

**ONLINE**

Twitter: @associationlab

www.associationlaboratory.com

**WASHINGTON, DC**

Suite 700

1444 I Street, NW
Washington, DC 20005

Telephone: 202-216-9675

**CHICAGO, IL**

Suite 850

35 East Wacker Drive

Chicago, IL 60601

Telephone: 312-224-2626



Quantitative Survey

Discussion Guide

Contents

[Research Comments 4](#_Toc156901031)

[Definitions and Framing 4](#_Toc156901032)

[Methodology 5](#_Toc156901033)

[Sample Design – Who gets the survey? 5](#_Toc156901034)

[Data Collection – How is the data collected? 5](#_Toc156901035)

[Data to Be Appended 5](#_Toc156901036)

[Instructions 5](#_Toc156901037)

[Survey Questions 6](#_Toc156901038)

[Demographics 6](#_Toc156901039)

[Individual Demographics 6](#_Toc156901040)

[Organizational Demographics 9](#_Toc156901041)

[Environmental Scan (1/2 Sample) 10](#_Toc156901042)

[Customers 10](#_Toc156901043)

[Services 11](#_Toc156901044)

[Technology 11](#_Toc156901045)

[Staffing and Management 12](#_Toc156901046)

[Personal or Professional Environment 12](#_Toc156901047)

[Strategic Roles (1/2 Sample) 13](#_Toc156901048)

[Research Roles 13](#_Toc156901049)

[Education Roles 13](#_Toc156901050)

[External Advocacy Roles 14](#_Toc156901051)

[Professional Advocacy Roles 14](#_Toc156901052)

[Convening Roles 14](#_Toc156901053)

[Maturity Model Assessment 15](#_Toc156901054)

[Company Maturity Model 15](#_Toc156901055)

[C-Suite CX Maturity 15](#_Toc156901056)

[Personal CX Maturity 16](#_Toc156901057)

[Relationship with CXPA (members) 17](#_Toc156901058)

[Membership Satisfaction 17](#_Toc156901059)

[Membership Value 17](#_Toc156901060)

[Likelihood to Recommend 17](#_Toc156901061)

[Relevance of CXPA 18](#_Toc156901062)

[Alternatives 19](#_Toc156901063)

[Sources of Information or Resources 19](#_Toc156901064)

[Selection Criteria 20](#_Toc156901065)

[Barriers to Participation 20](#_Toc156901066)

# Research Comments

This study aims to quantify initial conclusions based on secondary and qualitative research to inform global expansion strategy.

# Definitions and Framing

The following summarizes the key questions outlined in the draft survey question document. Additional areas of investigation can be addressed as needed.

* **Demographics** – What are respondents' personal and organizational demographics so that descriptive statistics and similarities and differences between audience perceptions can be developed?
* **CX Environmental Scan** – What are the most significant issues facing the customer experience profession that define the world within which they live and work?
* **CXPA Strategic Roles** – What strategic roles do stakeholders expect CXPA to play in acting as a platform for their and the surgical communities’ success?
* **Maturity Model –** What are perceptions of the maturity of the customer experience profession by different audiences?
* **CXPA Relationship** – What is the relationship of respondent with CXPA?
* **Competition** – Who are other competing or complementary stakeholders in the CX ecosystem, and what influences CXPA?

# Methodology

## Sample Design – Who gets the survey?

This survey will target will be distributed to the following.

* Members and engaged nonmembers (within last 3 years) of the CXPA

## Data Collection – How is the data collected?

The information will be collected via an online survey developed and deployed by Association Laboratory. Personal follow-up by CXPA staff will be used to improve response.

Each survey invitation recipient will be assigned a unique survey link and password. Respondents will have two weeks to complete the survey.

Two reminder emails will be sent to recipients who have not completed the survey. Respondents will receive a thank-you email.

The survey can be completed on a computer, tablet, or smartphone. Additional follow-up by staff or volunteer leaders of the CXPA may also be incorporated.

