Welcome to CGAP's Customer Centricity Maturity Assessment

Please complete this assessment to assess your organization's level of customer centricity. The results will guide you on actions you can take to shift your strategy, culture, structure, and operations to a more customer-centric business model. For an online version of this assessment go to: http://customersguide.cgap.org/assessment.

Let's get started

The following customer-centric assessment has been designed to assess your organization against best practices in customer-centric transformation. It follows a maturity continuum where some organizations are beginning the journey while others have already progressed to higher levels of customer centricity over time.

Discover Your Organizations Customer Centricity Level

The statements are formulated to assess the progress your organization has made in customer-centric transformation. Please indicate the degree to which you agree or disagree with each of the following statement.

Rate your organization on the following statements, using a scale of "1" to "5" where:

1 = Strongly disagree

2 = Disagree

3 = Undecided/Neutral

4 = Agree

5 = Strongly agree

Pillar 1 – Leadership and culture (Equal weighting of 11.1 percent)	1	2	3	4	5
1. Our brand promises are well aligned with our customer experience capabilities, ensuring that we deliver what we promise					
2. Leadership consistently communicates the importance of positive customer experience to all employees					
3. Our customers have sufficient access to leadership, which gives leadership a first-hand understanding of customer expectations					
4. A top leader in our organization is responsible and accountable for customer centricity strategy and implementation					
5. We regularly review how shifts in customer experience and the business environment affect the customer experience we deliver					
6. We have a documented strategy and roadmap of our customer centricity goals for the next 3 to 5 years					
7. Leadership is aligned on a customer centricity vision for our organization – our intended experience for customers					
8. We are agile enough to react to the competition by quickly changing or updating our customer experience strategy					
9. Leadership is accountable to key performance indicators that measure performance against customer-centric outcomes and objectives					

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Pillar 2 – Focusing Operations on the Customer (Equal weighting of 16.7 percent)	1	2	3	4	5
10. We structure our organization and hire the right type of employees to ensure that customers have the best possible experience with us					
11. We have best practices in place to ensure that exceptional customer experience is consistently delivered across divisions, business units, locations, products, and channels					
12. Together, business units and customer support teams regularly discuss ways to improve the quality of our customer experience					
13. We recruit and appoint employees who have the right competencies to ensure exceptional customer experience					
14. We partner with suppliers and specialists across the value chain to ensure that we offer the best customer experience design and delivery model					
15. We consistently ensure that all digital and physical touchpoints and channels used by customers deliver exceptional customer experience					

Pillar 3 – Empowering Employees, Insights, and Tools (Equal weighting of 16.7 percent)	1	2	3	4	5
16. Employees receive sufficient support from co-workers and other business units to deliver the best possible customer solutions					
17. Our employees are empowered with the mandate, customer insights, tools, and support to deliver exceptional customer experience					
18. We offer employee development programs aimed at consistently improving customer experience					
19. Employees are trained, mentored, and coached on our customer experience vision, strategy, and how to consistently deliver exceptional customer experience					
20. We regularly circulate internal communications and conduct events to ensure that customer centricity is top of mind for all employees					
21. Performance evaluation includes recognition (e.g., an employee of the month) and rewards for behaviors that deliver and enable exceptional customer experience					

Pillar 4 – Customer Experience (Equal weighting of 11.1 percent)	1	2	3	4	5
22. We have a clear customer-centric strategy that's widely communicated					
23. We regularly engage with our customers to better understand their future expectations					
24. We have a framework in place that measures customer experience across strategic and operational levels					
25. Our customer experience measurement framework uses a broad set of research and measurement techniques to understand what drives customer satisfaction and loyalty					

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	1	2	3	4	5
26. We regularly use customer experience insights to review whether our value propositions are in line with our customer experience strategy and design					
27. Our customer experience design process uses human-centered design principles to ensure the best customer experience					
28. We carefully consider the potential impact of all customer experience design decisions on the experience customers have with us					
29. Customer complaints and problems receive the highest priority in our organization					
30. Customers receive quick, quality feedback on all their queries					

Pillar 5 – Creating Value (Equal weighting of 20.0 percent)	1	2	3	4	5
31. Our business planning processes have an explicit customer value dimension that focuses on value segments (high, medium, low-value customers)					
32. We have a clear definition and understanding of current customer value					
33. We consistently calculate current customer value using embedded value, customer lifetime value, or similar models					
34. Our enterprise measurement framework makes it possible to link all customer measures to overall financial performance (return on investment, growth, retention, churn)					
35. Our management information system tracks how long customers remain as customers					

Provide your self-rating

Four levels of customer centricity maturity are described below.

