CXAP

Customer Experience & Analytics Professional

Customer Experience & Analytics Professional

Creating Transformational Insurance Customer Experiences through CX Engineering, Design Thinking and Advanced Customer Analytics

Best Practices in Customer Segmentation, Crafting Customer Personas with Precision, and Enhancing Customer Lifetime Valuations

CX Analytics for Service, Product & Operational Design

Customer Journey Blue Printing for Results

Capturing, Measuring and Shaping Customer Transaction Behaviors

Design, Track and Position the Pre-Purchase, Purchase and Post-Purchase CX Journey

Usability, Findability and Omnichannel CX Design & Management

Generational & Demographic Shifts: The Insurance Customer Experience of Today and 2020

Applying Design Thinking & Frameworks to Leverage the New Dynamics of Customer Loyalty

Case Studies in Predictive & Prescriptive Insurance CX Analytics

Transforming Call & Service Centers into Customer Experience Centers

The Digital CX Journey & Customer Engagement Management Technologies

Front Stage & Back Stage CX Analysis, Alignment and Augmentation

Jobs To Be Done and the New Digital and Product Paths to Creating Insurance CX, Market & Industry Disruption

Earn your CXAP Designation while Mastering and Integrating the Critical Frameworks, Tools and Techniques for Innovating, Deploying and Continuously Perfecting your Customers' Experience & Journeys with your Organization

May 19-21, 2021
Virtual Distance Learning

The Insurance Customer Experience Revolution: The Essential and Compelling Opportunity

It is becoming clear. Profoundly clear. Excitingly clear. Insurance customers are increasingly loyal to their experiences, not to their insurance company. Customers want and expect to quickly and easily transact with carriers – and come away from each interaction feeling good about the insurance company, their people, their processes, their customer facing technologies, and themselves. Customers view insurance companies in terms of the customer's own needs and preferred ways of buying, interacting and communicating – not in terms of how insurance companies are organized. Insurance consumers are demanding value adding experiences tailored to their unique preferences – thereby making the experience powerfully personalized.

Insurance customers feel absolutely entitled to a seamless customer experience. And it is certainly no longer about how insurance companies wish to interact with customers. The insurance customer experience is shaped over multiple dimensions as consumers demand the ability to move easily and effectively across all aspects of an insurance company's channels and touch points.

This requires that insurance companies innovate and unify the interactions throughout the entire enterprise to anticipate, design, and deliver a compelling customer journey. As noted designer Marty Neumeier observed; a customer journey that rivets the mind and runs away with the heart. And the nature and design of the insurance customer experience must also proactively and creatively adapt to the changing customers' expressed and unexpressed needs and wants.

Insurance customers are becoming more and more empowered and are always connected. They are interacting with insurance companies everywhere; websites, contact centers, adjusters, agents, brick-and-mortar branches. And they are talking. Engaging in an on going conversation with everyone known and unknown to them who will listen. They are talking about their experiences. In detail. Everywhere. Through a growing array of media, forums, and channels. Insurance companies cannot wait. They cannot initiate the voice of the customer. For insurance consumers have already found their voice. Demanding that insurance companies discover new and far more systematic and skillful ways of listening to the insurance consumer – analyze customer feedback accurately, and act with purpose and agility on what they hear. This requires deep and often transformative organizational change; A rethinking of existing processes and ways of working to create new and elegant solutions that resonate deeply with insurance customers.

For every customer complaint there are 26 other unhappy customers who have remained silent

Lee Resource

5% 75%
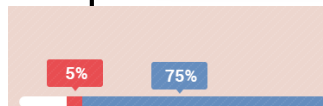
A 5% increase in customer retention can increase a company's profitability by 75%

Bain & Co

70%

70% of buying experiences are based on how the customers feel they are being treated

McKinsey

80% 20%

80% of your company's future revenue will come from just 20% of your existing customers

Gartner Group

"We see our customers as invited guests to a party, and we are the hosts. It's our job every day to make every important aspect of the customer experience a little better."