## Data to Be Appended

Any data within the CXPA database can be appended to the survey results.

* Region
* CCXP status
* Member status

## Instructions

The following are instructions for review.

* **Big Additions**: Is there a Big Question that needs to be added?
* **Big Deletions**: Is there a Big Question that needs to be deleted because it’s interesting but not useful?
* **Big Confusions**: Are you confused or don’t understand a question (as a normal CX human)?
* **Technical Edits**: Correct for terminology, phrasing, etc.

# Survey Questions

## Demographics

The following demographic questions are designed to provide more detailed respondent audience information. They allow for the identification and comparison of similarities and differences between key audiences.

### Individual Demographics

#### Age

**In what year were you born?**

Drop Down Box of Birth Years

#### Time in Profession

**For how many years have you been working in customer experience?**

Less than 1 year

1 - 4 years

5 - 9 years

10 - 14 years

15 - 19 years

20 years or more

#### Gender

**Which of the following best describes you?**

Male

Female

Other

I prefer not to say.

#### Location

**Which of the following best describes the country in which you work?**

Dropdown List of countries

Research Note: Can we get this from the CXPA database? Alternatively, we can group by regions.

#### Education and Training

**Which best describes your highest level of education?**

Secondary Education or High School Equivalent

Post-Secondary Education (Non-Tertiary) or Equivalent

Undergraduate Degree or Equivalent

Graduate or Postgraduate Degree or Equivalent

Doctoral Degree or Equivalent

Post-Doctoral Work or Equivalent

#### Direct Reports

**How many people do you directly supervise?**

None

1-4

5-9

10-19

20 or more

#### Professional Roles

**Which of the following best describes your role at work?**

Chief Experience Officer (CXO)

CX Director/Manager

Product Manager

Brand Manager

Customer Success Manager

Customer Service/Support Manager

Customer Journey Manager

Voice of the Customer (VoC) Manager

Customer Advocacy Manager

Omni-channel Experience Strategist

Customer Insights Manager

CRM Specialist

Loyalty Program Manager

CX Analyst/Data Analyst

User Experience (UX) Designer/Researcher

Customer Experience Trainer/Educator

Employee Experience Manager

None of the above

### Organizational Demographics

#### Industry

**Which of the following best describes the industry in which you work? [Select one]**

Retail

Banking and Financial Services

Technology or Software

Telecommunications

Healthcare

Hospitality or Travel

Automotive

Insurance

Consumer Electronics

E-commerce

Other industries (please specify)

#### Geographic Scope

**Which of the following best describes your organization’s geographic scope?**

Global

International (multi-country)

National

Multi-state/Multi-province

State/Provincial

Municipal

## Environmental Scan (1/2 Sample)

**Introduction and Context** – The CXPA is designing itself to be successful in a dynamic future. To help CXPA leaders navigate this uncertainty, this study assesses respondents' perspectives on the profession's customer experience issues.

###

### Customers

**Which of the following will significantly impact the customer experience profession over the next 5 years? Please select up to three options.**

RANDOMIZE

**Adapting to Changing Customer Needs:** Keeping up with customers' changing personalization, convenience, and speed expectations.

**Leveraging AI to enhance the Customer Experience**

**Using Customer Feedback:** Effectively gathering and acting on what customers tell us and want.

**Handling Market Changes:** Dealing with economic and market changes affecting customers' behavior.

**Localizing Global Strategies:** Making sure our worldwide customer experience strategies also meet local customer needs and preferences.

**Setting Realistic Expectations:** Making promises to customers that we can deliver on.

**Inclusive and Accessible CX:** Making sure our customer experience is suitable and reachable for all customers.

**Dealing with Digital Differences:** Addressing different levels of comfort and ability with digital technology among our customers.

None of above

Other (please specify):

### Services

**Which of the following will significantly impact the customer experience profession over the next 5 years? Please select up to three options.**

**Connecting CX to value -** CX has to ties to value:  winning new customers, keeping them (reducing churn), servicing them for less $, raising value per customer/cost to serve

**Integrating Online and In-Person Services:** Ensure digital and physical customer experiences work well together.

**Consistent Brand Experience:** Keeping the brand's look and message the same across all ways customers interact with us.

