

Welcome to ClearAction CX Advisory

Raise performance momentum for closing the brand-customer gap.

Grow customer value by *aligning* with customers' goals: trust-building, silo-bridging, all-employee engagement, leadership engagement, and systematic value generation.

Overview: Raising Your Performance Momentum

- 1) Skills
- 2) Assessments
- 3) Leadership
- 4) Engagement
- 5) Systematic Value

A Deeper Look at Selected Services

- 1) ClearAction Value Exchange™
- 2) Customer Culture Profit Growth Assessment™
- 3) CX Management Maturity Roadmap™
- 4) Digital Experience De-Siloed™
- 5) Customer Excellence DNA™
- 6) CX Value Dashboard™

Let's talk today: tel +1 408 687 9700 or Success@ClearAction.com

Customer experience performance momentum



ClearAction Continuum raises performance momentum.
Empower your marketing, customer experience and customer success practices for stronger strategic impact.

ClearAction Advisory closes the brand-customer gap.

Grow customer value by aligning with customer goals.

Customer Experience Strategy & Operations Advisory: expand growth and retention through trust-building, silo-bridging, all-employee engagement, and systematic value. Accelerate digital/technology readiness and ROI.

- Customer Culture Profit Growth Assessment™
- Customer Excellence DNA™
- Digital Experience De-Siloed™
- and much more

Marketing Strategy & Operations Advisory: elevate strategic Impact through alignment, scalability, unified efforts, resource efficiency, agility and value clarity. Accelerate digital and technology readiness and ROI.

- Market Responsiveness Index™
- Marketing Management Maturity Roadmap™
- Marketing Performance Assessment™
- and much more

ClearAction Value Exchange is real-time professional development.

Inspiring marketing and customer experience/success/care departments to influence cross-organizational collaboration, efficiency, performance and growth.

- Mission-critical resource for workforce of the future
- Quick personalized solutions (20-40 minutes)
- Rapid buy-in by peers and collective capability
- SaaS for 24/7 mobile access plus In-person Interactions



Clients include Adobe, Allegion, Anritsu, Applied Materials, Bankers Fidelity, Cementos Progreso, Cisco, Cosmote, Critical Software, Direct General Insurance, FIS, Hootsuite, Ingersoll Rand, Kaiser Permanente, LexisNexis, Moo, Renesas, Sage, Sailthru, SHRM, SunPower, Thomson Reuters, Valin, WEX, Whataburger, and many others.

Headquarters: Sunnyvale, California.

Founded: 2017 as merger of ClearAction CX and Marketing Operations Partners which Lynn Hunsaker and Gary Katz founded in 2005 and 2006, respectively.

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LYNN HUNSAKER, CHIEF CUSTOMER OFFICER, CHAIRMAN & CO-FOUNDER



Lynn led customer experience, quality and marketing at Sonoco and Applied Materials. She is a Hall of Fame author at CustomerThink.com, and has authored 6 benchmarking studies and 3 handbooks, including Innovating Superior Customer Experience. She is a board member of the Customer Experience Professionals Association (CXPA) and past president of Silicon Valley American Marketing Association (SVAMA). Lynn is a Certified Customer Experience Professional (CCXP) and Certified Professional Marketer (PCM). She has taught 21 courses at UC Berkley Extension, UC Santa Cruz Extension, Mission College and San Jose State University. She is a CXPA Recognized Resource Training Provider with CCXP students from 70 countries.

Lynn is a futurist in growth-generating customer-centered management, employee engagement in customer experience excellence, marketing operations, culture development, and performance momentum.

Customer Experience Skills

Online on-demand modules, onsite training, and hands-on application working sessions. We'll customize to your goals and participant backgrounds and locations. All topics have extensive practice exercises and reminder summaries.

ClearAction Value Exchange™

Real-time professional development for marketing and customer experience/success/care departments to influence cross-organizational collaboration, efficiency, performance, growth.

