INTERACTIVE XM PLAYBOOK

How non-essential retailers can manage customer and employee experiences during COVID-19 + beyond

A 3-phased strategy map + personal status tracker

smg service management group®

What XM means right now

The most devastating outcome of this global pandemic is undoubtedly the significant loss of human life. A very distant second—though still painful—is the impact on the global economy, which has led to substantial loss for most industries as the world was suddenly split into essential vs. non-essential services. While it's unclear exactly how or when this will all play out, it *will* end eventually. And as we transition into this "next normal," an effective experience management (XM) program can be an invaluable tool in managing the accompanying operational complexities with agility, navigating uncertainty with precision, and helping you emerge as a stronger brand.

What this piece is

While this content is designed to provide tactical recommendations for your XM program, it is not a comprehensive list for your business practices by any means. **These are SMG's recommendations for fundamental steps you should take to ensure your XM program is best positioned to help you navigate uncertainty amid COVID-19.**

What it isn't

This is not intended to be a prescriptive guide on how to run your business. While we take pride in using our XM expertise to help clients inform all facets of their organization, our goal is to share that expertise in the form of tangible actions specific to XM.

How to use it

This playbook is meant to be a centralized hub for tracking your brand's progress, and we encourage you to save iterations over the coming months. While there's a lot to consider, this 3-phased approach is future-focused with an eye toward the long-term evolution of your XM strategy.

How it's interactive

Each tactic features radio buttons based on priority as well as drop-down menus to track accompanying status. The top-navigation bar allows users to cycle between customer experience (CX) + employee experience (EX) phases and strategies quickly as you and your teams make strides.

This content is optimized for Adobe Acrobat + Adobe Reader.

Mitigate the damage

Challenge + timeline

In the first month following the implementation of safer-at-home policies, non-essential retailers were forced to halt routine business operations and pivot to digital channels as the main source of revenue for the foreseeable future. This store-closure phase presented significant impact on revenue and a unique set of organizational challenges—but also afforded XM teams with a rare chance to reflect critically on current strategies and revamp as needed leading up to reopening. It's worth noting: though we're well into Phase II, some actions from Phase I could become relevant again should states put policies back into place to combat a potential second wave.

Objective
Protect employees + customers while mitigating negative business impact

Use the radio buttons + drop-down menus to track priority level and status.

		PRIORITY LOW — HIGH	STATUS
Feedback collection	Implement an always-on digital feedback tab in order to collect unsolicited feedback on the user experience ▸ Resource: Improve the digital experience + increase conversion		
	Work with XM partner to update invitation(s) and survey language to convey empathy + ensure only relevant content is included		
	Revise post-transaction, in-store survey as needed to measure new touchpoints (curbside pickup, BOPIS, etc.) and/or processes (physical distancing, contactless checkout, etc.) *Note: Be critical about what content could be cut to continue managing survey length*		
Program logistics	As budgets and resources allow, revisit overall CX strategy, stand up additional feedback channels, and update reporting tools to reflect anticipated impact to current customer journey map (e.g., digital feedback, contact center measurement)		
	Monitor immediate shifts in scores across visit types/touchpoints to quickly identify + resolve potential issues with back-end systems, UX, and new processes		
	Democratize data using internal communication channels like splash pages + scorecards focused on ease of website navigation, selection/availability of merchandise, and process communication		
Technology	Work with XM partner to configure reporting dashboard + mobile app views to prominently display real-time results for newly emphasized measures		
	Build scripted in-platform response templates for streamlined, consistent approach to closing the loop on high-priority issues surfaced from feedback (mentions of terms like "lawsuit," "data breach," etc.) ▸ Resource: Case management best practice guide		
	Work with XM partner to update text analytics library and trigger AI-based alerts for comments related to digital transformation efforts (out-of-stock mentions, back-end system outages, etc.) ▸ Resource: Text analytics best practice guide		
Analysis + Insights	Work with XM partner to review previous customer journey map, predict accompanying impact of new digital transformation efforts, + understand implications for XM program ▸ Resource: Digital transformation best practice guide		
	Work with XM partner to conduct weekly key driver analyses to surface and adapt to weekly shifts in e-commerce behaviors + expectations		
	Leverage industry benchmarks to ensure brand-wide consistency across touchpoints in relation to same-segment competitors		

Use the radio buttons + drop-down menus to track priority level and status.

