

# ACTIVATING PURPOSE TO ACCELERATE CUSTOMER EXPERIENCE TRANSFORMATION

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There are many organizations that have a great customer experience and also many organizations that have a great brand.

However truly great organizations connect their brand with their customer experience in everything they say and do.

What connects brand and customer experience in these organizations, and really differentiates them, is that they have a well-defined purpose and they activate that purpose across the organization.

Companies that are known for iconic customer experience (e.g., Starbucks, WestJet, Four Seasons, Zappos, etc.) all have something in common: they activate what they stand for in everything they do. They operate with a clear and branded purpose. However activating purpose is not merely a training, marketing, or communication exercise, nor can it be managed from the middle. Purpose Activation involves engaging everyone in the organization to live the brand, rather than simply directing them on what to say or do.

Purpose, like brand, is strategic in nature and has implications across the entire business. Unless the CEOs and senior leaders own it and drive it, few people have a stake in it and there is no reason for them to fund and advance it. The CEO's office provides organizational protection and a home to nourish the purpose during activation.

Contrary to what many organizations do, Purpose Activation doesn't begin on the frontline. It is a four-stage process that begins with senior leaders.



Fig.1 Four Stages of Purpose Activation

### Stage 1: Align Senior Leaders

Purpose Activation is a cultural transformation that is driven by leaders. For this transformation to be successful, senior leaders must align to, believe in, and be ready to live the purpose. Even the best customer experience strategy can be undone by a culture that doesn't support it. Indeed, this is where most customer experience transformations fail.

CEOs should begin by prompting senior leaders to ask themselves three questions to ensure that the organization is ready for a successful and sustainable Purpose Activation:

1. What do we stand for?
2. What role does my department play in serving customers?
3. Are our day-to-day actions consistent with this?



### What do we stand for?

This question will give CEOs a clear picture of how well senior leaders understand and are aligned with the organization's purpose. If senior leaders understand, agree, and are committed to what the organization stands for, then the organization is likely ready to activate the purpose in their departments.

### What role does my department play in serving customers?

Senior leaders must align on and understand the fact that every department in the organization serves one goal—to get and keep customers. All senior leaders must be able to clearly articulate the role they and their team play in the customer experience, even if they don't have direct contact with the end customer. A successful Purpose Activation will make it easier for everyone to know how customer experience factors into every decision at every level and across every department.

### Are our day-to-day actions consistent with this?

Senior leaders need to be completely honest with themselves and consider: do decisions regarding people, policies, process and systems reflect the organization's purpose? Do their interactions with their team reinforce belief in the purpose?

Senior leaders need to:

- *Explain how their department contributes to the purpose*

- *Establish metrics that drive behaviours aligned to the purpose*
- *Eliminate silos that prevent employees from delivering the purpose*
- *Engage their teams and recognize team members for behaviors that reflect the organization's purpose*

Once senior leaders are aligned, they are positioned to put a plan in place that will help the rest of the organization understand, align to, believe in, and commit actions to living the purpose.

## Stage 2: Planning Purpose Activation

Successful Purpose Activation requires planning and preparation. This will ensure that the right tools and processes are in place to effectively support employees through the change process.

It is important to consider three key areas before the purpose is widely socialized.

1. **Designing and implementing a brand lens tool**
2. **Determining how and when to engage your employees**
3. **Determining how and when to measure and recognize success**

### Designing and implementing a brand lens tool

Purpose is a powerful brand lens, against which decisions can be benchmarked. When purpose is clear, making business decisions that are aligned to the purpose becomes a natural part of the business.



Until then, it is difficult for employees to behave in a way that reflects the purpose when nothing else in the organization supports or empowers them to do so.

By creating and implementing a brand lens tool—that is, a set of questions or statements that filter all decisions through the brand—employees can quickly and effectively assess whether a decision aligns to the purpose. This allows them to understand the impact of their decisions, identify trade-offs that may negatively impact the customer experience, and collaborate with other departments to simplify internal processes.

### **Determining how and when to engage your employees**

Purpose Activation involves telling the story of how the organization reflects the purpose. What team members believe will drive their actions. Purpose Activation activities should help employees understand what they will see, hear, and feel once the transformation has occurred.

Purpose Activation is a dialogue, not an announcement. Senior leaders must express early and often why the purpose is important to the business, how it will live in the business, and what will result from it. Team members must be given a forum to ask questions and express both their reluctance and their ideas. Deliberate face-to-face communication and feedback will help the entire organization understand what's expected, what will change, and what the implications will be—reshaping the culture.

Interactive sessions facilitated by leaders and cascaded throughout the organization provide the best means to accomplish this. It also demonstrates to employees that leaders are committed to both the purpose and the transformation.

### **Determine how and when to measure and recognize success**

Employee beliefs about what's important to the organization are influenced by what the organization chooses to measure and reward. Senior leaders must clearly explain how key performance indicators support living the purpose. If business measures and performance management metrics are not aligned to the purpose, it will never come to life.