- Mission-critical resources for workforce of the future
- Quick, personalized solutions (20-40 minutes)
- Rapid buy-in by peers for collective capability
- SaaS for 24/7 mobile access plus in-person interactions

Customer-Focused Communication™

Relationship-building skills for both customer-facing and non-customer-facing roles at all levels.

- Managing Intended Outcomes
- Assailing Assumptions
- Motivating through Questions
- Meeting Needs Remotely
- Advising & Partnering through Trust
- Empowerment through Listening

CXM 101

Introductory course for all roles and levels, both customer-facing and non-customer-facing.

- What Customers Experience
- Why Manage Experience
- How to Impact Experience
- Customer Experience Management Toolkit (multiple modules)

Customer Experience Excellence™

Competencies for CX managers and leaders from the CX management body of knowledge. ClearAction Continuum is a CXPA-Recognized Resource & Training Provider.

- Customer-Centric Culture
- CX Adoption & Accountability
- CX Strategy
- CX Metrics, Measurement & ROI
- CX Design, Improvement & Innovation
- VoC, Insight & Understanding
- Integrating the 6 CCXP Competencies (capstone)

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Customer Experience Assessments

Evaluation of strengths and opportunities, with playbooks and deployment working sessions.

Customer Culture Profit Growth Assessment™

Fast-track your market nimbleness through benchmark insights that guide all employees in tuning-in to customer, competitor and market trends: 32% higher profit achieved by best-in-class.

Digital & Technology Readiness & ROI™

Preparation of people, processes and visionary leadership for selection, deployment and value from digital experience, customer success, and customer experience technologies, plus:

- SharktΛInk™ is AI assessment, ranking and future state playbook.
- Customer Engagement Hub is guidance for CX omni-view.

Rapid Analytics Customer Environment™ (RACES™)

Chart a path to the right CX tactics using real data and customers to test CX scenarios. Fast and inexpensive deployment, rising above systems limitations with ad hoc test against a control.

Customer Experience Actionability™

Identify ways to increase actionability of VoC, CRM, analyses, and any CX data and programs.

Customer Experience Process Maturity™

Evaluate any process' management commitment, holistic approach, deployment and results. Catapults process performance through insights revealing mirages and pragmatic catalysts.

Customer Experience Value Quotient™

Compare customers' desired versus undesired outcomes across solutions and time to identify competitive leadership paths in customer experience excellence.

Customer Experience Projects-in-Flight™

Focus on additive value through ecosystem mapping and systematic analysis of all CX projects across the enterprise to track benefits realization and elevate strategic impact.

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Keys to Customer Experience Leadership

Alignment is the missing link in sustainable customer experience-led growth. It starts at the top. Align your senior leadership and all stewards of customer management to intentional CX.

Self-assessments: your firm needs this if your answers are "no" or "somewhat":

Strategic Renewal Workshop™

Unifies your C-Team in their CX vision and definition, equipping each executive with their respective operating plan in support of multi-year enterprise-wide CX objectives.

- Does each C-team member have an ops plan for CX?
- Is the C-team unified in their CX vision & definition?
- Is CX insight a determinant of corporate strategy?
- Do multi-year enterprise-wide CX objectives exist?

CXM Unification™

Provides all CXM roles (UX, VoC, CRM, etc.) with tools and skills to facilitate firm-wide adoption.

- Are CXM roles (UX, VoC, CRM, Svc, etc.) coordinated?
- Are CXM roles skilled as facilitators & change managers?
- Do you drive all functions' & levels' CXM adoption?
- Do all CXM roles have tools to drive transformation?

Customer Expectations Segmentation™

Characterizes customer personas by customer life cycle expectations that guide all functional areas (Finance, Legal, etc.) in meeting and exceeding CX needs. Clarifies intentional CX.

- Do you segment customers by expectation-sets?
- Are customer personas useful to Ops, Fin., IT, HR, etc.?
- Is there a radar to meet / exceed CX expectations?
- Is the number of personas manageable for all functions?

