

MEMBER EXPERIENCE MATURITY ASSESSMENT

The journey to building a customer-centric organization cannot be completed overnight. To achieve your CX goals, strategic planning and the right tools can help you meet your targets along the way. What's your current CX status?

	Exploring	Emerging	Building	Scaling	Championing
Current state	Evaluating a need for a CX program	Collecting feedback through centralized member surveys	Effectively capturing member feedback across a variety of touchpoints	Collecting feedback and managing experience at a member journey level	Customer-centric organization driving member experience as a distinct competitive advantage
Strategy Do you have clearly defined CX business objectives?	<ul style="list-style-type: none"> CX vision is not documented 	<ul style="list-style-type: none"> CX is recognized as an organizational value, but there is no clear roadmap in place yet 	<ul style="list-style-type: none"> Initial CX strategy, budget, and roadmap are defined 	<ul style="list-style-type: none"> A robust CX strategy addresses all key member personas, journeys, and touchpoints 	<ul style="list-style-type: none"> CX strategy is a power tool for proactively enabling new experiences
Deployment Who is involved in execution of CX initiatives?	<ul style="list-style-type: none"> Individual champions are researching information about member feedback, CX, and CX metrics 	<ul style="list-style-type: none"> Ad hoc cross-functional teams come together as needed 	<ul style="list-style-type: none"> CX efforts are managed by a full-time dedicated team with cross-functional support 	<ul style="list-style-type: none"> CX goals are aligned to business objectives and KPIs and cross-functional teams are assigned accountability for executing the roadmap 	<ul style="list-style-type: none"> CX strategy execution is integrated into everyday decisions and business processes
Data & listening channels How do you collect member feedback?	<ul style="list-style-type: none"> One-off member surveys Limited member feedback collected around visible member service touchpoints 	<ul style="list-style-type: none"> Basic, centralized voice of the member surveys and reporting to leadership team in place 	<ul style="list-style-type: none"> Multiple channels are utilized to capture feedback (email, SMS, web forms, etc.) Unstructured feedback is analyzed with text analytics techniques 	<ul style="list-style-type: none"> Ongoing omni-channel listening to voice of the member Robust key driver analysis is in place to help prioritize activities and optimize ROI 	<ul style="list-style-type: none"> Both solicited and unsolicited feedback is captured and analyzed Predictive analytics used to identify member loyalty and satisfaction risks and opportunities
Measurement How are metrics used to measure member experience?	<ul style="list-style-type: none"> 1-2 randomly selected metrics in place (such as number of member complaints, resolution time, etc.) 	<ul style="list-style-type: none"> 1-2 initial CX metrics selected, benchmarked, and regularly measured (such as annual CSAT or PSAT) 	<ul style="list-style-type: none"> A core set of CX metrics (including NPS, CSAT, CES) is defined Metrics are being captured at relational and transactional levels 	<ul style="list-style-type: none"> CX metrics are consistently captured for all key member touchpoints and journeys. CX metrics are correlated to key business objectives such as customer lifetime value, turnover, etc. 	<ul style="list-style-type: none"> CX metrics are consistently captured for all key member touchpoints and journeys Cross-functional internal KPIs, including EX metrics, are monitored against core CX metrics
Integration How are you identifying and acting on data insights?	<ul style="list-style-type: none"> No process in place for consistent sharing of feedback data across the organization 	<ul style="list-style-type: none"> Basic CRM integration is in place to simplify survey distribution Voice of the customer findings inform organizational strategy 	<ul style="list-style-type: none"> Survey invitations may be automatically triggered by pre-defined actions and events Rules and alerts are used to facilitate timely feedback actioning 	<ul style="list-style-type: none"> An automated workflow ensures member interactions are tracked, monitored, and routed to the right personnel for a speedy resolution. 	<ul style="list-style-type: none"> Systems support real-time integration and monitoring of experience and operational data across the tools employees use as part of their daily work
Focus to advance to next stage	Identify potential CX quick wins and start building CX buy-in across the leadership team	Identify priority use cases, and develop initial CX strategy with short - and long-term goals	Develop ROI calculation frameworks to map CX to business results. Start using member journey mapping	Ensure CX data integration into everyday workflows and tools. Automate use of metrics and insights into decision-making	Build in positive accountability system for all employees to be equipped to deliver on their part of CX

Technology Consideration



Survey Software

Survey Software

Enterprise Feedback Management Software

Customer Experience Platform

Customer Experience Platform

Why SoGoCX?

 **18+ years**
of research experience

 **Unparalleled**
customer service and account management

 **Real-time insights**
and reporting with custom CX dashboard

 **Powerful and user-friendly**
technology with best-practice and tips

 **Sophisticated analytics**
including text analytics and key driver analysis

SoGoCX Methodology

