

# Harnessing the Power of the Many



Learning from the USA's Customer Experience Leaders  
*Customer Experience Excellence Centre 2016 US Analysis*

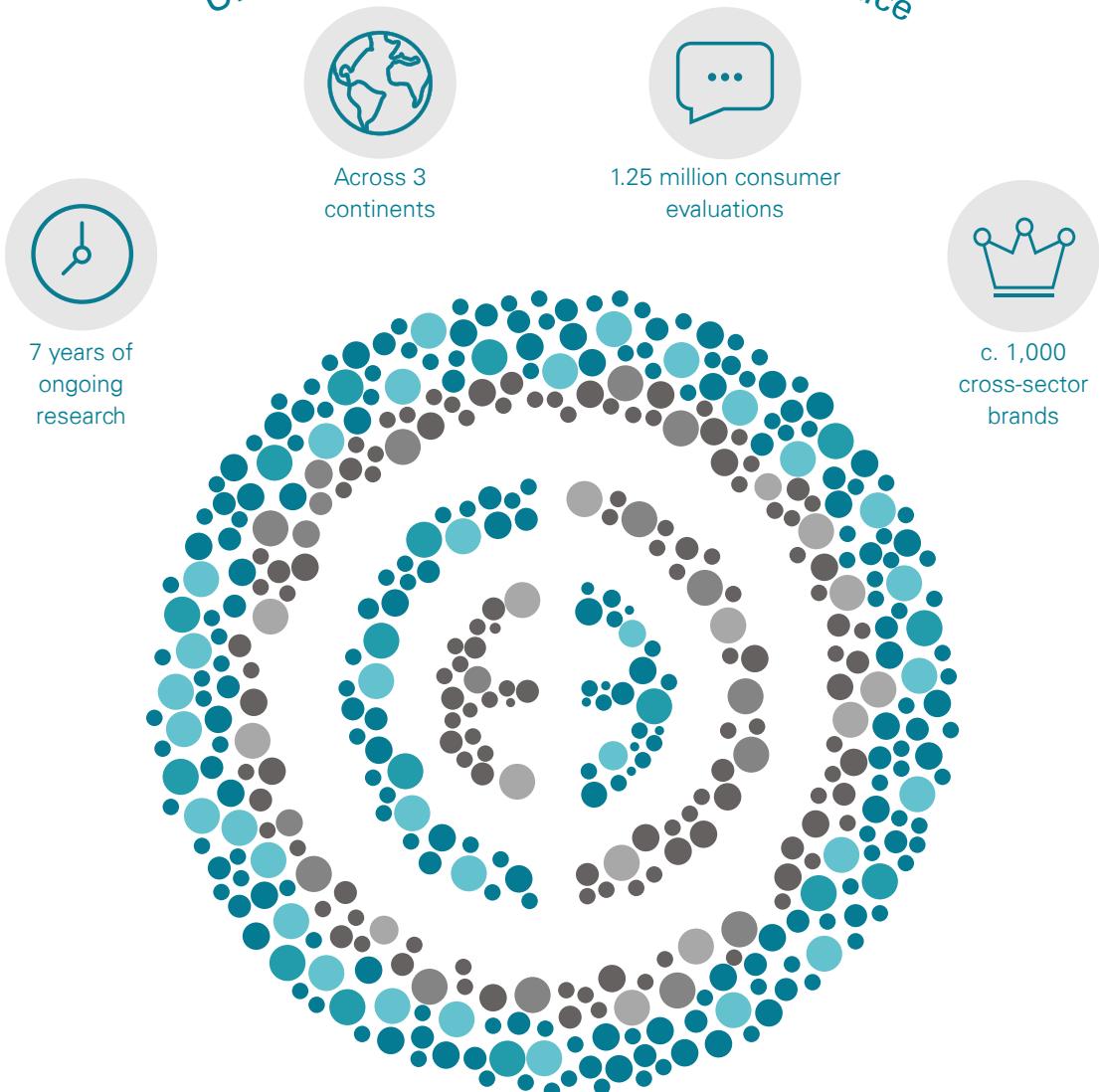


## 'Best Use of Thought Leadership'

*Customer Experience Excellence Centre*



## Understanding international best practice



### Through The Six Pillars™ of customer experience excellence



Personalisation



Integrity



Expectations



Vision and Strategy



Journey Prioritisation



Journey Diagnostics



Resolution



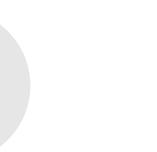
Time and Effort



Empathy



Journey Transformation and Roadmapping



CX Management and Control

### Applied to key customer experience challenges

# Foreword

**There is a uniquely defining characteristic of the top 10 companies in the 2016 US Customer Experience Excellence analysis – they have mastered the art of making a thousand moving parts think as one.**

Their secret? They have connected their people with customer purpose.

To achieve this they have had to become advanced practitioners in the field of alignment. They have the ability to keep all of the vital elements of the organisation aligned and headed in the same direction. They can orchestrate a complex organisation to consistently deliver an intentional experience across multiple touch points, channels and technologies and, in so doing, gain exponentially from the **power of the many**.

The **power of the many** day-to-day micro experiences that accumulate to a compelling reason to stay with a company and buy more of its products.

The **power of the many** thoughts, ideas and talents of its people to deliver great experiences every day.

The **power of the many** customers that advocate their products and services and act as energised ambassadors on their behalf.

The **power of the many** attributes that comprise the KPMG Nunwood Six Pillars and drive world-class experiences.

The **power of the many** nuggets of customer feedback that drive customer journey improvement and customer experience-defining insight.

The **power of the many** best practice learnings from across the globe.

They have understood that customer experience cannot be left to the default outcome of multiple different departments, all with their own agendas, all with their own perspectives and all with uniquely different objectives.

These companies are aligned organisations. They have hierarchies, silos and functions but don't act as if they are controlled by them; they have ageing technologies but have learnt not to be defined by them, and they have short-termist shareholders but don't act as if they are governed by them. They are motivated and driven by a deep desire to deliver on their customer purpose. They respond to their ultra-competitive markets with integrated precision, rapidly organising and reorganising as the circumstances demand, but always moving forward in the same positive direction.

They have learnt to manage the complexity of escalating expectations by understanding the customer so deeply, so profoundly, that they are leaders in setting those expectations.

Their employees are organised, excited and committed to an energising customer purpose. Everyone in the organisation is clear on what a great experience from their organisation looks like and they are committed to its consistent delivery.

Most organisations will achieve great customer experiences at one time or another. What sets the US top 10 organisations apart is their ability to do this consistently. To ensure that the sum of the many small things that they have to do each day, every day, add up to an outstanding customer experience where the whole is always greater than the sum of its parts.

**David Conway**

May 2016

# Contents

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USA 2016 Summary	06
The Six Pillars of Customer Experience Excellence	08
The Economics of Excellence	09
The 2016 US Customer Champions	10
The State of the Nation	13
Innovation and the Omnichannel Experience	17
The Connecting Power of Customer Purpose	21
Organising for Customer Journeys	26
The Human Equity Continuum	30
The Sum of Many Small Things	32
Lessons from America: The Alignment Checklist	35
Further Resources	38
The US CEE 2016 Top 100	39

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# USA 2016 Summary

The US remains a haven for global customer experience best practice. Despite a slightly diminished lead against the UK in 2016, a customer in the US is still six times more likely to have a great experience than a customer in the UK. The majority of US industries exceed their UK counterparts, some by a significant amount. Our research shows the reasons for this:



**US firms are much clearer on their customer purpose** and what they intend to achieve for customers, and are better at enacting corporate rules to ensure consistency of delivery. Whilst UK firms are capable of delivering a great experience, they are less able to do this on a consistent basis.

**US leaders are much more tightly focused on key segments** – they realise that you cannot be all things to all customers so they define their target customers tightly, specify the target experience and then follow the rules for delivery.

**Doing the right thing for the customer because it is the right thing to do is much more of a way of life.** Customers believe that, when it matters, these organisations will act in their interests ahead of those of shareholders.

**The customer is understood more deeply.** The voice of the customer carries more weight than the voice of finance.

**The customer agenda is set from the very top.** CEOs own the customer agenda. One CEO, addressing a series of questions with his executive team, was asked whether they had a customer experience team. His response was “yes, you are looking at it!” Contrast this to the UK where the customer agenda bubbles up from within the organisation and is signed off by the board, having first been ‘socialised’ and people’s ‘buy-in’ sought.

**Experience is much more multidimensional and sensorial.**

No detail is missed – there is an increasing sense of theatre about experience delivery. The focus on inspiring and exciting customers is considerably greater than in the UK. Nowhere is this more obvious than in the grocery trade – supermarkets have become destinations in their own right – the quality of the experience is more important than the price.

**Digital is integrated**, not kept as something separate with its own rules and philosophy, a digital island in a multichannel world. In the US, it has always been omnichannel.

**Customer journeys are seen to be more than just a means of improving the experience – they are a unit of organisational design.** Used to drive down cost, as well as to deliver a great end-to-end experience.

**Employees are at the epicentre of the experience** – the great companies are very particular about who they recruit. They focus on finding people who have a passion for customers, a passion for

the category and an inbuilt desire to deliver great service. Companies such as Wegmans restrict their growth because such people are not easy to find. Rather than compromise on the experience and undermine the brand, they grow more slowly. Zappos moved their business from San Francisco to Las Vegas, in order to tap into the large pool of people trained in the hospitality industry who had the right personal qualities to deliver the legendary Zappos service.

**The great companies are not just great for customers, they are also great places to work.** Several of the US top 10 feature highly on the 'Great Place to Work' list and many pay higher than the average – recognising the value of quality people.

**The leaders invest in their people**, recognising that knowledge and the ability to impart that knowledge to the advantage of the customer is vital.

Wegmans sends its people to France to learn about wine and to Italy to learn about cheese and pasta. The added value of the human contribution to the experience is where their focus lies. They want staff who can deliver real engagement and emotional connection – not automatons.

**The alignment between the employee experience and the customer experience is significantly greater in the US.** Culture is the root of experience. A culture where the customer genuinely comes first is a prerequisite of experience excellence.

