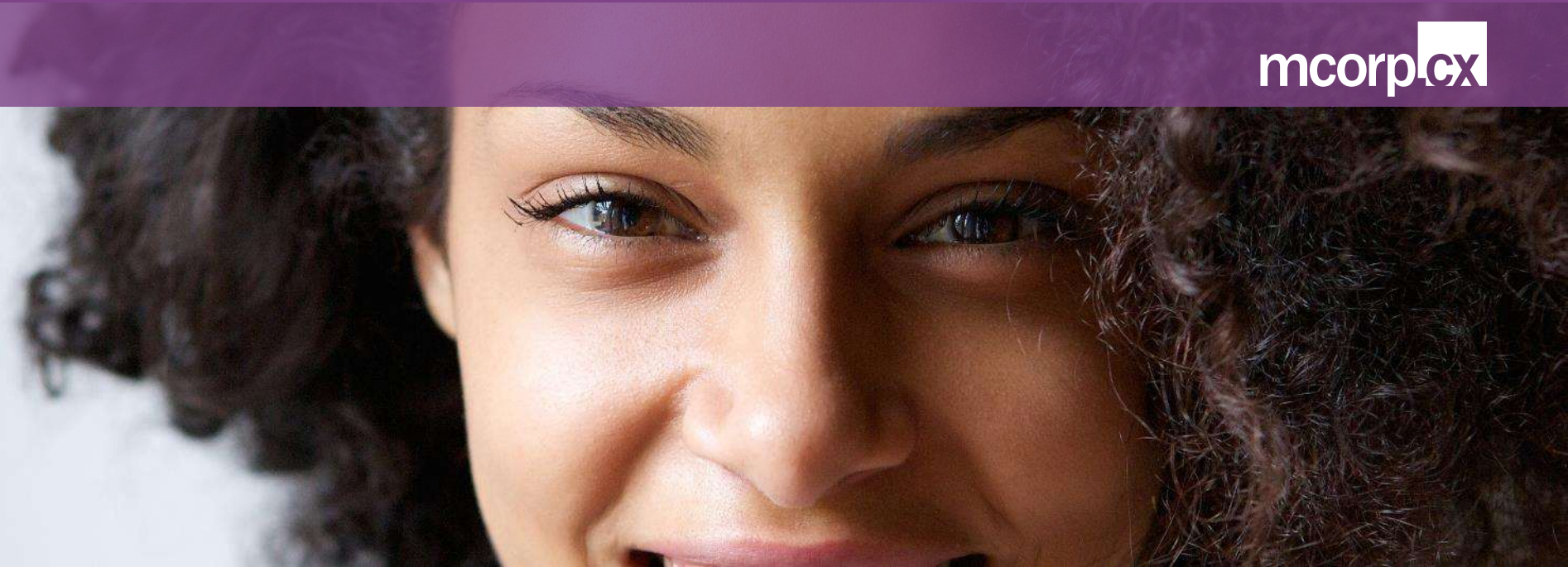


Educate, Train and Engage to Drive Customer-Centric Behaviors

An McorpCX “Lessons Learned” Webinar with The Hanover Insurance Group and Diane Magers, McorpCX Advisory Director and Emeritus Chair of the CXPA

October 19, 2021

mcorpCX



Your hosts...



Diane Magers

Advisory Director at McorpCX and Emeritus Chair of the CXPA

- Accomplished Experience Management, Sales, and Transformation Executive
- Has led CX disciplines for major brands and Fortune 100 companies across the globe for over 25 years
- Previously CEO for the CXPA (Customer Experience Professionals Association).



