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## Feedback Discussion Points from Strategy Framing Research Report version 4.0

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# CXPA - Strategy Framing Research Report - Feedback Discussion Points

## Introduction

This document contains all the discussion points that were raised by reviewers in their feedback on the Association Laboratory - CXPA - Strategy Framing Research Report version 4.

Any requests for clarity and edits to the text are reflected in version 5.0 of the report.

The feedback is arranged by reviewer.

Discussion Points

- **How does CCXP and its continued growth contribute toward CX recognition, understanding, and adoption?** There is a comment that “It is generally agreed that even if CXPA could flood the market with CCXPs, that not only would there not be jobs for all of them, but they still would be unable to drive CX adoption in the greater business world.” To me, this assertion seems to lack real-world context and perhaps validity .... There are currently FAR more CX jobs that are not held by CCXPs than there are CCXPs which suggests there is still significant growth opportunity for certification growth. It would be interesting to compare understanding of CX at organizations with a CCXP on staff versus those without a CCXP ... my hypothesis is that while the presence of a CCXP does not guarantee organization understanding and better adoption of CX as a business strategy, it does significantly increase the chance of such support and success. When CX is only viewed as a temporary project or just another tool\consideration that is used by a variety of employees the likelihood of successful outcomes attributed to CX is much lower. (Note: This is why the Board chose a focus on Professionals rather than general advancement of the concepts of CX. In short, it’s not CX unless it has the professionals, leadership support, tools and time to be successful.)
- **What does it mean to be a business discipline? What are the elements involved?** For example, I typically consider research and higher education as hallmarks of a discipline. What about sector awards ... do those help or hinder success?
- **Are there other elements of education that may need to be discussed?** The report divides Education into two categories: Pre-CCXP training and advocacy to grow the CX market. This seems to leave tremendous areas of investigation out – training on the application of CX concepts; application of CX in specialized markets such as healthcare or geographic markets; sessions on consumer and technology trends impacting CX; and a wide swath of skills needed to be a successful c-suite executive – mentioned later in an interview comment: “We need to teach CX professionals the non skills that they need as they progress up the business hierarchy.”
- **How can we strengthen and advance the ideas around maturity map concepts?** Very interested in seeing more development around the maturity map concepts that is discussed on pages 30 and 31. Maturity Model conversations to date have conflated a variety of concepts, and these discussions begin to help tease out different threads. Some things to consider further:
  - Government investment and/or support for CX (does the government fund positions? Host symposiums? Issue policy guidance? Reimburse CX certification attainment)
  - Higher education courses and research in CX in the region
  - Adoption by top companies in the region that profess a CX focus or employ a CXO
  - Presence of other CX associations, etc.
- **What are perspectives and ramifications around what is done by staff, partners, and volunteers?** The comment, “CXPA needs dedicated resources to grow internationally,

not volunteers” implies a shift in some elements from volunteers to other CXPA resources. Given CXPA’s roots as a heavily autonomously volunteer run organization at the local level, if there is a shift in this model, what do we need to keep in mind to make it successful for customers, volunteers, staff, and CXPA?

Points that may require broader exploration/validation

- **What is meant by “understanding of CX”, and is perception of the term keeping up with evolution of the CX professional role?** The origins of CX were in the contact center and voice of the customer. Today, CXPA advocated that “Every customer experience gain contributes to positive business performance outcomes” which includes a much wider range than previous perceptions and even what is tested on the CCXP. How do we better clarify what is part of effective customer experience and what is not? (Specifically, the report may be using terms “non CX” and “business skills” for items that we should be considering within essential CX professional career development.
- **What contributes to the turn-over level of CXPA membership and CCXP certification?** CX is easy to enter (often by a temporary assignment) and equally easy to exit. Anecdotally, it seems that the field has a shorter tenure than many other fields. It may be useful to collect information about tenure in CX.
- **What is the growth of the CX industry over the past 10 years?** The report states “the greater CX industry’s failure to grow significantly in the last ten years” but does not include a citation. Other industry reports have cited strong growth (and projected growth) and there is anecdotal information such as the adoption of CX by the US government. What’s the true landscape, and how should it be represented?
- **What is the meaning of the questions and feedback on the Body of Knowledge and CXPA CX book of Knowledge? Are these questions that we need to resolve?** Some parts of the report cite the CX Body of Knowledge as one of CXPA’s greatest accomplishments, but other portions include questions of who appointed CXPA as guardian of the BoK. There are similar comments raised about the CX Book of Knowledge that may require a broader collection of data – one interviewee noted “low quality” while we have also just learned an academic review panel has adopted the book as a required course text replacing the well-known “Outside In” book published by Forrester Research.