CX Management Maturity Roadmap™

Expands CXM agility by deploying strategic stepping stones to organically grow business results.

- Do you have equal maturity across CXM programs?
- Does your CXM roadmap rise above pillars/silos?
- Are you annually increasing multi-function engagement?
- Is your roadmap aimed on self-sustaining momentum?

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Keys to Customer Experience Engagement

Customers are impacted by every discipline enterprise-wide. They can proactively manage it. Weave customer experience improvement into everyone's routines and aspirations.

Self-assessments: your firm needs this if your answers are "no" or "somewhat":

Customer Expectations Awareness™

Provides compelling messages and reminders of each function's role in CX excellence, and weaves CX context into every meeting, training and executive message.

- Do all functions know customers' realities?
- Does each function know their role in CX excellence?
- Is CX woven into all meetings, trainings & exec messages?
- Do all employees see CX messages many times daily?

Embedded Outside-In™

Shows each employee why customers fund their job, how to make CX anticipation part of everyone's daily decisions, how to ensure smooth high-quality handoffs.

- Does each function see its charter in a CX context?
- Does everyone know why customers fund their job?
- Do each know how to manage their impact on CX?
- Is CX anticipation part of everyone's daily decisions?

Self-Reporting Team Recognition™

Recognizes collaborative progress toward CX standards of thinking and doing that are visible to all, and rewards prevention of CX issues.

- Does recognition emphasize collaboration?
- Are CX standards for thinking & doing visible to all?
- Is prevention of CX issues rewarded by recognition?
- Does the customer base benefit via employee recognition?

CX Value Chain Dashboard™

Empowers performance acceleration by highlighting the end-to-end natural layers of metrics. Focus attention on leading indicators that teams can control, predicting business growth.

- Do executives have line-of-sight among market performance and team's CX work?
- Is the primary focus on prevention of issue occurrence rather than NPS or churn?
- Is there a clear understanding of linkages between lagging and leading indicators?
- Do teams see clearly how their work impacts corporate goals?

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Keys to Customer Experience Value

Ease-of-doing-business and ease-of-work prevent unnecessary costs and empowers evangelists. Make collaboration for pain prevention and value creation a way of life enterprise-wide.

Self-assessments: your firm needs this if your answers are "no" or "somewhat":

Collaborative CX Resolution™

Engage annual cross-functional CX actioning company-wide in a systematic approach that closes the loop with the customer base to reset perceptions. (i.e. ease-of-doing business)

- Do cross-functional teams tackle chronic VoC issues?
- Is every BU, geography & function creating CX action plans?
- Is there a regular routine for organization-wide CX actioning?
- Does the customer base know your CX action plans?

CX Value Creation™

Shows everyone how they can be creative for whole customer life cycle and bring ideas to life.

- Does everyone know they can be creative about CX?
- Is creativity applied to the whole customer life cycle?
- Do you have a way to bring anyone's ideas to life?
- Do you have templates & exercises to drive creativity?

CX Ease-of-Work™

Maps employees' experience journey and minimizes waste/hassles for staff to do their jobs.

- Do you know your employees' experience (EX) journey?
- Do you reduce waste/hassles for employees to do their jobs?
- Is the EX journey designed per intentions of the CX journey?
- Are CXM tools applied to EX for continual improvement?

Digital Experience De-Siloed™

Integration of execution silos (vision, assumptions, goals, metrics, handoffs) and operational silos (organizations, channels, systems, data, processes) to empower full performance of DX tech.

- Is universality built-in to assignments, programs and initiatives?
- Do leaders demonstrate passionate foresight of integration business requirements?
- Is outside-in transparency high? (customer-centered openness of motives and status)
- Do you have a 720-degree view? (customer lifecycle traditional data + IoT data)

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Raise Your Marketing/CX Influence & Impact

ClearAction Value Exchange™

Marketing and customer experience/care/success (CX) manage a treasure trove of CX insights. Outside-in alignment company-wide to CX insights relies on these roles to build inward influence. Inward influence skills are rare among Marketing/CX roles, yet vital to agility and brand promise.