Jim Gulinello

AVP Learning and Development, The Hanover Insurance Group

- Learning & Development Leader & Experienced HR Professional
- Talented catalyst for cultural and organizational change
- Oversees strategic direction for training, coaching, and talent development for Hanover's Claims organization of ~1,400 employees.
- Adjunct instructor at Dean College



Michael Hinshaw

Founder and President, McorpCX

- CX industry pioneer and thought leader on multiple "Global CX Thought Leaders" lists
- Best-selling author: *Smart Customers, Stupid Companies: Why Only Intelligent Companies Will Thrive, and How To Be One of Them*
- Mentor and Richard H. Holton Teaching Fellow at U.C. Berkeley's Haas Business School

A recognized experience design and activation leader with over 18 years of ‘experience industry’ leadership...

Media recognition for our thought leadership



Analyst Recognition as a Top 25 global Customer and Employee Experience expert

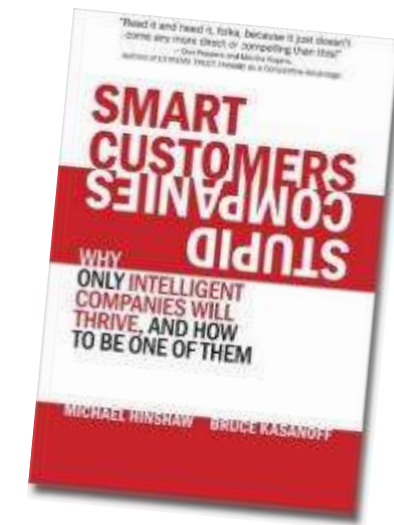


Kennedy: Digital Customer Strategy and Experience Consulting

Forrester: Customer Experience Strategy Consulting

Forrester: Employee Experience Consulting

Best-selling book on Digital Customer Experience innovation



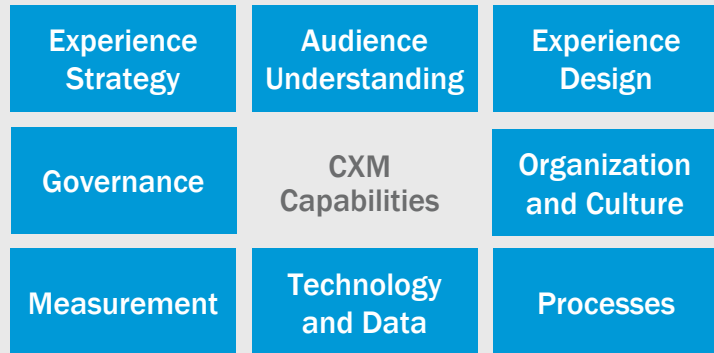
“One of the most exciting business books I’ve ever read.”

- Don Peppers
Founder, Peppers & Rogers

McorpCX helps activate customer-centric experience transformation – and drive results – in three core areas:

Build CXM Capabilities

Assessing maturity, defining improvements and helping activate organizational expertise across the 8 best-practice CXM Capabilities



Helping organizations adopt CXM best practices to systematize, scale and consistently deliver better experiences, and become more customer-centric

Transform Experiences

Applying our proven customer, employee and experience management techniques, playbooks, and frameworks



Persona
For priority audience segments or personas

Journey Maps Across prioritized audience journeys

Blueprints Linked to the actions, systems and capabilities to Improve

Activating CXM

Optimizing, designing, delivering and managing Qualtrics, Medallia, and Cisco WXM driven VoC systems and industry-specific digital solutions



Understanding Systematically
listen to your audiences

Insights
Analyze to gain audience insights, and act on them

Journey Management
Optimize and orchestrate journeys

Helping leading brands plan for, design, and deliver better customer experiences and business performance



Weyerhaeuser



مجموعة الباطين
ALBABTAIN GROUP

Leveraging proven frameworks, playbooks, and best practices to accelerate delivery and time-to-value

Playbooks and Best-Practice Standards Across Key Capability Areas



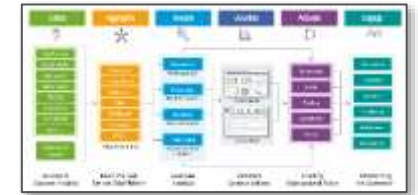
CXM Capabilities and Maturity Model, and 'CX Operating System'



Enabled through our Customer Experience Operating Model ('CXOM')



Proven Methodologies and CXM Technology Partners to Manage Experiences



Today, you're going to: Learn why customer-centric training matters;
See what CX-driven education looks like;
Follow one company's training journey;
Understand steps you can take;
Get your questions answered

Why educate on customer-centric behaviors...?

