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**CHIEF  
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OFFICER**

**2.0**



How to Build

Your Customer-Driven

Growth Engine

**WILEY**

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## More Praise for *Chief Customer Officer 2.0*

“Jeanne focused our leadership team on embedding her five competencies into how we do business. Using the content described here, she united us in redirecting how we develop and grow our business and customer relationships.”

—**Doug Holte, President, Irvine Company Office Properties**

“I *guarantee* that you will dog-ear this book and refer to it repeatedly to achieve success in your customer experience transformation and leadership role.”

—**Gavan Duff, Chief Customer Officer, MSA, The Safety Company**

“It's wonderful to see Jeanne Bliss come out with another great book. Chief Customer Officer 2.0 is full of sound, practical advice for leaders who want to help their organizations become more customer-centric. I highly recommend it for anyone who cares about customer experience.”

—**Bruce Temkin, Managing Partner of Temkin Group, Co-Founder, Customer Experience Professionals Association**

“Jeanne Bliss was the first to bring the chief customer officer role and customer leadership to us. With this book she continues to be a guardian and beacon to customer experience executives around the world.”

—**Kerry Bodine, Coauthor of *Outside In: The Power of Putting Customers at the Center of Your Business***

“Jeanne's five competencies in this book gave us a clear and concise path for improving client experiences and uniting our leadership team.”

—**Dan Schrider, CEO, Sandy Spring Bank**

“If you believe, like I do, that companies in today's increasingly commoditized world need to be customer-driven and experience-focused, then grab Jeanne Bliss's *Chief Customer Officer 2.0* off the shelf, read, and absorb it. Create such a position dedicated to developing a growth engine around the individual, living, breathing customers of your company, fulfill that position, or align with that person. Or, you know, be commoditized.”

—**Joe Pine, Coauthor, *The Experience Economy and Infinite Possibility***

“This is simply the most important book on your reading list right now to help you drive your customer experience transformation.”

—**Joe Wheeler, Executive Director, The Service Profit Chain Institute**

There is no one more qualified to write this book than Jeanne Bliss, a visionary and leading light in the search for what customer-centric leaders must do to propel their organizations to greater success. Read *Chief Customer Officer 2.0* to capitalize on Jeanne's decades of experience as a practitioner and coach, and learn how to truly embed customer-centric competencies into your organization.

—**Bob Thompson, CEO of CustomerThink Corp. and author of *Hooked On Customers: The Five Habits of Legendary Customer-Centric Companies***

“Make this book first on your reading list! Jeanne Bliss's thought leadership and ability to unite a leadership team and clarify this work takes years off your customer experience transformation.”

—**Yves Leduc, President, Velan, Inc.**



“No matter your role in business, run to the cash register with this book. In *Chief Customer Officer 2.0*, you are provided a model, set of filters, tangible game plan, and the tools you will need to enjoy rewarding and sustainable growth that comes from delighting your customers. The book you are holding is approachable, transformational, and in keeping with the incredible thought leadership Jeanne Bliss has offered throughout her customer-obsessed career!”

—**Joseph Michelli, *New York Times* bestselling author of *Leading the Starbucks Way*, *The Zappos Experience*, and *The New Gold Standard***

This book should be a reality show because almost every company needs a makeover to make customers a priority again. *Chief Customer Officer 2.0* is the best guide for your own successful makeover!

—**Jeffrey Hayzlett, primetime TV and radio host, speaker, author, and part-time cowboy**

“Jeanne Bliss has the experience and wisdom to guide you through the process of creating a customer-driven organization.”

—**Shep Hyken, customer service expert and *New York Times* bestselling author of *The Amazement Revolution***

# **Chief Customer Officer 2.0**

## **How to Build Your Customer-Driven Growth Engine**

**(Completely Revised and Expanded)**

**Jeanne Bliss**



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*For All the Leaders Who Grow Their Businesses by  
Improving Customers' Lives*

# Introduction

I've been doing this work for so long, that sometimes while I'm waxing on, a Chief Customer Officer (CCO) client will ask, "Can you write that down?" I don't often do that, because my goal in coaching CCOs and leadership teams is for them to find their own united voice. To help them emerge as customer leaders. We unite the CCO and executive team in focusing their organizations on customer-driven growth. On replacing reactivity and survey score addiction with embedded competencies that became part of the business engine. My job is behind the scenes to ensure they don't fall into the same potholes others before them have, and to help them accelerate their transformation as swiftly as possible.