**US leaders realise that every experience is the sum of several smaller experiences** and it is the attention to detail within each micro experience that makes a competitive difference. Chick-fil-A describes this as 'second mile service', the tiny things that add up to a great experience when you put them all together.

Whilst there is much to learn from the US leaders, UK firms are learning from best practice very quickly. Companies such as Lush, First Direct and John Lewis are getting closer to their outstanding US counterparts. What is interesting is that the average experience is better in the US than the average experience in the UK, and that is because US organisations are further along the customer experience maturity curve.

Research conducted in March 2016

7,504 US consumers evaluated 243 brands

Spanning 10 sectors



Financial Services



Grocery Retail



Non-Grocery Retail



Restaurants and Fast Food



Entertainment and Leisure



Travel and Transport



Logistics



Utilities



Telecos



Public Sector

# The Six Pillars of Customer Experience Excellence

The *Customer Experience Excellence Centre* is the world's largest customer experience think tank. Through an ongoing research programme across three continents over seven years, over 1.25 million consumer evaluations have been gathered.

The Centre's research demonstrates that a universal set of emotional qualities defines an outstanding customer experience – these are The Six Pillars. Personalisation, Integrity, Expectations, Resolution, Time and Effort and Empathy are all essential goals to master for a leading customer experience.

## The Six Pillars



Organisations that deliver across The Six Pillars demonstrate the enhanced commercial outcomes that are achievable, as The Six Pillars have a clear link to loyalty and advocacy:

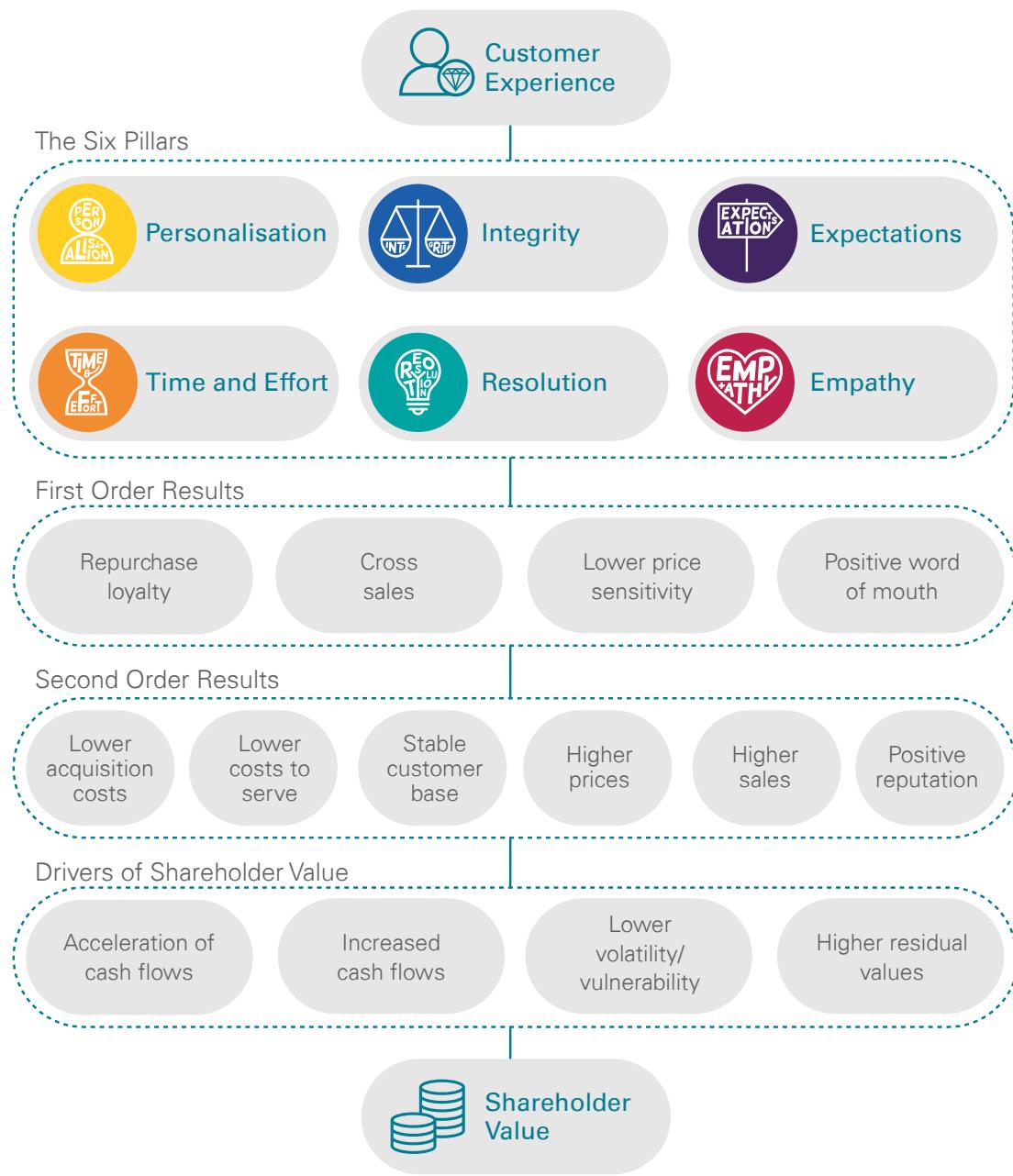


# The Economics of Excellence

Organisations that excel at The Six Pillars ultimately create greater shareholder value by delivering multiple-tiered commercial outcomes. These rest on creating an emotional connection – as defined through The Six Pillars – which, in turn, create relationships and behaviours consistent with growth.

The following conceptual model draws on the *Customer Experience Excellence Centre's* research to illustrate the economics of customer excellence.

## Guiding economic model



# The 2016 US Customer Champions





Membership only warehouse club, Costco Wholesale, is another customer experience leader that recognises the importance of the detail – focus on the small things and excellence will come. Costco recruits employees that recognise the value of this in enhancing the customer experience, and so has a set of highly engaged employees who take a personalised approach to interactions with customers.



Grocery retailer H-E-B cleverly enhances the weekly grocery shop with in-store theatre and technology. H-E-B stores have their own in-house chefs who frequently whip up signature dishes for customers to sample, alongside offering general cooking advice. And to aid the shop, customers can use the H-E-B app to create shopping lists from scanned receipts and even find out in which aisles items can be located.



Wegmans is known as a theme park of food and bases its business on anticipatory service – knowing what the customer needs before they know themselves. Highly knowledgeable staff, eager to share their knowledge with customers, provide an outstanding experience. This is demonstrated through an almost telepathic level of customer service, alongside a continual innovation pipeline focusing on how best to improve the customer journey.



Southwest Airlines has redefined service in air travel. With a business model that places as much importance on their employees as they do their customers, the Southwest brand is delivered through every individual staff member expressing their personality and engaging with passengers in a way that makes every flight memorable. Southwest ensures its staff are recruited with an attitude to serve its customers, whatever it takes.



Online shoe retailer Zappos is famed for the lengths it will go to for its customers. Encouraged to make emotional connections, Zappos employees are set customer service metrics rather than being targeted on call volumes. This is acknowledged in endless tales of Zappos' 'insane' levels of customer service – from the lengths they will go to to resolve customers' problems, to small gestures such as thank you cards and flowers.

# Spotlight on Customer Champions



The leading brand for another successive year, USAA is a paragon of customer experience excellence. The financial services organisation recognises the importance of putting the customer at the heart of the business, in both word and deed. Such customer centricity has resulted in world-leading scores across The Six Pillars.

"Customer experience is our main priority; the service we provide to our members is the foundation USAA was built on. We are focused on knowing our members and fully understanding their individual needs, so we can effectively provide appropriate and customised solutions to protect and enhance their financial security.

What we do begins and ends with our mission: to serve the financial needs of our members through a lifelong relationship. Our employees are personally committed to delivering excellent service and great guidance. That exceptional service builds loyalty and trust over the long term.

We truly understand the demands of the military community. Many of our employees have either served, been a spouse of someone who served, or grew up in military

families and, as a result, our employees can relate and provide customised advice for our members at all stages of their lives.

With the pace of today's marketplace we have made, and continue to make, adjustments to our structure and operations, to remain agile and put ourselves in the best position to continue to know, understand and meet our members' needs with exceptional experiences. This includes ensuring we can serve them through their channel of choice, expanding across our contact centres to service through phone, usaa.com, mobile and other digital channels.

Our mission guides us every day and it's not only what we do, but how we do it. The quality of our service and the passion and advocacy we have for the 11 million-plus members we serve is what matters most. Our member service representatives are some of our most mission-driven employees. They are the face and voice of USAA and live USAA's core values: service, loyalty, honesty and integrity."

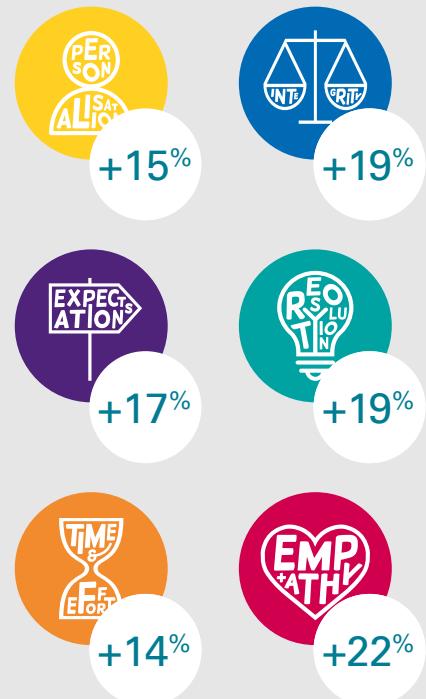
*Thomas Grothues, SVP Banking and Insurance Solutions*

“

We will continue investing in the foundation that makes USAA great today – world-class member service.

”  
Ty Richardson,  
VP Strategy  
and Analytics

## The Six Pillars: Scores vs US Average



## Implication

Alignment within an organisation is crucial – with strategy, employees, customers and process working together towards a shared purpose to deliver business success.