Jeff Bezos

The Insurance Customer Experience Revolution: Seizing the Opportunity, Meeting the Challenge

The high stakes of the customer experience revolution is requiring insurance companies, regardless of size or past success, to reframe their operating models and come to market strategy. The most successful carriers going forward will not only design functional components around a customer centric perspective – but unify and tightly integrate these capabilities into a high impact and cohesive customer journey. A customer journey that continuously improves and distances the firm further and further from the competition. A journey that delivers dramatic increases in both customer and employee satisfaction, profitable growth, and reduced costs. A customer journey that continually generates innovation, discipline and focus throughout the enterprise.

55%

55% of consumers would pay more for a better customer experience
Defaqto Research

The winning insurance carriers will greatly accelerate the velocity between insight, design and masterful execution. Execution that ensures the defining elements of the desired customer experience are predictably delivered throughout the firm on every interaction by every employee and channel to every customer – and thereby creating an army of customer advocates of the firm. For these are the carriers that have successfully decoded the touch points, interactions and behaviors that exert the greatest influence in earning unsurpassed levels of customer loyalty. Their strategies and decisions are all grounded in what matters most in making the customer experience positively memorable; exceeding the customer expectations on things that the customer truly values.

9 out of 10 consumers expect to receive a consistent experience over multiple contact channels
Synthetix

These winning carriers have avoided the limited "find-and-fix" customer pain points approach to marginally improving the customer experience. While recognizing that such analysis is important, creating a truly differentiated insurance customer experience requires a well thought out and innovative orchestration of structure, people, process, product, place and technology. In this larger more emboldened approach customer journey mapping is amplified through CX blueprinting that details with supporting data and customer forensics the changes necessary to create a truly delightful customer experience – Challenging traditional constraints in driving toward break through ideas and solutions. The effort goes well beyond the voice of the customer (VoC) and into the mind of the customer (MoC). Resulting in a robust customer experience design enabled by creative leadership and engaged through highly motivated employees committed to a commonly held CX focus. A focus that is further enhanced by making the invisible very visible through customer analytics which elevate the causation between actions and results; providing timely insights to drive further innovations and continual renewal of the firm's CX capabilities.
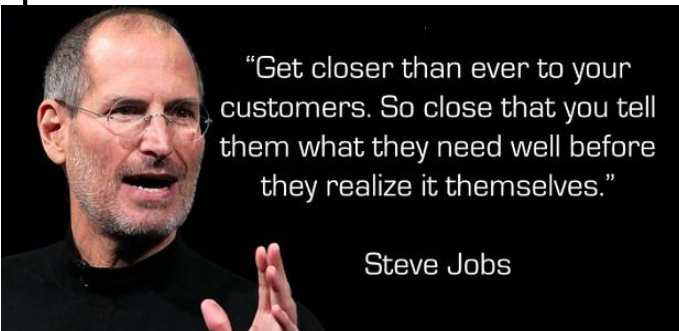
"Get closer than ever to your customers. So close that you tell them what they need well before they realize it themselves."

Steve Jobs

The 2021 CXAP Designation Class will be conducted through the CIOP Institute's Virtual Distance Learning Platform from 9:00am – 4:30pm Wednesday May 19th and Thursday May 20th. The Friday May 21st session will be conducted 8:30am to 1:00pm.

The Customer Experience & Analytics Professional (**CXAP**) Designation Class - The Essential Knowledge, Skills and Tools

Knowledge That is Both Profound and Pragmatic

The Customer Experience & Analytics Professional (CXAP) designation program provides a unique and powerful learning experience. It is designed to enable participants to meet head on the complex challenges of designing, building, deploying and continually enhancing a differentiating insurance customer experience. The conference conveys deep insights and a true grasp of the knowledge, frameworks, tools and disciplines that comprise emerging CX best practices. CXAP candidates discover new ways to innovate, shape and operationalize the customer experience – all in a manner that materially and immediately improves business results.