You can build strategic influence and impact by participating in ClearAction Value Exchange. It's about the intersections between people. It's about connecting the dots across things. Mission-critical skills today emphasize collaboration, nimbleness, and customer alignment.

Key performance indicators driven by ClearAction Value Exchange participation are multipliers of your Marketing/CX investments:

Increase:	Maximize:	Decrease:
<ul style="list-style-type: none"> Follow-through Ability to prioritize Productivity of resources Employee engagement Strategic vs. tactical work Resource acquisition 	<ul style="list-style-type: none"> Stakeholder satisfaction Stakeholder cooperation Team collaboration Right the first time Job satisfaction Continuity 	<ul style="list-style-type: none"> Project stalls Duplicated resources Redundant efforts Rework Employee turnover Alliance workload

This is ClearAction Value Exchange. It's just-in-time learning customized per your interactions and role. Everything is designed to be absorbed in 30-minute bites and applied on-the-job the same day. It's professional development in an interactive community. It's member-led and member-driven, expert-facilitated, open source and non-commercial. Find real-time solutions to succeed and to enjoy your work.

Value criteria: Make a quick guestimate of the costs associated with weaknesses in the areas in the table above. You can reverse those costs by immersing your whole department in the ClearAction Value Exchange. Additionally, make a quick guestimate of gains possible through increased credibility, customer-alignment, internal harmony, and agency productivity. Strengths in these areas allows your team to leapfrog performance norms, differentiate customer experience and drive sustained growth for all Marketing/CX stakeholders.

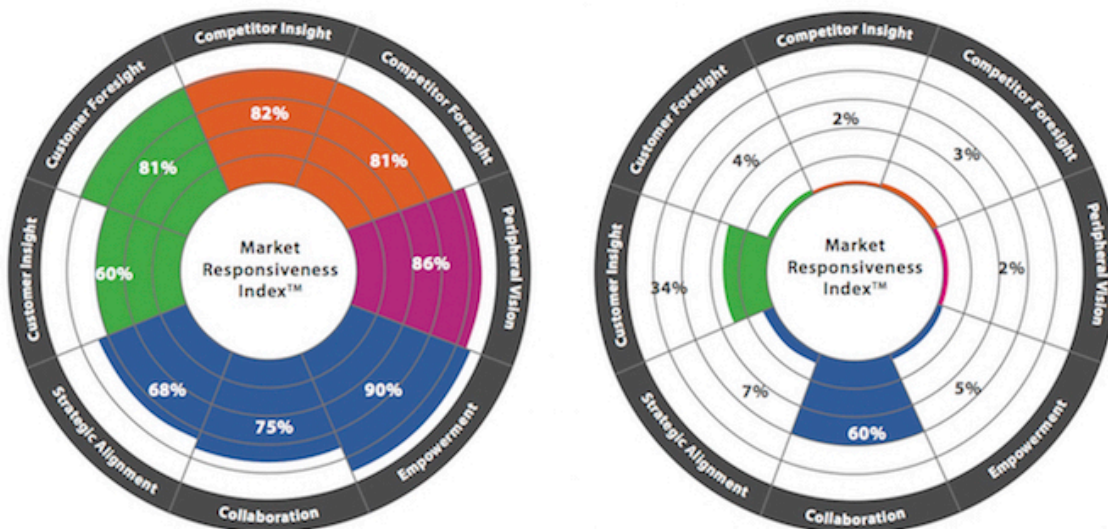
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Fast-track Your Market Nimbleness

Customer Culture Profit Growth Assessment™

First-to-market solutions and actions addressing emerging opportunities is key to rapid growth. Your firm's level of empowerment and synchronization with trends spurs scalability and speed.