More about USAA on the  
Excellence Centre

# The State of the Nation

## US customer experience continues to outperform the UK

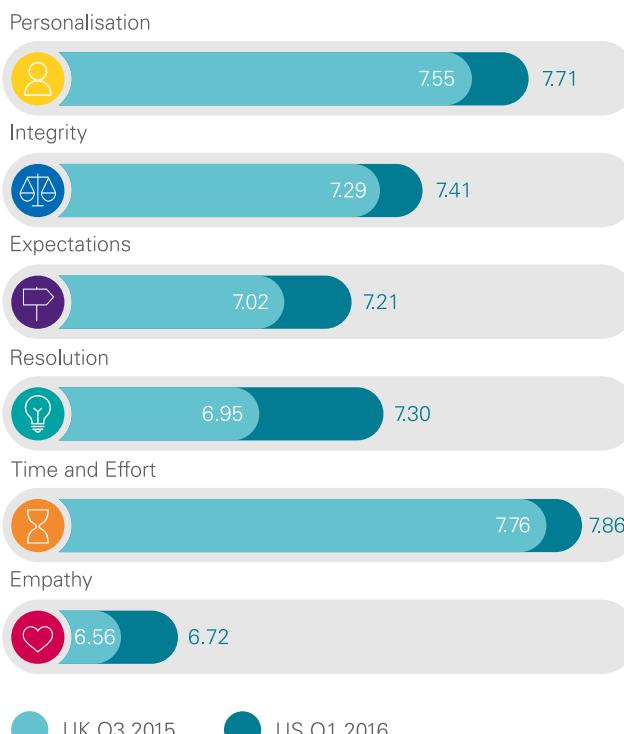
Despite a slightly diminished lead from 2015, US organisations remain better than the UK at delivering customer experience excellence.

The US continues to provide outstanding examples of best practice for UK organisations to learn from, with five times more outstanding brands (achieving a CEE score of 8+) in the US analysis than in the UK. The US top 5 brands are the best in the western world, ahead of any other organisations analysed by the *Customer Experience Excellence Centre*.

UK Q3 2015 7.25

US Q1 2016 7.42

Overall performance US vs UK +2%



## US surpasses the UK across The Six Pillars

By winning across The Six Pillars, US brands outperform their UK peers.

The US particularly outshines the UK for the pillar of Resolution (+5%), driven by a combination of factors:

- US organisations are at the forefront of technological innovation to solve issues
- Leading organisations are structured in such a way to encourage responsibility for Resolution
- Colleagues are empowered to resolve issues in whatever way is appropriate for each customer
- All driving the 'service recovery paradox' – a problem being resolved in such a way that it leaves the customer feeling better about the organisation than they did before the issue occurred.

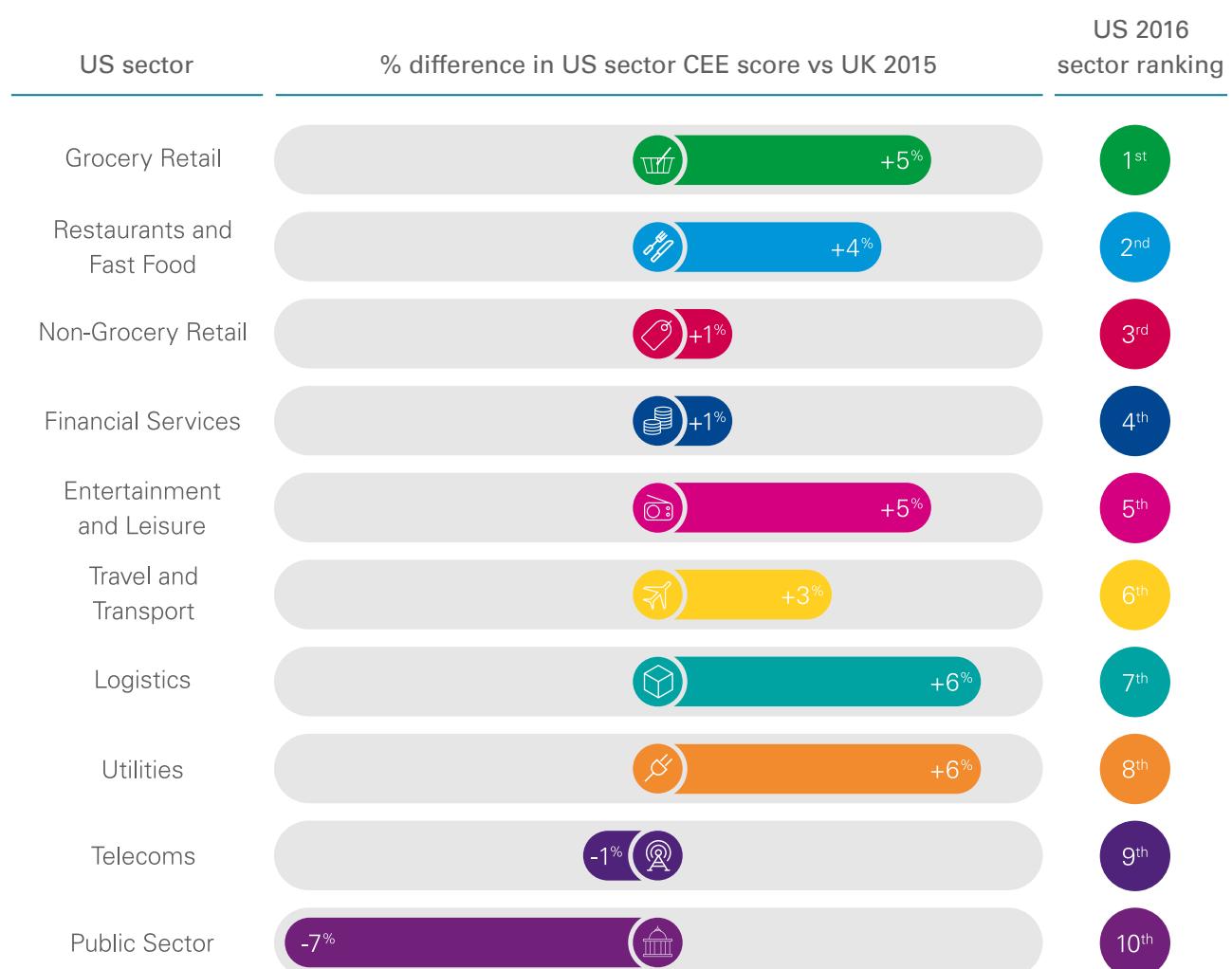
In the last year, despite some declines in US performance, there has been a particular improvement in US organisations meeting and exceeding customer Expectations. This pillar is a driving factor for brands who have progressed in the US in 2016.

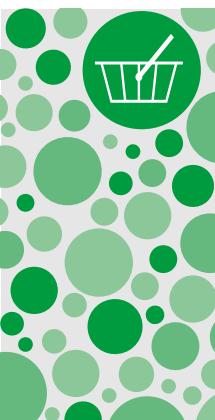
# The State of the Nation

## Most US industries outperform their UK counterparts

The US outperforms the UK across the vast majority of industry sectors analysed by the *Customer Experience Excellence Centre*. Only telecoms and the public sector (new to the US analysis in 2016) buck this trend – with no organisations within these sectors featuring inside the US top 100.

### % difference in US sector Customer Experience Excellence score vs. UK 2015





## Grocery Retail

US grocery retailers continue to stand out for customer experience, with three grocers featuring in the top 10 alone. Each one takes a slightly different stance to deliver on customer experience; from the use of technology to enhance the experience, to in-store theatre to entertain and inform. Yet they all understand, seemingly more so than their UK counterparts, what their customers want in an outstanding shopping experience, and place its importance ahead of price. As a result, US grocery retail outperforms its UK equivalent across all Six Pillars, most notably, Resolution and Empathy.

“I truly love Wegmans, they are open all hours, they have childcare, a pharmacy and even cooking classes for customers, catering to every taste from vegetarian to gluten-free diets.”

US CEE 2016 respondent, Wegmans



## Non-Grocery Retail

Superior performance in Time and Effort is a driving factor of non-grocery retailer success in the US. Another sector to feature three organisations in the top 10 alone, the leading non-grocery retailers are acknowledged for their ability to ensure a swift and frictionless process. Through a clever use of technology to ensure digital/omnichannel ease, alongside the recruitment of employees who have a truly customer-centric attitude, the US non-grocery retail leaders are defined by a stronger service culture than that of the UK.

“Wonderful experiences – always. They do such a great job of finding clothes that fit and look good on me. Love shopping here.”

US CEE 2016 respondent, Nordstrom



## Financial Services

With a financial services organisation in the number 1 position for another successive year, it's proof that even complex sectors with less excitement around everyday interactions can deliver an outstanding customer experience. The US' leading financial organisations do this through an intense focus on Empathy, with a deep understanding of the customer and their circumstances at the heart. This, in turn, creates trust in the organisation – something that many UK financial organisations are still working on – to be seen to do the right thing for the customer.

“Fair, honest business for insurance and banking. Recently involved in a hit and run accident. They took care of 90% of actions with little response from me. They were quick and fair.”

US CEE 2016 respondent, USAA



## Travel and Transport

Outperforming UK counterparts across all Six Pillars, the service culture of the US travel industry is characterised by its recognition of the link between employee and customer experience. The leaders invest in their people and recruit for attitude and, perhaps more so than the UK, find employees who have a genuine desire to deliver great service and do 'whatever it takes' for their customers. They pay attention to the detail of every micro experience.

“When traveling with my parents, they were both in wheelchairs and they allowed us to go in with them first. By letting me go in with them it helped to have a great experience.”

US CEE 2016 respondent, Southwest Airlines

# Spotlight on Customer Champions

## Disney Parks

2<sup>nd</sup>  
rank in 2016 of  
243 brands  
3  
places from  
2015

Disney Parks is renowned for delivering a magical experience for its guests. What is perhaps surprising though, is it's an intense focus on process that makes the Disney magic work.

From badges offered for a first visit or birthday so every cast member knows to treat the guest with even greater attention, to an extra fast pass handed out to a child looking disappointed to end a ride, Disney employees are trained to recognise when someone needs a little 'Disney magic' added to their day. It's no surprise then that the pillar Disney Parks stands out for is Empathy – recognising the needs of each guest, perhaps even before they realise themselves.

