# Six Rules for Creating an Effective CX Playbook

Developing and sustaining a strong Customer Experience (CX) Playbook (and Culture) is an iterative process. It takes time and consistent alignment with your firm's CX Culture definition and processes. These six rules can help you in the development and implementation of your CX Playbook.

Rule #1 - Balance prescription with latitude

This rule is both the most important and the most difficult to follow. Strike the right balance between prescription and latitude. If every situation has a prescribed response, you are more likely to get pushback from your team and you will impact their ability to use their strengths and find solutions. If there is too much latitude, your CX Playbook will have little impact on the results you are seeking to achieve.
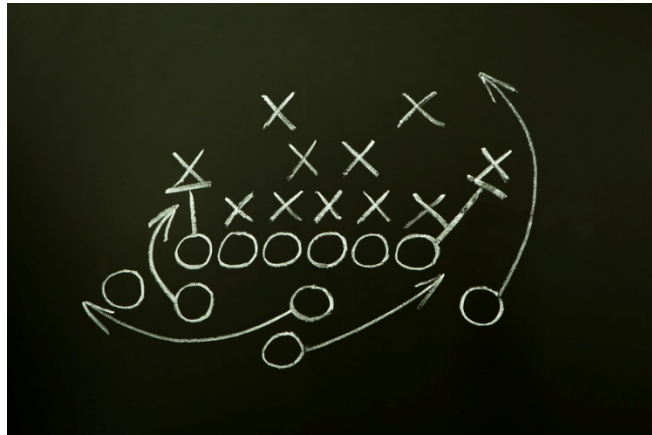
In our discussion under Culture in *Building a CX Playbook for your firm*, we stated that a culture of client experience is one in which your team doesn't react to situations without considering how 'their' response will impact the client.

Use meetings, training, and storyboarding to expose your team to the potential challenges and appropriate responses. Then give them a chance to use their decision-making experience and creativity to deliver results. (Always measure so you can course correct if needed).

Rule #2 – Be concise

To achieve the results you desire throughout your firm and to get everyone on the same cultural page, you must make a persuasive argument to your whole team. It can be tempting to try and capture everything in one document. This can be overwhelming and difficult to integrate into day-to-day behaviors. Consider having your CX Playbook concentrate at the level of policies, programs, and/or processes.

Consider bringing your CX Playbook to a meeting with your mid-level managers. Get their feedback. It is easy to be 'overly' comprehensive when we try not to leave out important information. As you try and figure out just how much detail needs to be included in your CX Playbook, try using Rule #3 as a filter.

Rule #3 – Make the playbook the law

One reason to be concise in creating your CX Playbook is that the playbook must become the law. If it is to become the law, it is essential to avoid including too many nuances and specifics that will require continually updates and be difficult to enforce. CX Playbooks should cover the most important elements of your CX initiative including your expectations for how your team will execute on them.

Rule #4 – Communicate

Spend time and attention on communication. Bring the CX Playbook to team meetings, training, situational project meetings. Use whatever means needed to keep the playbook front of mind. You simply cannot over communicate.

Rule #5 – Use a template where needed

If there are specific elements that you want used every time a contract, interview, proposal, short-list interview, onsite meeting, etc. is held, give your team a template in your CX Playbook to guide them. This will ensure that the important elements of your playbook are discussed and included as appropriate.

Rule #6 – Continue to improve your playbook

After developing your CX Playbook, it is important to define a process for updates and improvements. Remember CX Culture change is an iterative process. Your CX Playbook needs to be a living document. The passage of time, client needs, and development of creative solutions will lead to improved practices. To accommodate changes, consider having each section of the playbook 'owned' by one of your firm leaders. He or she should coordinate changes as needed. In most cases, at least an annual checkpoint review is necessary.

Client Savvy works with professional services firms to design, implement, and measure impacts of Client Experience as a strategy. Our primary objective is to help firms align client experience and customer loyalty with their top strategic priorities. Rather than "one more thing," the goal of the implementation strategy is to integrate with existing processes as a means of creating the path of overall success.