Gartner for Marketers

Sample Action Plan: Customer Experience

The Action Plan is a collaborative, living document that you'll create with your Gartner team. Each plan is customized to reflect your specific objectives.

Our analysts work with you to focus on the areas with the greatest potential impact on your business. You'll then use the Action Plan as a touchstone to measure progress against goals and course-correct if necessary.

Put your customer experience plan into action! Call us at 1-866-592-5144 or email us at gml@gartner.com



Customer Experience: Create a digitally led customer experience



How your Gartner partnership will provide continuous, long-term support

Client Objective 1

Increase sales by building a customer experience that sets us apart from our competitors

Client Initiatives

- Develop customer segments/personas and create a more personal and targeted customer experience
- Leverage the findings to increase sales/make betterinformed decisions with the marketing budget
- Identify and source agency partners to support the customer experience initiative
- Develop a forward-thinking customer experience environment and enable testing and validation of new techniques

Action Plan and Gartner Resources

- Use the Marketing Maturity Assessment to help you understand your organization's current customer experience efforts and outline what actions are needed to reach the next level
- Establish a unified vision and architecture to bring together the cross-functional resources needed to provide exceptional branded moments at every customer touchpoint
- Develop rich customer personas using our toolkits and frameworks based on a top-down and bottom-up view of your customer by using first-party knowledge and other research techniques
- Layer in data as the context that ensures customer experiences are relevant and timely
- Guide you in driving a successful customer experience strategy by providing frameworks and research that define the key customer experience foundations your marketing organization needs to master
- Provide Trend reports on customer experience leadership patterns and best practices to better inform your decision making
- Recommend campaign management and customer segmentation vendors, and provide objective insight on their proposals
- Work with you on the building blocks of the customer experience content supply chain as your customer experience continues to evolve



Customer Experience: Turning loyal customers into advocates



How your Gartner partnership will provide continuous, long-term support

Client Objective 2 Client Initiatives Action Plan and Gartner Resources Increase customer Assess current loyalty Use the Marketing Maturity Assessment to help you understand your strategy and build a business organization's current customer loyalty efforts and outline what actions retention and acquisition by are needed to reach the next level case to refresh the current strategy with best practices improving our Define what you need to do to reach your goals and provide guidance customer loyalty in building a business case for advocacy marketing Develop an advocacy program program that is based on Collaborate with our analysts to use customer data to add lift to best practices and proven advocacy investments by data Review current analytics to spot defections early and increase Review the current marketing customer retention platform to evaluate the solution against our goals Work with our analysts to inject "Loyad"-generated content into and needs personalized customer communications, and use Loyads as your champions against negative reviews Learn best practices in understanding customer Evaluate advocacy marketing platform (either homegrown or from retention and acquisition data a third-party vendor) Create a feedback loop Implement an advocacy marketing solution to segment the advocacy that drives continuous testimony of loyal customers to drive content to prospects who value improvement to the long-term relationships advocacy program Review strategy and results quarterly to continually improve advocacy program



6

Sample engagement plan for the first 90 days

	1-30					31-60				61-90			
Weeks	1	2	3	4	5	5 6	5	7	8	9	10	11	12
 Key milestones Service interactions 	Kickoff				Î)-day neck-in				▲ Portfol review	io	90-day review
Written research and tools	Identify researd reports to baseline team's understanding	C) do co	Review digital and CX plans, priorities, documents, corporate goals, and next steps			Review findings from Spend Survey and other relevant surveys			ey yo it w m	Toolkit: Compare your investment with peers in marketing spend and maturity			
Subject matter experts	Prioritize next steps and gaps mapped to customer experience strategy				Learn best practices from across industries around content creation and curation			and p techr scan agen	Talk to analysts and perform technology landscape scan for vendors, agencies and service providers			Talk to an analyst expert to get actionable advice contextualized to your priorities	
Peers	Engage for best-in- class sales and marketing support models and structures							After the first 90 days, we'll continue to collaborate to address your highest priorities, helping you save time, reduce risk and lead with confidence.					