		PRIORITY LOW ⟶ HIGH	STATUS

Feedback collection

Revise (don't postpone) already-scheduled annual EX surveys to capture feedback on closure/reopening plans, new policies + procedures, and concerns specific to the pandemic
Note: Consider emphasizing corporate-level responses until reopening

Field pulse surveys to get an early read on employee perception, initial concerns, + long-term employment intentions ▶ Resource: 3 key elements of an EX solution

Analyze exit survey results to surface insights from those leaving voluntarily that may help further inform future handling of unforeseen furloughs/RIFs

Program logistics

Use existing internal communications to share immediate shifts in roles and responsibilities as well as mid-/long-term impact on EX program

As budgets and resources allow, revisit overall EX strategy, stand up additional feedback channels, and update reporting tools to reflect anticipated impact to the employee life cycle

Connect with CX program owners to understand how insights being surfaced could influence EX as well as how respective efforts can be more synchronized moving forward

Technology

If not already in place, work with XM partner to integrate feedback collection + reporting systems with HRIS data for more efficient, adaptive measurement strategies

Supplement point-in-time surveys with an always-on feedback channel (hosted on intranet site) to collect unsolicited concerns and suggestions from front-line teams

Use real-time reporting dashboard + alerting technology to quickly identify and triage high-impact, low-frequency areas of concern

Analysis + Insights

Analyze employee feedback by role, store size/type, and projected re-open phase at state level to surface more actionable insights leading up to resuming business operations

Focus on wellbeing + safety concern metrics while investigating open-ended comments for themes and possible action items

Use consistency analysis to identify locations with low, historic overall engagement + key driver scores and take a proactive approach to assisting managers with their improvement efforts

Manage the crisis

Challenge + timeline

Following the initial store-closure phase, retail brands, consumers, and same-segment competitors have settled into a new normal, in which day-to-day operations resume and health + safety protocols remain in place. While it's unclear how long this phase will last, circumstances and customer/employee expectations continue to change rapidly—and brands must look to their XM programs to react accordingly.

Objective

Continue adapting effectively as we collectively manage the "new normal"

Use the radio buttons + drop-down menus to track priority level and status.

		PRIORITY LOW —— HIGH		STATUS
Feedback collection	Work with XM partner to field a pre-visit survey to gauge changing perceptions, expectations, + future intent as stores begin to reopen across varying state guidelines			
	Update survey with psychographic questions to understand varying levels of concern + expectations across customer segments			
	Add question block for new service standards and visibly demonstrate health + safety measures (e.g., mandatory PPE, plexiglass at checkouts, physical distancing requirements)			
Program logistics	Review and revise program training materials to highlight emphasis on brand-specific health + safety guidelines			
	Work with XM partner to remap customer journey to track shifts in interaction types and related impact on scores (e.g., continued surge in e-commerce, strained customer care teams)			
	Emphasize training on using text analytics to identify and (where appropriate) respond to emerging topics related to COVID-19 and/or digital touchpoints			
Technology	Leverage internal benchmarks to set + track location-level performance goals on brand-specific KPIs within reporting dashboard			
	Quickly pinpoint + investigate areas of concern across your geographical footprint by using clickable "Sentiment by region" text analytics views			
	Integrate new + existing datasets into centralized reporting hub using real-time API for cross-channel analyses, multisource text analytics, and comprehensive case management			
Analysis + Insights	Understand competitive positioning by working with XM partner to distribute regular report-outs of industry benchmarks emphasizing key drivers and emerging KPIs like cleanliness, health + safety, and availability of items			
	Use rewards + penalties analysis to understand common causes of dissatisfaction and proactively reduce customer churn			
	Reference branded benchmarks with a focus on competitive visit share + trip motivation to discover opportunities for growth and keep track of competitors gaining ground ▸ Resource: BrandGeek®—SMG's market intelligence tool			

Use the radio buttons + drop-down menus to track priority level and status.

		PRIORITY		STATUS
		LOW —— HIGH		

Feedback collection

Use DIY survey-building tools to field intermittent pulse surveys aimed at following up with action items + the related impact on employee sentiment

Revise "stay" survey to include ranked-choice question on which potential action(s) would have the biggest impact on retention (PPE, hazard pay, flexible sick time, etc.)

Meet with key stakeholders from all areas of the business to determine ideal ongoing survey cadence
Note: Check in at 1–2 week intervals at most + keep script short to avoid survey fatigue

Program logistics

Communicate new best practices for training and action-planning—specifically around health + safety protocols—broadly, clearly, and frequently to ensure they're implemented in time for reopening

Hold monthly status calls to keep front-line managers accountable for using EX data to drive actions in the field

Broadly communicate "celebration" alerts from CX program + managerial wins from employee comments to recognize front-line excellence, encourage service-related best practices, and boost morale

Technology

Task managers with using in-platform action-planning tools to develop, manage, + track action strategies based on survey results

Continue fine-tuning text analytics + alerting strategies based on the themes surfaced in Phase I

Use real-time reporting dashboard + rule-based alerting technology to quickly identify and triage areas of concern

Analysis + Insights

Conduct key driver gap analyses across CX and EX datasets to identify + address employee-customer disconnects around what matters most to customers

Compare EX performance to industry benchmarks at the DMA level to ensure your brand is positioned to attract + retain top talent

Use predictive models to determine which locations are most at-risk for turnover + take preventative steps as needed

Maximize your XM strategy

Challenge + timeline

As we emerge from the crisis, brands will face a new competitive landscape given the economic toll and the industry-wide acceleration of digital transformation efforts. Brands should also prepare for a long-term psychological impact that will shape consumer + employee behaviors and expectations for years to come. A future-focused XM strategy will make it easier to collect feedback, surface insights, + identify the right actions needed to earn loyalty and drive bottom-line results. Because the exact timeline is in flux, consider these recommendations to be less immediate actions and more big-rock items to keep top of mind as you revamp your XM strategy + initiatives.