Context that may need to be considered as we look at path(s) forward

**CXPA has NOT operated a single model since inception – and the changes in emphasis at various phases may provide insight into how to operate moving forward.**

The report is based in the premise that 2023 CXPA is a continued direct flow from its inception, however there are distinct stages during which CXPA has operated on different priority models – each which gives insight into pros and cons:

**The Early Years – 2011 - 2015**

The earliest years of CXPA were characterized by connecting those in the emerging field of CX and introducing anyone who would listen to the general concept of CX. In 2015 (four years after founding) Bruce Temkin wrote: “The CXPA is a very special organization, which is built on a concept I call M2M (Member to Member). We’ve worked hard to create an environment and build programs where passionate CX professionals can connect with and help other passionate CX professionals.”

During this early period, local networks were given a great deal of autonomy, reimbursed for holding events of virtually any type because it was not as important WHAT Networks did or espoused, just that they were bringing people together. Much of the membership base was drawn from corporate membership packages that enrolled a wide swath of employees that were involved in a very limited manner if at all.

In person local events were key activities, attended by not only CX professionals, but also marketers, user experience, sales, etc. In the interest of being inclusive and removing friction to participation, there were few procedures to track and maintain engagement. This helped plant seeds and raise enthusiasm about CX, and generally people felt good to get together and socialize – but it did not add very much to the advancement of CX knowledge or growth of CXPA. In general, it could be said that this method tended to keep programs at an introductory, rudimentary, or simple case study level. As the practice of CX advanced and number of CX professionals increased, this model began to feel stress – for example, in senior CX leaders who began to tire from repeating the same conversations about what CX is and instead were seeking more advanced conversations and engagement with more proven, replicable methods.

CXPA’s annual meeting at this time was the CXPA Insight Exchange. This conference served the entire breadth of the CX community, including those new to the field, mid-career, and late careerists. A significant portion of the agenda was devoted to “show and tell” sessions in which attendees presented short, behind the scenes overviews of the steps taken to implement CX at their organization.

Toward the end of this period, the Certified Customer Experience Professional credential was introduced.

## The Mid-Years – 2015 - 2019

As CXPA began to see more interest abroad than it was prepared to serve directly, CXPA adopted a strategy of being “all things CX” and flirted with the idea of being more about “CX” or even “X”. This became manifest in a significant number of non-monetary partnerships with outside conference providers that were holding events viewed as directly or indirectly connected to CX (e.g., Customer Contact Week, Customer Success programs, etc) in addition to continued operation of local networks. Many of these sessions promoted the idea that customer service, call centers, complaint handling, BPO or other elements were the same as CX. Individuals in the regions mistakenly perceived that the programs were held, organized or informed by CXPA because CXPA listed these on their website, promoted them in social media, and had their logo present at the event.

This strategy was very good in making CXPA appear as a much larger organization than it was and helped to wave the flag for CX in a number of nascent markets. However, it repeated the same pitfall as the earlier strategy in that content was generally at introductory or surface levels - - neither structured nor advanced. It also stifled involvement in CXPA in cases -- for example, one Toronto CX professional never considered becoming a CXPA member or attending a CXPA program because they assumed that attending local Network events and a partner conference was all there was to CXPA. (That individual has subsequently joined and contributed to CXPA publications!)

The Certified Customer Experience Professional credential continued to see mostly organic growth during this period, without significant changes to the program or its promotion. CXPA Insight Exchange continued as a peer-sharing event with an agenda determined by voluntary speaker submissions. An Insight Exchange was held in Ireland, designed to serve the UK market, but with limited attendance.

## Focus on Formalization of the Profession – 2019 - 2023

Despite its progress to this point, CXPA had never adopted a definition of customer experience, opting instead to recognize that different people and companies had different working definitions. Beginning in mid-2019, the Board and leadership began an intentional series of steps toward increasing its focus on formalizing the discipline and profession of customer experience.