Extended description of levels:

Level 1: Basic level of interest and awareness, but understanding of customer experience is weak

Level 2: Customer experience is seen as important and early buy-in is achieved

Level 3: Customer experience is seen as important and formalized programs are developed/implemented. It is also/or seen as critical, and leadership is actively involved

Level 4: Customer experience is one of the core tenets of strategy and integrated across all levels. It is also/or part of the DNA of the organization and maintained throughout

Please choose which level currently matches your organization best.

Please answer for your business, in line with your role.

- Level 1: Unconvinced but interested
- Level 2: Getting involved and buy-in
- Level 3: Formalized and dedicated
- Level 4: Engaged and empowered

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Your Customer Centricity Maturity Level

The Customer Centricity Maturity Model provides an index of the extent to which an organization has matured regarding integrating customer centricity in their daily operations. Use the Solution Key below to add up your points to arrive at your score.

Calculating weights

	Points per statement when:				
	Strongly Disagree	Disagree	Undecided / Neutral	Agree	Strongly Agree
Pillar 1 – Leadership and culture (Equal weighting of 11.1 percent)					
1. Our brand promises are well aligned with our customer experience capabilities, ensuring that we deliver what we promise	0.0	0.6	1.1	1.7	2.2
2. Leadership consistently communicates the importance of positive customer experience to all employees	0.0	0.6	1.1	1.7	2.2
3. Our customers have sufficient access to leadership, which gives leadership a first-hand understanding of customer expectations	0.0	0.6	1.1	1.7	2.2
4. A top leader in our organization is responsible and accountable for customer centricity strategy and implementation	0.0	0.6	1.1	1.7	2.2
5. We regularly review how shifts in customer experience and the business environment affect the customer experience we deliver	0.0	0.6	1.1	1.7	2.2
6. We have a documented strategy and roadmap of our customer centricity goals for the next 3 to 5 years	0.0	0.6	1.1	1.7	2.2
7. Leadership is aligned on a customer centricity vision for our organization – our intended experience for customers	0.0	0.6	1.1	1.7	2.2
8. We are agile enough to react to the competition by quickly changing or updating our customer experience strategy	0.0	0.6	1.1	1.7	2.2
9. Leadership is accountable to key performance indicators that measure performance against customer-centric outcomes and objectives	0.0	0.6	1.1	1.7	2.2
Pillar Total	**0.0**	**5.0**	**10.0**	**15.0**	**20.0**
Pillar 2 – Focusing Operations on the Customer (Equal weighting of 16.7 percent)	Strongly Disagree	Disagree	Undecided / Neutral	Agree	Strongly Agree
10. We structure our organization and hire the right type of employees to ensure that customers have the best possible experience with us	0.0	0.8	1.7	2.5	3.3
11. We have best practices in place to ensure that exceptional customer experience is consistently delivered across divisions, business units, locations, products, and channels	0.0	0.8	1.7	2.5	3.3
12. Together, business units and customer support teams regularly discuss ways to improve the quality of our customer experience	0.0	0.8	1.7	2.5	3.3
13. We recruit and appoint employees who have the right competencies to ensure exceptional customer experience	0.0	0.8	1.7	2.5	3.3
14. We partner with suppliers and specialists across the value chain to ensure that we offer the best customer experience design and delivery model	0.0	0.8	1.7	2.5	3.3
15. We consistently ensure that all digital and physical touchpoints and channels used by customers deliver exceptional customer experience	0.0	0.8	1.7	2.5	3.3
Pillar Total	**0.0**	**5.0**	**10.0**	**15.0**	**20.0**
Pillar 3 – Empowering Employees, Insights, and Tools (Equal weighting of 16.7 percent)	Strongly Disagree	Disagree	Undecided / Neutral	Agree	Strongly Agree
16. Employees receive sufficient support from co-workers and other business units to deliver the best possible customer solutions	0.0	0.8	1.7	2.5	3.3