Objective

Future-proof the program + maximize the opportunity to emerge as a stronger brand

Use the radio buttons + drop-down menus to track priority level and status.

		PRIORITY LOW —— HIGH	STATUS
Feedback collection	As customers grow weary of lengthy surveys, adopt innovative solutions for in-store feedback including branded app integration, on-site tablets/kiosks with DIY survey-building capabilities, + in-store behavioral analytics/beacon technology		
	To position feedback channels as an ongoing customer-brand dialogue, implement conversational tools for digital touchpoints (social messaging in-app feedback, chatbots, + interactive voice commerce surveys for digital voice assistants)		
	Go beyond what customers think and see how that impacts what they do by pairing purchaser + non-purchaser surveys with behavioral data using visit detection technology and device-agnostic survey delivery solutions		
Program logistics	Prepare to restructure teams + roles to reallocate resources appropriately as complex analyses + processes continue to become automated due to technical advances in data science capabilities		
	Optimize your online reputation management strategy to monitor/respond to online ratings + reviews and avoid potential issues going viral ▸ Resource: Online reputation management best practice guide		
	Enlist subject matter experts from all areas of the business to create a cross-functional steering committee that meets monthly to ensure the program informs all areas of the business		
Technology	Lean in on data science innovations like AI-based alerting, predictive analytics, + smarter, more accurate text analytics as datasets grow more robust		
	Evolve reporting platform to reflect—and deliver insight on—the end-to-end customer journey by building advanced multi-channel views + BI tool functionality		
	Engage XM partner to ensure long-term alignment between tech roadmap + internal needs/strategic priorities		
Analysis + Insights	Regularly pair CX data with other key business metrics to validate the data, demonstrate ROI, and secure long-term program buy-in across the organization		
	Engage research teams to collaborate on how to best work alongside AI-based technologies + keep efforts focused where they deliver the most value		
	Reference industry benchmarks to ensure digital transformation efforts live up to your brand expectations + drive e-commerce share of spend		

Use the radio buttons + drop-down menus to track priority level and status.

		PRIORITY		STATUS
		LOW —— HIGH		

Feedback collection

Revisit annual + stay survey content with focus on both retention efforts and providing growth opportunities to reward front-line efforts

Assess strengths + weaknesses of always-on listening posts and coach employees on how this tool can be used most effectively long-term

Implement conversational feedback solutions (e.g., chatbots, internal messaging systems) to promote ongoing 2-way, brand-employee dialogue

Program logistics

Meet quarterly with cross-functional team referenced in **Phase II, Feedback collection** to collaborate on long-term EX strategy and how to scale efforts across the business

Prepare to restructure teams + roles to reallocate resources appropriately as complex analyses and processes continue to become automated due to technical advances in data science capabilities

With tools like always-on VoE and pulse surveys at your disposal, look for ways to embed employee feedback into company culture rather than being just an annual check-in

Technology

Transition to fully integrated CX + EX reporting dashboards to break down data silos and understand the impact each experience has on the other

Lean in on data science innovations like AI-based HR red flag alerting, predictive analytics, + smarter, more accurate text analytics reporting

Engage XM partner to ensure long-term alignment between tech roadmap + internal needs/strategic priorities

Analysis + Insights

Look again to in-depth key driver analyses to understand the long-term impact the pandemic has had on shifting key engagement metrics

Work with XM partner to link EX + CX data to determine the focus areas that will have a meaningful impact across the business

Pair exit + onboard survey findings to further inform hiring and retention initiatives that can be quickly referenced for future events

The world changed quickly.
Let's change with it.

Businesses across the globe face a once-in-a-generation challenge that's fundamentally reshaping consumer behaviors and business operations in a way few thought possible. While a unified effort is required to meet this challenge, the most effective way to be "all in this together" is to leverage the direct feedback employees + customers are providing in order to adapt your strategies to meet their changing needs and expectations.

A truly effective XM strategy enables brands to use real-time feedback to act with agility and embeds the voice of customers and employees in all areas of the business—from the breakroom to the boardroom. To truly change the way you do business, it's imperative to listen closely across touchpoints, act quickly on the insights surfaced, and think frequently on how to evolve your XM strategy over time.

Rebuild with customers + employees

SMG partners with more than 500 global brands—including 30% of the NRF Top 20—to help them use real-time feedback to measure and manage customer + employee experiences. To see how we're helping retailers use that feedback to navigate uncertainty amid the pandemic, contact us directly or visit our COVID-19 Resource Center for frequent updates on XM research + best practices.

About Service Management Group
SMG inspires experiences that improve people's lives. We are a catalyst for change, providing actionable customer, patient, and employee insights that boost loyalty and drive business outcomes. Our unique model puts a dual focus on platform technology and professional services—making it easier to collect, analyze, and share feedback and behavioral data across the enterprise. To learn more about our customer experience management, employee experience, and brand research solutions, visit www.smg.com.

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