Key steps included:

- Writing **A Guide to CX Job Descriptions**, an initiative designed to help foster better framing and empowerment of CX professionals.
- **Developing a communication platform and community consensus definitions** now housed at [www.whatisCX.com](http://www.whatisCX.com). These resources – particularly the definition of customer experience and its associated video – have been key to the activities of CXPA in the past three years.
- **Revamping the CCXP preparatory affiliated trainer program** to require alignment with the CXPA platform while allowing for freedom of curriculum.
- **Introducing the expectation that a conference agenda must align with CXPA’s definition of CX.**

- **Requiring Network Events to address some element of CX to be eligible for reimbursement.** (e.g., no social driving range outing)
- **Adopting CX Day themes rooted in the communication platform.**
- **Incorporating CCXP preference into [www.cxjobboard.com](http://www.cxjobboard.com) and increasing focus on highlighting CCXP accomplishments**
- **Developing and publishing the CXPA CX Book of Knowledge and Effective Collaboration monograph series**
- **Repositioning CXPA’s conference** to an advanced content focused program for more senior CX leaders

These activities are showing results in:

- The quality of CX position job postings including CCXP preference by major, respected international brands
- Discussions on CX Day, including adoption of key platform elements by the US Government
- Adoption of the CXPA Book of Knowledge as a required college level course textbook
- Approval of the CCXP application fees for government reimbursement in Saudi Arabia

This history and development should be learned from and considered as CXPA considers next steps in its development. It may well be that there are better ways to execute than was previously done – or there may be new insight gained from these reflections. At a minimum, reference to “the original CXPA model” should receive clarification as to which period(s) it refers.

### **Deeper discussion\consideration may be needed as to what “Community” means in CXPA’s future**

Geographic-based Networks have been CXPA’s definition of community for the majority of its history. While community is discussed throughout the report, there is very little discussion of Networks. The terms in the report view community more as a verb, from the individual perspective:

- “either seeking CX knowledge or seeking other CX professionals”
- ‘connecting with CX professionals across the world’
- ‘Knowledge sharing’
- “addressing a sense of loneliness”

Little to no mention is made about social events or Networks as entities. When Networks are mentioned, comments seem to be primarily about administration and procedures. Those comments generally seem to suggest that CXPA is too restrictive and cumbersome in regard to local communities, stating “The perception of trying to insure CXPA quality may perhaps be stifling international growth opportunities.”

Meanwhile, the report notes that “CX practitioners continue to be drawn together locally and internationally to share the common experience of bottom-up CX adoption” and that “there are

already thriving pockets of CX community globally, but that the CXPA may be missing the opportunity to welcome these existing groups into the CXPA family”. However, the report also characterizes outside groups “there is a fractured collection of groups, organizations, and events globally that seem to want to coalesce, but until now that has not happened”.

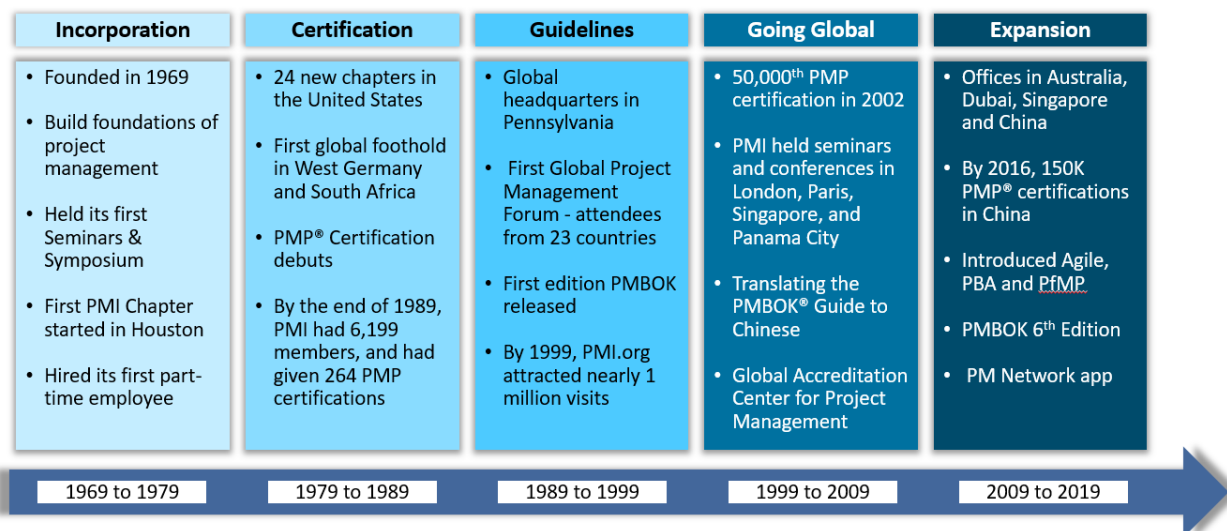
Considering all of the above, it may be worth delving into these concepts more deeply:

- What has kept the collection of CX enthusiast communities from having greater coalescence?
- What aspects of “community” need greatest priority for the current and future CXPA community?
- What might scale? What might not scale?
- Are there lessons to be learned from CXPA’s own progression over time to help support these external organizations as well as CXPA’s ten-year goal to secure the future of the CX profession and recognition of CX as a respected business discipline?
- What is it that CXPA is uniquely positioned to do that only CXPA can do?

