

# Strategies for smart goal setting and advancing your outcomes

It's easy to turn on an experience management (XM) program and let it run—but advancing your program + hitting goals that drive business performance requires evolution over time and a commitment from the entire organization.

SMG takes a staged approach with clients that focuses on meeting progress-specific objectives at one level before moving to the next. This establishes a strong foundation for growth and an XM program that produces impactful enterprise-wide outcomes.

## STAGE ONE

**ESTABLISH A STRONG FOUNDATION**  
Engagement sets the stage for success

### Drive response rate

- Boost confidence in the data with volume.
- Focus on program visibility + adjusting invites and incentives if responses are low.

### Increase company-wide program engagement

- Incorporate action planning into your plan.
- Empower and encourage users to check in on the data regularly.
- Share survey results directly with front-line teams.

### Define static areas for focus (AFFs)

- Set all teams to work toward the same objectives.

## STAGE TWO

**FOCUS ON IMPROVEMENT**  
Understand the correlation between KPIs

### Migrate to dynamic AFFs

- Move to focus areas customized by company unit based on a measure's importance, store performance, and company performance.

### Set benchmarks to measure against

- Use SMG benchmarks or group similar units and internal benchmarks for comparisons across organizational groups to establish guideposts. (On average, OSAT increases by 1.8%-pts over each year of the first three years with SMG.)

### Assess progress + define opportunities for improvement

- Use performance data + benchmarks to pinpoint underperforming areas.

## STAGE THREE

**DRIVE BUSINESS OUTCOMES**  
Link XM results to financial performance

### Establish clear targets across all levels of performance

- Quickly drive growth by focusing on lower performers, not across-the-board improvements.
- Share best practices from high performers to drive growth in lower performers.

### Audit your insights

- Ensure your program is driving change, not just collecting data (to better understand the difference, read this guide: [Anatomy of a true CX insight](#)).

### Calculate changes needed for financial impact

- Use XM insights to see where you can improve the bottom line.

## Examples of goal-oriented XM programs driving real-world business outcomes:



130% increase in YOY comp sales in key retail department



12% increase in overall satisfaction at major fast casual restaurant brand



31% increase in customer spend in health + beauty retail



\$250,000 improvement to annual bottom line in grocery retail

To learn more about goal-setting best practices, reach out to your SMG team or [contact us](#).



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