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**How to Empower Everyone with a Customer Experience Dashboard**

Show the connections between external results and team-level work.

Engage leaders to help laggards.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Area A | Area B | Area C |
| Financial metric |  |  |  |
| CX metric |  |  |  |
| Process output |  |  |  |
| Warning signal |  |  |  |
| Lever |  |  |  |

1. *Financial metrics*: select from revenue, margin, profit, relationship length, customer churn (attrition), market share, share of budget, and so forth.
2. *CX metrics:* select from a correlation analysis of what is driving customer behavior that leads to the selected financial metrics.
3. *Process output:* select a metric that is the output of a key process related to the selected CX metric.
4. *Warning signal:* select a metric that shows goodness of inputs to the selected process and/or in-process signals of impending scrap, re-work, delays, or dissatisfying outputs.
5. *Lever:* adjustment that could be made with creative thinking about resources, skills, stakeholders, and/or culture that could positively impact warning signals and/or process outputs

*This is a sample of ClearAction’s many tools and techniques for successful CX ROI.*

***Send us your thoughts and questions about this template: OptimizeCX@ClearActionCX.com***