These micro experiences seem like a little Disney magic to the observer, but behind this is a process that has allowed this to happen in the first place. Walt Disney was known for his fixation with procedure and this continues to live and breathe through Disney University – the global training programme for all cast members – that teaches about the important roles that process and people play together, to inject something a little different to make a personalised Disney experience.

Technology also plays an important role in the Disney experience. The My Disney Experience app makes planning a personalised itinerary a doddle. With everything at your fingertips to be able to book a restaurant to coincide with the evening fireworks, but to fit around the fast passes you've pre-booked for your favourite rides so you don't have to spend two hours in the queue, the app will also tell you live wait times and where to find your favourite characters whilst in the parks.

Arguably one of Disney Parks' most important technological developments in recent years though is the introduction of the MagicBand – a rubber bracelet with RFID sensors that ensures a quick yet personalised experience. This innovation connects the guest to every choice they've made on the My Disney experience app, allowing payment, ride fast pass entry, restaurant reservations and more, all simply by the scan of a band.

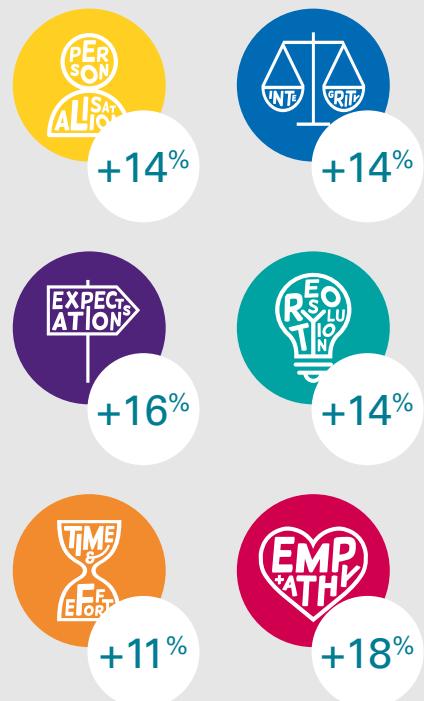
It's this combination of technological innovation and personalisation of process that ensures a magical Disney experience for each and every guest.

“

It's not the magic that makes it work; it's the way we work that makes it magic.

“  
Lee Cockerell  
Former EVP of Operations

## The Six Pillars: Scores vs US Average



## Implication

It's possible to create magic from the mundane – the sum of many micro experiences through a typical customer process can combine to build an outstanding customer experience.



More about Disney Parks on the Excellence Centre

# Innovation and the Omnichannel Experience

## The power of digital in an omnichannel customer experience

With customers across the globe expecting a seamless experience across all touch points, the leading US companies recognise that digital is just one of the modes of engagement that a customer might use. Consequently, the US customer experience is more integrated and delivers a more omnichannel experience than in the UK. Consumers find it easier to move across and within channels in a way that suits their needs at a particular time.

Nevertheless, the focus on using digital to solve customer problems in the US has led to significant innovation, and there is much the UK can learn from the US' sophistication.

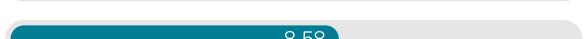
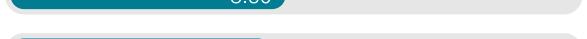
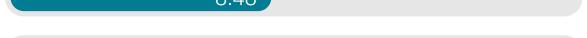
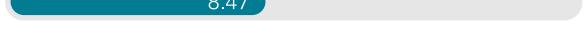
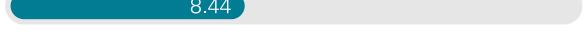
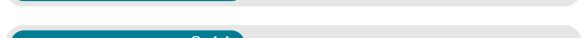
For example, USAA has developed a suite of apps that have revolutionised how customers interact

with them. Such app-based interfaces have removed paper from the process of insurance claims, from car purchasing and from cheque depositing – improving things for the customer and reducing cost for USAA.

As referenced previously, Disney Parks offers its guests a bracelet that uses RFID technology. The MagicBand enables a speedy yet personalised experience for everything from ride entry to restaurant reservations.

Grocery retailer H-E-B has introduced an app to make shopping easier for its customers – allowing them to create shopping lists from scanned past receipts and even find out which aisles products are located in.

## US 2016 omnichannel leaders:

Omnichannel rank	US sector	Brand	Omnichannel Score	CEE rank 2016
1 <sup>st</sup>		USAA		1 <sup>st</sup>
2 <sup>nd</sup>		Zappos		10 <sup>th</sup>
3 <sup>rd</sup>		Disney Parks		2 <sup>nd</sup>
4 <sup>th</sup>		Southwest		9 <sup>th</sup>
5 <sup>th</sup>		Publix		3 <sup>rd</sup>
6 <sup>th</sup>		Edward Jones		11 <sup>th</sup>
7 <sup>th</sup>		Charles Schwab		16 <sup>th</sup>
8 <sup>th</sup>		The Container Store		42 <sup>nd</sup>
9 <sup>th</sup>		Aflac		26 <sup>th</sup>
9 <sup>th</sup>		Costco Wholesale		6 <sup>th</sup>
9 <sup>th</sup>		Nordstrom		16 <sup>th</sup>

## Six Pillar Innovation

What is apparent in the US is that digital is more about finding creative ways to solve customer problems than digitally enabling existing processes.

Fintech providers are leading the way in the financial services industry. Retailers are harnessing video and expert systems to curate and manage individualised collections and utilities are maximising the communication advantages of smart meters.

The organisations that are close to their customers find innovation easy. They simply identify problems their customers have and fix them. Their innovation is grounded in their business model and is a tangible manifestation of their brand. It is not technology for its own sake.

The leading US companies are carrying this philosophy in their developments across each of The Six Pillars:



### Personalisation

Providing a custom-fitted experience; referred to as 'hyper personalisation':

- Zappos offers individualised curated collections to their customers.
- Advertisers send discounts that are customised both on browsing history and geographical location.
- Netflix continues its pursuit of the ultimate 'you catalogue' for each viewer, identifying the one film or programme that is exactly right for the viewer's taste.



### Empathy

Delivering human empathy through technology:

- The increasing adoption of companion robotics to customer service (for example, Pepper, the personal robot).
- MasterCard has transformed a favourite fashion accessory (for example, rings, wristbands or keyfobs) into a payment device.

Zappos invests considerable effort in developing new tools that will surprise and delight customers. Within its internal innovation lab - 'Zappos Labs' - the online retailer has a dedicated team of employees who focus on solving customers' pain points and creating compelling and customised experiences across all channels. For example, Ask Zappos allows customers to snap photos of items they see on the street and text, email or Instagram them to team members. A representative will then find the item and send a link to the customer to buy online. New capabilities implemented in the Zappos mobile app allow consumers to shop and favourite items across different devices, as well as store their payment information in a secure environment.

10<sup>th</sup>

Zappos





## Expectations

### Using big data to exceed expectations:

- Technology companies are developing apps that sense when a customer is bored and send personalised content.
- USAA are using their huge transactional data resources to equip the customer at point of purchase with all of the relevant information needed to make the smartest purchase possible. Their app identifies what type of discounts are usually available or what others have paid at individual outlets.



## Resolution

### Ensuring that the customer is put in control when things go wrong – or preventing things from going wrong in the first place:

- With the USAA car insurance app, if a customer has an accident, they simply dictate what happened into their phone and take a photograph of the scene. The app adds the GPRS coordinates of the accident and the weather conditions at the time. Press a button and the claim is initiated, no forms or paperwork needed. A replacement car is delivered to the scene within an hour.
- Some services leverage predictive analytics to identify potential delays on public transport before they even happen and send an SMS with alternative routes.
- Retail robots automatically audit shelves and warn of the need to re-order or replenish, to save customers the disappointment of not finding their favourite item.



## Time and Effort

### Increasing the time and resources that organisations spend to ensure customers don't need to do so:

- Nimbl, the mobile ATM operating in New York, eliminates the need to go to the ATM. Simply use the app to specify the amount of cash needed and it is hand delivered to a customer's office or home.
- The Nordstrom trunk club delivers clothing items monthly and learns better what is right for the individual through what is returned.
- Adobe's Smart Bag keeps an in-store real-time inventory of what is in the shopping bag, allowing for automatic payment without going to a check-out.



## Integrity

### Going beyond the delivery of returns for shareholders, putting customers ahead of shareholders:

- Ally Bank's advertising campaign is about setting new standards of behaviour in banking.
- Some furniture retailers are investing and innovating to ensure the furniture that customers purchase will fit within their home – putting satisfaction ahead of sales.

# Spotlight on Customer Champions



Kroger, the second largest general retailer in the US, is known for its forward-thinking strategy and early adoption of innovations. This is driven by listening closely to the customer's voice and a strong investment in its customer science practice.

Year on year, Kroger proves to be consumer-centric and to have a clear focus on addressing issues faced by shoppers through digital development.

The chain has rapidly embraced mobile apps (reportedly used millions of times weekly) and was among the first brands to release an update for the Apple Watch, constantly working towards keeping up with trends its customers adopt. But the true differential of Kroger is how it leads the way in digital innovation and in-store implementation.

Kroger has used predictive analytics and infrared sensors to address the issue of queuing in-store and, more recently, the chain began monitoring the temperature of its freezers, thanks to the Internet of Things. In the last year, Kroger has also introduced the digital shelf, with video-streaming capabilities to

display advertisements, alongside the ability to send alerts to customers when they pass by an item on their shopping list (via the Kroger app).

This innovation provides a number of micro experiences through the typical shop, from pointing shoppers to their favourite items, to signposting to those with particular dietary needs the products that fit their requirements. Such micro experiences reshape how customers shop at Kroger, simply by putting convenience at the centre of the experience, and result in above average scores for Time and Effort and Personalisation.