The class itself is highly interactive, challenging, thought provoking and proceeds at an accelerated pace. Advanced CX concepts and models are delivered through dynamic tutorial presentations. The tutorials are fast paced, highly informative and intense. The content is robust, relevant and real; going well beyond theory by combining the latest CX thinking with practical and proven high impact techniques. Newly gained knowledge is reinforced through class work-shops and insightful case studies. Participants are equipped with the insights that will help guide them in forging a CX map into the future. They are challenged and inspired. They are immersed in the possibilities and are rebooted with a new level of energy, creativity, and confidence that can only come from deep knowledge and masterful skills.

Who Should Attend

Crafting and pursuing a unified approach and skillset is essential to creating and sustaining a truly differentiating customer experience. The CXAP designation program pulls from three fundamental spheres of knowledge; CX Engineering, Design Thinking, and Customer Analytics – which collectively and directly affects an ever widening population and growing number of functions across the enterprise. Insurance professionals and leaders who are involved with any process, service, product, operation, technology, strategic initiative or function that contributes to improving the experience of the firm's current and targeted future customers will find the CXAP conference particularly valuable.

It takes 12 positive experiences to make up for one unresolved negative experience

"Understanding Customers"
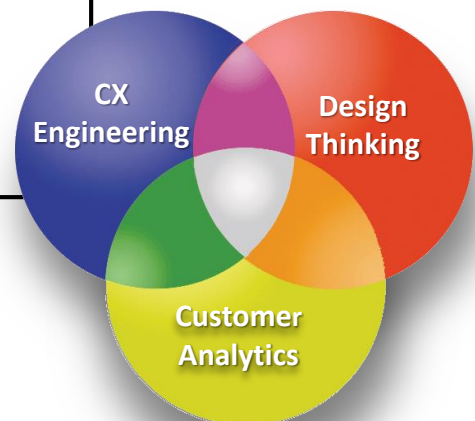*by Ruby Newell-Legner*

It costs 6 – 7 times more to acquire a new customer than retain an existing one

Bain & Co

"I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel."

- Maya Angelou

CX Engineering

Design Thinking

Customer Analytics

The CXAP Designation Process – The Pathway to CX Excellence, Mastery and Professional Recognition

From the very first moment of the very first day of the CXAP conference participants gain the knowledge to discover unmet needs and opportunities to create new customer solutions; Knowing how to make each customer interaction move the satisfaction dial. Knowing that the business and operating models and practices that got us here are inadequate to move us forward. Knowing that to consistently deliver a truly compelling customer experience requires that we go well beyond fixing the customer's pain points and design new processes, technologies and ways to better engage employees and increase organizational agility. Knowing that to get better means we often need to get different. The CXAP Designation generates this knowledge through a concise four step process:

REGISTER: Each candidate completes and submits a CXAP Application and Registration form as contained in this brochure or the applicant contacts the CIOP Institute directly at 866.930.CIOP(2467) to register by phone.
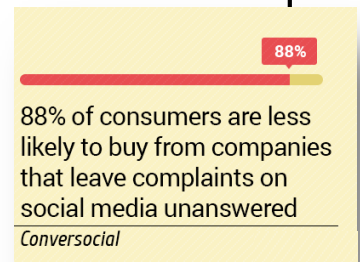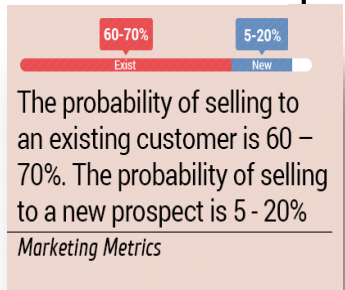
PREP: 30 days prior to the CXAP Designation Class, candidates are provided a preparation package containing CX thought leadership and design thinking articles and other reference material for their review and preparation. Textbooks are mailed to attendees two weeks prior to the program.

