How to Get Buy-In from Decision Makers to Truly Improve Customer Experience: A Report from Surveying 150 CX Professionals

By: Dr. Alyona Medelyan, CEO, Thematic
Contents

About This Whitepaper .............................................................................................................................................. 3
The Survey ......................................................................................................................................................... Error! Bookmark not defined.
The Respondents ............................................................................................................................................... Error! Bookmark not defined.
The Results ......................................................................................................................................................... 8
Conclusion .......................................................................................................................................................... 14
Getting buy-in and commitment for CX initiatives from executive leaders is key when it comes to driving real results for customers, but many CX leaders struggle with this.

We surveyed 150 CX professionals to learn about their current role and situation: Are they getting buy-in in their organization? Which strategies have they tried that worked to secure buy-in and which didn’t?

This report describes the survey itself, its respondents and provides a deep-dive into the answers.
1. The Survey

Over the course of Fall 2019, we surveyed 150 CX professionals. The survey itself was conducted by Thematic, in collaboration with the Customer Experience Professionals Association (CXPA), and publicized through our social media, CXPA and our friends & influencers in CX space, such as Annette Franz and Maurice FitzGerald.

1.1 Survey Questions

Instead of coming up with multiple-choice questions about possible drivers, we used one simple rating question and two open-ended questions as the core of the survey, with the goal of finding nuggets of knowledge that we would otherwise miss.

First, we asked to rate the level of buy-in among the executives:

* 1. How would you rate the level of buy-in among your executive stakeholders?

The two open-ended questions were:

- What have you found to be most effective in securing buy-in from stakeholders?
- What obstacles have prevented you from securing buy-in from stakeholders?

We also asked a series of close-ended questions about the respondents such as:

- Where are you located?
- What is the nature of your current role?
- How long have you been working in Customer Experience?
- How long has your company been focused on CX?
- What are some attributes that describe your company?

At the end of the survey, we run optional rating questions:

- To what extent has your executive team bought into a CX metric or set of metrics?
- How extensively are your CX metrics tied to financial metrics at your company?
- To what extent do you tie open-ended customer feedback to your CX metrics?
- Do your stakeholders ever dismiss customer feedback insights or reports as anecdotal?
2. The Respondents

Let’s start by looking closely at the 150 professionals who responded.

The majority were located in North America:

![Bar chart showing the percentage of respondents located in different regions.]

People’s answers to the question “Where are you located?”

The majority are working in a CX team and only for 23% CX is only a part of what they do.

![Bar chart showing the nature of respondents’ current roles.]

People’s answers to the question “What is the nature of your current role?”
The majority of respondents, 75%, have worked in CX for at least 3 years. Around 45% worked in CX for more than 5 years.

When it came to the company itself, only just over 30% were just starting out. All others are either a few years in, or have been working on CX for the past 5 years or longer.
When it came to attributes that describe the companies of the respondents, we observed over 50% of companies working in B2B, and less in B2C space, with slightly more Service than Product focused organizations.
3. The Results

Now that we reviewed the types of respondents to this survey, let’s look at the answers to the core questions: level of buy-in, winning strategies and hurdles.

3.1 Level of Buy-In

To rehash, the question was “How would you rate the level of buy-in among your executive stakeholders?”. The majority of respondents selected “Average. It depends on the situation”. Almost a quarter, 35 people, believe that their buy-in is poor or extremely poor. And a third, 50 people, believe that it’s above average.

![Bar chart showing the distribution of responses to the level of buy-in question.]

The overall rating for the level of buy-in is 3.1. By segmenting the respondents by their attributes described in section 2, we can learn which attributes are associated with higher scores, and which ones are associated with lower scores.

<table>
<thead>
<tr>
<th>More likely to have higher buy-in</th>
<th>Average buy-in</th>
<th>More likely to have lower buy-in</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America, Consultancy, Startup, SMB, Respondent is more than 5 years in CX, Company focused on CX for a while or longer</td>
<td>B2C, B2B Respondent is less than 5 years in CX</td>
<td>Outside of North America, Enterprise, Company is just starting out in CX,</td>
</tr>
</tbody>
</table>

This is interesting because getting buy-in is the number one issue for CX professionals. The above attributes signal the kinds of jobs that will be more satisfying.
Responses to the rating questions we asked at the end revealed additional associations:

<table>
<thead>
<tr>
<th>Rating of 4 or 5</th>
<th>Rating of 3</th>
<th>Rating of 1 or 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.6</td>
<td>3.1</td>
<td>2.8</td>
</tr>
<tr>
<td>3.5</td>
<td>3.2</td>
<td>2.6</td>
</tr>
<tr>
<td>3.5</td>
<td>3.1</td>
<td>2.9</td>
</tr>
<tr>
<td>3.7</td>
<td>3.1</td>
<td>2.5</td>
</tr>
</tbody>
</table>

Average level of buy-in, depending on the answers to 4 rating questions, describing common behaviors and situations in organizations.

For Annette Franz, CCXP, Founder of CX Journey, Inc. and Board Chair, CXPA, these findings—though unsurprising—remain instructive to CX professionals. “This is what many CX professionals struggle with: getting commitment from their executives,” Franz says. “Then when I look at who the respondents are, about a third of them are just starting on their journey; the work that lies immediately ahead for them is to get that executive commitment. Without it, they won’t get very far.”

3.2 What works well to secure buy-in?

Each respondent answered the open-ended question: What have you found to be most effective in securing buy-in from stakeholders?

We have coded each response according to one or more themes and sub-themes using Thematic’s AI-powered coding software.