By connecting engagement scores to key performance indicators, senior leaders can quickly see pain points in the organization and make adjustments. This allows the organization to identify and communicate small wins often. Recognizing individuals and departments that consistently live the purpose is a powerful declaration of the organization's commitment to its purpose.

### **Stage 3: Engage Hearts and Minds**

Purpose Activation is more than an announcement or a workshop. It's not a pep rally, but rather a consistent, operationalized, and meaningful declaration of transformation. Employees will form beliefs based on what they experience before and after you widely socialize the new purpose and those beliefs will drive their actions.



Three things need to happen to engage the hearts and minds of all employees.

1. Start with “why”
2. Engage emotions
3. Maintain leader commitment

### Start with why

Starting with “why” inspires employees to the purpose because they feel that they’re a part of a greater aspiration. Simon Sinek’s “start with why” concept is powerful because it connects the part of the brain that makes decisions to the part of the brain that responds with emotion. Merely telling employees the “what” risks stalling the transformation, because they don’t trust it.

To paraphrase Sinek, “why” is how an organization expresses what it believes; “how” refers to the actions that bring that purpose to life; and “what” is the product of that belief. Starting with “why” helps employees to emotionally invest in the new purpose. Argues Sinek, “When people are financially invested, they want a return. When people are emotionally invested, they want to contribute.”

Clearly stating the “why” puts transformation into context for employees. This lowers their natural resistance to change, and allows them to more easily envision how they can contribute to the organization by living the purpose. As they become inspired by the purpose, they’ll begin to behave differently and naturally transform the customer experience.

### Engage emotions

Purpose Activation is about engaging people in a way that makes them emotionally connected to the purpose. Purpose, by nature, is not about acquiring new knowledge or adopting a new skill; it’s based on a core belief in a higher aspiration. When employees have something to believe in, something bigger than their job, they’ll engage more meaningfully with each other and with customers.

### Maintain leader commitment

All leaders across the organization are key change agents and are integral to the transformation. The role that leaders play in the late stages of Purpose Activation is two-fold: give employees the time to adjust to new behaviours, patterns and expectations; and sustain the momentum the Purpose Activation generates.

During Purpose Activation, leaders must continually engage their team face-to-face. As employees begin to “self-actualize” the purpose, leaders must provide the coaching and support to give them the confidence to “do old things in new ways.”

During Purpose Activation, leaders will have a natural inclination to expect an immediate return on investment, but transformation takes time. They may be tempted to make adjustments or abandon Purpose Activation when positive results don’t materialize quickly. Continually involving leaders in activities that help





them engage the hearts and minds of their employees will help them stay patient and let purpose do its job.

#### **Stage 4: Let Purpose Do Its Job**

Once your team is engaged—that is, they understand the purpose and are ready to commit actions—it is critical to allow them to actively experiment with how they'll live it every day. While their roles may not change, their approach to doing business will be different.

Purpose Activation is a transformation and leaders themselves need to remain aware of how they respond to and manage change during the transformation.

There are three ways to ensure that leaders stay engaged while allowing purpose to do its job.

- 1. Rethink how the organization serves customers**
- 2. Stay attuned to employee ideas**
- 3. Be selective about what you say “no” to**

#### **Rethink how the organization serves customers**

Leaders should use Purpose Activation as an opportunity to rethink parts of the organization—people, policies, processes and systems—that need to be changed so that everyone can live the purpose. If everything the organization does stops people from living the purpose, they'll quickly lose confidence in it.

#### **Stay attuned to employee ideas**

As people begin to live the purpose and focus their energies towards the customer, they'll look for permission to bring forward ideas about how to operationalize the purpose. To sustain the transformation, and ensure that people remain inspired by it, leaders must find ways to regularly gather direct feedback and ideas.

Organizations that have a well activated purpose encourage people to bring forward ideas by developing a forum for those ideas to be discussed, evaluated, adapted, and shared. Often these ideas are driven by customer feedback which when implemented become moments of delight that are integral to the customer experience.

#### **Be selective about what you say no to**

The ideas employees bring forward will come from a place of engagement and connectedness, meaning they'll likely be quite passionate about them. By saying “no” before an idea is properly cultivated, leaders may undermine employee's confidence in the purpose.

Senior leaders should embrace the things the organization can say “yes” to immediately. This shows a commitment to the transformation and models how purpose will live in the organization at a strategic level. These ideas will become a benchmark against which people will evaluate their own ideas, filtering and refining them so that they're aligned with the organization's purpose.



## Conclusion

Purpose Activation is an ideal pre-cursor to any customer experience transformation.

It provides the mechanism to connect all employees to the customer through a brand lens. Without it, frontline and back office employees will lack context and will fall short of the great aspiration your brand stands for, resulting in less than optimal results.

Even if your organization has already begun—or is well on its road towards—customer experience transformation, Purpose Activation can be a powerful catalyst. A successful Purpose Activation will inspire all employees across the organization to live the brand and help them see how what they do, and how they do it, impacts the customer.





