



What If? Elevating the HX through Inspirational CX

In “[An Awakening](#)” we introduced you to a new design paradigm, a type of design that evolves the current foundations of human-centered design and elevates it to humanity-centered design through human experience (HX). This chart shares the current thinking about client experience best practices while identifying how to elevate your CX through an inspirational HX lens where organizations AND people thrive.

Leadership, Strategy & Infrastructure

Objective: Develop a vision, purpose and strategic CX framework and infrastructure for sustainability and ongoing innovation.

Strategy	Description/Best Practices	HX Perspective/Key Considerations
CX Sponsors and Champions	Key organizational leaders who have positional/functional authority and influence and who possess genuine passion and are role models for CX to increase the probability for success and sustainability.	Creating a “leadership network” among like-minded/like-situated CX leaders to share mutual insights, best practices, tools, etc. to amplify overall CX impact and credibility for community/career flourishing.
CX Strategic Charter & 5 Questions	Serves a “true north” and anchoring device for the CX strategy and efforts. 5 Questions within the charter that answer: 1) Where are we going? (Vision) 2) Why are we going? (Purpose) 3) How do we measure success? (Scorecard Metrics) 4) How do internal/external roles align to delivering the Vision/Purpose (Alignment) 5) What’s in it for the stakeholders (Commitment)	Consider adding humanity as a stakeholder for which the vision/purpose/scorecard/roles would align to activate even greater reach for doing well and doing good with the CX efforts of the organization.
CX Program Design	Beginning with “voice of the client” and client empathy design inputs, CX Programs provide a robust inventory of critical CX offerings to cultivate client joy and loyalty. CX Programs are anchored around Client Journey Mapping that creates visibility for every meaningful client touchpoint from brand interactions, sales interactions, client service and team interactions. CX Programs generally include client communication	Engage client feedback for CX integration ideas with client social/charitable interests as well as pro bono or mentoring opportunities with the community at large. Determine how you can amplify the great work that your team is already engaging with in their community and endorse from a firm perspective.

	and promises, client relationship building and appreciation, business intelligence systems, client feedback systems, pricing/billing systems and project management protocols.	
CX Governance	The way organizations set standards, rules, policies, processes, procedures, and metrics/KPIs to manage the organization’s CX portfolio. Governance is the structure that keeps organizations from backsliding into previous states of status quo. Less about policing and punishing—more about observing, driving accountability, and providing meaningful support where it is needed most.	Consider including a specialty role for outside advisors to contribute to CX accountabilities to includes clients, community, and other social/charitable stakeholders. Create a CX Committee that can drive the vision inside the firm and spotlight the activities that encourage HX.
CX Operations	The nerve center and muscles of a managed CX program. CX Operations thrive when centered around client and employee journey data. How any ‘federation’ of business units collectively and systematically senses, activates, and realizes the benefits of CX through the application of people, processes, and technology. It enables a successful system to market, sell, provide, and support the products, services, and broader value the organization creates and delivers. CX-centric operations are set up to continually deepen client intimacy in harmony with the ‘machinery’ keeping the lights on and the doors open.	Consider wrapping CX operations around stakeholder journeys. Include a specialty role for outside advisors to contribute to CX operations to includes clients, community, and other social/charitable stakeholders within CX operations for people, processes, and technology.
CX Product/Service Innovation	The series of new or significantly improved activities the organization invests in to increase competitiveness, add value, or enter new markets. In CX, innovation often refers to significant advancements in product/service delivery, quality, or service blueprint design to discover new areas of value in new and enhanced ways. Innovation opportunities present themselves more abundantly when organizations meticulously map prospect, client and employee journeys and interactions.	Consider including a specialty client advisory role for outside stakeholders to contribute to CX product/service innovation. Incorporate past and future experience ideas from clients, community, and other social/charitable stakeholders.

Technology, Data, Feedback & Insight

Objective: Build simple, closed-loop platform that senses, gathers and manages the “raw material” for experience design and decision-making through “voice of the client/stakeholder” (VOC) data, feedback, and insights to drive smarter decisions.

Strategy	Description/Best Practices	HX Perspective/Key Considerations
CX Technology & Platforms	This includes all bespoke and externally sourced commercial hardware, software, and services. These tools collect, distill, analyze, and manage employee and client research, data, and feedback and offer actions to systematically improve the employee’s and/or client’s experience. By far, the greatest challenge is integration with adjacent business tools (i.e.: CRM, ECMS, Customer Data Portals, IVRs, etc.)	Organizations can “lend” CX platform technologies and VOC expertise as “acts of service” to a community, social/charitable partners as they seek to align their CX/stakeholder experiences. Share the feedback you receive with the community to make everyone benefit.
NPS® – Net Promoter Score	Originally developed in 2003 by Bain & Company, NPS® stands for Net Promoter Score which is a metric used in client experience programs. NPS® measures the loyalty of clients to an organization with a single question survey: “How likely is it that you would recommend [Organization X/Product Y/Service Z] to a friend or colleague on a scale from 1 - 10?”	Consider including humanity-centered community, social/charitable stakeholders in an NPS® survey to discern perception and loyalty to the organization. Explore sensible modifications to the NPS® ranking that incorporates extent to which org can support charitable causes.
Client Value Assessment/Client Interviews	Typically facilitated by outside advisors, in-depth client interviews (in person or virtually) are a tool to assess client value by using appreciative inquiry and seeking to understand what clients are trying to achieve in their organizations, who they perceive to be “best in class” service providers and how your organization meets standards for excellence. Unlike surveys, CVAs allow for a positive interpersonal experience that makes clients feel honored/special and valued as “experts” as they share their insights.	Include questions within a CVA that provide benchmark insights and best practices data that can be shared with interview participants as a “gift” to support their professional development, elevate their personal brands within their organizations and potentially spark community/networking opportunities for their human flourishing outside of their client interactions with the organization.