## Discussion Points

1. **The sections around CXBoK evoked a lot of emotions. Specially the discussions around CXPA as the Custodian of CXBoK.**
  - *Has CXPA positioned/earned the ownership of CXBoK? | Who has appointed CXPA as the owner of CXBoK? | Do they care if they say or go contrary to the CXPA CXBoK?*
  - I think this needs further discussion. How is CXPA perceived by the CXPA and non-CXPA community with regard to being the custodians of CXBoK?
  - Establishing this credibility as the true custodians for CX knowledge is crucial and it forms the foundation of everything else we build around the discipline.
  - Fun fact : The first edition of PMBoK was released in 1996 almost 27 years after PMI was actually founded. Here is a summary of PMI's evolution we put together last year
  -

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- **What are your perceptions of the CXBoK product? “Can’t pass exam with it.” 😊**
  - As someone who holds both certifications : CCXP and PMP, this comment made me smile
  - Anyone who has been through the laborious task of reading the PMBok will tell you how difficult it really is to comprehend the content. (Not to mention the quality of print which is intentionally made to look weird to avoid photocopying)
  - I was able to get through the exam thanks to Rita Mulcahay's PMP Exam prep guide and I advise all PMP aspirants to include it as their primary study material.
  - When I took to CCXP exam in 2017 , there were not many courses or material or RTPs available at my disposal. I had a few suggested books to read and some mock tests. And I think that is what makes my CCXP certification so special for me.
  - The CCXP exam (as with the PMP exam) is meant to test your understanding and application of the concepts and knowledge defined in the CXBok.
  - In short, I am glad it does not help folks pass the exam. It is meant to be a lot more than that.
- 1. **CX as a practitioner discipline may be mature, but CX as a business discipline is unknown**
  - This is a good point to probe further
  - Are we expecting CXPA staff to do the advocacy and credibility building with the businesses (C-Suite and leadership) ? Or would it be a group of member volunteers (With the right credentials) who would help drive this?
- **CCXP needs to be the start of an expert CX journey, not an end.**
  - I think this can also be the mid-level.
  - We could consider something on the lines of :
    - Literacy level : For all CX enthusiasts
    - Fluency level : For all CX practitioners who are in CX roles or do portions of CX in their role or anyone who is interested in building a deeper knowledge and understanding
    - Expert level : For CX practitioners who have made CX their chosen career path. Here is where we position CCXP
    - Mastery level : For CCXPs who take things to the guru level 😊

Overall, I think the report highlights 3 things that felt were important (IMHO).

1. Our international strategy should define a “How to” rather than “where to”
2. We need to define and enhance the long-term perceived value for our members
3. We need to drive both practitioner and Industry advocacy

Maybe our graph should look more like this? 😊 Not one or the other, but both.



## Discussion Points

- Page 6 recommendations – while these are not linear, perhaps these should be grouped in an order based on a higher-level construct (e.g., development, community, maturity, operating model, etc. which we should come up with). The first recommendation is an umbrella statement and ‘burning platform’ if we have such a thing. All the ones below support that first one.

**Overarching: CXPA needs to leverage its expert and independent position to advocate CX to senior business leaders, create a CX market, and generate demand for CX and CX practitioners.**

- CCXP needs to be the start of an expert CX journey, not an end. **(Development)**
  - CXPA needs to develop maturity maps and metrics for regions, corporations, and practitioners to enable transparent global data driven investment, and targeted CX advocacy. **(Maturity)**
  - CXPA needs to develop an international community growth strategy – specifically ‘a how, not where’ strategy. **(Community)**
  - CXPA needs to (co)develop value for professionals not wholly involved in CX, or not seeking CCXP certification. **(Development)**
  - CXPA needs to become intentionally operationally global, and frictionless to deal with. **(Operating model)**
- Page 10 ...”CXPA has not created a CX market that drives a top down adoption of CX, an understanding of the value of a CCXP, and the true value of CX as a business differentiator. ...There was discussion around how CX-PA may need to broaden its remit away from professional practice towards CX-A, to include the business imperatives around CX, and CX development. This is a huge strategic question and think needs to be discussed and debated or at least more support points here.
- Page 11 – The ‘CX service world’ is made up of many independent consultants, consulting companies, selling professional services, technology solutions and education in the CX space. Most suppliers are using different versions of CX disciplines and methodologies that is tied to their own solution. Another important point which is part of the reason for confusion in the market. Many different methodologies, though leaders, points of view out there. This is where CXPA needs to become ‘the source’ but is a journey to get there. It’s more than just publishing e-books and bodies of knowledge.