You can fast-track your market nimbleness through benchmark insights that guide all employees in tuning-in to customer, competitor and market trends. 32% higher profit is achieved by the best-in-class companies, on average, in the Market Responsiveness Index™ benchmark pool.



This is the Customer Culture Profit Growth Assessment™. Research of 10,000 companies across 25 years proved that a strong customer-culture drives over 35 business performance measures, including ROI, customer retention, market share and sales. Employees' 20-minute assessment online produces a benchmark comparison, roadmap and playbooks to speed your nimbleness. We mobilize your organization in bringing the roadmap to life in application working sessions.

What's the Value? Make a quick guesstimate of the lost opportunities over the past year as market shifts occurred. Add win-loss and turnover of customers and employees. You can reverse those figures by 25-50% as **evidenced** by the 400+ firms in the MRI™ best-in-class benchmark.

Start with **MRI-CX Pulse™** to get your benchmark comparison report in 1-2 weeks, based on 20 of your executives' answers to the 20-minute assessment online. See how powerful this report is in rapid adoption of new habits across your firm that elevate your market nimbleness.

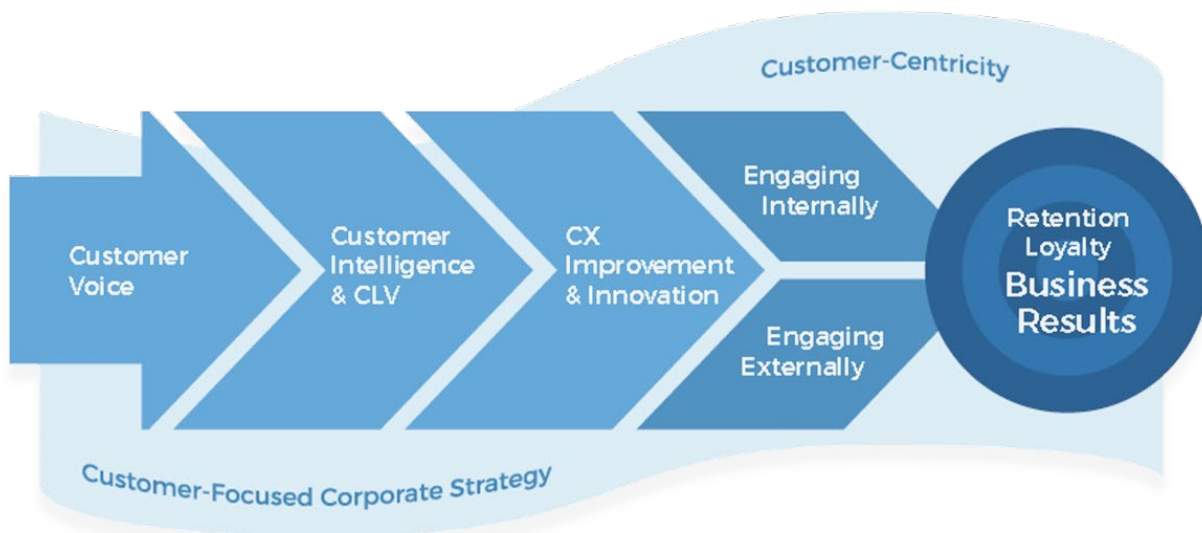
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Expand CX Management Agility

CXM Maturity Roadmap™

CX management agility is nimbleness to embrace emerging challenges and opportunities. Connected, flowing CX management is prerequisite to scalability and higher performance.

You can expand your CX management agility by deploying strategic, essential stepping stones. Retention, loyalty and business results grow organically through this model by earning trust.



This is the CXM Maturity Roadmap™. It makes customer experience excellence your way of life.
 1st stage: activating the system across the full set of building-blocks.
 2nd stage: building maturity through sophistication of the essential stepping stones.
 3rd stage: sustaining momentum in engagement, relationship strength and business results.
 We mobilize your organization in bringing the roadmap to life in application working sessions.

