



10 ways to spark field engagement in your CX program

[A best practice guide]



Today's winning brands know to stay atop a crowded marketplace, they have to find new and innovative ways to resonate with customers. That's why it's no surprise companies are investing more resources in customer experience (CX) measurement programs.

How can organizations make sure the investment pays off?

A best-in-class program has to deliver cutting-edge technology and world-class insights—but technology and insights will have diminished impact if field teams aren't using the program to drive action. The truth is, the success of any CX program depends largely on your field teams:



Committing to your program vision + CX strategy



Delivering loyalty-inspiring customer service



Using reporting tools frequently + effectively

That's why it's so critical to choose a CX partner with a proven track record of keeping the field engaged and schedule regular program checkups once your strategy is in place. Because left unaddressed, a disengaged field can lead to more serious conditions detrimental to your brand's long-term health—including decreased customer loyalty, loss of competitive visit share, and eventually lower comp sales.

Not to worry—we're here to help.

SMG's CX programs are designed to inspire field teams to provide exceptional brand experiences across every touchpoint—every single day.

In this guide, we'll share some **quick tips** for keeping your field teams engaged.



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Break down company walls to maximize engagement

The customer experience touches every part of your business—whether it's IT working to build better customer connections on your website and mobile app or HR integrating customer-centric initiatives into training materials. Yet we sometimes see CX programs cast as an “Operations project” or a “Marketing initiative.” And a program that lives “somewhere else” means it's on the peripheral of your company's larger vision—and the efforts are only being seen by a select few.

To make sure your program breaks down walls rather than builds them, set up a cross-functional steering committee with stakeholders from every department. It's not about diffusing responsibility—it's about helping everyone better handle their individual responsibilities by syncing up improvement efforts and broadening potential program impact. An effective steering committee allows you to:

- ▶ Consider insights more holistically from multiple departmental perspectives
- ▶ Create comprehensive action plans with integrated cross-functional input
- ▶ Ensure the right people are in the room when opportunities arise

Most importantly, when front-line teams know their efforts are being seen across departments and their wins are being tracked and celebrated throughout the organization, they're more likely to put in the kind of effort they want to be recognized for.

To establish and communicate company-wide visibility:

- ▶ Send program communications addressed personally from executive stakeholders
- ▶ Put a spotlight on CX insights at company conferences + training sessions
- ▶ Celebrate program wins as an organization—visibly + consistently

How Checkers uses its CX program at multiple levels to drive consistency:



Checkers associates can access Quickscores, comparisons, trends, and period reports — all in real time. General managers, for example, access the website to track and assess key drivers of satisfaction and review survey responses from restaurant guests. Marketing associates use this data to evaluate menu item feedback. Cross-functional groups leverage the data for operational decision-making.

[See the case study](#)



