

CX Proposal

A Framework to Enhance Voice of Customer (VOC) and Customer Engagement Practices

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Agenda

1. Overview

- ▶ Importance of VOC and community engagement
- ▶ Focus on CX and business growth

2. Assessment of Current CX Implementation

- ▶ Community engagement initiative
- ▶ Voice of customer initiative

3. Needs Assessment for other teams

- ▶ Product and marketing teams

4. VOC Framework Expansion Strategy

- ▶ Customization for specific team needs
- ▶ Change management practices
- ▶ Metrics and measurement
- ▶ Stakeholder engagement

5. Q&A

Introduction

Proposal Overview

This proposal highlights the:

Importance of VOC and Community Engagement

- ▶ Voice of Customer (VOC): Captures direct feedback from customers, providing valuable insights into their needs, preferences, and experiences.
- ▶ Community Engagement: Fosters a collaborative environment where customers, partners and employees can share knowledge, support each other, and build a sense of community.

With a focus on:

- ▶ Enhancing Customer Experience: Leveraging VOC and community engagement to improve product usability, customer satisfaction, and overall user experience.
- ▶ Driving Business Growth: Utilizing customer insights to inform product development and marketing strategies, leading to increased customer retention, loyalty, and market share.



Assessment of current implementation

Assessment of current customer engagement implementation

Success Factors

Strong integration

- ▶ Integration with Coveo's AI-powered search and recommendations.

Active participation

- ▶ Engagement from both customers and employees.

Product updates

- ▶ Consistent product updates and knowledge base maintenance.

Recognition

- ▶ Encouraging and recognizing contributors.

Challenges & suggestions

Maintaining engagement

- ▶ Implement gamification and loyalty programs to keep customers consistently engaged.

Regular updates

- ▶ More frequent updates (at least quarterly).

Introduce all Coveo platforms

- ▶ Use the homepage to introduce all customer engagement platforms so they know the right platform for an issue.

Content readability

- ▶ Continuously creating high-quality content using standardized style guide

Assessment of current VOC implementation

Success Factors

Comprehensive data collection

- ▶ Using diverse methods (surveys, interviews, feedback forms) to gather extensive customer insights.

Provide insights

- ▶ Translating and categorizing feedback.

Customer-centric culture

- ▶ Fostering a company-wide culture that prioritizes and values customer feedback.

Continuous improvement

- ▶ Reviewing and updating VOC processes to ensure ongoing relevance and effectiveness.

Challenges & suggestions

Insights from all users

- ▶ Business users, system admins and developers.

Long-Term VOC Commitment

- ▶ Ensure that VOC initiatives are an ongoing priority, not just a one-time effort.

Mixed methods research

- ▶ Combine qualitative and quantitative research methods to get a holistic view of customer feedback.

Expectation Management

- ▶ Communicate clearly with customers about what feedback can be acted on and the expected timeline.

Needs assessment of other teams

Which other teams to focus on **why**

Product team

- ▶ Product innovation driver: Prioritizes features and improvements based on VOC feedback.
- ▶ Customer experience impact: Shapes offerings that directly affect satisfaction and retention.
- ▶ Market competitiveness: Addresses pain points and innovates to stay competitive.

Marketing team

- ▶ Customer insights utilization: Creates targeted, relevant, and compelling messages.
- ▶ Brand alignment: Ensures marketing narratives align with customer experiences.
- ▶ Campaign effectiveness: Improves relevance and engagement rates using customer feedback.

Benefit from the synergy

- ▶ Maximized impact: Addressing both creation and communication of customer-centric solutions.
- ▶ Cross-functional collaboration: Ensures customer feedback is integrated across the journey.
- ▶ Buy-in from executives: As both R&D and business teams are in loop, there is a greater buy in from all stakeholders and executives.

Needs assessment of the product teams

Challenges

- ▶ A system to collect, categorize, and prioritize customer feedback.
- ▶ Ensure continuous alignment between product capabilities and evolving market needs.
- ▶ Keeping product documentation up to date with rapid release cycles across various knowledge bases.
- ▶ Bridging communication gaps between development, support, and customer-facing teams.
- ▶ Translating qualitative feedback into actionable UX improvements.