**Standing Out from Competitors:** Making our customer experience different and better than what competitors offer.

**Boosting Customer Loyalty:** Creating strategies to keep customers returning and staying loyal to our brand.

**Handling Complaints Well:** Managing and responding to customer complaints and questions in a helpful way.

**Learning from Customer Feedback:** Developing programs to collect and use customer feedback to improve our services.

**Personalizing vs. Standardizing:** Finding a balance between offering personalized experiences and efficient, standard processes.

### Technology

**Which of the following will significantly impact the customer experience profession over the next 5 years? Please select up to three options.**

**Privacy vs. Personalization:** Finding the right balance between offering personalized experiences to customers and keeping their data safe and private.

**Using Advanced Technologies:** Including artificial intelligence, machine learning, and other new technologies in our customer experience plans.

**Tech Integration:** Combining new customer experience technologies with our current systems.

**Keeping Up with Rapid Technological Changes:** The challenge of staying updated with the fast pace of technological advancements in CX.

**User-Friendly Design:** Ensuring that the CX technology is easy to use and understand, both for employees and customers.

**Cost of Technology Implementation:** The financial burden of acquiring, implementing, and maintaining new CX technologies.

**Training and Skill Development:** The need for ongoing training for staff to effectively use and leverage new CX technologies.

**Omnichannel Integration:** Seamlessly integrating multiple channels (online, in-person, mobile, etc.) for a cohesive customer experience.

### Staffing and Management

**Which of the following will significantly impact the customer experience profession over the next 5 years? Please select up to three options.**

**Training Employees:** Ensure employees have the skills and motivation for a great customer experience.

**Choosing the Right Measures:** Finding metrics and indicators to check if customer experience works.

**Creating a Customer-Focused Culture:** Making the whole organization care about customer experience.

**Budgeting for CX:** Getting enough money and resources for customer experience projects.

**Understanding Customer Needs:** Understanding the customer journey to improve customer experience.

**Working Together Across Teams:** Getting different departments to work together on customer experience.

**Following Rules:** Changing customer experience strategies to meet new laws or regulations.

**Showing CX Value:** Proving that customer experience projects are worth the investment.

### Personal or Professional Environment

**Which of the following will significantly impact the customer experience profession over the next 5 years? Please select up to three options.**

**Understanding CX Basics**: Difficulty understanding basic customer experience concepts.

**Explaining CX Importance**: Trouble explaining why customer experience is important to my company.

**Proving My CX Skills**: Showing my customer experience skills beyond having a CCXP certificate.

**Getting Resources**: Hard to get the money or tools needed for customer experience projects.

**Staying Updated**: Struggling with new customer experience trends and practices.

**Managing Time**: Balancing customer experience work with other job duties.

**Measuring Success**: Hard to measure and show the results of customer experience work.

**Learning More**: Finding ways to learn more and improve customer experience.

## Strategic Roles (1/2 Sample)

Strategic roles are general pathways through which the CXPA can address members and the profession’s needs. Collected data narrows the focus of the CXPA and allows more creative and precise development of specific solutions addressing the desired role.

### Research Roles

**What is the most critical job for the Customer Experience Professionals Association (CXPA) to focus on? Please choose three (3) from the list below.**

**Trend Analysis and Forecasting**: Identifying and predicting emerging trends in CX.

**Global CX Best Practices Research**: Conducting and sharing global research on CX best practices.

**Innovative CX Technology** Evaluation: Assessing and reporting on new CX technologies.

**Cross-Industry CX Benchmarking**: Comparing CX strategies across industries.

**Customer Behavior Studies**: Researching changes in customer behaviors and expectations.

**CX Impact Analysis**: Analyzing the business impact of CX strategies.

**Cultural Influence on CX**: Exploring how culture affects customer experience.

### Education Roles

**What is the most critical job for the Customer Experience Professionals Association (CXPA) to focus on? Please choose three (3) from the list below.**