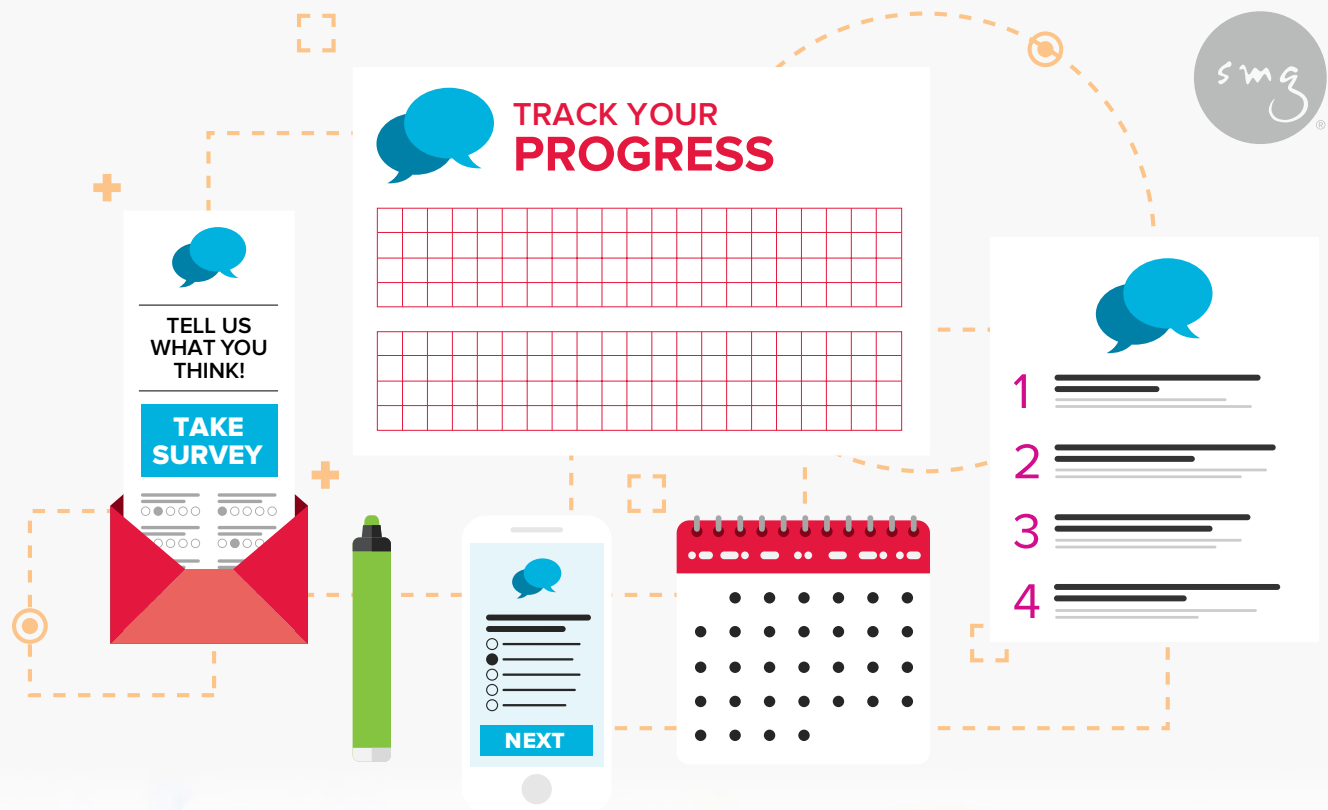
Bottom Line

When programs get siloed, engagement gets stifled. Make sure your program has visibility in every department, at every level.

The best way to establish your program as an organizational effort? **Brand it to reflect your culture.**

A well-branded program helps you:

- ▶ Capture front-line attention + inspire excitement in the field
- ▶ Establish the program as part of the larger company strategy
- ▶ Demonstrate to customers that their feedback is important



2

Pair CX data with familiar metrics to showcase accuracy + impact

Every CX program inevitably comes to a moment of truth when it has to answer the all-important question: what impact is it having on the business? Give a convincing answer and you'll have an engaged field team trusting the data to guide action every day. Fumble for a response, and you'll be fighting an uphill battle against front-line skepticism as long as the program survives.

The most important thing you can do to spark field engagement is show them early and often that they can trust the data to point them in the right direction. To create and track objective impact:

- ▶ Simplify your top-down messaging to identify the biggest opportunities
- ▶ Confirm key drivers with operational audits + field observations
- ▶ Bolster your data with qualitative insights from real-time customer comments

But even if your action plan is working and you're moving the needle on CX scores, that isn't always enough to keep the field engaged. To truly demonstrate your program's value, you need to prove it's an effective means for accomplishing more tangible ends: establish financial linkage by tying

CX metrics to things like average tip amount, increases at the transaction level, and comp sales across locations.

Just as important as the financial impact, you also need to show clearly and consistently how the program affects the everyday job. Time your insights and customize improvement strategies around things that have a direct effect on front-line performance, including:

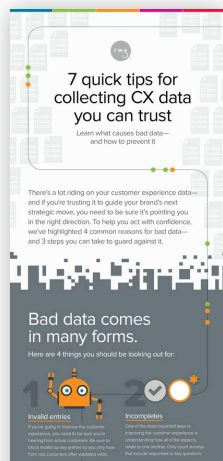
- ▶ Holidays + peak traffic periods
- ▶ Special company events
- ▶ Promotional campaigns + new items

These kinds of causal relationships between the data and the everyday are especially important to establish early on, when field teams are more likely to be leery of how much time and energy they should invest.