IMMERSE & APPLY: Candidates participate in the very intense and content rich two and a half day CXAP Conference that deep dives the key bodies of knowledge, underlying concepts, tools, and techniques for designing, deploying and continually improving a compelling insurance customer experience. During the class attendees learn advanced customer empathy best practices, participate in a virtual Insurance CX Service Safari and complete a corresponding Insurance CX design end-to-end case study.

CONFERMENT: Completion of the CXAP Class results in the awarding of the Customer Experience & Analytics Designation. The senior leadership of each candidate's sponsoring firm are advised of their candidate's success in attaining the CXAP Designation. An all-points insurance industry press release is distributed announcing the professional achievement of the new CXAP Designees. Graduates receive their CXAP diplomas.

60-70% Exist   **5-20%** New

The probability of selling to an existing customer is 60 – 70%. The probability of selling to a new prospect is 5 - 20%
Marketing Metrics

88%

88% of consumers are less likely to buy from companies that leave complaints on social media unanswered
Conversocial

EMPATHIZE — DEFINE — IDEATE — PROTOTYPE — TEST

"While Strategy is a powerful discipline, many companies forget that without good execution a strategy is only a plan – an intention. Every year thousands of strategic plans fail because they weren't translated into compelling customer experiences." **– Marty Neumeier**
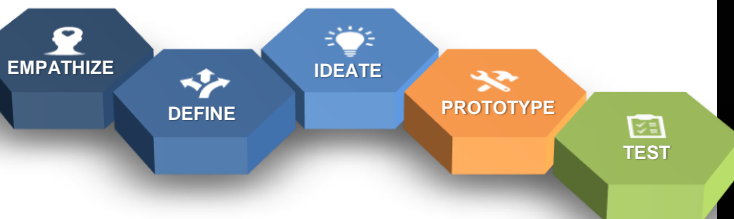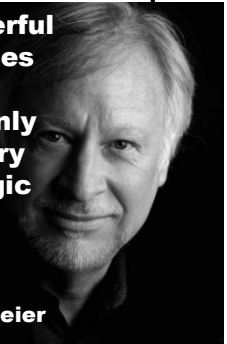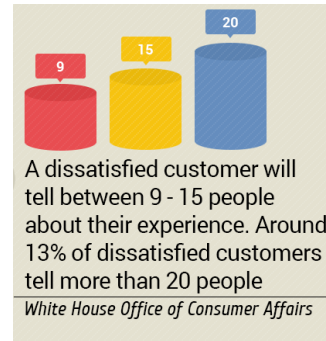
The CXAP Curriculum – Moving Beyond Theory to Meaningful Action

The CXAP topical content has been specifically formulated to equip insurance professionals and leaders with the knowledge and techniques necessary to craft, execute, and operationalize a winning customer experience program. The conference agenda is organized sequentially; the concepts, ideas and tools advance attendees along the actual process and phases by which an insurance customer experience design is blueprinted and engaged.

Advanced Customer Typography & Targeting
- Data Analysis for Customer Segmentation
- The Five-W Segmentation Framework
- Sizing & Valuing Customer Segments
- Customer Persona Best Practices
- Customer Persona Behavior Analytics
- Customer Lifetime Value Forecasting
- The Economics and Financials of CX
- Creating a Holistic CX Organizational Perspective
- Company vs. Customer Specific Touchpoints
- Measuring Rational & Emotional Touchpoints
- Reach, Resonance & Reaction
- Conversion & Purchasing Models
- Messaging, A/B and Split Testing
- Designing and Managing Post Purchase Behavior
- Customer Loyalty Drivers & Techniques
- CX Generational and Demographic Patterns
- Today's Insurance Buyer and the Buyer of 2020
- CX Best Practices Templates & Toolkit
- The Essentials of Design Thinking
- Design Thinking & CX Innovation Workshop
- UX Design Principles & Practices
- Disruptive Insurance CX Designs

A dissatisfied customer will tell between 9 - 15 people about their experience. Around 13% of dissatisfied customers tell more than 20 people

