakeholders	Developed real-time, role-based dashboards for post-flight experience program leaders; opportunity to do the same for customer service transactional program		- Build aggregate feedback dashboards for customer service program - Incorporate sophisticated analytics (e.g. Text iQ- and Driver iQ) to improve actionability
Organization Taking Action	Launched automated alerts / 'ticketing' for post-flight experience program – to drive immediate action when customer self-report poor flight experiences		Create & pilot a closed-loop program to follow-up directly with high-value customers who self-report poor service experiences
Value from Insights & Action	CX COE reports out change in CSAT and target traveler revenue to senior leadership on a monthly basis.		Perform retroactive analysis correlating customer CSAT and booking behavior / annual revenue

Product/Program Adoption & Value Opportunities

CX/EX/SR Product Maturity Map

	Level 1: LIMITED	Level 2 (Basic): FOUNDATIONAL	Level 3 (Intermediate): UNIFIED	Level 4 (Advanced): INTEGRATED
	The organization lacks a centralized XM platform	The organization establishes the underlying XM infrastructure for capturing experience data and sharing insights	Organization consolidates XM data onto a single platform, enabling cross-functional collaboration, omnichannel listening, and automated, insight-driven actions	The organization embeds its XM platform into its core business processes, enabling real-time, data-driven actions and personalized experiences at scale
Value	Simple VoC to get a Experience and use what you already know	To increase engagement and mitigate risk Collect and assess core CX listening to identify and fix what's broken and improve UX	To increase effectiveness Deeply understand the customer experience beyond X-data with quantified impact assessments and AI/ML modeling to help focus on the highest impact issues	To optimize effectiveness and minimize costs to serve View, understand, and orchestrate the omni-channel customer journey to drive CrossXM initiatives
LISTEN capture and aggregate XM data about people's experiences from various touchpoints and channels				
		Qualtrics AI	Qualtrics AI	Qualtrics AI
UNDERSTAND transform XM data into actionable insights tailored to specific insight users				
			Qualtrics AI	Qualtrics AI
ACT drive impactful actions across an organization based on XM insights				
			Qualtrics AI	Qualtrics AI

CX Product Maturity Map (includes Digital, Care, & Location)

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Value	Simple VoC to get a Experience and use what you already know	To increase engagement and mitigate risk Collect and assess core CX listening to identify and fix what's broken and improve UX	To increase effectiveness Deeply understand the customer experience beyond X-data with quantified impact assessments and AI/ML modeling to help focus on the highest impact issues	To optimize effectiveness and minimize costs to serve View, understand, and orchestrate the omni-channel customer journey to drive CrossXM initiatives
LISTEN capture and aggregate XM data about people's experiences from various touchpoints and channels	Simple baseline surveys Relationship surveys Simple touchpoints	Multichannel experience data captured from initial set of listening posts: Relationship Touchpoints // Transactional Touchpoints // Overall Site and App Experience // Persistent feedback // Simple embedded data // Contact Us Form // 3P Reviews Qualtrics AI	Structured and unstructured experience data collected from listening posts across journeys and channels: Multichannel Journey Listening (digital, location, care) // Digital Experience Analytics Unstructured call/chat transcript analytics Qualtrics AI	Real-time, individual-level experience data used to fine-tune analytical models: Adaptive targeted listening // Personalization responses Conversational feedback Qualtrics AI
UNDERSTAND transform XM data into actionable insights tailored to specific insight users	Basic analytics	Insights from basic analytics distributed through role-based dashboards for initial set of users: Basic analytics // Dashboard visualization// Text iQ // Benchmarks // Journey-based context from surveys only// XiD usage (based on solicited feedback)	Automated insights generated from BOX data and distributed through dynamic dashboards: Experience Profiles (XiD) // Conversational analytics // Journey Analytics // Expansion of O-data integrations // Data Modeler Qualtrics AI	Advanced AI-powered analytics applied at individual level to recommend next best actions: Automated Intelligence // Journey Mining // Orchestration/xFlow // Effectiveness // Segmentation & Personalization Qualtrics AI
ACT drive impactful actions across an organization based on XM insights	Simple Alerts	Core set of alerts and triggers set up: Alerts & actioning // Review & Reply (3rd-party reviews)	Workflows integrated with key operational processes and systems and trigger real-time actions: Automated workflows/xFlow Quality Management - Human Basic Coaching Qualtrics AI	Targeted actions deeply integrated into real-time operational systems and process: Recommended actions // End to End Human & Automated QM Advanced Coaching & Compliance // Complaints Management // Alerts based on orchestration effectiveness Qualtrics AI

Deep Dive(s) on Focus Topics

Room for a headline

- + Lorem ipsum dolor sit amet, consectetur adipiscing elit quis lobortis arcu ante nec ex pulvinar at eros ut, commodo sodales.
- + Pellentesque luctus, lectus eu elementum sodales, augue risus fermentum urna, vel vestibulum sapien lectus ac ipsum. Aenean dolor nisi, convallis vitae arcu ac.
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Open Discussion & Feedback

Room for a headline

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