Moving From...

Moving Towards...

Inside-Out (Company Centric)

Outside-In (Customer Centric)

Great Customer Service

Great Customer Experience

LOB-Centric View

Cross-Org, Journey-Centric View

Customer Support

Customer Empathy




Inform and Instruct

Collaborate and Educate

Empower, upskill, and motivate your people



Drive commitment and alignment across levels and roles

	Direct Interacts with customers directly
	Indirect Designs and influences customer interactions
	Low Contact Supports the people and systems customers interact with

“I understand what our goals are, the part I play in achieving those goals, and how my behaviors and contributions fit into the bigger picture.”

Operationalize Empathy



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Experience expectations are the catalysts for changing the way organizations think and work



Best practices...

**Values-based culture:
Learning and development impacts**

Provide knowledge and skills to deliver great experiences

Ensure relevance for every level and role in your organization

Different modalities for different purposes

Contextual “learning and doing” to drive behavioral change

Goals and metrics that link to program and business goals

Continued reinforcement, and assessment



Reflecting needs and values: Everyone expects and wants engagement and connection

Engaged

Want to be involved,
consulted, provide ideas

Personal

Want 1:1 experiences and
support, personal growth

Valued

Empowered, recognized,
rewarded...

Purpose

Make a difference, give
back, contribute

Different modalities based on needs, role, learning styles

Insights and innovation ‘Mini-Labs’ and playbooks: Fun, interactive sessions building experience design

Organization:
Expand, Engage, Collaborate

Teams:
Participate, Innovate, Create

Employees:
Prepare, Grow, Recognize



Goals for Mini-Lab Sessions:

- Formulate ideas to rejuvenate employee experience
- Design great customer experiences
- Empower and gain momentum for CX
- Team building and skill development

What sticks: Leveraging emotion, creativity and growth



Experiential

90% of what's being learned is being remembered when doing. We immerse ourselves in the experience and feel our way through it, raising emotional intelligence and self-awareness.



Playful

Adult learning is most effective in a positive emotional state - when it's fun. It makes intimidating, perplexing material engaging and easier to comprehend.



Iterative

A cyclical process leads to twice the impact of linear learning and builds new habits and paradigms, which dictate our behavior and decision making in our daily lives.



Collaborative

As social beings, adding social and collaborative elements to learning significantly improves outcomes. Whether on or off-line, the results are always more powerful.

Contextual “learning and doing” helps change thinking, and drive measurable behavioral change



Link goals and metrics to program and business value

- Customer Experience Impact
- Employee Impact
- Organizational Impact
 - Collaboration
 - Agility and Adaptability
 - Creativity and Innovation
 - Quality

Changes in
measurable outcomes

Measurable changes
in perception

Changes the ways of
working and skills

Changes in how
people think

Support with continual reinforcement, and assessment



Recognize,
and Celebrate



Continued
Development



Learn, Try,
and Apply

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About The Hanover Insurance Group

- A \$4.9B, 160-year-old insurance company, founded in 1852
- Based in Worcester, Massachusetts
- Offering a wide variety of standard and specialized insurance protection for small and mid-sized businesses, as well as for homes, automobiles and personal items.



Our goals for educating on customer-centric behaviors

“Claims is a key experience for our customers. Which is why boosting CX awareness, understanding, and abilities for our 1,300 claims employees is so critical.”

Retain Customers and Create Promoters

1

Serve Our Customers More Effectively

2

Support the Practical Application of Empathy

3

CX is a Key Competitive Lever in Our Industry

4

Customers' Expectations Evolving and Changing

5

What we set out to achieve...