White House Office of Consumer Affairs

78%

78% of surveyed customers say that competent customer service reps are most responsible for a happy customer experience

Genesys Global Survey

"I saw an opportunity to combine data, algorithms, and human experience to create a new business model."
- Katrina Lake

STITCH FIX

Calibrating Customer Attitudes & Preferences
- Attitudes vs. Satisfaction Metrics
- SUS, SUPR-Q, SEQ
- Customer Preference Mapping & Analysis
- Needs, Wants, Desirability and Delighters
- Customer Attitude & Purchasing Patterns
- Brand Pillars for CX Journey Support
- Scoring Customer Brand Affection & Affinity
- Customer Effort and Customer Satisfaction Metrics
- Critical to CX Data Gathering
- CX Data Gathering Tools & Techniques
- Determining Proper Customer Sample Size
- Data & Confidence Intervals to Ensure Accuracy
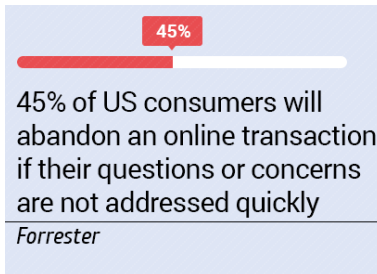- New NPS.2 & Other Techniques for Gauging CX
- Jobs to Be Done Frameworks

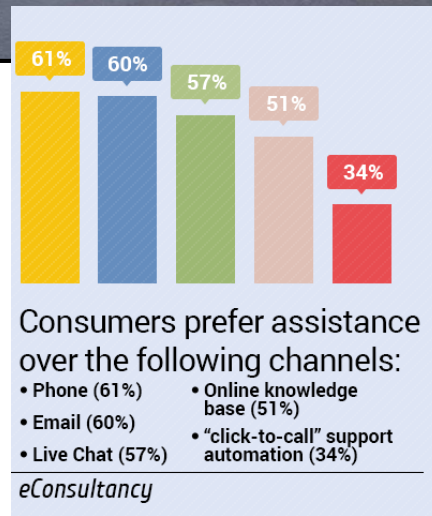# The CXAP Curriculum – Moving Beyond Theory to Meaningful Action

CX Journey Mapping with Precision and for Results

- From Marketing Funnel to CX Journey Mapping
- Linking CX Metrics to CX Journey Mapping
- Survey of CX Journey Mapping Best Practices
- The Five Pitfalls to Avoid
- Insurance Customer Journaling Technique
- Defining the Ideal CX by Advanced Persona
- Generating the CX Journey Hypothesis
- Mapping the Actual CX Journey
- Task Mapping & Analysis
- Calculating Pleasure, Pain and Indifferent Points
- Front Stage & Back Stage Analysis
- CX Mapping Including Agents
- Identifying & Calibrating CX Journey Opportunities
- Closing the CX Performance Gaps & CX DOE
- From Hypothesis, to Evidence, to Performance
- Customer Loyalty Drivers & Techniques
- Survey of CX Journey Mapping Frameworks
- Pallet of CX Journey Mapping Tools

61% **60%** **57%** **51%** **34%**

Consumers prefer assistance over the following channels:
- Phone (61%)
- Email (60%)
- Live Chat (57%)
- Online knowledge base (51%)
- "click-to-call" support automation (34%)

eConsultancy

45%

45% of US consumers will abandon an online transaction if their questions or concerns are not addressed quickly

Forrester

Organizing for Successful CX

- CX & The C-Suite
- CX Target Operating Model
- From Call Centers to CX Engagement Centers
- CX Based Culture & Reward System
- The CX Engagement Hub Approach
- Omnichannel CX
- Creating the Seamless Enterprise Wide CX
- Lean, Kaizen & CX
- CX Program Office & Impact Center
- From Product Manager to CX Manager
- CX Based Product & Service Restructuring
- Reinventing the Role of Marketing

Technology Enabled CX

- Strategic Technologies Shaping CX
- The Digital CX Journey
- Integrating CX Digital Platforms
- Customer Self Service & CX
- Unstructured Data & Social Media
- The CX Based Technology Strategy
- Survey of Usability Techniques
- Improving Findability & CX Usability
- Tapping into User Generated Feedback
- Disruptive Developments & Trends
- The Future Digital Insurance Customer Journey

"What really makes the difference is when the customer asks: When I went through that experience, did the provider really engage with me, did they understand my needs, did they think logically about what was best for me?"