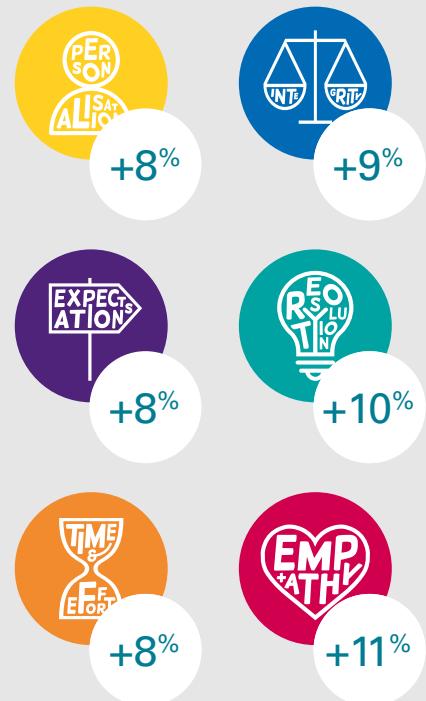
Kroger invests heavily in understanding its customers, their needs and the road bumps they experience as they shop. It then employs technology and data to ensure these road bumps are removed from their shopping aisles.

“

One of the ways we continuously improve the shopping experience is by bringing new technology and digital capabilities to our business.

Kroger Q1  
2015 Results

## The Six Pillars: Scores vs US Average



## Implication

Investing in technology and keeping up to date with the latest digital trends is crucial to continue meeting customers' changing demands and continually find ways to make life easier for the customer.



More about Kroger on the  
Excellence Centre

# The Connecting Power of Customer Purpose

**As human beings we have long learnt the power of aligning behind a sense of common purpose. It is something that we are naturally programmed to do. It is through understanding this facet of human nature that the great organisations have created the alignment necessary to harness the power of the many.**

It is no accident that each of the US top 10 have, in their own way, set out a clear purpose that their organisation can align behind so that each individual component moves forward in the same direction. It is the clarifying nature of this purpose that anchors a unique brand experience.

At the heart of this purpose lies a controlling idea, an idea that resonates deeply with employees and customers alike. It shapes the experience both internally for employees and externally for customers,

and the US top 10 are world class exponents of connecting people and purpose.

However, a compelling purpose alone is not enough. It needs guidelines or principles that amplify how it should be implemented. It is these simple rules, or design principles, that ensure a consistent experience across all touch points.

Think of birds flocking: cohesive, integrated – they have a single purpose to fly to warmer climes. However, the way they exercise control is based on a few simple rules: keep to an optimum distance from the next flight partner; match their speed and velocity; anticipate changes in direction arising from elsewhere.

The power of a few simple rules to drive cohesion has long been known – but our US leaders use it to their distinct advantage:

## 1<sup>st</sup> USAA

### Customer Purpose:

To contribute positively to members' lives.

### The Simple Rules:

- To understand the customer at a deep and profound level
- Treat the customer as you would want to be treated yourself

### Experience:

Extraordinary levels of Empathy and emotional connection.

## 2<sup>nd</sup> Disney Parks

### Customer Purpose:

To create happiness for others.

### The Simple Rules:

Make every experience magical:

- I project a positive image and energy
- I am courteous and respectful to all guests
- I stay in character and play the part
- I go above and beyond
- Treat the customer as you would want to be treated yourself

### Experience:

A magical, captivating 'wow' experience that delivers a 70% return rate (Source: Be Our Guest, The Disney Institute).

When Walt Disney began to define the experience in his theme parks, the simple rules reflected the characters from Snow White. They are as relevant today for any business as they were in the 1950s:

**Be Happy**...make eye contact and smile!

**Be like Sneezy**...greet and welcome each and every guest. Spread the spirit of hospitality...it's contagious!

**Don't be Bashful**...seek out guest contact.

**Be like Doc**...provide immediate service recovery.

**Don't be Grumpy**...always display appropriate body language at all times.

**Be like Sleepy**...create dreams and preserve the magical guest experience.

**Don't be Dopey**...thank each and every guest!

2<sup>nd</sup>

## Disney Parks



3<sup>rd</sup>

## Publix

### Customer Purpose:

Making shopping a pleasure.

### The Simple Rules:

- Never let making a profit stand in the way of doing the right thing
- Make the food the star
- Deliver outstanding customer service and competitive pricing

### Experience:

Customers love the experience of shopping at Publix.

4<sup>th</sup>

## Amazon

### Customer Purpose:

Customer first.

### The Simple Rules:

- Put the customer in control at all times
- Become the world's most customer-centric company
- Excite and inspire the customer

### Experience:

Amazon has defined the online shopping experience for its customers.

## 5<sup>th</sup> Chick-fil-A

### Customer Purpose:

To have a positive influence on all who come into contact with Chick-fil-A.

### The Simple Rules:

- Focus on 'Second Mile' service
- The first mile is the foundation: good customer service, hot food hot, cold food cold. The second mile is what is remarkable, for example, carrying customers' trays to their tables.

### Experience:

It's the little things that Chick-fil-A does really well that create a memorable experience. These little things exceed expectations and create repeat customers who turn into ambassadors. In fact, 10-15% of Chick-fil-A's customers are 'raving fans' (Source: CNN iReport). These are the people who do over-the-top things to show their love for the brand.

## 7<sup>th</sup> H-E-B

### Customer Purpose:

Sell stuff they don't!

### The Simple Rules:

- Put the food front and centre
- Ensure a Texan sense of place
- Invest in our customers so we can have the lowest prices possible
- Invest in our partners' pay and benefits
- Invest in our communities

### Experience:

Convenience, low prices, friendly people. Continually working to find new and exciting products.

## 6<sup>th</sup> Costco Wholesale

### Customer Purpose:

To continually provide members with quality goods and services at the lowest possible prices.

### The Simple Rules:

- Obey the law
- Take care of members
- Take care of employees
- Respect vendors

### Experience:

Shoppers describe the experience as fun. They pay their employees more on average than most retailers, keeping turnover lower than others. They keep a determined focus on their original strategy – low margins, low overheads, sensible profits.

## 8<sup>th</sup> Wegmans

### Customer Purpose:

Ensure customers are truly put first.

### The Simple Rules:

- Happy, knowledgeable and superbly trained employees
- Treat customers like guests
- Enable customers to take time, relax and enjoy the experience
- Care about the wellbeing of every person
- High standards are a way of life

### Experience:

Empowered, passionate staff working in a theme park of food, creating an almost unbreakable bond with its customers.

A destination in its own right.

Listed as one of the best employers in the US in Fortune's '100 Best Companies to Work for'.

9<sup>th</sup>

## Southwest Airlines

### Customer Purpose:

A dedication to the highest quality of customer service, delivered with a sense of warmth, friendliness, individual pride and company spirit.

### The Simple Rules:

- The personality of our people make the difference

### Experience:

Passengers love interacting with Southwest Airlines' staff.

10<sup>th</sup>

## Zappos

### Customer Purpose:

Uncommon service.

### The Simple Rules:

Create a customer culture based on:

- Deliver wow through service
- Embrace and drive change
- Create fun and a little weirdness
- Be adventurous, creative and open-minded
- Pursue growth and learning
- Build open and honest relationships
- Build a positive team and family spirit
- Do more with less
- Be passionate and determined

### Experience:

Continually having your expectations exceeded.

Southwest has a clear and succinct customer purpose. "We exist to connect people to what's important in their lives through friendly, reliable and low-cost air travel."

This is coupled with a vision that states: "Our vision is to become the world's most loved, most flown, and most profitable airline."

The combination of the two ensures that not only are employees encouraged to go the extra mile, but they also know how they should go about it and why it is important. It isn't just about moving people from A to B safely – it is about connecting people to what is important to them.

As CEO Gary Kelly describes, "Southwest is a great place to work and brings the greatest joy because we have such a meaningful purpose."

9<sup>th</sup>

## Southwest Airlines



# Spotlight on Customer Champions

## Zappos

10<sup>th</sup>  
rank in 2016 of  
243 brands

39  
places from  
2015

Long heralded as an exemplar of customer experience, Zappos, one of the world's largest online shoe retailers, has moved into the US top 10 in 2016 and features among the world's leading brands for customer experience excellence.

From the outset, Zappos recognised the challenge of online shoe buying for customers unable to try them on. So it offered free shipping, free no quibble returns and invested in a call centre that was centred around customers being able to ask questions to find the right product for them. As a result, Zappos developed customer service metrics that emphasised creating a personal connection with the customer, rather than call volumes. Perhaps an increased cost of service, but its evident such service-focused KPIs can enhance performance – with company sales today well over \$2 billion.

Such a customer-focused strategy has resulted in Zappos performing strongly across all Six Pillars of customer experience, most notably, Empathy and Resolution.

Zappos employees are encouraged to go above and beyond traditional customer service and are famed for the lengths they will go to for

their customers. Endless stories fill the internet about their 'insane' customer service; for example, one mother emailed Zappos to ask for a replacement pair of sandals for her son as the strap had broken. A prompt reply said they would send a replacement overnight, and not to worry about returning the old pair. However, when they arrived, it was the wrong sandals – on contacting Zappos again, they apologised profusely, told her to keep the new shoes or donate to charity, and the correct pair would be with her the next day. A story in great customer service, but also a note in the importance of trusting the customer – by not asking her to return the shoes, they'd gained a customer for life. Stories such as this make it no surprise that over 75% of Zappos purchases are from repeat buyers (Source: Forbes article, Languatics).

Next on the path to success for Zappos is reportedly the transition to a Holacratic structure. At Zappos, this means that when a problem arises more than once, a different team of people will address it each time. The goal for this is to find the best, innovative solution to each new challenge – developing opportunities to build on Zappos' success.

“

I love that Zappos will send a replacement before even receiving a return.

US CEE 2016 respondent

## The Six Pillars: Scores vs US Average



## Implication

Setting targets based on call volumes is unlikely to benefit the customer experience. Instead, focus on customer service metrics that are based around building an emotional connection.



More about Zappos on the Excellence Centre

# Organising for Customer Journeys

Einstein once remarked “Everything should be made as simple as possible but not simpler”.

Organisations have a natural tendency to create their own complexity. This is a fact of life that organisations seem to permanently rediscover:

- A proliferation of products and services
- Inconsistent and overlapping processes
- Misaligned incentives
- Misaligned KPIs and measurement systems
- A poorly articulated strategy

In a world of escalating complexity, organisations that concentrate on simplification are better equipped to respond competitively.

The leading US organisations are permanently engaged in systematically rooting out unnecessary, self-inflicted complexity. They focus on using technology to transform the experience itself, not just make its delivery more efficient.