In the past ten 10 years, since writing and publishing *Chief Customer Officer: Getting Past Lip Service to Passionate Action*, it has been my privilege to be called upon by nearly every business vertical around the world—to coach their Chief Customer Officer and executive leadership teams in their transformation toward customer-driven growth. Insurance, technology, healthcare, retail, financial services, hospitality, manufacturing, telecommunications, Software-as-Service companies, service businesses, government agencies, and many other industry leaders have reached out for clarity and a road map on how to navigate these often-unwieldy waters. (*Usually starting with a somewhat urgent call asking for help defining the work and the role. You are not alone!*) Like you, they needed a way to break this work up and accomplish it in a realistic manner.

We have made great strides together. And we have stories to tell. These stories from both clients and customer leadership executives representing nearly every business

vertical are peppered throughout this book in case studies entitled “My Rock, My Story.” This title is a nod to Sisyphus, who we all at times feel akin to, pushing the rock up the hill.

And that is why I have written this book for you. I wanted to provide this advanced toolkit as your success accelerator and road map. To that end, this is essentially a completely new book with specific tales of customization and implementation comprised from working with practitioners in multiple industries, organizations, and cultures.

Through working with leaders around the world, heightened specifics and tactics have emerged to increase success for this role and customer-centric business transformations. Through coaching, more tools have been established to provide greater clarity for CEOs and executive teams seeking to understand the value in this role and their personal commitment required to make it a success. Through coaching, five Customer Leadership Competencies have emerged that create an engine for reliably leading this work.

Around the world, the customer leadership executive role (chief customer officer, vice president of customer experience, etc.) has been embraced in both business-to-business and business-to-consumer organizations. Leaders in these roles have worked to figure out how they should organize, act, and make decisions to earn the right to business growth by embracing employees and customers and delivering an experience they want to have again and tell others about. There have been many versions of success, as you probably know well from living within the constraints of trying to do this work across a silo-driven organization. And many opportunities remain—through learning from each other and sharing our stories.

Helping you achieve success as CCO with your executive team and organization depends upon actions and behaviors that have been developed, practiced, and matured through my many years as a practitioner and coach. I will share these with you.

- The common denominators to customer leadership executive success.
- Roadblocks for organizations that were stopped short.
- Five Customer Leadership Competencies of world-class companies.
- What changes when the five competencies become a part of the way you go to market, develop products, reward people, and conduct annual planning.

Many things have *not* changed since I wrote *Chief Customer Officer: Getting Past Lip Service to Passionate Action*. Organizations still rely primarily on areas of expertise or silos to run the business. Annual planning is still done (mostly) silo by silo. Lagging indicator surveys still often drive point-in-time action to try to improve results (not always the customer experience) and the customer is often still the only one experiencing the outcome of this disconnection.

What *has* changed is the power that social media has given customers to speak out about their experiences. I am supremely enthused about this forcing function! Lagging survey metrics can't catch surges of happiness and unhappiness that customers express in social media to make an impact on customer growth and profitability. And the cherry-picked silo-based projects that emerge from these results are not solving the problems causing customers to depart or grow.

The monthly CEO report out still goes from silo vice president to silo vice president in C-Suite meetings. But there is growing angst that this dissected view is not the right one to make focused and impactful customer growth investments.

And with that, more companies are trying to figure out how to organize and unite to tackle experiences end to end. It's a noble commitment...but still misunderstood. Now more than ever with the rise of social media, big data, and the surge of focus on customer experience, CCOs are at risk of chasing the 'shiny object' of the moment than at embedding a set of behaviors that will transform their organizations.

So with all of that in mind, here is the inside of my new and improved clock on how to become what I call "the human duct tape" of the organization. *Chief Customer Officer 2.0* is for you, the...

- Customer leadership executives with the role today
- CEOs and boards considering the role for their organization
- Those moving to CCO from another role
- People aspiring to bring the role into their organization
- Executive Teams working with the CCO
- Recruiters placing customer leadership executive positions

Thanks for all the years of reaching out and trusting me to help you along the way. I wrote this for you, as always, to have my hand on the small of your back, encouraging and prodding you to push that rock up that hill. I am honored we get to spend this time together again. Supporting you is my life's work. Thanks for taking the time to read this new and enriched material.