What's the Value? Make a quick guestimate of direct investments in retention, loyalty, engagement and customer intelligence. Those investments can be reduced 50% or more through CXM Maturity Roadmap™ deployment. Make a quick guestimate of costs related to chronic customer pain; executing this roadmap can reduce those costs up to 80%. It's a multiplier on customer retention, loyalty and business results.

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Digital Experience De-Siloed™

Digital experiences within or across business silos have inherent value limitations since they are not integrated at the customer level and the enterprise level, where it becomes painfully visible.

Silos are the metaphor for disconnected things that would be stronger through coordination.

Execution silos include disconnected visions, assumptions, goals, metrics and handoffs.

Operational silos include disconnected organizations, channels, systems, data and processes.

Universal Keys	Execution Silos	Operational Silos
Broaden Perspectives Expand Motivations Nurture Collaboration Build-in Universality 	Sync visionary leadership for customer co-creation and outside-in transparency	Sync 720-degree view and digital empathy for strategic data monetization
	DX AGILITY™	DX ALTITUDE™

Digitalization is hindered or helped to the degree that silos are coordinated.

- **Universal keys tame silos** by broadening perspectives, expanding motivations, nurturing collaboration and building-in universality.
- **DX Agility™** syncs execution silos through:
 - **Visionary leadership:** passionate foresight for new business requirements.
 - **Customer co-creation:** real-time journey path, solution bundling, price bidding.
 - **Outside-in transparency:** customer-centered openness of motives and status.
- **DX Altitude™** syncs operational silos through:
 - **720-degree view:** customer lifecycle traditional data overlaid with IoT data.
 - **Digital empathy:** combination of humans and AI-driven machines.
 - **Strategic data monetization:** use of data to drive operating metrics.

This is Digital Experience De-Siloed™. It's customized to your company through three phases, each within 60-90 days. Your subject matter experts participate in succinct tailoring calls to prepare playbooks that we bring to life in application working sessions.

What's the Value? Make a quick guesstimate of the lost opportunities associated with delays, re-work, and work-arounds originating from silos. These costs are multiplied when technology is laid on top of execution silos and operational silos.

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Align Your Firm to Intentional CX

Customer Excellence DNA™

Brands admired for consistently stellar customer experience (CX) performance share this: founders crisply characterized intentional customer experience, and they are adamant about using this characterization as their guiding light and benchmark for everything they do.

You can inject customer excellence into your company DNA by establishing the vital backbone of (1) Align from the Top, (2) All Hands On-Deck, and (3) Systematic Value. These form the basis for efficient and effective digitalization and customer intelligence, engagement, and care. The degree to which this 3-factor backbone is missing or existing is a divider or multiplier on CX ROI.

Align from the Top	All Hands On-Deck	Systematic Value
Sync tools & mindsets to facilitate all functional areas' and managerial levels' adoption of CX excellence	Engage all functions in proactively making a difference for CX excellence	Cultivate cross-functional capabilities for continual adaptation to CX excellence
 DNA Master Plan™	DNA Activation™	DNA Transformation™

This is Customer Excellence DNA™. It's customized to your company and existing resources for deployment of each phase within 60-90 days. Your subject matter experts participate in succinct tailoring calls to prepare playbooks that we bring to life in application working sessions. Systematic Value includes company-wide subscription to the ClearAction Value Exchange.

What's the Value? Make a quick guestimate of the percentage of your contact center calls, churn, sales cycle delays, escalations and negative word-of-mouth attributed to issues originating among your non-customer-facing disciplines. You can redirect 25-50% of that to higher value endeavors in perpetuity, essentially creating a CX annuity through Customer Excellence DNA™. Additionally, do a quick guestimate of untapped value from your investments in marketing/CX technologies. You can add 50-100% ROI to these resources through Customer Excellence DNA™.