Requirements from VOC

- ▶ Tools to aggregate, categorize, and prioritize customer feedback from multiple sources.
- ▶ Dedicated platform for managing beta releases and collecting structured feedback.
- ▶ Predictive analytics for product planning.
- ▶ Prioritize customer feedback and aligning product development with customer needs.

Needs assessment of the marketing teams

Challenges

- ▶ Translating complex product features into compelling value propositions.
- ▶ Attributing marketing efforts to customer satisfaction and engagement metrics and measuring the long-term impact of brand-building initiatives.
- ▶ Creating targeted content that also ensures consistency of messaging across various marketing channels.
- ▶ Balancing authentic community voices with brand control.
- ▶ Aligning with sales, product, and customer success teams to ensure marketing messages align with product capabilities and roadmap.

Requirements

- ▶ Real-time access to customer interactions through insight dashboard.
- ▶ Tools to measure content engagement across various channels
- ▶ Analytics for measuring community health and engagement levels.
- ▶ Integration with product management tools to ensure alignment with feature releases and roadmap.
- ▶ Tools for turning customer feedback into compelling marketing narratives.

Framework expansion strategy

Five phases of framework **expansion strategy**

Phase 1

Preparation

- ▶ Integrate feedback from multiple sources into a single VOC data hub.
- ▶ Categorize and prioritize feedback using AI.
- ▶ Develop real-time dashboards for key insights.

Phase 2

Alignment

- ▶ Conduct workshops to present VOC benefits.
- ▶ Identify VOC champions within teams.
- ▶ Develop standardized processes for sharing insights.

Phase 3

Development

- ▶ Generate actionable recommendations for product and marketing teams.
- ▶ For example, feature requests for product team and case studies or blog ideas for the marketing team.

Phase 4

Implementation

- ▶ Develop targeted content and personalization strategies.
- ▶ Fully integrate VOC practices into workflows.