Learn how Pets at Home was able to demonstrate a top box customer experience that reaches all the way to the bottom line.

[See the case study](#)



Are you struggling with data doubters?

It may be time to reevaluate your data integrity efforts. Collecting customer data is easy—making sure it's accurate enough to drive action requires both effort + expertise. Here are 7 quick tips for collecting CX data you can trust.

[See the list](#)

Bottom Line

Don't let your program live in the abstract. Measure and communicate the ways it impacts your most tangible business metrics.

3



Tailor reporting tools to specific roles

It's hard to formulate and execute an effective gameplan if your team members don't understand their positions. To be efficient, your CX program has to provide a comprehensive suite of tools uniquely fitted to each level and role, whether it's:

- ▶ Location-level reporting dashboards that identify Areas for Focus
- ▶ Mobile apps for mid managers traveling between locations
- ▶ Powerful report-builders to help corporate users dig for new insights

Be sure to communicate how different user groups can use their respective tools to drive continuous improvement

at every location. Your CX program is a corporate initiative, but its success hinges on system-wide adoption and execution. Check in regularly to make sure managers are coaching low performers, sharing best practices, and doing everything they can to keep scores trending up.

To get everyone on the same page, communicate proactively at every level to explain how the CX program fits into the organization's overarching strategy, using things like:

- ▶ Executive communications to reiterate top-line visibility
- ▶ Regular training webinars to keep everyone fresh on best practices
- ▶ Push reports to follow through + keep the program top-of-mind



Bottom Line

When it comes to the customer experience, there are no small roles—do everything you can to get everyone on board and in tune with your strategy.



See how Domino's UK engaged franchisees by custom-designing reporting tools for each user group—increasing the number of locations using the tools at least 3 times per week by 140%.

[See the case study](#) ▶



SMG Best Practice

Don't just dictate your plan of action—involve your teams in the process. When you're looking for ways to improve key drivers and resonate with customers, get input from the people closest to the action.

To keep scores trending in the right direction, your strategy needs user-specific tools to engage multiple levels



	Daily	Weekly	Monthly	Quarterly
Location Manager	▶ Checking comments using mobile app ▶ Sharing positive guest comments	▶ Reviewing focus areas by DOW and TOD ▶ Discussing progress with team	▶ Posting monthly performance report ▶ Updating action plans accordingly	▶ Creating new action plans ▶ Celebrating successes from last quarter
Mid Manager	▶ Reading comments using mobile app ▶ Touching base with locations on highs and lows	▶ Reviewing focus areas and identifying units in need of attention before visits	▶ Reviewing performance across locations ▶ Sending out best practices on common themes	▶ Reviewing action plans ▶ Recognizing top/most improved locations
Power User		▶ Monitoring comments and trends ▶ Reviewing ad hoc test results	▶ Reviewing progress month-to-month, top/bottom, and outliers	▶ Building company-wide action strategy based on analysis presentation

4

Get an actionable sample to guide your focus

Every program faces unique challenges when it comes to field engagement—and choosing an experienced CX partner can help you overcome them—but one common theme across all programs and industries is more engaged locations consistently have higher response rates than their disengaged counterparts. And that makes sense. After all, it's hard to stay engaged with a program that's short on engaging information.

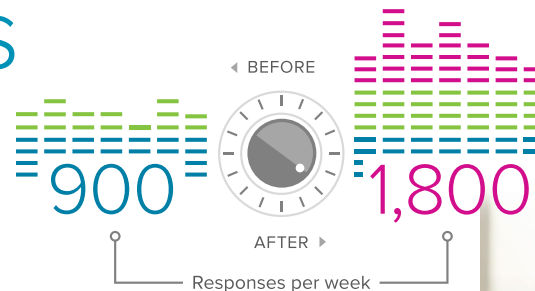
While the goal is always to use the data to guide action, you have to be able to trust that it's inspiring the *right* action. If you're not getting to a certain threshold of responses every month, it means you're not hearing from enough customers to get a representative

sample and you're in danger of the only thing worse than not acting: taking the wrong action.