- Page 12 – CXPA Mission & Positioning – agree with most everything here but perhaps the section is called the ‘internal’ because there is a significant disconnect between internal and external as you state. The last paragraph (business value to senior leaders) is a big point that we should be addressing throughout our recommendations.

Body of knowledge, community, and education sections – agree with points made in these sections, though I’m not sure of the true distinction between body of knowledge and education (I see the points you make in the descriptions but not sure if should be broken out separately). Body of knowledge is a subset of education.

- Page 17 – Operational Readiness – agree with these statements but I believe there are some general operational requirements before even getting to readiness with systems, etc. based on the path forward we choose.

Discussion Points

**Community** - "creating or co-opting new communities globally is not perceived as smooth or frictionless experience"

- This statement makes me very curious. Are there examples or details of what is not frictionless? What needs to be improved? Is this an issue of limited resources? No events budget? Paperwork? Rigid guidelines? It looks like some of this is captured in the comments later in the report - just wonder if there was a key theme in here.

Response – you are not the only one to ask, but no examples were discussed.

Summary of my take aways on the key themes from Interviews:

1. **State of the Industry:**
  - Challenges in understanding and adopting CX in businesses are evident.
  - Need for CXPA to assume a leadership role in promoting CX at a business level.
  - Variation in the understanding and adoption of CX globally.
2. **CXPA Mission & Positioning:**
  - The perception of CXPA as a pioneer in advocating CX, focusing on CX practitioners.
  - Need to expand influence beyond CX professionals to business leaders and decision-makers.
3. **CCXP & Body of Knowledge:**
  - The CCXP certification and body of knowledge are highly regarded.
  - Discussions about making the body of knowledge more globally applicable.
  - Debate on whether to introduce different levels of certification.
4. **Community:**
  - The value of the CXPA community is recognized.
  - Discussions on scaling the community globally while maintaining its value.
5. **Education:**
  - Importance of education for CX practitioners and the need for CXPA to advocate for CX education.
  - Suggestions for partnerships with educational institutions.
6. **CXPA International:**
  - Acknowledgment of CXPA's US-centricity and the need to expand and tailor strategies for international markets.
  - Discussion on conducting market research for international expansion.
7. **Operational Readiness:**
  - The need for operational efficiency to support strategic decisions.
  - Suggestions include automation, process optimization, and global staffing solutions.

Comments and Insights:

- **Advocacy and Leadership:** CXPA may need to proactively advocate for CX in the business community, bridging the gap between CX theory and practice. This may involve targeting senior business leaders and emphasizing CX's role as a business differentiator.
- **Global Applicability:** Strategies can be developed for international expansion, considering regional CX maturity and customizing approaches accordingly. This may include addressing perceptions of US-centricity and making the body of knowledge globally releatable.

- **Education and Certification:** The report suggests evaluating the feasibility of different certification levels or types to cater to a diverse range of CX professionals. Partnering with educational institutions could further enhance the value and reach of CX education.
- **Community Engagement:** Scaling the community while retaining its value is key.
- **Operational Excellence:** Emphasize the importance of being operationally ready to support strategic initiatives. This may include exploring automation and global staffing solutions to enhance efficiency.

Broad themes to look out for :

1. **Develop a Clear Advocacy Strategy:** Focus on creating a CX market and generating **demand** for CX professionals with background in diverse disciplines. ( Reference; the case for PMP)
2. **Enhance and Globalize the Body of Knowledge:** Ensure its applicability across different regions.
3. **Strategize International Expansion:** Conduct thorough market research to identify key regions for expansion.
4. **Focus on Educational Partnerships and Program Development:** Strengthen the role of CXPA in CX education.
5. **Operational Readiness for Strategic Decisions:** Implement process optimizations and consider global staffing solutions.

Looking ahead

I think the toughie here is being able to translate these insights into actionable strategies to strengthen CXPA's position as a leader in the CX domain.