Jeanne Bliss  
Los Angeles, California  
February 2015

## **Your Reading Road Map for *Chief Customer Officer 2.0***

Having prescribed to all my clients that they need to give employees and customers a road map on the experience that they deliver, the following is your reading road map for Chief Customer Officer 2.0. This book is assembled to enable you to work with your leadership team to establish a one-company approach and understanding of what it means to focus on “customer experience.” It will provide you with a framework that can be customized to your organization so that you can earn the right to customer-driven growth. Through the “Action Lab” tools and “My Rock, My Story” case studies, it will challenge you to determine how your current efforts compare to others doing the same, it will provide encouragement in storytelling, and it will provide practical actions you can implement.

<b>Chapter</b>	<b>Purpose</b>
1. Chief Customer Officer Role Clarity	Summary of the CCO role based on the five-customer leadership competencies.
2. Unite Leadership to Ensure Role Adoption and Acceleration	How to lay the groundwork for a successful transformation.
3. Competency 1: Honor and Manage Customers as Assets	Information on each competency to customize and implement actions for your organization.
4. Competency 2: Align around Experience	
5. Competency 3: Build a Customer Listening Path	
6. Competency 4: Proactive Experience Reliability and Innovation	
7. Competency 5: Leadership, Accountability, and Culture	
8. Staging the Work	Maturity Map so you can stage the work and the evolution of the CCO role for your business.
9. Comprehensive Toolkit for Hiring or Interviewing a CCO. There is valuable information here for <ul style="list-style-type: none"> <li>• CCO candidates</li> </ul>	Prepares you for the successful research and selection of a customer leadership executive for your organization.

- Executives and Boards considering the role
- Headhunters recruiting for the role

# Chapter 1

## Chief Customer Officer Role Clarity

### The Five Customer Leadership Competencies

A Chief Customer Officer is successful when he or she can simplify how the organization works together to achieve customer-driven growth, engage the leadership team, and connect the work to a return on investment. That's what everyone wants to know about this role. What does the Chief Customer Officer do, how is the work staged and what is its impact? You'll find the answers to these questions in this book.

What you will also find, which is equally important, is how to unite the leadership team and organization to 'earn the right' to growth by making decisions and orienting business operations to improve customers' lives. This is the elusive and challenging element of this work that, when neglected, can turn it into a program or project rather than a transformation. Sustainable change will occur only when this work goes beyond project plans and status updates and is grounded in caring about customers' lives. It's the path to growth the five competencies outlined in this book provides.

What I know from over thirty years as a CCO practitioner and coach to customer leadership executives and their C-Suite, is that we've got to take the reactive nature out of this work. Our work must be about embedding behaviors and competencies in the organization: Competencies that

will transform how the business and operation are run, to achieve customer-driven growth.

If you became the customer “Velcro man” or “Velcro woman” where all customer issues were strewn in your path upon assuming this role, you know that establishing role clarity and executive alignment is paramount. Without it, you run the risk of being defined as the fix-it person. And that's *not* who you want to be.

Customer-focused efforts are often highly reactive because they sync to the cycle of survey results. The results come out; the silos react independently, rinse and repeat. This reactive nature of waiting for the results and then taking actions that chase the score push the work to what I call “whack-a mole” tactics. Fixing things. Project plans or work streams with red, yellow, and green dots.

And the role of the chief customer officer (CCO) is defined as the fix-it person for what currently ails customers, or the one nagging the silos to take action. Despite all this activity (giving a false positive of commitment measured by energy expended), we have not embedded new behaviors for how we understand customers' lives, how we care about their lives, and how we improve their lives. **Our work is defined by project plan movement rather than customer life improvement.**

*The purpose of our work* is to galvanize the organization to deliver experiences that customers want to have again—to earn the right to customer-driven growth. But what we sometimes do in these roles is the opposite. Customer-focused actions are one-off reactions to survey results, or to an executive in the field getting direct customer feedback, or to a letter that lands on someone's desk. Information is delivered, the silos react, and the cycle repeats.

As a result, the higher purpose of our work, which is to drive growth, is lost. These efforts then fall prey to being perceived as costs without reward. CEOs and boards *want* to be customer focused, but without an explicit connection to growth, many consider the work to be:

- A leap of faith.
- Expensive.
- Deterrents to the “real” work.

