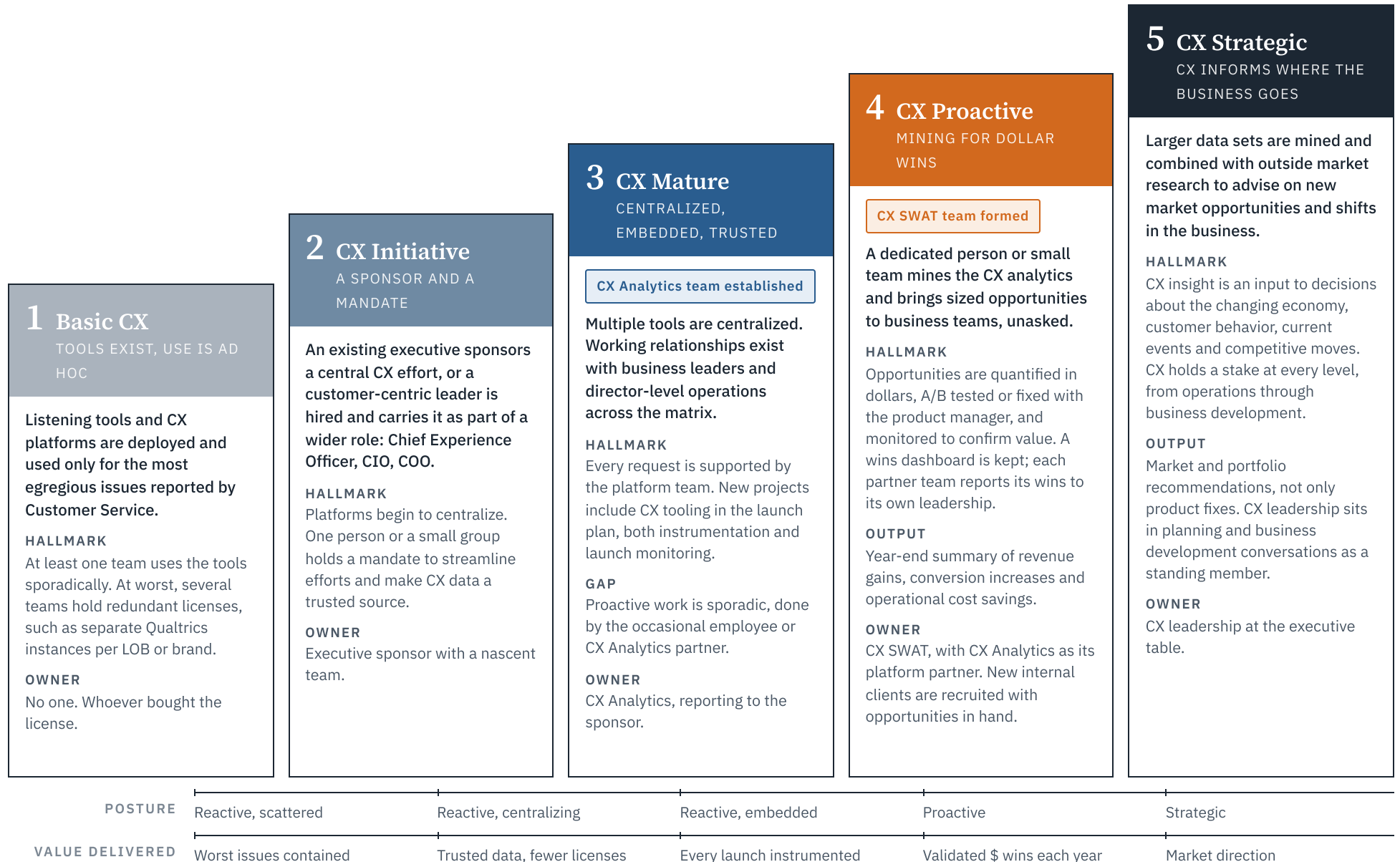


Stages of CX operational excellence for large companies

Five stages, each unlocked by a specific investment. Locate your organization by its hallmark, then fund the unlock rather than the stage above it.



Each stage in detail, and what unlocks the next one

The unlock column is the investment decision. Each one is a prerequisite, not an aspiration.

STAGE	WHAT IT LOOKS LIKE	WHO OWNS IT	TOOLING AND DATA	WHAT UNLOCKS THE NEXT STAGE
1 • Basic CX Tools exist, use is ad hoc	Basic listening tools and ad hoc CX platforms are in place. They are opened only when Customer Service escalates an egregious problem. Use is sporadic and dependent on individuals.	No one formally. The license sits with whichever team bought it. Customer Service is the de facto trigger.	Redundant licenses across LOBs and brands. No shared dataset. Findings live in individual inboxes and slide decks.	→ An executive puts their name on CX. A license inventory shows the cost of redundancy and the absence of a trusted number.
2 • CX Initiative A sponsor and a mandate	An existing executive sponsors a central CX effort, or a customer-centric leader is hired and carries CX as a portion of their duties. A streamlining mandate is issued.	The executive sponsor (Chief Experience Officer, CIO, COO or similar) plus one person or a small team with the mandate.	Platforms start to centralize. The team works to make CX data a trusted datasource: consistent definitions, one place to look.	→ Consolidation finished. A request intake with an SLA. CX tooling written into the standard launch checklist for every product.
3 • CX Mature Centralized, embedded, trusted	Tools are centralized. Relationships with business leaders and director-level operations mean every request is supported, and every new project launches with CX tools for instrumentation and monitoring. Proactive work is occasional and personal.	The CX Analytics platform team, serving every LOB, geography, brand and channel as a shared service.	One central repository. Session replay (quant) and listening platforms (qual) deployed consistently and reliably across products.	→ CX Analytics handling 100% of inbound requests. One named person freed from the queue to mine for opportunities. Product managers willing to A/B test.
4 • CX Proactive Mining for dollar wins	A single employee or small team mines the CX analytics and hands quantified opportunities to business teams. They recruit new internal clients with opportunities in hand. A shared wins dashboard lets each team report upward; a year-end summary totals revenue, conversion and cost-saving gains.	CX SWAT, partnered with CX Analytics and working directly with product managers.	Same platforms, used offensively: complaint mining, population sizing, dollar conversion, A/B test and post-release monitoring.	→ A multi-year record of validated dollar wins. Access to larger data sets and outside market research. A standing seat in planning and business development.
5 • CX Strategic CX informs where the business goes	Larger data sets are mined and combined with external market research to advise on new market opportunities, shifts to the business, and ways to evolve with a changing economy, customer behavior and current events. CX has a stake at every level, from operations to business development.	CX leadership at the executive table, with Analytics and SWAT as the engine beneath it.	CX data joined to market, financial and competitive data. Longitudinal views across years, segments and markets.	→ This is the top of the path. The work from here is to keep stages 3 and 4 funded, since strategic credibility rests on them.

HOW TO USE THIS PAGE

Find the hallmark that describes your organization today. Then read the unlock in that row. That is the next investment. Skipping a stage usually means the stage above collapses back into reactive work within a year.

WHERE MOST LARGE COMPANIES SIT

Between stages 1 and 3, often with pockets of stage 4 energy from individuals. The move from 2 to 3 is the hardest culturally, because it asks LOBs to give up their own licenses.

THE TWO TEAMS

Stage 3 is where CX Analytics is established as a shared service. Stage 4 is where CX SWAT is formed on top of it. Their roles, loop and partners are on the companion reference.