



# Improvement Themes & Principles

James Verdon

CoMC - April 2024

# Engagement Outputs Reminder

As discussed last month:

Long term  
vision:

CODE MANAGEMENT (James Rigby update)

Customer  
service  
vision:

ENHANCED CDSP CUSTOMER EXPERIENCE,  
WHERE THE BENEFIT AND VALUE-ADD IS TRULY FELT

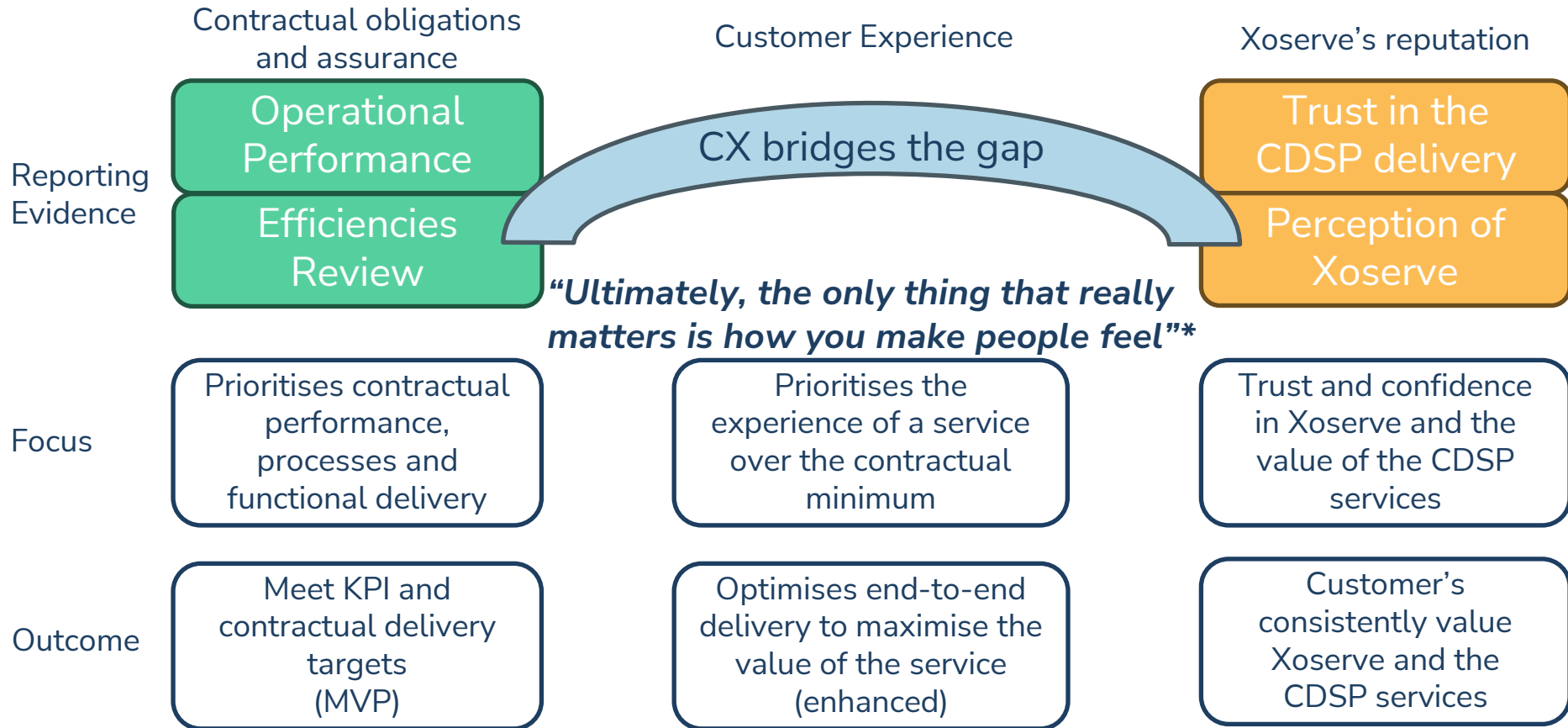
Core pain  
points:

Not understanding  
customer / audience

Info isn't easy to find  
or understand

Spamming contacts

# Why we need focus on Customer Experience (CX)



# Capability Themes & Principles

Goal

ENHANCED CDSP CUSTOMER EXPERIENCE,  
WHERE THE BENEFIT AND VALUE-ADD IS TRULY FELT

Support Theme

Customer Intelligence

Digital Experiences

Communications Strategy

Tools / Platforms

CRM / ServiceNow

A single, multi-purpose CDSP Portal for all services

CRM functionality

Principles\*

Understanding:  
1. Right People  
2. Right Information  
3. Right Time

Simplified access to services that are:  
1. Intuitive  
2. Consolidated  
3. Transparent

Consistently:  
1. Tailored for audience  
2. Informative  
3. Valued

Customer benefits

More valued interactions and engagement experiences.

