How Do You

Track the Effectiveness
of Your CX Efforts?

Steps to Building
Your Custom
CX Metrics Portfolio

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You can't improve what you don't measure. And your boss isn't going to invest in your customer experience (CX) initiatives if you don't show her it's worthwhile. There's no universal approach to measuring the value of your CX efforts, but you can follow these four steps to create a customized measurement solution.

Step 1: Set clear goals

Before you design your metrics, you need to have clear goals. Ask yourself—and your stakeholders—these questions:

- What are we trying to accomplish by delivering a great customer experience?

- How does our CX strategy fit into the corporate strategy?

- What do customers need or want from us?

- What value do we want to give to customers today and 10 years from now?

Simplify your answers into a one-sentence CX vision statement; then think about how the statement affects what you measure. For example, if your vision statement is "We want to be our customers' trusted energy advisor," your metrics should include Net Promoter Score (NPS). If your statement is "We want to be easy to do business with," your metrics should include customer effort score.

Step 2: Build your set of metrics

A healthy set of measurement tools includes **descriptive**, **perceptual**, and **outcome metrics** that point to how well you're delivering on your CX vision statement.

Focusing on what happens when customers interact with your utility, **descriptive metrics** include:

- Call length (average handle time)
- Website performance
- Outage restoration time (actual versus estimated)

Perceptual metrics help you understand how customer interactions affect customer perception. For example, use customer effort score to measure your customers' perceptions of how easy it is for them to do business with you.

Outcome metrics, like NPS, measure what customers will do as a result of their experience with you. NPS asks customers how likely they are to recommend your brand or service, helping you gauge their loyalty and brand advocacy.
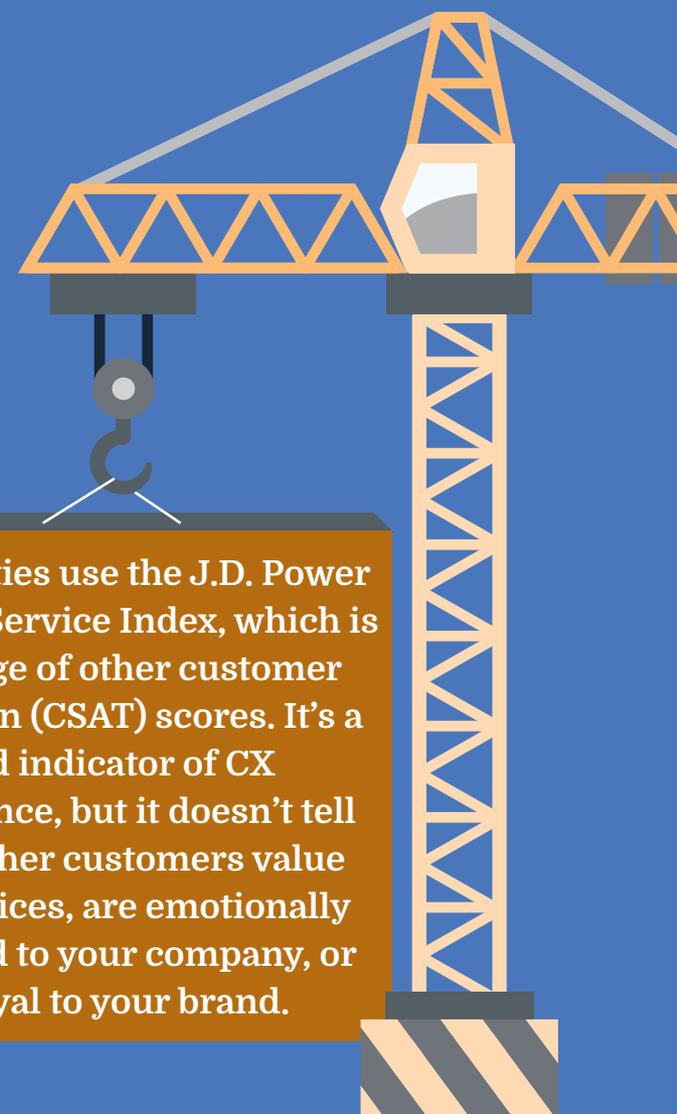
Many utilities use the J.D. Power Customer Service Index, which is an average of other customer satisfaction (CSAT) scores. It's a broad indicator of CX performance, but it doesn't tell you whether customers value your services, are emotionally connected to your company, or are loyal to your brand.

Step 3: Combine your metrics to create a complete picture

Create a dashboard that shows how well you're performing relative to your metrics and share it across the organization. If your goal is to increase NPS from 4 to 8, show your progress toward that goal.

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Step 4: Get feedback to drive improvement

Keep track of the customer data your metrics are providing and use it to tweak your CX activities. Make sure you're also talking to employees and getting their feedback; after all, they're the folks whose efforts you're measuring. Adopt an enterprise feedback management (EFM) approach to get, analyze, act on, and resolve customer and employee input. Remember, it's not so much about the method you use to track CX efforts; it's what you do with those metrics to improve the customer experience that matters.

Visit our website to learn more about the E Source EFM solution.

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And for more information about
CX metrics, read our three-part series:

- Customer Experience Metrics—Part I: Building Upon the Traditional Approach to Measuring CX Success

- Customer Experience Metrics—Part II: Building Up Your CX Scorecard with Descriptive, Perceptual, and Outcome Metrics

- Customer Experience Metrics—Part III: Four Tips for Successfully Implementing CX Metrics

For 30 years, E Source has been providing research, consulting, and market research to more than 300 utilities and their partners. This guidance helps our customers advance their efficiency programs, enhance customer relationships, and use energy more efficiently.

View this e-book online at
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