“  
**USAA maintains a relentless focus on the quality of member experiences. Integrated planning that includes all service channels is essential and ensures our members have a seamless experience.**

Chris Cox, VP Digital Strategy and Operations, USAA

Amazon has used techniques borrowed from the 1980s quality movement to micro measure and improve every aspect of their customer journeys. Designing out interactions that add no value for them or the customer (the best service is no service – when things just work). They are focused entirely on the minutiae of customer journeys.

The role of customer journeys is changing. No longer just the preserve of experience designers, they have become the entire proposition. A means of aggregating and integrating service, product and support, these are sequential experiences combined into a definable unit of management and measurement.

Increasingly, customer journeys are becoming the currency of organisation improvement. This is posing some UK businesses with organisational design challenges. How do we manage and improve a customer journey that runs across many of our functional silos, and do so in a way where the whole is greater than the sum of its parts?

Leading organisations are discovering that within a customer journey, each micro experience can be defined and seen as a reusable design component. For example, the application stage of a financial services customer journey can be defined, optimised and then reused for mortgages, credit cards and current accounts.

The problem many organisations now face is how to structure an enterprise capable of dealing effectively with this new world.

## Customer-centric organisation design – the integrated enterprise

In the leading US companies, the barriers caused by traditional silos and functions are not just being eroded, but purposefully dismantled.

Companies such as USAA and American Express are building new types of organisations based on the concept of reusability. Entirely new modes of organisation design are emerging as businesses grapple with managing customer journeys in a post-silo world.

Two of the organisations in the US top 10, USAA and Zappos, have made significant progress in moving from the rigidity of a structured organisation, to a structuring process where resources are deployed in the best way to meet customer needs.

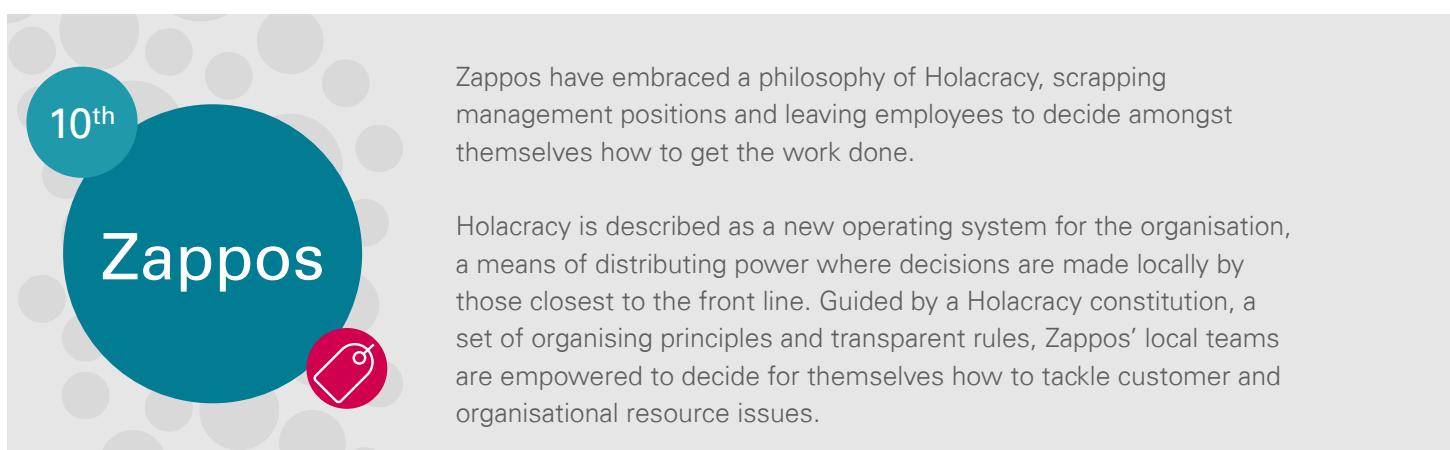
USAA describes their enterprise architecture as being designed for innovation and superior customer service. They have moved from the silo-based pyramid structure to a radial organisation where key capabilities are aligned to the customer's needs.

“

USAA also applies human-centered design principles in developing digital experiences – designing based on stated and observed member needs and conducting rigorous usability testing. The voice of the member is collected through multiple feedback sources and drives prioritization decisions.

Chris Cox, VP Digital Strategy and Operations, USAA

”



**Zappos**

10th

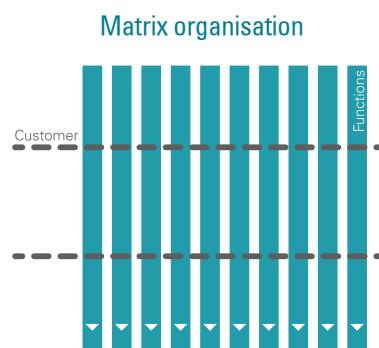
Zappos have embraced a philosophy of Holacracy, scrapping management positions and leaving employees to decide amongst themselves how to get the work done.

Holacracy is described as a new operating system for the organisation, a means of distributing power where decisions are made locally by those closest to the front line. Guided by a Holacracy constitution, a set of organising principles and transparent rules, Zappos' local teams are empowered to decide for themselves how to tackle customer and organisational resource issues.

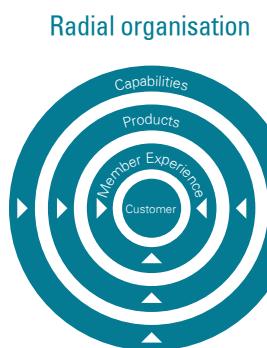
## Customer journeys require a new business architecture



The journey is the result of individual departmental efforts – which don't necessarily all align to work together and create a good experience for the customer.



Some organisations are managing the matrix of departments and journeys by appointing end-to-end journey owners, either an individual or a forum.



The most advanced companies, such as the US leader, USAA, have organised the business around the customer, managing journeys, not functions – an integrated enterprise.

In this new world, duplication is the enemy. Organisations are redolent with overlaps, duplication and interdepartmental inefficiencies. Every large business has multiple ways of doing the same thing. By structuring around customer needs, USAA was able to not only improve the quality of customer service, but also to improve cost ratios by designing out duplication and becoming hugely adept at design reuse. By institutionalising the reuse of journey designs USAA has:

- Accelerated time to market
- Reduced costs
- Accelerated organisational change
- Increased customer recruitment
- Increased revenues
- Achieved world-leading innovation

The organisation design is built around individual customer needs groups and encompasses their end-to-end customer journeys, while the contact centres are structured around customer life events, ensuring a real empathetic connection with the customer.

What was important to USAA was that they surfaced in customers' lives problems they could solve in new ways. They implemented an ideation tool, open to the entire organisation, to identify potential improvements for their customers. In the first three months employees submitted some 6,000 new ideas, with employees encouraged to work up their suggestions, build the business case and pitch their concepts to the leadership.



# Spotlight on Customer Champions

## MasterCard

76<sup>th</sup>  
rank in 2016 of  
243 brands

▲ 51  
places from  
2015

MasterCard is one of the transformation brands of the last year in the US, moving up 51 places into the top 100. Its 2016 rank of 76th is testament to the brand's efforts to be seen as a driving force in the payments industry.

With a company mission defined as "Every day, everywhere, we use our technology and expertise to make payments safe, simple and smart", MasterCard acknowledges the importance of innovation in the payment experience; indeed, one of the brand's core values is agility: "we act with a sense of urgency and deliver value through our innovation and execution".

In recognition of the increasing demand from consumers for smarter ways to pay, MasterCard set up its own 'MasterCard Labs', an incubator for new ideas. One of the ideas that came to fruition is its Masterpass proposition – a 'digital wallet' that enables secure online and in-app payments, also letting users store their card details and delivery information in one place, making the checkout process quick, seamless and secure.

And the Labs continue to test new ideas – from piloting commercial

tests for facial and voice recognition apps, to conducting trials of a wristband which authenticates a cardholder through their unique cardiac rhythm.

MasterCard approaches innovation in a very customer-centric way – find a problem with the customer experience and build a solution for it – a reason why the organisation performs so well for Resolution in particular.

It's not just about technology though. Alongside great service and benefits, MasterCard looks to exceed Expectations, and has long been surprising its cardholders with its Priceless campaign, most recently, through 'Priceless Surprises' – all based around the idea of making memories for its customers that money can't buy.

Add to this its high scores for acting with Integrity – which relates to MasterCard's efforts to make the financial system more accessible – and it's no surprise that not only is MasterCard in the US CEE Top 100, but also has a top 20 ranking in Fortune's 'Change the World' list, sitting alongside other leading innovative companies who are seen to 'do good' as part of their strategy.

“

I use MasterCard almost every day. They make it easy to contact them and are very responsive.

”

US CEE 2016  
respondent

## The Six Pillars: Scores vs US Average



+4%



+4%



+4%



+5%



+3%



+3%

## Implication

Consumers are expecting continually smarter ways to interact with a company and its products. This provides organisations with an opportunity to create better, smarter and more memorable experiences, often driven by technological innovation.



More on the  
Excellence Centre

# The Human Equity Continuum

It's evident from the *Customer Experience Excellence Centre* analysis that the leading US organisations understand the need for alignment. Alignment is the optimal organisational state where customer strategy, employees, key processes and customers work in concert to propel growth and profits.

In the 1990s, organisations began to focus on the Service Profit Chain: the link between employees, customers and commercial outcomes. Many organisations simplified this to 'happy employees create happy customers which equals happy shareholders'.

A simplification too far. Purely focusing on employee or customer satisfaction as end states misses the alignment of inputs needed to create the required commercial outcomes.

In many organisations, each of these capability areas has its own engine. There is a culture initiative, an employee engagement initiative and a customer experience initiative – invariably they are not joined up and each engine pulls in a slightly different direction, reflecting the agenda of the originating department.

What we see in the excellent organisations is alignment. Each engine is pulling in the same direction – this overcomes inertia and these businesses achieve real momentum.



Southwest Airlines starts with culture and shared values.

Highly sophisticated recruitment techniques ensure employees who join the company share their values, are inspired by the customer purpose and bring their personalities to work every day. They are very clear on the employee experience, offering an environment that encourages the right type of customer-oriented behaviours.