## **The Five Customer Leadership Competencies**

For customer experience efforts to become valued and considered critical to driving growth they must rise above the fray of being defined as problem solving or chasing survey scores. The work must be defined as building your customer-driven growth engine, with the CCO role as the architect of that engine.

From being a practitioner in the rinse and repeat cycle to coaching CCOs and the C-Suite, I knew I had to find a way to break that cycle. To create a system that shows a clear and simple connection to a return on investment, and gives the CEO that legacy that he or she wants to leave as their mark. That system is these five competencies that will, over time, build your customer-driven growth engine.

The 5 Customer Leadership Competencies connect to growth. They deliver constantly updated information to unite leaders on the most impactful customer priorities, and they shift attitudes from chasing survey scores to caring about and improving customer lives to earn the right to growth.

Here are the benefits of this five-competency business engine:

- They establish the connection to business growth. The five competencies elevate customer experience efforts from getting a score to 'earning the right' to growth.
- You build them *at your own pace*, with actions that are most potent for your culture, your leaders, and the company's ability to take on the work within each competency.
- They build an engine analogous to the familiar process of product development, with distinguishable steps and metrics and performance requirements. These five competencies provide an equal discipline for focused customer experience development.
- They drive a one-company focus on customer experiences by uniting leaders in investing in the most impactful priorities. Competency five, for example, builds a monthly process (called a customer room) to step people into the shoes of the customer, uniting the company to focus on a few critical actions rather than having every silo choosing many tactics separately from one another.
- They specify actions that demystify the role of the customer leadership executive (CCO, CXO, etc.). The role becomes clear, as architect and facilitator of the engine, uniting leaders to make decisions that improve customers' lives and lead to business growth.

I call these Customer Leadership Competencies because they define the behavior of world-class organizations focused on customers and employees. They impact how these organizations decide to grow, how they lead in



unison, how they identify and resolve issues, and how they collectively build a one-company experience.

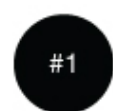
Below is an introduction of the five competencies that will comprise your customer-driven growth engine. Later in the book there is a full chapter on each competency, along with tools to help you to customize your version of these competencies for your organization. These are:

- **Action Lab:** Tools and templates to immediately put into use.
- **My Rock, My Story:** CCO stories on how they united leadership, worked through challenges, and achieved success.

Based on working as a practitioner, and with clients around the globe for over thirty years, here is the *real-world* approach for how to integrate the discipline and role of customer experience leadership into your operation. **Here are the five competencies that define the Chief Customer Officer role** and require engagement of the executive team and organization to make them a success.

### 1: HONOR AND MANAGE CUSTOMERS AS ASSETS.

*Know the Growth and Loss of Customers and Care About 'WHY?'*



#### Customers as Assets:

Align leaders to make a defining performance metric – the growth or loss of your customer base. Shift to a simple understanding of customer-driven growth success.

- Growth of Customers
- Loss of Customers
- Business Growth



In Competency 1, the work is to align leaders to make a defining performance metric—the growth or loss of the

customer base. The purpose is to shift to a simple understanding of the overall success achieved when a company earns customer-driven growth.

Customer Asset Management is to know *what customers actually did* to impact business growth or loss versus what they *say they might do* via survey results.

For example: how many new customers did you bring in this quarter, by volume and value (power of your acquisition engine); how many customers were lost this quarter, by volume and value (power of the experience and value perceived); how many increased their purchases; and how many reduced their level of engagement with you? The key here is to express these outcomes in whole numbers, not retention rates, so the full impact is understood—these numbers represent the lives of customers joining or leaving your company.

This connection can be explained and accepted by your board of directors. And it gives your executives a platform from which they can personally talk about this work, take ownership of it, and connect it to business growth.

The role of the CCO is not to build and then ‘pitch’ these metrics to the C-Suite. It is to unite leaders in establishing customer asset metrics and customer growth behaviors that they will stand behind as a united leadership team. And it is to work to build the engine with them to enable the data so that this information is recurring and refreshed to drive business decisions.

What this means is to know and care about, at the executive level, the shifting behavior within your customer base that indicates if their bond with you is growing or shrinking. And, importantly, it's about engaging your executives in caring about the “WHY?” Why did customers

stay or leave, buy more or less, or actively use your products or services more or less?

