

Project Brief: Customer Experience (CX) success stories – internal

Date Initiated: 04/10/18

Updated: 01/08/19

Final Due Date: Ongoing

BACKGROUND	OBJECTIVE(S)
<p>Our aspiration: A culture of customer caring so powerful it inspires brand loyalty every step of the way</p>	<p>Share success stories with employees that demonstrate how we are making progress within our strategy as well as delivering an exceptional customer experience and help build employee awareness/understanding of our CX definition.</p> <ul style="list-style-type: none">• Experiential products: products that, inherent in their design, deliver unique customer benefits• Experiential touchpoints: How effective are we in delivering benefits to our customers within our daily workflows that are typical and repeatable company-to-customer interactions?<ul style="list-style-type: none">○ Benefits: What benefits are we trying to deliver throughout our customer experience?<ul style="list-style-type: none">▪ Reduced effort of end user<ul style="list-style-type: none">• Responsive: When I have a need it doesn't require a lot of effort/time to resolve• Improves my efficiency (adherence with codes, easy to install, minimizes building design time, auto-material list, etc.)▪ Adapts to customer's unique needs▪ Offers a great getting-started experience▪ Strengthens our

	<p style="text-align: center;">infrastructure to meet future needs</p> <p><i>Please note that great CX is different from great customer service (e.g., heroic efforts going above and beyond for one specific customer). CX is repeatable for many customers.</i></p>
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STRATEGY

Our aspiration: CX-driven organization

- A culture of customer caring so powerful it inspires renewed brand loyalty every single step of the way

[This section also included our strategic priorities and bulleted actions; removed from this sample due to confidential and proprietary information.]

TARGET AUDIENCE(S)

- Uponor North America employees
- Note: Most internal messages repurposed for external audiences (reps, distributors, customers, consumers, social media followers, etc.)

KEY MESSAGES

- We mean progress...
 - Being a catalyst for change / business disruption
 - Progress through differentiated product service delivery
 - Industry leadership through education, advocacy and innovation
- Establish segment-focused business model
- Define and develop winning customer experience
- Establish scalable operational excellence
- Advance change leadership

INTERNAL EVENT CONSIDERATIONS

- Fireside Chats (all-employee meetings)
 - Feb. 14, 2018
 - May 7, 2018
 - July 30, 2018
 - Oct. 29, 2018
- Pizza for Progress employee events (January 2019; July 2019)

- Bi-monthly Townhall meetings (Operations employees)
- 100th anniversary event (July 2019)
- Employee celebration for opening Hutchinson manufacturing plant expansion (October 2019)
- Leadership meeting (December 2019)

Deliverables	Owner	Approvers	Timing	Status
Sales and Marketing progress update (email) and Salesforce Chatter	kmf and CX champions	VP of Sales VP of Marketing and Customer Experience	As necessary	On time
Uponoria article / blog / – also includes monthly Wildly Important Goal (WIG) scorecard updates	kmf and CX champions	VP of Marketing and Customer Experience Sr. Director of Marketing Senior Manager of Corporate Communications Functional VP	As necessary	On time
UNA intranet teamsite We mean progress landing pages	kmf Sr. Director of Marketing IT webmaster CX champions	VP of Marketing and Customer Experience Senior Manager of Corporate Communications Functional VP	May 1, 2018: Initial buildout; As necessary	On time
Uponoria week-in-review / coming soon new Uponor progress update newsletter	kmf and CX champions	None needed if content approved in other tactics (e.g., Uponoria; We mean progress landing pages.)	As necessary	On time
Lead-time progress updates (for employees – repurposed for reps and distributors / customers)	kmf Senior Director of Sales Demand Manager Inventory Analyst Manager	VP of Sales VP of Marketing and Customer Experience Sr. Director of Marketing	Monthly (typically third week)	On time
Fireside Chat (all-employee meeting) talking points	kmf and CX champions	President VP of Marketing	Quarterly Feb. 14 May 7	Completed

		and Customer Experience Sr. Director of Marketing Sr. Manager of Corporate Communications Functional VP	July 30 Oct. 29	
Operations Employee Town Hall talking points	kmf and CX champions	President VP of Marketing and Customer Experience Sr. Director of Marketing Sr. Manager of Corporate Communications Functional VP	Bimonthly Jan. 23-24 March 20-21 May 6-7 July 18-19 Sept. 12-13 Nov. 19-20	Completed
Road to Hutch (OpEx-related activities with manufacturing expansion)	kmf Manufacturing Expansion Project Manager Appropriate CX champion	VP of Operations Sr. Manager of Corporate Communications Functional workstream leader and/or VP	Monthly until August 2018;	Completed
Posters – bulletin boards/monitors	kmf and CX champions	None needed if content approved in other tactics	As needed	On time
Mid-year Pizza for Progress employee events	kmf Brand Director Sr. Manager of Corporate Communications	President VP of Marketing and Customer Experience Sr. Director of Marketing	June 12, 2018	Completed
Leadership meeting	kmf Sr. Corporate Communications Manager	President and VPs	December 2018	Completed

Year-in-review video / ppt	kmf	VP of Marketing and Customer Experience Sr. Director of Marketing	December 2018	Completed
Year-end progress update letter from Uponsor president to families	kmf	VP of Marketing and Customer Experience Sr. Director of Marketing	January 2019	Completed

FUNCTIONAL SUPPORT NEEDED

- Digital support [video]
- Internal communications
- Administrative support
- IT
- External agency
- Other

COMPETITIVE ASSESSMENT

N/A

KEY MILESTONES

[CX champions provided their key milestones and dates related to our strategic priorities; removed from this sample due to confidential and proprietary information.]

Strategic priority	Milestone	Owner	Timing	Key message

BUDGET REQUIREMENTS

TBD: Quarterly Pizza for Progress will likely require a budget

TEAM MEMBERS / CX CHAMPIONS

VP of Marketing and Customer Experience	Executive sponsor
Sr. Director of Engagement Marketing	Engagement marketing
Sr. Manager of Corporate Communications	Internal / external communications
Manager of Corporate Communications	Internal / external communications
Director of Strategy	Marketing
Director of Intelligent Water	Intelligent Water
Director of Sales Operations	Sales Ops
Regional Sales Director	U.S. Sales
Director of Marketing (Canada)	Canada Sales
Training Senior Manager	Training
Design Services Manager	Design Services
Manager of Customer and Technical Services	Customer and Technical Services
Senior Finance Manager	Finance
Director of Operations	Operations
Talent and Acquisition Manager	HR
IT Manager	IT
Supply Chain Analyst	Supply Chain

LOCATION OF ARCHIVED ASSETS

- Uponoria (Uponor's global intranet)
- UNA local intranet teamsite We mean progress landing pages
- CorpComm email archival

SUCCESS MEASURES

- Surveys (engagement, knowledge, baseline and follow-up)
- Focus groups (responses and feedback)