Discussion Points

- I generally agree with the current state & challenges summarized across the member/non-member, RTP, and Supplier sections in the materials. And it's a very well-done report. I am probably "solution-jumping" ahead in this process... but one area of focus coming out of this work may very well be the work to refine/crystalize the brand identity for CXPA, followed by a marketing vision, strategy, content plan, & execution plan. This idea is implied throughout but not quite stated as such, that I found.

## Discussion Points

- In reference to the challenges the discipline is encountering: for me the biggest challenge of this profession is the lack of senior management support, which condemns most CX initiatives to finish as a one-off exercise. The root cause is just lack of understanding what's in it for me (my business)?
- Customer Experience for me is a business practice that is here to help organizations build long-lasting relationships (loyalty) that is translated into sustainable growth. The practice goes way beyond measuring NPS, it is the heart of the business and the first thing the CEO should consider. While the fact is that the root problem starts with understanding what CX stands for. I feel that the basic definition is unknown to leaders. Some think it is customer service upgraded, some think it is related to marketing/branding and some think it is an NPS score. But that connects to the lack of awareness of CXPA as a body of knowledge among leaders.
- The fact the market is young and that there are so many players giving CX definitions is creating confusion and also sometimes deception with organizations that tried to go for it but failed.
- I would like to challenge the phrase that says CXPA is completely independent. CXPA is selling sponsorships as other organizations and is promoting these offers as part of the deal, so I would say that definitely that CXPA is the most independent of all but not 100%.
- 'The body of knowledge is unknown to people outside of the CX circle' and one of the reasons is the language barrier that in some countries like France, Spain, Germany, Italy could be an issue.
- For the Education piece I would say that the expectation is that CXPA provides some training or learning journey for organizations that want to step into customer-centricity. The "journey map" is not just for practitioners.
- CXPA International - I think we should consider establishing CXPA EMEA as a big center in addition to the one in the US. It's a big region that could boost its CX maturity through such an organization.
- CXPA International - there are many CX maturity models that exist out there. We are using them to measure the CX maturity level of customers in different competency domains, so I think it will not be very difficult to come out with something that is shared globally.

#### Discussion Points

1. What role can CXPA to further elevate the CX discipline globally, there were some mentions of this during the last session, but tangibly what actions can be taken
2. CCXP - What additional support can CXPA give to CCXPs after they earn their certification
3. How do we differentiate between the CXPA membership and CCXP, should they co-exist and how can we position them clearly - this is partly covered in the post-CCXP section of the report, but needs more clarity
4. Fostering a sense of community and regional chapters, I can see this coming up in the expansion section, how do we solve it, should we have a guideline (not rules) for the regional chapters, and how do we create the 'what's in it for them' (local chapter leaders) to sustain and further the cause. It shouldn't be led by RTPs or CX consultants only who are looking for networking and business opportunities, but sincere authentic CX focus.

## Discussion Points

1. For CXPA to grow internationally, there needs to be clear guidance and support for regional leads, such as goals, assets, and development roadmap/methodology. There is always a balance requirement between global best practices and local tailoring.
2. The country and local member needs can be determined based on the regional lead's knowledge + a structured CX maturity assessment. Whilst the exact details and scope are yet to be developed, it would need to include things like innovation in CX, government & policy around customer centricity, % of companies that employ CX practitioners, the activity level of the CX community if any (conferences, events, awards), availability of CX training, etc. What would be the other applications for the Regional/country maturity assessment model?
3. Now to the member needs, I feel we need to have a clear understanding of our current and prospective member personas. Most of our members now are CX practitioners, but they would surely include different personas with different needs. In addition to this, there would be people interested in applying CX in their day jobs like IT, marketing, operations, etc; senior leaders who are unaware of CX but would benefit from it; and potentially many more. Once we understand their needs, we will be in a better place to talk about growth opportunities and products to offer. You have already outlined that it needs to go beyond CCXP certification and knowledge sharing with the CX community. Mapping our members' and prospective members' journeys could be advantageous to crystalizing where CXPA could have the biggest opportunity.
4. Knowledge sharing outside of the broader business community is a crucial point, to create the market that would demand CX professionals. I feel the big gap at the moment is not 'what CX is' and potentially not even 'what is the ROI', but 'how do I get there and what would it take'. The majority of leaders just don't see why their people can't 'just be' customer-centric if that's what the company decides to aim for. CX knowledge needs to become part of leadership education, like MBA.
5. You talk about operational readiness for CXPA, which I wholeheartedly agree with. The list will probably grow once we have the final strategy, and will potentially include user experience.