With this book, you'll be able to start the conversation with your leadership team and engage them in building your version of customer asset metrics. You will be able to engage them in building your company's version of this simple metric, and translating and communicating it across your organization, in a manner that connects to your operation and resonates with your employees.



## **Elevating Our Donors as Assets**

**Martin Hand**

*Chief Donor/Customer Officer*

*St. Jude Children's Research Hospital*

*Martin Hand is Chief Donor/Customer Officer at St. Jude Children's Research Hospital, where he is responsible for the overall donor experience, contact center operations, and donor account processing functions. Martin was previously Senior Vice President of Customer Experience at United Continental Holdings.*

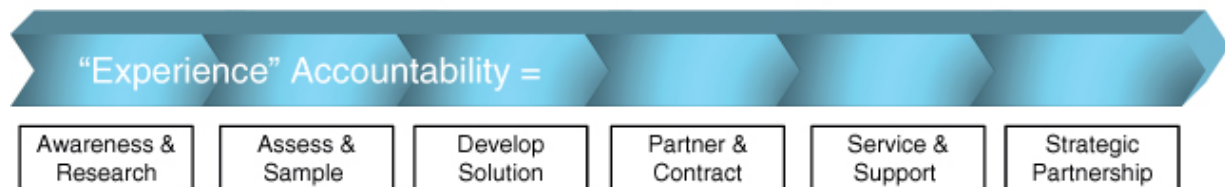
It takes \$2 million per day to operate St. Jude Children's Research Hospital to help save children's lives. Donors caring about these kids have contributed over 75 percent of those funds for more than 50 years. Without them we couldn't have pushed the overall childhood cancer survival rate from 20 percent to 80 percent. Therefore we want to connect all of our employees to the importance of how their work impacts donors' lives, and to find effective and simple ways to measure and discuss the growth or shrinkage of our donor base. Our goal is to elevate this donor-centric philosophy across the organization and make the donor experience a key part of how we measure our success.

What we find is that it is most powerful to combine story telling when we deliver this information. We will tell the growth of donors and how many we did not keep, and then we will challenge the organization with the impact of losing donors. We tell this story in both the number of lost donors and also in the value of the donor we lost—to show the potential future revenue of a lost donor.

We show explicitly the incremental growth that we would have if we kept 5 or 10 or 20 percent more donors. And then we attach that information to examples of issues that drive donors away. Now people's work is connected to growth and they have clarity about what they can do about it.

## 2: ALIGN AROUND EXPERIENCE.

*Give Leaders a Framework for Guiding the Work of the Organization.  
Unite Accountability as Customers Experience You. Not Down Your Silos.*



#2

### *Align Around Experience:*

Align the Operation Around Customer Experience Delivery & Innovation. "Earn the Right" to Customer Asset Growth.

- Customer Journey
- Focus on Priorities
- Leadership Language

Competency 2 gives leaders a framework for guiding the work of the organization: requiring cross-silo accountability to deliver deliberate customer experiences. It unites the organization in building a framework for 'earning the right' to customer asset growth. The role of the CCO is to unite leaders and the organization in building a one-company version of their customer journey.

This means facilitating across the silos to unite them in the development, and understanding of the entire customer journey, versus the silo-based processes that dictate the customer experience (such as the sales process, marketing acquisition process, etc.). It includes focusing the organization on priority one-company experiences. And on changing the conversations from silo-driven conversations

to collaborative conversations about customers' lives—their experiences across the journey they have with your organization. Over time, this will evolve leadership language to drive performance along the customer journey, driving accountability to journey stages, not only down silos.

As a result of competency two, questions about silo and project performance will shift to include accountability for customer life improvement. Your customer journey framework will provide a disciplined one-company diagnosis into the reasons behind customer asset growth or loss. And it will establish rigor in understanding and caring about priorities in customers' lives (The *real* power in journey mapping.)

With this book, you will be able to assess how you currently use your customer journey map as the framework to consistently drive company focus, in your customer listening, experience improvement, and planning efforts. You will learn how other CCOs have avoided the “shiny object” syndrome that journey-mapping is at risk of being today. And you will learn how to move mapping from a one-off activity to the beginning of a competency that drives business behavior.