1,300 Claims Employees

Boosting CX awareness, understanding and abilities

Flexible and Extensible

Designed to be adaptable as Hanover embeds customer-centricity more broadly

Multi-Mode Delivery

Combining instructor-led cohorts and eLearning programs

Organizational Self-Sufficiency

Core model of 'train the trainer' to internalize the capability, and the program

Role-Based Training

Ensuring relevance for different groups and employees

Experiential Learning

Recognition that learning occurs in different ways for different people

Relevant and Practical

Immediately applicable tools and practical, hands-on skills

Behavioral Change

Learning program elevates employee understanding

The approach we took: Our 'CX training journey'



1. Assembled stakeholder team



2. Defined Desired Outcomes



3. Selected Our Learning Partner



4. Built Training Blueprint



8. Built Trainer and Learner Guides



7. Began Co-Development Process



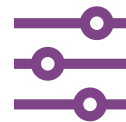
6. Design for all Modules



5. Executive Review and Approval



9. Pilot Delivery and "Train-the-Trainer"



10. Evaluate and Adjust/Modify Program



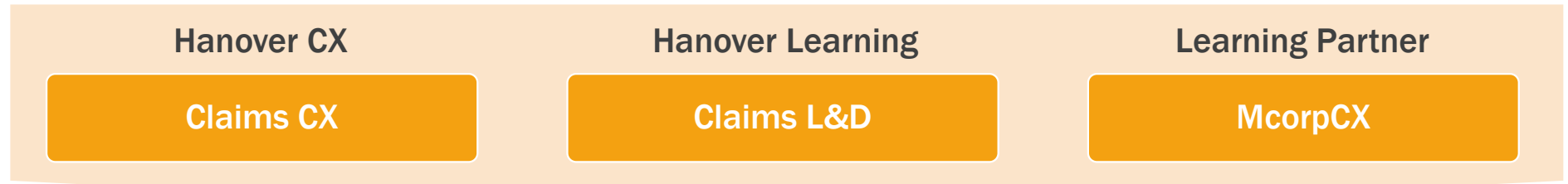
11. Systematic Rollout



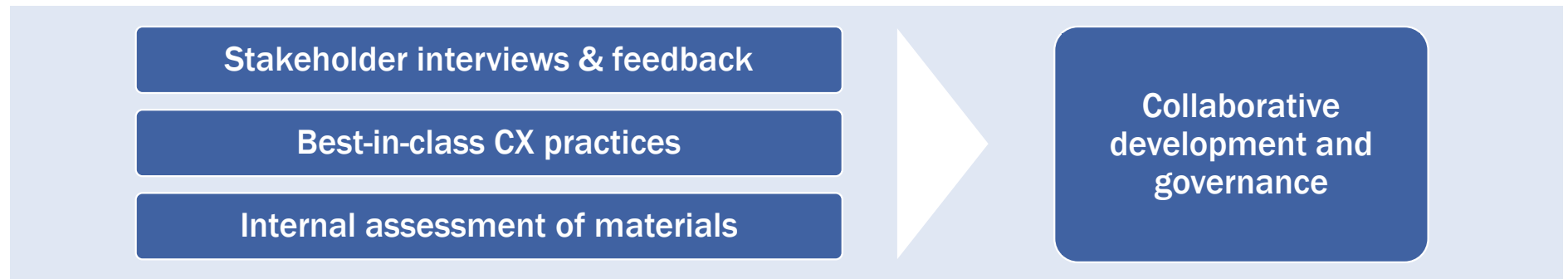
12. Continue to Measure and Improve

A co-developed approach to program design and build

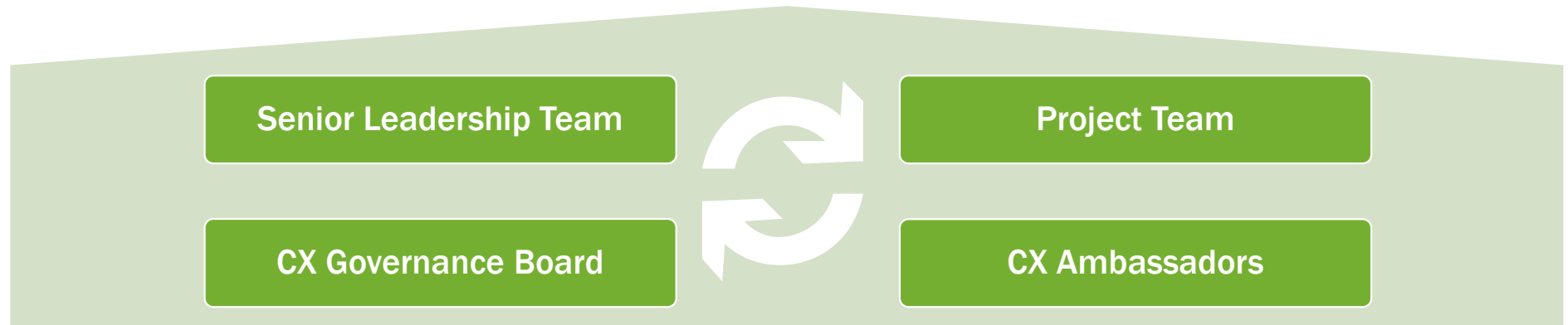
Supported by Experts



The Build Approach



Working With a Feedback Loop



Driving CX education and delivery across the organization

			<i>Format</i>	<i>Employees</i>	<i>Managers</i>	<i>Hours</i>	<i>Focused on...</i>
On-Demand	CCX 0	Getting Ready to Learn	eLearning		●	1	Readiness
	CCX 1	Introduction to Claims CX	eLearning	●	●	1	
	CCX 2	Your role in Claims CX	eLearning	●	●	1	
<hr style="border-top: 1px dashed #ccc;"/>							
Cohort-Based	CCX 3	Understanding our Customers	Facilitated	●	●	8	
	CCX 4	Relating to Customers	Facilitated	●	●	12	