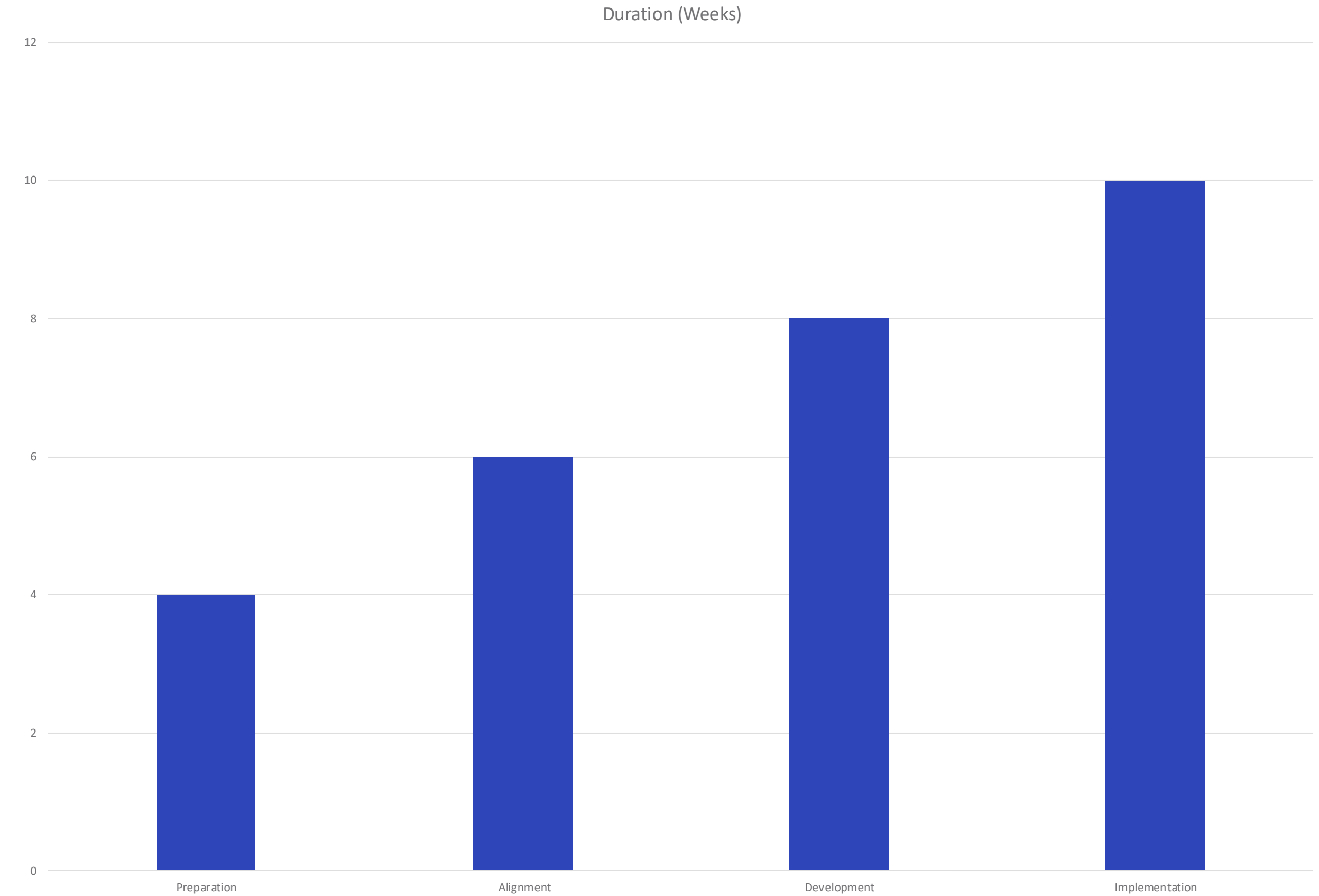
Phase 5

Optimize and scale

- ▶ Continuously refine VOC practices.
- ▶ Expand successful practices to other teams.
- ▶ Regularly update AI models for improved insights.

Estimated execution **timeline**

| Phase | Duration (Weeks) | Description |
|----------------|------------------|--|
| Preparation | 1-4 | Integrate feedback, categorize, prioritize, develop dashboards |
| Alignment | 4-6 | Conduct workshops, identify VOC champions, standardize processes |
| Development | 6-8 | Generate actionable recommendations for product and marketing teams |
| Implementation | 8-10 | Develop content, implement personalization strategies, integrate workflows |
| Optimization | Ongoing | Continuous improvement, expand practices, update AI models |



Customization for **specific teams**

Product team

- ▶ Implement feedback prioritization system.
- ▶ Establish regular VOC sessions in product planning meetings.

Marketing team

- ▶ Develop a content recommendation engine based on customer insights.
- ▶ Implement a collaborative platform for creating and validating marketing messages with customer input.
- ▶ Establish a "Customer Story Bank" for testimonials and success stories.

Stakeholder engagement

Key Stakeholders:

- ▶ Executive leadership.
- ▶ Product and marketing teams.
- ▶ Product support and customer success teams.
- ▶ Sales and account management teams.

