



**CXPA** | Customer Experience  
Professionals Association™

Modular Course

**Measures, Metrics and Business Value**  
*Defining and Driving Impact of Experience Change*



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# Course Objectives

- Understand how to define CX measures, metrics and business value
- Learn ways to embed structure for CX benefits into your internal processes
- Learn the art and science of tracking benefits realization
- Examine ways to think differently about business results and ROI
- Understand the opportunities of building a foundation of CX benefits realization
- Creating successful structures within your organization's processes to showcase success for customer and associate experience and engagement



**Greg Tucker, CCXP**  
 Founder and CEO  
 Tucker & Co.

Experienced transformation executive committed to identifying business value from CX opportunities and ensuring their delivery to the bottom line, collaboratively and productively. Skilled in linking CX programs to business value, building ROI models to build C-Suite commitment and organizing CX Governance to drive program delivery and value. Over 25 years of transformation leadership for global brands including Microsoft, Oracle, Google, GE, PepsiCo, Panera Bread, AT&T and Thomson Reuters.



**Sandra Fornasier, CCXP**  
 Senior Manager  
 Autodesk

Head of Customer Insights and Experience at Autodesk. Customer Experience impassioned professional with 20+ year proven track record at building customer experiences that will naturally guarantee mutually successful business outcomes in a B2B context. CCXP certified, skilled as defining CX strategies, designing measurement that matter, and driving cross functional leadership to action.



**Ed Bodensiek**  
 CEO  
 Cravety

Edwin ("Ed") Bodensiek is the CEO of Cravety, an Employee Experience technology company with roots in CX consulting. He is the former chief experience officer of Miles & Stockbridge, a top law firm on the U.S. East Coast, and a former director of communications at Johns Hopkins University, the U.S. Treasury Department, and the Fulbright Scholar Program. As VP of Brand for Select Medical, a \$6B public company in healthcare, Ed led the development of a patient experience and employee experience model. Ed is a frequent speaker on EX and CX as a total brand experience.



**Bob Azman, CCXP**  
 Founder and CXO  
 Innovative CX Solutions

Customer Experience Officer. Global Operations Executive. Contact Center Expert. Consultant. Educator. Innovative and visionary executive with an exemplary record of providing customer-driven solutions to companies in high growth or rapidly changing business environments. Provides a unique perspective as a thought leader, consultant, practitioner and business partner in customer experience design and execution to help companies become easy to do business with. Past Chairperson, CXPA.



**Diane Magers, CCXP**  
 Founder and CEO,  
 Experience Catalysts

Passionate experience transformation executive and change agent. Thought leader and innovator for ways of engaging associates, customers and partners. Skilled in creating CX business value and systematically changing organizations to align around experience and drive financial impact. Specializes in design thinking, journey management and value creation. Over 25 years of transforming experiences working in and with brands such as Sysco, AT&T, Dale Carnegie, Invisalign, Freeman, Sodexo, Sandy Spring Bank and MoneyGram. Previous CEO for CXPA and Emeritus Chair.





## Measures, Metrics and Business Value Modules

- Module 1 – Setting the Stage
- Module 2 – Current State: Relevance and Needs
- Module 3 – Linking CX to Business Value
- Module 4 – Gaining Investment and Tracking Benefits
- Module 5 – Measuring, Reporting and Improving Value Delivery

# Toolkit for CX Value Creation

Data & Analytic Tools –  
Statistics, Key Drivers,  
Data Samples, etc.

Value Linkage Models  
& Simulators

Leading  
vs  
Lagging Indicators

Drivers of  
Financial Metrics



Trending  
vs  
Themes

Quantitative  
Reporting

Qualitative  
Reporting

Stakeholder  
reports



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