

Creating a Client Experience Program Charter

A “charter” creates the formal authorization to launch a project. A charter connects executive sponsorship (and power) with leaders and front-line staff tasked with carrying out an initiative.

A Client Experience (CX) charter should be written by (or written on behalf of and signed by) the highest level executive responsible for seeing the CX program deliver results. The charter states the *business case* for CX and provides any agents of change the formal authority needed to make “stuff” happen.

While a charter is necessary to delegate authority in a complex organization, a CX charter accomplishes more than delegation of authority. CX management, by nature, is a cultural transformation effort. The CX charter *shows* the “why” to everyone in the organization and reveals the strategic, business, and cultural drivers - all with C-level support. In fact, we recommend the charter acting in many ways as a *declaration*; we encourage the executive in charge to sign at the top, and the other executives supporting to sign below. Show ALL your staff that the entire executive team is committed to and supporting the CX charter, and the cultural transformation that will come with it.

Culture changes when incentives are aligned for all parties, be sure the charter shows clearly:

- The cultural drivers
- The business drivers
- The motive for employees to engage
- The motive for clients to engage

Keep the charter simple. Your objective isn’t to detail every specific task, effort, role, or responsibility. Instead, a charter is used here to inform, align, and empower execution – whatever evolving form that execution will take. Focus on behaviors rather than processes, as behaviors are what reveal underlying culture. Because a charter focuses on behaviors and aligned outcomes for everyone, each member of the organization can confidently act with creative and inspired insight. They will know their actions will be supported and encouraged because they are aligned with the charter’s behavioral framework. Likewise, any behavior not endorsed by the charter can be called out by anyone, backed by the charter’s power.

The CX charter becomes a statement of “this is who we are.” And because we know *who we are*, we can infer as professionals how we should live, act, work, and engage.

The best charters further this by including simple yet clear and objective metrics to provide measurement of the desired behaviors. Measure what matters, and what’s measured will improve.

An example CX charter is shown on the next page, and a “Desired Behaviors Matrix” is shown on the page after.

Client Listening and Client Experience Management (CX) Charter

From: CEO

Purpose:

We exist to improve the human condition. We cannot achieve that mission without carefully understanding each client's unique needs and expectations then responding to them.

Cause for Action:

Our revenue is over-concentrated in federal programs, which are subject to uncertainty in changing political climates. If we accelerate growth in non-federal markets we stabilize the business, creating security for employees. By retaining our best people we improve our ability to execute our mission. By retaining existing and growing new clients, we create more opportunities to impact the human condition.

Cultural Impact:

Excellence begets excellence. By carefully building great experiences for our clients, we build better experiences for ourselves. We cannot say "we improve the human condition" with integrity if we don't also continuously improve the conditions of our own clients and employees. Growing a culture passionate about client experience *proves* our commitment to our mission.

Scope:

- Phase 1 & 2 have been completed: a broad baseline of client perceptions (Phase 1) and a pilot of project manager-initiated feedback exchanges (Phase 2)
- Phase 3: Implement a continuous feedback process across most/all projects and clients
- Phase 4: Develop and implement an overall client experience management program
- Create governance to assure adoption and sustainability of CX efforts

Expectations and Responsibilities:

- We will establish a CX Center of Excellence (CoE) to design, develop, implement, and support a client listening and client experience initiative. The CX CoE will propose metrics to track success
- Executives will champion the CX program, articulate the vision and goals, and monitor performance metrics
- Unit leaders and division managers will provide resources and staff to execute the CX program. They will inform the CX CoE of impediments, discoveries, opportunities, and lessons learned
- Project managers will operate the processes using the tools provided. They will share with their leaders the discoveries made that can elevate any aspect of our client experience

Desired Behaviors:

As a demonstration of our success, our staff will consistently:

- Make all decisions with empathy for the client (act as though the client helped make every decision)
- Seek out uncertainty our clients' face, and provide clarity when others don't
- Assess every client's sentiment, always seeking to understand and react appropriately, never assuming excellence
- Integrate our partners into our client experience culture, creating great outcomes for them, and helping them create great outcomes for us and our mutual clients

Metrics:

We will know we succeeded by capturing behavioral and business metrics:

- Behavior metrics include feedback participation, the number of CX ideas generated, and an internal CX Adoption assessment metric
- Business metrics include Net Promoter Score, revenue churn, new clients earned, client lifetime value, and proposal win rates

You may want to further codify the behavioral alignment by creating a clear “Desired Behaviors Matrix” such as the example provided below:

Relating	Adapting	Leading	Partnering	Teaching	Measuring
Firmly plant your feet in your clients’ shoes. Find out what other problems they are battling and see if you can help them.	Inventory the decisions your clients need to make this week. How can you make it easier for them to make those decisions?	List all the civic organizations that might benefit from design excellence. How can you help them?	Reflect on the best project partners you have today. Write a summary of how their worst performing method might improve.	Consider how you might exchange knowledge with another professional. What can you learn from them, and vice-versa?	Explain to a client how you measure project success. If they don’t understand, do you know why they don’t?
Reach out to clients and ask questions that will help you know what you can do to make them happier.	Identify a process one of your project partners loves to use and think about how you can incorporate into your work.	Identify a local leader who recently enables poor design choices. Ideate twenty ways you can help them correct their course.	Give credit when and where it’s due. Send a friendly personal note to a key partner who helped you with a design solution.	Try teaching the same concept to a child, a teen, a college student, and an adult. Did you really understand as well as you thought?	Make predictions about the effects decisions and actions will have on a project. How often were you right?
Spend an afternoon with your client. Ask to walk you through everything they’re juggling right now.	Be a metal detector for uncertainty. Find one unknown and fill it in for your client. Show and share your diligence.	Pick a volunteer opportunity where you can be more than a warm body. What expertise did they need?	Document your professional learning and translate it into something a project partner or client can use in their work.	Pick a top-tier organization and approach someone on their board. How might you help them understand design?	Revisit some of the measurements you made on an old project. Which are still justifiable, and which should you discard?