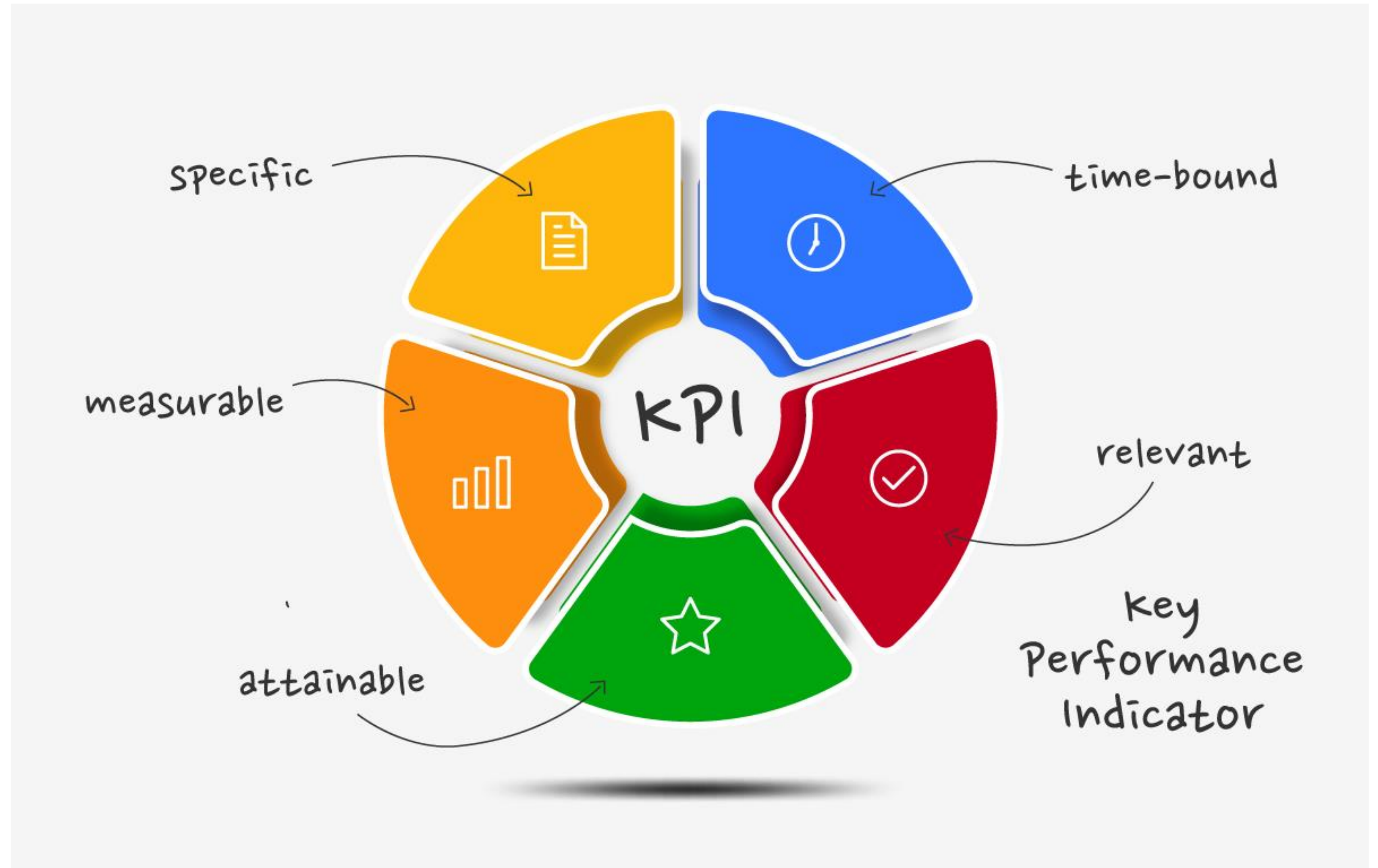
Engagement strategy

- ▶ Secure executive sponsorship.
- ▶ Establish a committee with representatives from all key stakeholder groups.
- ▶ Provide regular updates and host townhall meetings.
- ▶ Create a dedicated VOC hub for resources and updates.

Metrics and measurement

We'll track the following KPIs to gauge the effectiveness of our VOC and customer engagement initiatives:

- ▶ Engagement with VOC tools.
- ▶ Community engagement metrics.
- ▶ Number of product improvements and marketing initiatives from VOC insights.
- ▶ Customer retention rate, upsell, cross-sell success rates, and customer lifetime value.
- ▶ Improvement in customer satisfaction (CSAT) and net promoter score (NPS).



Change management **Practices**

To ensure VOC practices are not Good-to-have but must-have, our change management execution plays an important role. Here are some recommendations:

- Identify the key changes in organizational structure.
- Secure visible support from C-level executives.
- Include VOC metrics in company-wide OKRs.
- Provide regular updates on VOC initiatives.
- Implement in phases with pilot programs in key departments and gradually implement across other teams.
- Establish channels for employee feedback to ensure it's a willing change.
- Regularly assess and adjust based on internal feedback.



Conclusion

Summary of key points

- ▶ VOC Framework Expansion: Implementing a comprehensive strategy to enhance customer engagement and VOC practices.
- ▶ Phased Approach: Utilizing an agile methodology to adapt and iterate throughout the process.
- ▶ Change management plan: Ensuring structural changes to execute the VOC initiatives efficiently.

Expected outcomes

- ▶ Enhanced VOC Practices: A robust system for collecting, analyzing, and acting on customer feedback.
- ▶ Organizational Alignment: Better collaboration across product and marketing teams, resulting in more cohesive strategies.
- ▶ Improved Customer Engagement: More personalized and targeted content, leading to higher satisfaction and retention.

Next steps

- ▶ Implementation Kickoff: Begin the first phase of the expansion plan with a focus on preparation and alignment.
- ▶ Continuous Monitoring: Regularly track progress and make adjustments as needed to stay on course.
- ▶ Stakeholder Engagement: Maintain open communication with all stakeholders to ensure transparency and buy-in.

Questions!