	CCX 5	Interacting with Empathy	Facilitated	●	●	4	
	CCX 7	Sticking the Landing	Facilitated	●	●	2	Reinforcement
	CCX 8	Reinforcing for Impact	Facilitated		●	3	
				28 Hrs.	32 Hrs.		

Giving learners key tools to take back to their jobs...

Interactive tools used in and after training...



Workbooks

Personal Growth Action Plans

Reinforcement tools for managers...



Monthly reinforcement exercises

Manager Toolkits

Learning aids to keep concepts fresh...



Attributes of Empathy and 'Empathy Starters'



HEAR Model for Active Listening



Plutchik's Wheel of Emotions



Merrill Communication Styles



Measurable impact for the business, and our people

Delivering qualitative and quantitative results...

“...hands down, the best customer service training I have ever been to or seen...”

“...the combinations of interactive, group and lecture sessions kept me engaged and interested...”

“...this was super... really valuable and a great use of time...”

Manager and Staff Comments

NPS (Net Promoter)



Courtesy and Respect



Perceived Flexibility



Measured Pre- and Post-Training

With some key learnings we gained along the way

Combining e-learning
and cohorts drove
powerful learning

Leverage a facilitator
and a copilot for
virtual sessions

Find a partner
that can integrate
standard modules

Support materials for
facilitators and
learners

Reinforcing learning
and behaviors 'on the
job' is critical

Embrace flexibility -
because you don't
have a choice

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Committed leadership, across the organization

- Leading and Learning
- Model behaviors
- Time to learn
- Culture and talent prioritization
- Check-ins across all roles
- Evangelize and celebrate



Clear strategy and goals, and a roadmap to get there

Defining the Target: What do we want the organization to do and think differently?

What capabilities, skills and competencies are required?