**Professional Training Programs**: Offering CX training for professionals at different career stages.

**Certification Courses**: Providing specialized CX certification courses.

**Global CX Case Studies**: Sharing CX case studies from various industries and regions.

**Mentorship Programs**: Facilitating mentorship for CX professionals.

**CX Thought Leadership Forums**: Creating platforms for CX thought leadership discussions.

**Industry Collaboration for Education**: Partnering with academia for CX education.

**Online Resource Library**: Maintaining a digital library of CX resources.

### External Advocacy Roles

**What is the most critical job for the Customer Experience Professionals Association (CXPA) to focus on? Please choose three (3) from the list below.**

**Awareness Campaigns**: Raising awareness of CX's importance.

**Public Relations and Media Outreach**: Promoting CX in media.

**Partnerships with Educational Institutions**: Integrating CX into academic curricula.

**Hosting CX Conferences and Events**: Showcasing CX innovations at events.

**Developing CX Success Stories**: Researching and sharing effective CX case studies.

### Professional Advocacy Roles

**What is the most critical job for the Customer Experience Professionals Association (CXPA) to focus on? Please choose three (3) from the list below.**

**Promoting CX Standards**: Advocating for CX standards and best practices.

**Influencing CEOs/C-Suite:** Communicating value of CX to senior leadership.

**Influencing Policy and Regulation**: Engaging with policymakers for CX recognition.

**Representation in Industry Forums**: Representing CX profession in industry discussions.

**Educating Stakeholders**: Providing CX education to practitioners.

**Global CX Advocacy**: Promoting CX globally.

**Supporting CX Research Initiatives**: Supporting research in CX.

**Public Awareness of CX Career Paths**: Highlighting career opportunities in CX.

### Convening Roles

**What is the most critical job for the Customer Experience Professionals Association (CXPA) to focus on? Please choose three (3) from the list below.**

**Facilitating Industry Consensus**: Building consensus on CX issues or trends.

**Neutral Platform for Dialogue**: Offering a platform for CX discussions.

**Setting Universal CX Standards**: Establishing global CX standards.

**CX Innovation Incubator**: Nurturing new CX ideas and innovations.

**Research and Thought Leadership Hub**: Providing insights for future CX directions.

**Cultural and Regional CX Integration**: Investigating different cultural perspectives on CX.

**Forecasting Future CX Trends**: Predicting future CX trends and developments.

## Maturity Model Assessment

The following questions are designed to assess the company, c-suite, and respondent’s perceptions of CX maturity.

### Company Maturity Model

**How does your organization currently manage customer experience? Please select the option that best describes your situation.**

**Beginning Stage**: We mainly respond to customer needs as they arise without a specific customer service plan.

**Growing Stage**: We're paying more attention to our customers and starting to collect basic information about them, but we don't have a comprehensive strategy yet.

**Developing Stage**: Our approach to customer service is more consistent, and we're beginning to integrate customer experience into our business plans with some initial goals.

**Advanced Stage**: Customer experience is a significant part of our business strategy. We actively use customer data and feedback to refine our approaches.

**Leading Stage**: Our organization is at the forefront of customer experience in our industry, constantly innovating and employing advanced techniques for customer engagement.

**Transformative Stage**: Customer experience is deeply embedded in our company's culture. We focus on delivering complete customer experiences and utilize advanced technology for personalized services.

### C-Suite CX Maturity

**How does your organization’s senior leadership or C-Suite think about customer experience? Please select the option that best describes your situation.**

**Beginning Stage**: We mainly respond to customer needs as they arise without a specific customer service plan.

**Growing Stage**: We're paying more attention to our customers and starting to collect basic information about them, but we don't have a comprehensive strategy yet.

**Developing Stage**: Our approach to customer service is more consistent, and we're beginning to integrate customer experience into our business plans with some initial goals.