Exceptional digital experiences for all user types.  
Effective self-serve routes and materials for customers that delivers transparency & value.

Consistent messaging for informative and relevant communications for all customer representatives.

# Developing our Themes in Unison

## Customer Intelligence

Data from the digital estate will inform and enhance our customer intelligence.

A combination of customer self-serve and access controls capabilities will automatically update our CRM records for the benefit of customers and stakeholders.

The accurate information held about each individual representative allows Xoserve to automate and communicate through enhanced criteria.

The communications records will be visible within our customer intelligence, allowing easy review of what information has been sent to our customer or stakeholder.

We know and understand our customers

User data subscriptions preferences

Targeting and defining audiences

ENHANCED XOSERVE EXPERIENCE

Information, services and support is easy to find and use

Subscription preferences

We know WHO and WHY we target someone with a communication

Key new features will allow Customers to see who else has received a comm within their organisation, WHY they have been sent the communication and the ability to unsubscribe from that campaign.

Transparent communications log, allows quick review of the information provided from Xoserve.

Customers and stakeholders being able to maintain their own preferences puts them in charge of what information they receive.

## Digital Experiences

## Comms Framework

# Next Steps

PLEASE FEEDBACK – Customer support for this proposal is essential as we build out our strategy and BP25 business cases.

Strategy Stakeholder Engagement Event - 15 May

- Case study - how these themes change your experience of our services and communications
- Digital Experience:
  - Vision demo
  - User reaction video



Questions?

Please feedback to:

[james.verdon1@xoserve.com](mailto:james.verdon1@xoserve.com)

07976 563 899

# APPENDIX



# Customer Intelligence Principles

Customer Intelligence

Digital Experience

Communications



## Data & Tools

Xoserve will leverage true data “line of sight” through service delivery, customer data, and content management.

A single source of customer truth will be poled from across the Xoserve delivery, through integration across provision.

All customer / stakeholder data will create true Customer 360<sup>0</sup> views, supporting relationship management.



## Right People (WHO)

Customer relationship data will drive automation and identify accurate, well-defined audiences.

Customers will set their own preferences and subscriptions, allowing Xoserve to identify where they are a stakeholder.

Contracts will use “Core” relationships to ensure there is always an appropriate representative.

Customers can opt in / out.



## Right Information (WHAT)

Prioritisation of content management will ensure documentation is always up to date.

Content alignment will apply to any service, product or contract, and managed by accountable owners.

Appropriate audience levels will be defined for content writing.



## Right Time (WHEN)

Understanding a customer or stakeholders' relevance to any given topic, Xoserve can automate and will ensure any communication is issued at the appropriate time of a campaign.

We know and understand our customers

# Digital Experience Principles

Customer Intelligence

Digital Experience

Communications



## Simplified Access

Must haves:

Secure

Single sign-on (SSO)

Multi-factor authentication (MFA)

All services accessible through one master portal.

One LSO process will control access across all services within the same digital ecosystem.

Key roles will easily review / approve access / spend requests from their staff.



## Intuitive

Must haves:

Robust UX design

Task-based consideration to UX

Summary dashboard views

Customers / stakeholders will maintain their own user and preference data.

Customers / stakeholders will be presented with:  
next best actions  
recommended reading  
“Did You Know...” opportunities for additional subscriptions.



## Consolidated

All Digital touchpoints will be housed in one place

All services will consistent, branded designs.

Client platforms will develop within the core Xoserve design principles.

All future projects and developments will align to this umbrella principle.



## Transparent

Customers will be able to track all their interactions within their portal homepage.

Comms will have supporting data to contextualise receipt and who else has received (in same org.)

Key roles will be able to monitor activity across their organization's usage.

Information,  
services and  
support is easy  
to find / use

# Communications Principles

Customer Intelligence

Digital Experience

Communications



## Consistency

Corporate tone of voice  
Branding  
Comms structure (via templates)  
Transparency

All formal contact points (box accounts) will route (in/out) through Xoserve CRM, to log & report MI.

All formal points of contact will use the domain "@xoserve.com"



## Targeted

Every communication will have a defined audience.

Comms processes will recognize:  
- core relationships  
- users  
- subscribers  
- key stakeholders

Xoserve can consistently evidence WHY a customer is receiving a communication.



## Informative

Every individual will have tailored communication at the appropriate level, for example:

1. Managers and Execs will receive briefs
2. SMEs and Users will receive process level information and instructions
3. IT and Infrastructure reps will receive detailed technical guidance to support their roles.



## Valued

Every customer or stakeholder will find the received content of value.

Customers understand WHY they have received the communication.

Customers can unsubscribe or update their preferences.

No recipients will feel spammed!

We know WHO and WHY we target with a communication