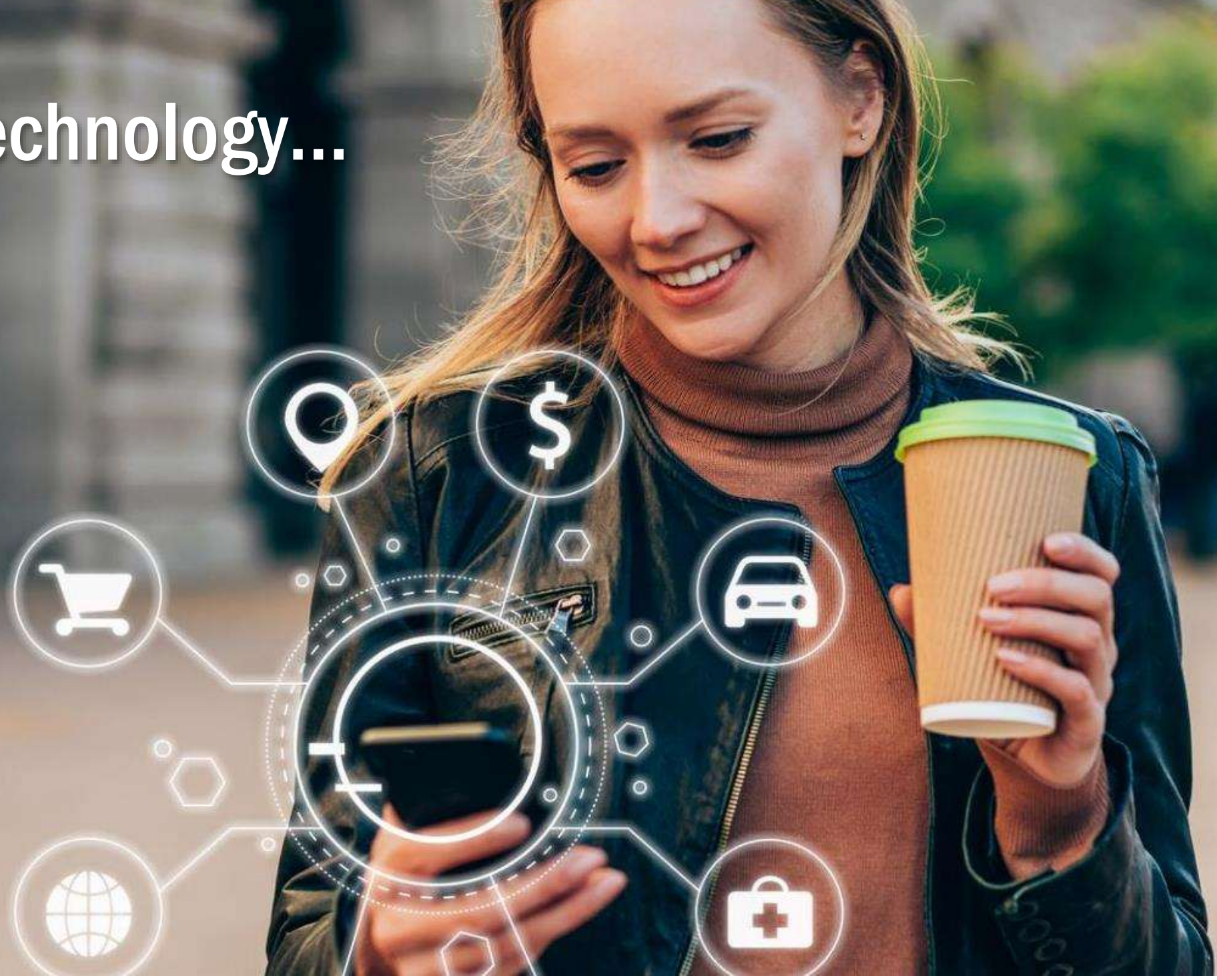
What behaviors by role?

How will each person learn?

How do we ensure it is holistic, immersive and engaging?

How will we progressively gather feedback and measures along the path?