They are also clear on what these behaviours need to look like. Communication is vitally important and, like many organisations, they have learnt the power of storytelling to reinforce the company's purpose in day-to-day interactions with customers. Every week, CEO Gary Kelly gives public praise to employees who have gone above and beyond to show great customer service. Each month the Southwest Spirit magazine features the story of an outstanding employee and the company highlights positive behaviours through a variety of recognition programmes and awards.



# Spotlight on Customer Champions

## Charles Schwab

16<sup>th</sup>  
rank in 2016 of  
243 brands

29  
places from  
2015

Charles Schwab, one of the leading providers of US investment services, ranks 16th in this year's analysis, a move up 29 places from 2015.

"Customer experience is our top priority and all things derive from that. It is reflected in the way we describe our corporate strategy, which we call "Through Clients' Eyes." This strategy is the bedrock for our decision making. Through clients' eyes means when we make decisions, we are focused on the clients' interests, their goals, their future.

Since launching the company roughly 40 years ago, we've set out to challenge the status quo in our industry, looking for ways to offer our clients more value and a better experience. We believe it can't just be an idea, so we embed it in business processes, in how we compensate and reward employees, and how we measure success.

To try to ensure a consistently great experience across all channels for our customers, we make the client experience our primary objective, embed it across the enterprise, operationalize it, measure for it, incorporate learnings quickly, hire for it."

Schwab's culture of service is at the heart of how we activate our strategy, and we see an absolute link between the employee experience and the customer experience. In 2015, Schwab received, with distinction, a fourth consecutive win of the Gallup Great Workplace, placing Schwab among the top 40 companies recognized for having the most engaged workforces in the world.

Looking to the future, our approach will continue to be guided by our strategic focus on clients and will be based on engagement – encouraging clients to demand accountability and play an active role in the relationship; value – ensuring products and services deliver maximum value; service – serving clients based on an understanding of their needs; transparency, providing the information clients need to be confident in their relationship with Schwab; and empowerment – arming our clients with the products, tools and expertise that make it simpler and easier to pursue their goals."

*Greg Gable, Schwab Senior Vice President*

“

There are few things we enjoy more than doing for clients exactly what we would want if we were the client.

*Walt Bettinger,  
CEO*

## The Six Pillars: Scores vs US Average



## Implication

Charles Schwab's success reinforces the importance of organisational alignment, focusing all employees on key goals that everyone across the business can articulate, driven by a clear sense of customer purpose.



More about Charles Schwab  
on the Excellence Centre

# The Sum of Many Small Things

**"Success is doing a million small things well over and over again"**  
*Jim Sinegal, Founder, Costco*

Excellence is in the details. Focus on the details and excellence will come.

There is much focus at the moment on the "Law of Incremental Gains". The success of the GB cycling team is driven by it. David Brailsford, who led this team, pioneered what he called the "aggregation of marginal gains". Improving every aspect of what you do by 1% has a compound effect that vastly exceeds the number of individual gains.

In the customer experience world, we have seen the power of micro experiences – remarkable small experiences that get talked about and help drive recommendation. Not everyone feels able to recommend a company so, to drive advocacy, they need to be given something to recommend – some part

of the experience they are going to want to tell others about. Something that is so clever or insightful that it strikes a deep cord.

Each of these 'signature experiences' sits alongside multiple other sequential micro experiences that, when knitted together, sum to a great experience overall.

These signature experiences do not have to be large or costly, simply symbolic of the brand and easily replicable.

The excellent organisations create great customer experiences by doing lots of small things really well.

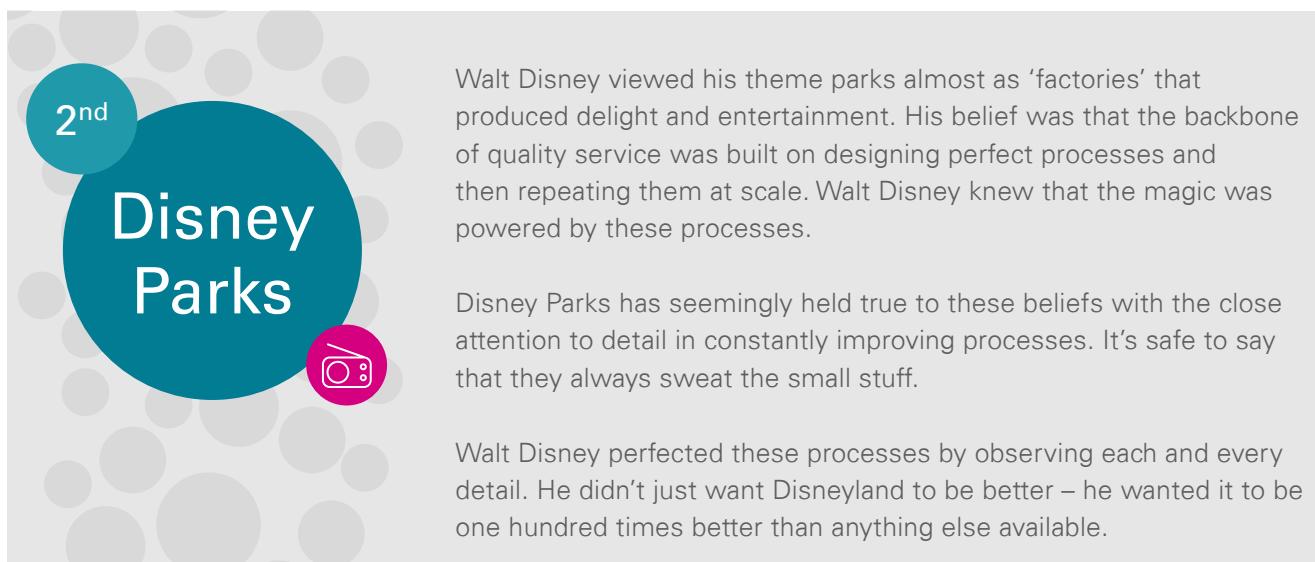
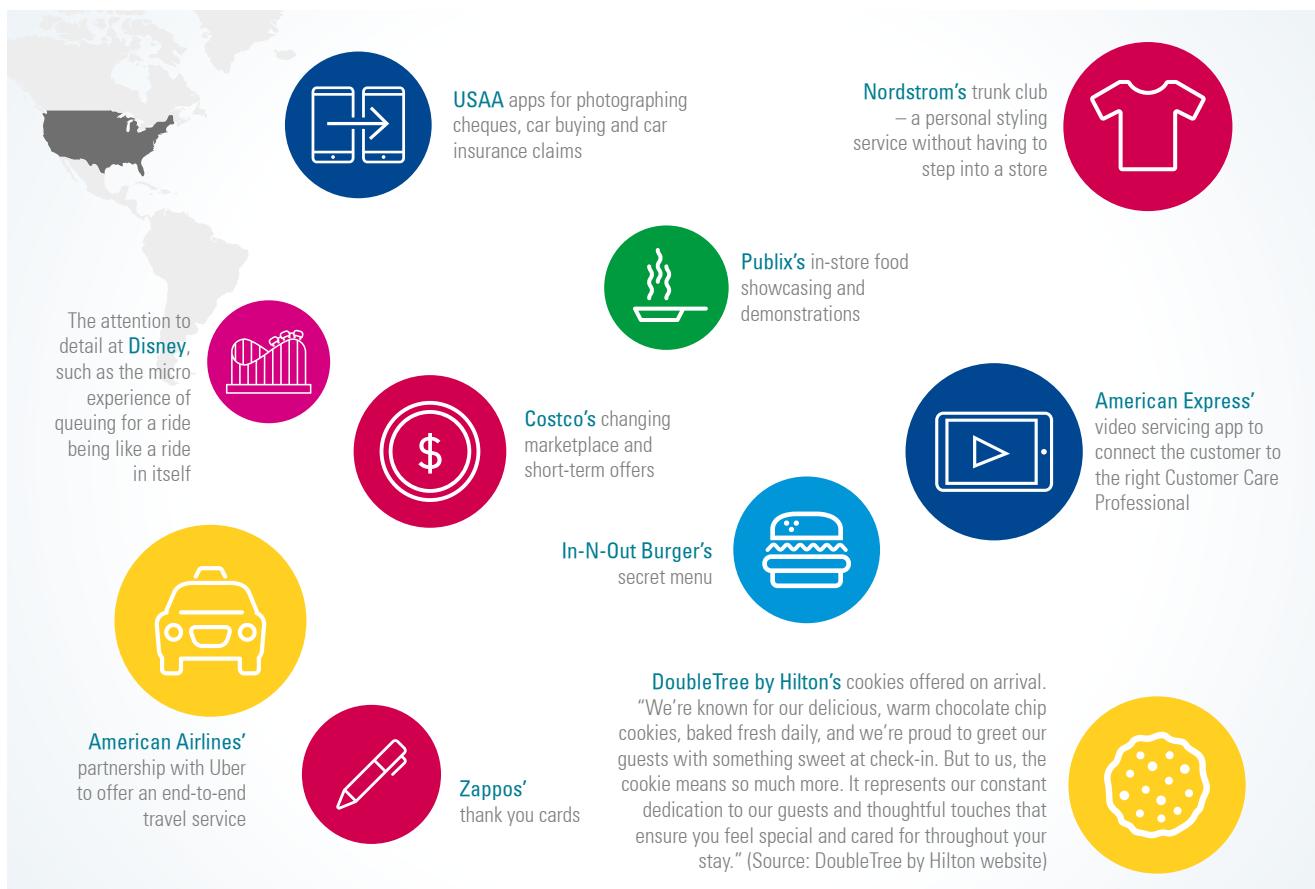
Chick-fil-A creates raving fans not just through delivering good food, but also through delivering a good experience. They do a lot of little things that continue to exceed expectations and are talked about between friends and shared on social media, helping to drive revenue.

1. Staff say "my pleasure" instead of "you're welcome" – it is more personal.
2. They greet customers with an umbrella if it is raining.
3. There are fresh flowers at every table.
4. Table touches take place to check in with customers and make sure everything is OK.
5. Staff carry customers' trays to their tables.
6. Staff call customers by their first name not a random number.

All micro experiences that sum to a great experience overall.



## Examples of signature experiences from the US leaders



# Spotlight on Customer Champions



In-N-Out Burger, a Californian burger chain which has recently expanded its presence into a number of other states, owes much of its popularity to its so-called 'secret menu'.