Here are two sample answers to this question and how they have been coded.
Here is the distribution of major themes and more specific sub-themes across all responses to this question:

<table>
<thead>
<tr>
<th>Most common themes</th>
<th>🌐 157 responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>business case</td>
<td></td>
</tr>
<tr>
<td>roi 10% link the outcome 10% financial gain 7% costs 6% reduced churn 4%</td>
<td>34%</td>
</tr>
<tr>
<td>data &amp; metrics</td>
<td></td>
</tr>
<tr>
<td>data 10% metrics 7% data &amp; metrics (other) 4% evidence 3%</td>
<td>22%</td>
</tr>
<tr>
<td>communication</td>
<td></td>
</tr>
<tr>
<td>communication (other) 15% repeating the message 3% meetings 2% alignment 1%</td>
<td>20%</td>
</tr>
<tr>
<td>strategy &amp; planning</td>
<td></td>
</tr>
<tr>
<td>strategy 6% planning 5%</td>
<td>9%</td>
</tr>
<tr>
<td>customer feedback</td>
<td></td>
</tr>
<tr>
<td>voice of the customer 4% customer feedback (other) 2% surveys 2% customer stories 2%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Answers to the question “What have you found to be most effective in securing buy-in from stakeholders?”

Below we dig deeper into the insights gained from segmenting the data by buy-in level.

### 3.3 What are the hurdles in securing the buy-in?

Each respondent answered the open-ended question: *What obstacles have prevented you from securing buy-in from stakeholders?*

Just like in 3.2, we have coded each response according to one or more themes and sub-themes using Thematic’s AI-powered coding software.

Here are two sample answers to this question and how they have been coded.

**Lack of understanding the value of focusing on CX**  
Buy-in rating: 3  
Location: North America  
Years in CX: 1 to 2 years  
- customer focused culture: lack of understanding  
- customer focused culture: value of cx

**Their excuses are: time investment; money; other more pressing priorities**  
Buy-in rating: 2  
Location: North America  
Years in CX: More than 5 years  
- costs and resources: costs  
- strategy & planning: competing priorities
Here is the distribution of major themes and more specific sub-themes across all responses to this question:

<table>
<thead>
<tr>
<th>Most common themes</th>
<th>157 responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>business case</td>
<td></td>
</tr>
<tr>
<td>data &amp; metrics</td>
<td></td>
</tr>
<tr>
<td>communication</td>
<td></td>
</tr>
<tr>
<td>strategy &amp; planning</td>
<td></td>
</tr>
<tr>
<td>customer feedback</td>
<td></td>
</tr>
</tbody>
</table>

Answers to the question “What have you found to be most effective in securing buy-in from stakeholders?”

Below we dig deeper into the insights gained from segmenting the data by buy-in level.

### 3.4 Insights

It’s interesting to compare two groups of respondents: Those who report good or excellent level of buy-in (50 people, with an average buy-in rating of 4.3), and those who don’t (35 people, with an average buy-in rating of 1.7).

**Are there differences in the strategies referred to as winning ones?**

Here, we compare the responses by these two segments in Thematic’s Explore tool, which sorts themes among the “most effective strategies” by the greatest difference in volume between the two groups:

Themes by volume across two segments who answered the question “What have you found to be most effective in securing buy-in from stakeholders?”
Both groups mentioned communication and making a business case as keys to securing executive buy-in. But practitioners reporting above average levels of executive buy-in were:

- 2.5X as likely to reference data and metrics
- 2X as likely to include customer feedback
- 40% more likely to reference strategy and planning

They are also non-surprisingly mentioning customer-focused culture of their organizations.

But the greatest difference between the two segments is the focus on ROI for the organization:

![ROI Chart]

In Franz’ experience, the importance of showing ROI, as well as sound strategic planning, are critical. “In order to get executive commitment, we’ve got to prove ROI, show linkages to outcomes, build the business case, and more,” she says. “That can only be done with data and metrics. And strategy and planning really go hand in hand with that. It’s nice to show linkages and talk about outcomes, but we need to also show how we’re going to achieve the outcomes, so you’ve got to have a plan in place.”

So, how does one prove the ROI of CX?

We have written an article on this topic recently, which includes not just the rationale behind it but also a clear guide and a spreadsheet to model the ROI using internal numbers, such as the number of customers, their spend and a popular CX metric Net Promoter Score.

**Are there differences in the obstacles encountered by the winning ones?**

There are!

Everyone struggles with costs & resources.

But practitioners reporting below average levels of buy-in are:

- 60% more likely to list strategy and planning
- 3x as likely to list **customer focused company & culture**
- More likely to list communication
The greatest difference is in the strategy of the company, that often cites “competing priorities” as the main reason for not embarking on a CX journey:

For Franz, the idea of “competing priorities” raises a key question that needs to be asked of an organization’s executive. “Why are you doing the things you’re doing for your business if it’s not for—and in the best interest of—the customer? CX practitioners need to help their executives see how all of the CX improvements go hand in hand with many of the company’s “other” initiatives/priorities. CX improvement initiatives aren’t about creating more work but about doing things differently, more efficiently, more effectively – the outcome of which leads to retention and revenue.”

The second greatest difference is the lack of understanding of the value of CX in a company that isn’t as focused on the customers due to its culture:
It is clear from the survey data that simply making a business case for CX initiatives isn’t enough to generate the kind of buy-in and commitment that CX leaders need.

By proving the ROI of CX with hard data, and incorporating customer feedback into stakeholder communications, CX leaders can move past struggling to secure buy-in, to winning the kind of commitment to the customer that will make a difference.

At Thematic, we use customer feedback to do just that. Our AI-powered platform gives CX leaders the tools to turn qualitative customer feedback into quantified insights that map to metrics that executives care about.

Learn how we do it.