- Jo Causon

Institute of Customer Service

CXAP | Customer Experience & Analytics Professional

HOW TO REGISTER

Phone: 866.930.CIOP

Fax: 866.308.9686

Mail: 2051 Craigmore Dr.
        Suite 200
        Charlotte, NC 28226

VIRTUAL DISTANCE LEARNING

The 2021 CXAP designation session will be conducted through the CIOP Institute's virtual learning platform. Participants will experience the renowned CXAP professional and leadership development program in a real time remote highly interactive learning environment. No additional costs on your part as distance learning participants are provided easy to follow instructions and links to the CIOP Institute's secure virtual learning platform – along with immediate real time access to our staff and host for any assistance in preparing for, and throughout, the class. All session materials including program textbooks are mailed to distance learning attendees two weeks prior to class**.**

REGISTER EARLY!

Seating is intentionally limited to support the highest degree of immersive CX design thinking and interactive learning. Please register early to avoid being wait-listed

APPLICATION & REGISTRATION FORM

_____
NAME

_____
TITLE & DEPARTMENT

_____
COMPANY NAME

_____
PHYSICAL BUSINESS MAILING ADDRESS

_____
CITY, STATE, ZIP/POSTAL CODE

_____
TELEPHONE

_____
E-MAIL

TUITION: $2,775 before May 1st – $2,975 after May 1st

DISCOUNTS: 5% for CIOP Designees; 10% for teams of 3-4;
                20% for teams of 5-9; 30% for teams of 10 or more

PAYMENT METHOD

CREDIT CARD PAYMENT FOR $_____

_____
Credit Card Number (VISA, MC, AMEX only)   Expiration Date

☐ I prefer to pay by check. Please use the credit card information above to guarantee my registration. I understand that if my check is not received within four weeks prior to the conference the CIOP Institute will charge my credit card. Please make payable to the CIOP Institute, 2051 Craigmore Dr. – Suite 200, Charlotte NC 28226

TERMS & CONDITIONS
- Cancellations and transfers can be accommodated up to April 23rd
  An administrative charge of $500 will be assessed cancellations and transfers
- Payment must accompany registration and payable in US Dollars

FIRST CLASS

Introducing Virtual Distance Learning

Utilizing the CIOP Institute's virtual learning platform you can now experience our renowned professional and leadership development programs in a real time remote highly interactive learning environment. No additional costs on your part as distance learning participants are provided easy to follow instructions and links to the CIOP Institute's secure virtual learning platform – along with immediate real time access to our staff and host for any assistance. All session materials including program textbooks are mailed to distance learning attendees two weeks prior to class.
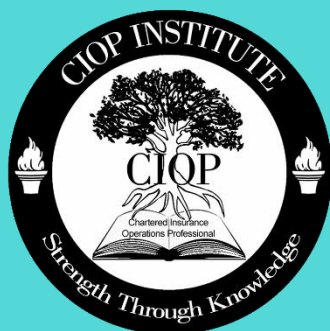
Our virtual remote learning approach is exactly the same as our on-company-site and centrally conducted programs; High impact content delivered through engaging instruction that enables participants to excel in their current position while preparing them for the higher responsibilities they aspire to.

CIOP INSTITUTE
CIOP
Chartered Insurance
Operations Professional
Strength Through Knowledge

you are invited!
CXAP CONFERENCE
May 19-21, 2021

CIOP Institute
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www.CIOPInstitute.com