

**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:  
Diversity Based CX Design**

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

**Generative AI Enabled CX:  
Insurance Use Cases and  
Application Examples to  
Accelerate Profitable Growth  
and Customer Interaction**

**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**

# 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.

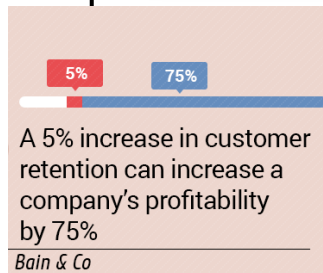
**This requires that insurance companies innovate and unify the interactions throughout the entire enterprise to anticipate, design, and deliver a compelling customer journey.** As noted designer Marty Neumeier observed; a customer journey that rivets the mind and runs away with the heart. And the nature 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 ongoing 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*

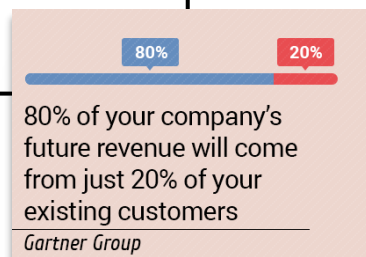


*Bain & Co*



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

*McKinsey*



*Gartner Group*



You need to get to the future, ahead of your customers, and be ready to greet them when they get there – Marc Benioff



# 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.

**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.

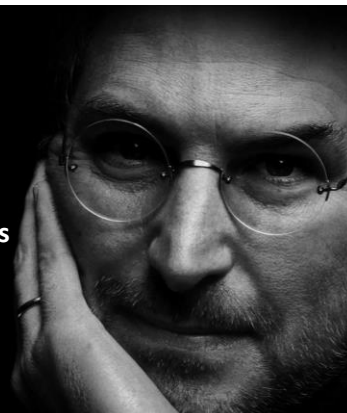


9 out of 10 consumers expect to receive a consistent experience over multiple contact channels

*Synthetic*

You’ve got to start with the customer experience and work backwards to the technology

- Steve Jobs



The Customer Experience and Analytics (CXAP) program is conducted on company sites thereby enabling an insurance organization to realize the benefits of having a larger number of concurrent participants gain respective knowledge and skills. Tuition is a function of the number of attendees: \$3,200 for 10-14, \$2,850 for 15-20 and \$2,275 for 21+. To explore conducting the CXAP Program on your site please contact Paul James, Dean of Curricula at the CIOP Institute: [pjames@ciopdesignation.com](mailto:pjames@ciopdesignation.com) or by calling the CIOP Institute at 866.930.CIOP(2467)

# 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.

1 2 3 4 5 6 7 8 9 10 11 12 13

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

*"Understanding Customers"*  
by Ruby Newell-Legner

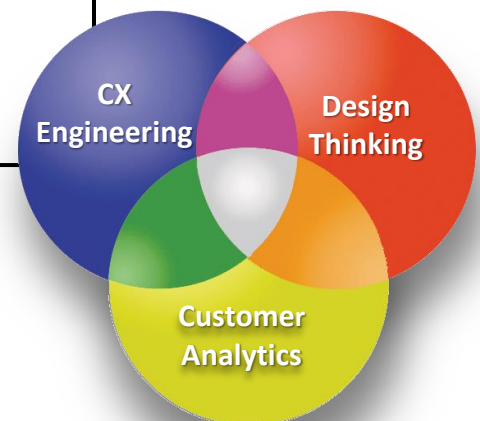


It costs 6 – 7 times more to acquire a new customer than retain an existing one

*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



# 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.



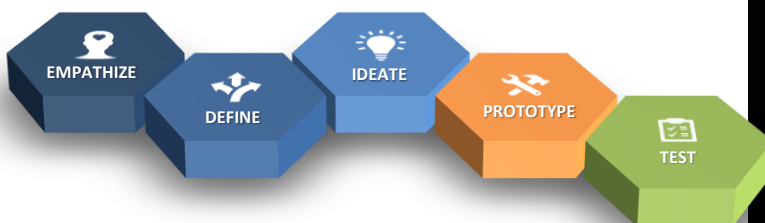
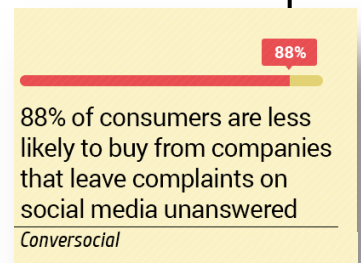
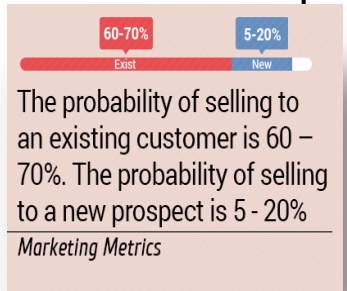
**PREP:** 30 days prior to the CXAP Designation Class, candidates are provided a preparation package containing CX thought leadership and design thinking articles and other reference material for their review and preparation. Textbooks are mailed to attendees two weeks prior to the program.



**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.



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



If there's one reason we have done better than our peers, it is because we have focused laser like on customer experience.

- Jeff Bezos

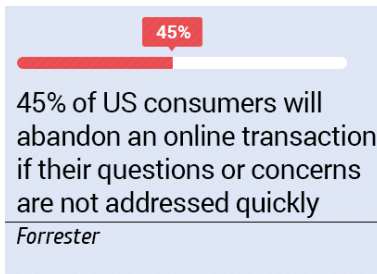
## Calibrating Customer Attitudes & Preferences

- 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 Linkage with CX Journey Analysis
- Critical to CX Data Gathering
- CX Data Gathering Tools & Techniques
- Determining Proper Customer Sample Size
- Data & Confidence Intervals to Ensure Accuracy
- New NPS.2, CES & Other Techniques for Gauging CX
- Jobs to Be Done Frameworks

# The CXAP Curriculum – Moving Beyond Theory to Meaningful Action

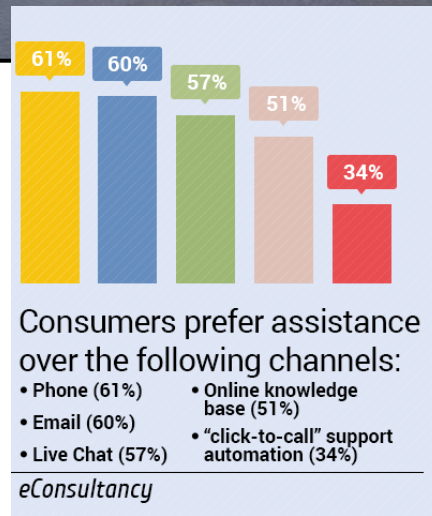
## CX Journey Mapping with Precision and for Results

- 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



### 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
- Generative Agentic AI Enhanced CX Design & Case Illustrations



## 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