**Advanced Stage**: Customer experience is a significant part of our business strategy. We actively use customer data and feedback to refine our approaches.

**Leading Stage**: Our organization is at the forefront of customer experience in our industry, constantly innovating and employing advanced techniques for customer engagement.

**Transformative Stage**: Customer experience is deeply embedded in our company's culture. We focus on delivering complete customer experiences and utilize advanced technology for personalized services.

### Personal CX Maturity

**How do you personally manage customer experience? Please select the option that best describes your situation.**

**Beginning Stage**: I mainly respond to customer needs as they arise without a specific customer service plan.

**Growing Stage**: I’m paying more attention to our customers and collecting basic information about them, but we don't have a comprehensive strategy yet.

**Developing Stage**: My approach to customer service is more consistent, and we're beginning to integrate customer experience into our business plans with some initial goals.

**Advanced Stage**: Customer experience is a significant part of my business strategy. I actively use customer data and feedback to refine our approaches.

**Leading Stage**: I am at the forefront of customer experience in our industry, constantly innovating and employing advanced techniques for customer engagement.

**Transformative Stage**: Customer experience is deeply embedded in my perception of my job. I deliver complete customer experiences and utilize advanced technology for personalized services.

## Relationship with CXPA (members)

The following questions are designed to help understand how different audiences might perceive the CXPA. This question is for member respondents only.

### Membership Satisfaction

**Overall, how satisfied are you with your membership in CXPA?**

Extremely satisfied

Very satisfied

Moderately satisfied

Slightly satisfied

Not at all satisfied

### Membership Value

**Considering all you receive from the CXPA, would you say your CXPA membership is a...?**

Excellent value

Very good value

Good value

Fair value

Poor value

###

### Likelihood to Recommend

**How likely would you recommend the CXPA to a colleague?**

5 - Extremely likely to recommend

4 - Very likely to recommend

3 - Moderately likely to recommend

2 - Slightly likely to recommend

1 - Not at all likely to recommend

### Relevance of CXPA

**Considering the full range of offerings from the Customer Experience Professionals Association (CXPA), including programs, products, services, and events, how relevant is the association to your everyday professional activities?"**

Extremely Relevant

Very relevant

Moderately relevant

Slightly relevant

Not at all relevant

## Alternatives

### Sources of Information or Resources

**Which of the following sources do you utilize for information, community, or other resources related to customer experience? Please select all that apply."**

Internal company resources (e.g., in-house training, internal knowledge bases)

Educational institutions (e.g., universities, online courses)

CX consultants

Technology companies (e.g., software providers, tech-focused CX platforms)

Other global or national CX associations (e.g., ICMI or CSIA)

Customer Experience Professionals Association (CXPA)

Local CXPA chapters

Informal meetings of local CX professionals

Professional networking groups (e.g., LinkedIn groups, professional forums)

Industry conferences or seminars

Online communities or forums (e.g., Reddit, Quora)

Books, journals, or publications in the field of customer experience

Podcasts or webinars focused on customer experience

Social media platforms (e.g., Twitter, Facebook groups)

Other (please specify)

### Selection Criteria

**What are the five most important factors you consider when selecting an organization as a resource for customer experience (CX)? Please select up to five."**

Expertise in customer experience

Good Reputation

Networking opportunities

Solutions for CX challenges

Affordable and good value

Easy to access (online or nearby)

Quality CX materials (like articles studies)

Certification opportunities

Latest CX technology and tools

Community support

Industry insights

Convenient and flexible

Matches my professional/personal goals

### Barriers to Participation

**Which of the following, if any, are substantial barriers to your participation in CXPA? Select all that apply.**

Membership fees are too high.

Benefits do not justify the costs.

Membership demands too much time.

Membership is not relevant to my job.

Networking opportunities are not helpful.

I am not aware of what membership offers.

My employer does not support membership.

Cultural or regional differences limit my participation.

Lack of digital accessibility (e.g., online content or platforms).

Language barriers (e.g., materials or events not in my primary language).