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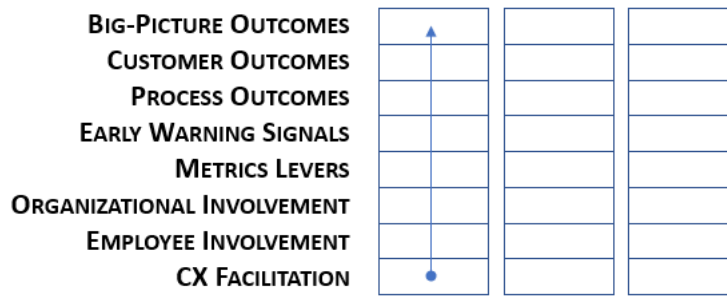
Empower Metrics Acceleration

CX Value Chain Dashboard™

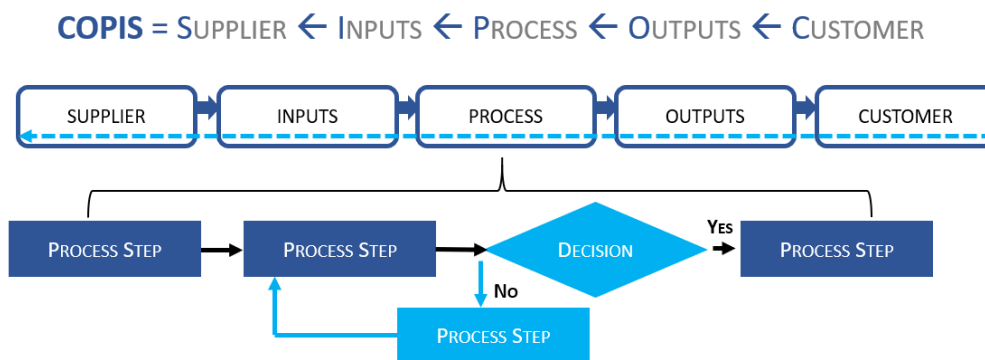
Executive sponsorship is strengthened through visibility to teams' achievements and roadblocks. Teams are motivated to solidly execute strategy by seeing how their work translates to growth.

You can empower metrics acceleration by highlighting the end-to-end natural layers of metrics. Focus attention on leading indicators that teams can control.

Robust correlation and root cause analysis can identify early warning signals and levers that can predict outcomes for customer behaviors and business growth.



This is the CX Value Chain Dashboard™. It displays the natural flow of metrics at-a-glance. It's based on the natural flow of COPIS: customers determine necessary outputs of processes which identify the inputs needed from suppliers. The key is to "peel the onion" systematically, to enable teams to focus on early warning signals within their process workflows as predictive KPIs.



What's the Value? Make a quick guesstimate of static performance and expected growth gaps.

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Wisdom sustains performance momentum

Save time and mis-steps through the wisdom of executives who succeeded in similar situations. Our advice is founded in years of navigating CX performance momentum within major brands. We weave our recommendations into your existing strengths for enduring ROI.

ClearAction CX Advisory

ClearAction Advisors are former VPs and Senior Directors of Fortune 500 companies with long customer experience and marketing pedigrees in driving transformation for growth.

Sampling of ClearAction Senior Advisors:

					
CAROL BORGHESI	DIANE MAGERS	LARA WISE	BILL CUSICK	LYNN HUNSAKER	DENNIS DEGREGOR
RECENT CORPORATE ROLES:					
					
CUSTOMERS 1ST CULTURE SVP MANAGING DIR 21ST CENTURY CUSTOMER EXPERIENCE	OFFICE OF THE CUSTOMER SR. DIR. CUSTOMER ENGAGEMENT	VP CUSTOMER & AGENT EXPERIENCE VP CUSTOMER EXPERIENCE	VP CUSTOMER EXPERIENCE & BRAND MANAGEMENT	HEAD OF QUALITY DIR. MARKETING CX IMPROVEMENT MANAGER VoC MANAGER	GLOBAL MD WW CX SERVICES EVP CX STRATEGY & OPS VP CRM

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We look forward to raising your customer experience performance momentum