<p>Project Milestone “Transactional” Surveys</p>	<p>These surveys are typically included before, during and after significant client interactions or projects. Surveys can be incorporated during project kick-off protocols, regular project status updates and as post-project debrief discussions to solicit feedback, insights and best practices for continuous improvement and deeper client relationship intimacy.</p>	<p>These surveys can include social/community impact metrics to be evaluated before, during and after projects to provide a more fulsome accountability to human flourishing.</p>
<p>Pulse Check Surveys</p>	<p>These surveys provide in-the-moment “emotional” reads on client disposition and relationship to the organization. Facilitated as a part of email signatures, billing, and invoices, etc., pulse check surveys can also provide an impetus to proactively reach out to clients to ensure the CX program is achieving its client objectives in the moment.</p>	<p>Consider including humanity-centered community, social/charitable stakeholders in pulse check surveys to discern perception and loyalty to the organization.</p>

Internal & External Communications

Objective: Increase sustainable buy-in through predictable communication forums.

Strategy	Description/Best Practices	HX Perspective/Key Considerations
Dashboards	A tool that provides clients visually engaging reporting for key performance indicators, executive project summaries and overall metric/budget to cultivate confidence and clarity in communication	Organizations may also include client preferred humanity-centered stakeholder metrics (like fundraising/giving goals, hours served, project progress, impact events, etc.). Report out to the team and community on successes that elevate human flourishing.
Business Reviews	A convening (usually annual, semi-annual, or quarterly) of key business leaders – client and organization to provide executive summary of point-in-time accomplishments, status reports, outcomes, etc. and to create a forum for mutual strategy sharing, goal planning, trend forecasting, etc. to elevate CX alignment with an organization’s priorities, goals, and investments.	Organize Business Review Benchmarks to provide overall market trend insights, performance metrics, etc. for clients to use as benchmark validation in their internal executive reviews. Consider including humanity-centered community, social/charitable progress, or stakeholders as guests in a business review meeting.
Team Huddles	A convening (usually weekly, daily) to communicate critical project or key initiatives updates and to facilitate time-sensitive decision-making among client and organization key stakeholders.	Organizations can share headline messaging, data, research, insights to help client stakeholders “look good” and flourish in their professional development.
Alerts and Awareness	Forums for communication (digitally, by phone, in person) to ensure clients are up to date with urgent, time-sensitive insights (financial, industry, competitive, etc.) to enable clients to confidently communicate with key stakeholders, make decisions, stay in compliance, etc.	Consider including humanity-centered (social, health, well-being, charitable, etc.) critical alerts and awareness through your CX focused communication forums.

Relationship Building & Client Appreciation

Objective: Engage authentic reasons for connection and gratitude to deepen intimacy, loyalty, and continued client buy-in.

Strategy	Description/Best Practices	HX Perspective/Key Considerations
Value Added Services	Any CX driven offering that provides professional and personal value to clients that may include education, specialized research, industry reporting, seconded professional support, etc. for which the client is not required to pay additional fees.	This may include created shared education and resource opportunities with client-preferred humanity-centered stakeholders, as well as social/charitable activities that may include joint fundraising, event participation, support etc.
Entertainment/Social/Networking	Relationship building and client appreciation activities that may include meals, arts, sports, travel, access/introductions, VIP invitations, etc. This may also include organizing and facilitating peer-to-peer cohorts/forums for the benefit of client-to-client network building.	Organize activities around social/charitable events and include humanity-centered topics in peer-to-peer cohorts (mental health, social justice, etc.)
Mark the Moment Recognition, Gifts and Communication	A system for tracking, remembering, and recognizing key milestones (promotions, birthdays, anniversaries, new arrivals of children or pets) and critical life moments (illness, sympathy, crisis, etc.) with tangible recognition and communication (gift, cards, PR, etc.)	Include recognition and communication for client-preferred social/charitable interests and shared media or other promotion platforms for humanity-centered client priorities.

Brand Experience (BX) Integration

Objective: Unify client experience with critical elements of brand experience to amplify and accelerate positive outcomes.

Strategy	Description/Best Practices	HX Perspective/Key Considerations
Marketing	BX to CX integration includes brand identity, website, content, social media, strategic alliances, events, and communication ambassadors/influencers.	Identify how marketing assets can increase social awareness, generous giving, access to new stakeholders, brand/market visibility, and validation for client humanity-centered stakeholders and organizations.
Public Relations	BX to CX integration includes messaging, media contact lists, press releases, journalist and media pitches, media quotes, and paid media.	Creating access to client humanity-centered stakeholders and organizations with how-to guides for engaging media to share platform and showcase, promote, source opportunities and storytelling to increase inspiration/recognition for all stakeholders
Charitable Causes	BX to CX integration includes selection of charity/cause, employee engagement within charity/cause, financial donations/contributions to charity/cause, participation in events for charity/cause and proactive fundraising to support charity/cause by giving an organization's clients a seat at the table.	Combine efforts with clients to inspire greater employee engagement to humanity-centered social/community impact efforts and to multiply the financial and brand building impact that client collaboration can produce for the charity/cause. Align interests with those organizations around you that are important to clients and team members.



Experience

Our HX CX perspective is inspired by CX professionals with significant experience bringing client experience to life. If you are interested in exploring how you can elevate your brand, contact HX Allies:



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