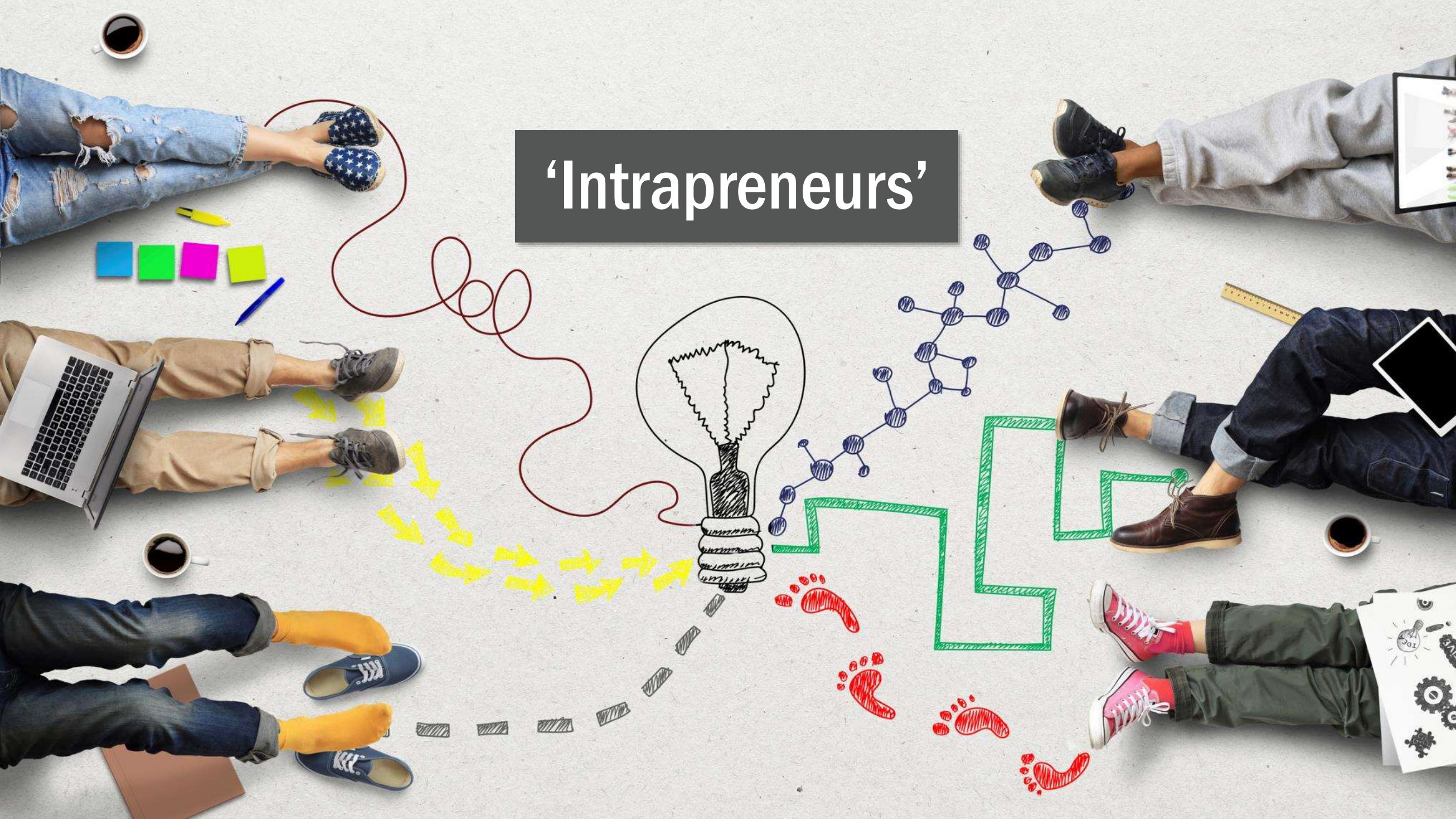
Humans and technology...



Tools of the trade



'Intrapreneurs'





Sherpas and Stories

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Questions? Time for a brief fireside chat...



Thank you!



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