To ensure each location is getting sufficient sample:

- ▶ Create store signage + remind the front line to inform customers about the survey
- ▶ Use multiple invitation methods to get a broader, more representative sample
- ▶ Drive up response rates + return visits simultaneously by using bounce-back incentives

You can also call out response counts as a key metric and track progress across locations using back-of-house noticeboards and monthly reports. When employees fully understand the value of hearing from every customer, they also realize the importance of making every customer interaction worth talking about.



hmv

How hmv increased response rates:

hmv held regional meetings with all store managers to articulate the key role the program would play going forward and to emphasize the organizational commitment to improving the customer experience.

[See the case study](#)

Bottom Line

To keep the needle moving, you have to keep the data coming. Do everything you can to turn up the volume on customer feedback.

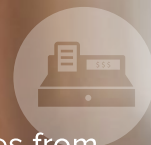




40%
of responses from
email invitations



29%
of responses from
POS invitations



SMG Best Practice

Consider multiple invitation methods to get a more representative sample, including:

- ▶ Smartcodes printed on POS receipts
- ▶ Branded email invitations
- ▶ Integration with your brand's mobile app



5 Use multiple forums to share + message consistently

Communication is an integral part of each of the actions prescribed so far, but it deserves its own callout. Because while having a program that produces results is great, if those results aren't shared throughout your organization, it's unlikely your field teams will be engaged for long.

But the difference between knowing that communication is key and knowing what and how to communicate is often the difference between just having a CX program and having one worth keeping. When you bombard people with too much information, they'll get overwhelmed and eventually check out. To make sure you're getting the right information to the right people:

- ▶ Task your CX partner with focusing analysis presentations on the most actionable items
- ▶ Enlist your steering committee to share those insights quickly + broadly
- ▶ Make sure mid managers focus coaching visits on how to improve key drivers

Above all else, keep your front-line messaging straightforward and consistent. Make it as visual as possible, so it's easy to grasp and retain important information at a glance. And use your communications to tell a single story long enough to make a difference. If your monthly communications are talking about Friendliness of Staff, your training webinars are focused on ways to be more friendly, and your managers are making it a point of emphasis in shift huddles, don't confuse things by switching gears and talking about Store Cleanliness until you've made an impact.

Bottom Line

When you're charting a path to improvement, you can't afford to be all over the map. Be selective and communicate with purpose.



To keep the messaging fresh, mix up your modes of communication according to their intended purpose:

- ▶ Splash pages, infographics, + monthly newsletters to track performance on key drivers
- ▶ Executive emails or mailers to celebrate wins + announce strategic moves
- ▶ Regularly scheduled webinars to sustain program focus + refresh training
- ▶ Monitors in your home office for streaming real-time customer comments
- ▶ CX partner presentations + booths at organizational tradeshows



6

Keep the program front + center at every location

You can have trustworthy data and multiple channels for consistent, top-down communication, but if word isn't making it all the way to the front lines, your program isn't doing much for the customer experience. It's easy to forget there's a lot going on for front-line employees, and every customer interaction comes with its own unique opportunities and challenges. If you're not strategic with the way you message the program, you'll risk letting program initiatives get lost in the everyday shuffle of other daily duties.

That's why it's up to your management team to keep the program top-of-mind by simplifying unit-level Areas for Focus into specific plans of action—tangible things each employee can start doing right away. Start initiatives like:

- ▶ Shift huddles to review role-specific, prescriptive actions
- ▶ Breakroom scoreboards to set goals + track progress
- ▶ Service alerts to track + resolve specific business issues

Once the program begins feeling like a useful tool rather than an added responsibility, the field will get excited about using it every day. And by putting the program center stage at each location, you're helping to ingrain that commitment to the customer experience into the everyday culture of your business, which eventually leads to:

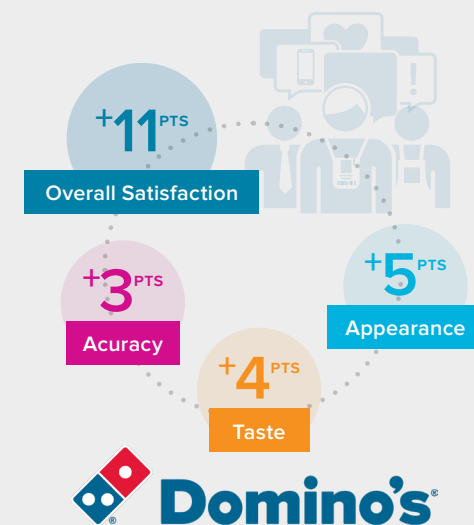
- ▶ Improved customer connections
- ▶ Stronger brand loyalty
- ▶ Better financial performance

“We wanted a program that was unit-specific and rolled up to the corporate level as opposed to being a corporate tool that had little application at the unit level. If we can move the whole bell curve to the right—and keep it moving—then our leaders are going to continue to be leaders, and we're going to continue to get better and better over time.”

Barry Vaughan
Director, Product Strategy
+ Development



By engaging field teams with action-oriented reporting tools that target specific areas for focus, Domino's UK moved the needle on key loyalty metrics



Bottom Line

A program that falls off the radar is at risk of falling off the rails. Keep your unit-level insights and action plans top-of-mind at every location.



SMG Best Practice

Engage customers and staff simultaneously by turning internal CX initiatives into customer-facing promises.





Recognize employees for their achievements

Finding innovative ways to provide exceptional service is the entire reason you're investing in a CX program—so when employees help you win with customers, it's important to recognize their achievements and celebrate as a team. There are several ways you can track and celebrate program wins, including:

- ▶ Using celebration alerts when customers recognize an employee for exceptional service
- ▶ Sending monthly communications from executives to call out top performers
- ▶ Incentivizing continuous improvement by rewarding teams who achieve the goals you set

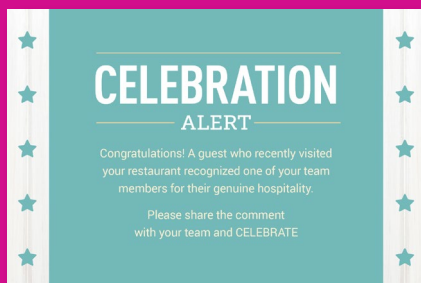
When field teams feel like their efforts are paying off and the company is taking notice, it's not about getting rewarded—it's about feeling like the

work itself is rewarding. And after talking to one million employees, we've learned that rewarding work is the number one key driver of employee engagement.

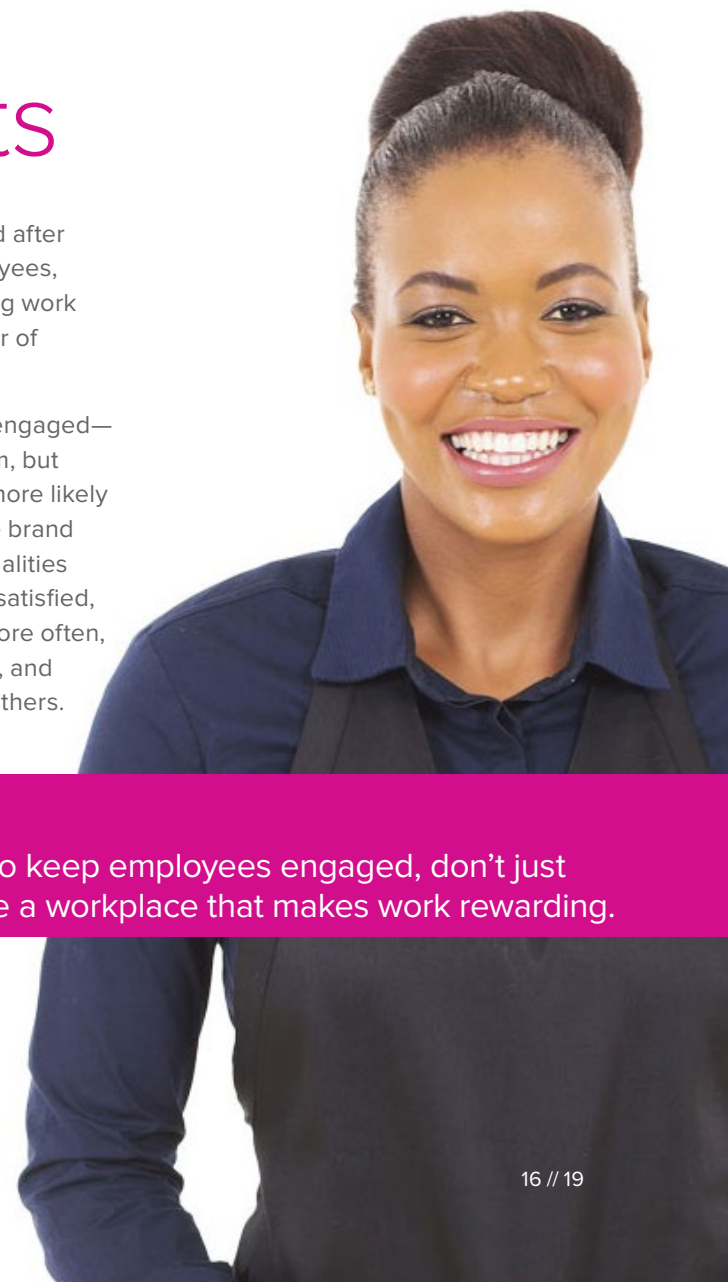
When your employees are engaged—not just with the CX program, but with the job itself—they're more likely to be innovative, productive brand ambassadors. And those qualities are critical in driving highly satisfied, loyal customers who visit more often, spend more when they visit, and recommend your brand to others.