On first appearance, In-N-Out Burger has an aptitude for simplicity and offers a very straightforward menu, comprising only of the Double Double, the cheeseburger, the hamburger, French fries, milkshakes and beverages. Or at least, that's what the menu displayed in-store would have its customers believe.

However, for those in the know, In-N-Out Burger actually offers a very extensive, but secret, menu to choose from. The company shares some of the secret items on its website, branding the list as the 'not-so-secret' menu. The options, however, are much more extensive than advertised. A quick search on the internet tells of the Flying Dutchman, light fries and even a Neapolitan shake. The true In-N-Out burger experience is based on one critical micro experience: the option to order items that are not even on the menu. In-N-Out Burger's 'secret menu' enables diners to customise their meal in any way they wish.

Some speculate that the secrecy is a clever marketing strategy – an approach that had many people visiting with an urge to experience the chain and be an 'insider'. Others believe that this is simply the fruit of exceptional customer service to provide the customer with anything they request – and call these items the 'not-so-secret' menu. The fact that 'secret menu' items show on till receipts demonstrates that the company is involved in making this happen in a centralised fashion.

This (not so) secret menu is the base of In-N-Out Burger's strong performance in both Personalisation and Time and Effort in particular, propelling the brand to 12<sup>th</sup> position for its first appearance in the US CEE analysis.

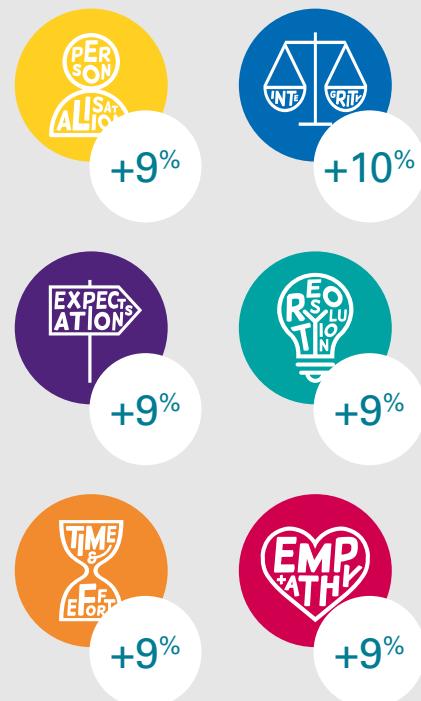
In keeping with many of the other leading US organisations, In-N-Out Burger also pays close attention to its employee experience, offering a substantial wage and rigorous training for team members.

It's this combination of commitment to excellent service by investing in its employees, alongside fulfilment of orders to exact customer specifications, that leaves In-N-Out Burger customers in the know feeling delighted.

In reality, we don't have any secrets at all. It's just the way some of our customers like their burgers prepared, and we're all about making our customers happy.

In-N-Out Burger website

## The Six Pillars: Scores vs US Average



## Implication

Signature micro experiences can become symbolic of a brand. When combined, they drive advocacy and loyalty among customers, through a greater overall experience.



More about In-N-Out Burger on the Excellence Centre

# Lessons from America: The Alignment Checklist

*Our Customer Experience Excellence Centre analysis has shown that significant organisational benefit is derived from alignment, which leads to competitive advantage.*

Alignment is that optimal state in which strategy, employees, customers and key processes work in concert to propel growth and profits.

Aligned businesses have a seamless culture of shared purpose, enjoying greater customer and employee satisfaction and superior returns for shareholders.

Aligned companies focus employees and their work on key goals. Everyone can articulate what the needs of customers are and what his or her unit must do to satisfy them.

## To assess whether your organisation has the key drivers of alignment in place, consider the following checklist:

- We have a clear sense of customer purpose
- This customer purpose is embodied in our brand
- We have a comprehensive customer experience strategy that defines how we will deliver The Six Pillars
- We have clear organisational priorities based on removing the causes of detraction and building capabilities for delivering the drivers of promotion
- Everyone in our organisation understands the customer purpose and their role in delivering it
- We are clear on the few simple rules (design principles) that guide our experience design
- We understand our target customers
- We have an experiential segmentation model
- We have a well-articulated target customer experience – nuanced for the segments we serve
- We are organised in a way that allows us to optimise the delivery of customer journeys
- We consistently work together
- We are able to align the employee experience with the customer experience
- Our KPIs and key metrics are integrated into a measurement framework, based on our customer purpose, that drives actionable insight across each of our customer journeys
- We have a business model linking experience design to commercial outcomes
- We have distributed decision-making power to the front line

## Leadership behaviours

Customer experience success requires organisations to ensure that, as well as thinking about alignment, they think about how they address The Six Pillars.

The most successful organisations are aligning the employee experience to the customer experience by encouraging the following role model leadership behaviours. When the employee experience and the leadership behaviours satisfy the following conditions, then high quality Six Pillar outcomes naturally emerge.



### Personalisation

#### Employee Experience:

- Help me develop as an individual – to be the best I can be
- Enable me to improve my sense of self-worth – make me feel my contribution is valued and that my work is meaningful
- A job role that enables me to utilise my unique talents
- An environment that promotes continuous learning and improvement

#### Customer-oriented leadership behaviours:

- Focus on the customer as an individual
- Aim to make the customer feel special and important
- The target experience for customers is articulated and understood



### Resolution

#### Employee Experience:

- There is support when I need it
- Personal concerns are dealt with, with urgency
- I am able to participate in decisions that affect my team and I
- Leaders look after my interests
- I am supported to learn from mistakes without blame

#### Customer-oriented leadership behaviours:

- Focus on the customer as an individual
- Aim to make the customer feel special and important
- The target experience for customers is articulated and understood



## Integrity

### Employee Experience:

- Business has a higher purpose than just making money
- Fairness is key
- Interpersonal relationships are based on trust
- The environment is safe to be myself
- There is consistency between word and deed
- Communications are open and explanatory
- Rules are applied consistently
- There is trust between and across teams

### Customer-oriented leadership behaviours:

- Convey what we stand for to the customer
- Leaders inspire trust
- Leaders role model the organisation's values
- Teams are enabled to see how they impact the customer
- Doing the right thing for customers is the top priority



## Time and Effort

### Employee Experience:

- My time and extra effort are recognised and appropriately rewarded
- Leaders and managers show respect for my time

### Customer-oriented leadership behaviours:

- Look to minimise the effort a customer has to make to deal with us



## Expectations

### Employee Experience:

- The organisation has stretching objectives
- Leaders are clear on their expectations
- Leaders provide helpful and constructive feedback

### Customer-oriented leadership behaviours:

- Ensure we accurately set the customer's expectations



## Empathy

### Employee Experience:

- The organisation and its leaders care about me
- I am able to bond and affiliate with my colleagues
- Issues are dealt with sensitively and with emotional intelligence
- Leaders react positively and in line with our values when under pressure
- Leaders show sensitivity and concern over needs and feelings

### Customer-oriented leadership behaviours:

- Demonstrate the organisation cares about its customers and employees
- Leaders start by considering the customer when making decisions
- Foster a sense of passion for the customer

# Further Resources



## Customer Experience Excellence Centre



The *Customer Experience Excellence Centre* is dedicated to rapidly improving customer experiences by defining what 'best-in-class' looks like for customers around the world.



### Access the Excellence Centre online

Learn from the international best practices of innovative and fast-moving brands.

<http://www.nunwood.com/customer-experience-excellence-centre/>



### Access customer experience best practice resources

Download previous reports, watch best practice sector webinars and download CX white papers.



### Apply for membership

A community for customer experience professionals, providing access to best practice tools alongside a platform to connect and influence.



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## 2016 US Top 100 Results

Sector Key  
 Financial Services  
 Non-Grocery Retail  
 Utilities

Entertainment and Leisure  
 Restaurants and Fast Food  
 Logistics

Grocery Retail  
 Travel and Transport  
 Change vs 2015:  
 Up  
 Down  
 No change  
 New to study

01



# USAA

2016 US Customer Experience Excellence Centre Winner

02

Disney Parks

03

Publix

04

Amazon

05

Chick-fil-A

06

Costco Wholesale

07

H-E-B

08

Wegmans

09

Southwest Airlines

10

Zappos

11

Edward Jones

12

In-N-Out Burger

13

The Vanguard Group

14

AAA

14

Kroger

16

Charles Schwab

16

Marriott Hotels & Resorts

16

Netflix

16

Nordstrom

20

Trader Joe's

21

Aldi

21

Fidelity

23

DoubleTree by Hilton

23

Red Lobster

25

Vistaprint

26

Aflac

26

Caribou Coffee

28

Avon

28

Hyatt

28

Hyvee

28

Lowe's

32

Alaska Airlines

33

Hilton Hotels

33

Krispy Kreme

33

Westin

36

Courtyard by Marriott

36

Hannaford's

38

Apple Store

39

Panera Bread

39

Polo Ralph Lauren

41

ShopRite

42

The Container Store

43

Hallmark

43

PayPal

45

Meijer

46

American Express

47

Ace Hardware

47

Hampton Inn Suites

47

Sam's Club

50

Apple TV

50

Five Guys

50

Petsmart

53

Ally Bank

53

Barnes & Noble

53

TD Ameritrade

56

Discover

56

Kohl's

56

Target

59

Sephora

60

Bed Bath & Beyond

60

BJ's Wholesale Club

62

Subway

63

JetBlue

63

Starbucks

65

Kaiser Permanente

65

Prudential

67

Holiday Inn

67

IHG

67

State Farm

67

The Home Depot

71

AMC Loews

71

Six Flags

71

Victoria's Secret

71

Walgreens

75

Food Lion

76

CVS

76

MasterCard

76

Olive Garden

76

Papa Johns

80

Merrill Lynch

81

Williams-Sonoma

82

Visa

83

American Greetings

83

Dunkin Donuts

85

Save-A-Lot

86

Macy's

87

Chase

87

TJ Maxx

89

Arby's

89

FPL

89

Sheraton

92

JCPenney

92

UPS

94

Whole Foods

95

Chili's

95

GEICO

97

eBay

97

FedEx

97

IHOP

97

Pizza Hut

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