Bottom Line

When you're trying to keep employees engaged, don't just reward them—create a workplace that makes work rewarding.



Celebration alerts make it possible to recognize employees for outstanding service—in real time.



Rewarding work is the top driver of employee engagement

Aspects of the workplace that matter most:

21%

Work is rewarding



11%

Opportunities to learn/grow

11%

Opportunities to use talent

7%

Receive recognition

6%

Team members are trustworthy

6%

Provided training to do my job well

6%

Provided info/tools to do my job



3 quick ways to jumpstart your field engagement efforts



1

Establish a routine rooted in positivity

There's no question CX programs are useful tools for building better customer connections—but we often see them misused as hammers to track and punish low-performing locations. It's important to remember that improving the customer experience is an ongoing process, and some locations will naturally outpace others. Be sure to establish a routine for how your managers can use the tools to focus everyday efforts and coach their teams to drive incremental improvement.



2

Implement regular lunch + learns

In addition to educating your organization, these corporate learning sessions can help secure executive buy-in and bring awareness to the program's goals, challenges, and successes. If you're still looking to set up your cross-functional steering committee, they're also a great time to discuss how the program can fit into different departments throughout your company.



3

Develop a plan for bottom performers

Your brand reputation depends on consistency across locations. Beyond focusing your efforts on key drivers, visit your top-performing locations to see what they're doing right and share those best practices with bottom performers. Use training webinars, conferences, and the other communication channels you've established to share key insights and call out the specific actions that have had the biggest impact.

Want to spark engagement with your field teams?

Field engagement can be a tricky thing to talk about, partly because it's so hard to quantify. But it's a critical discussion every program needs to have regularly and proactively. Chances are, by the time you've diagnosed it as a problem, it's already become a widespread issue.

The best thing you can do to spark and sustain engagement is choose a CX partner with a proven track record of getting the right information to the right people at the right time.

About SMG

SMG (Service Management Group) partners with more than 325 brands to create 5-star human experiences that drive loyalty and create profitable sales. SMG's holistic approach differentiates through state-of-the-art measurement, technology, and insights that help clients listen, understand, and act. Strategic solutions include omniCX™, Brand Research, and Employee Engagement. SMG is a technology-enabled research firm with a global footprint—evaluating over 130 million surveys annually, in 50 languages across 125 countries.

smg.com

Connect with us   

Kansas City: 1.800.764.0439
London: +44 (0)20 3463 0700
Tokyo: +8 (1)03 4580 2700



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If you'd like to have a conversation about what you can do to keep your field teams engaged and your customers happy, visit smg.com/contactus.