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	Strongly Disagree	Disagree	Undecided / Neutral	Agree	Strongly Agree
17. Our employees are empowered with the mandate, customer insights, tools, and support to deliver exceptional customer experience	0.0	0.8	1.7	2.5	3.3
18. We offer employee development programs aimed at consistently improving customer experience	0.0	0.8	1.7	2.5	3.3
19. Employees are trained, mentored, and coached on our customer experience vision, strategy, and how to consistently deliver exceptional customer experience	0.0	0.8	1.7	2.5	3.3
20. We regularly circulate internal communications and conduct events to ensure that customer centricity is top of mind for all employees	0.0	0.8	1.7	2.5	3.3
21. Performance evaluation includes recognition (e.g., an employee of the month) and rewards for behaviors that deliver and enable exceptional customer experience	0.0	0.8	1.7	2.5	3.3
Pillar Total	**0.0**	**5.0**	**10.0**	**15.0**	**20.0**
Pillar 4 – Customer Experience (Equal weighting of 11.1 percent)	**Strongly Disagree**	**Disagree**	**Undecided / Neutral**	**Agree**	**Strongly Agree**
22. We have a clear customer-centric strategy that's widely communicated	0.0	0.6	1.1	1.7	2.2
23. We regularly engage with our customers to better understand their future expectations	0.0	0.6	1.1	1.7	2.2
24. We have a framework in place that measures customer experience across strategic and operational levels	0.0	0.6	1.1	1.7	2.2
25. Our customer experience measurement framework uses a broad set of research and measurement techniques to understand what drives customer satisfaction and loyalty	0.0	0.6	1.1	1.7	2.2
26. We regularly use customer experience insights to review whether our value propositions are in line with our customer experience strategy and design	0.0	0.6	1.1	1.7	2.2
27. Our customer experience design process uses human-centered design principles to ensure the best customer experience	0.0	0.6	1.1	1.7	2.2
28. We carefully consider the potential impact of all customer experience design decisions on the experience customers have with us	0.0	0.6	1.1	1.7	2.2
29. Customer complaints and problems receive the highest priority in our organization	0.0	0.6	1.1	1.7	2.2
30. Customers receive quick, quality feedback on all their queries	0.0	0.6	1.1	1.7	2.2
Pillar Total	**0.0**	**5.0**	**10.0**	**15.0**	**20.0**
Pillar 5 – Creating Value (Equal weighting of 20.0 percent)	**Strongly Disagree**	**Disagree**	**Undecided / Neutral**	**Agree**	**Strongly Agree**
31. Our business planning processes have an explicit customer value dimension that focuses on value segments (high, medium, low-value customers)	0.0	1.0	2.0	3.0	4.0
32. We have a clear definition and understanding of current customer value	0.0	1.0	2.0	3.0	4.0
33. We consistently calculate current customer value using embedded value, customer lifetime value, or similar models	0.0	1.0	2.0	3.0	4.0
34. Our enterprise measurement framework makes it possible to link all customer measures to overall financial performance (return on investment, growth, retention, churn)	0.0	1.0	2.0	3.0	4.0
35. Our management information system tracks how long customers remain as customers	0.0	1.0	2.0	3.0	4.0
Pillar Total	**0.0**	**5.0**	**10.0**	**15.0**	**20.0**

Once you have a total score you can determine at which level of customer centricity you are.

Level 1 at 50 and less

Level 2 at 51-66.6

Level 3 at 66.7-83

Level 4 at 83.1-100

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How to Improve Your Customer Centricity Maturity Level

Below you will find a description for each level and the steps you can take to improve.

Customer Centricity needs to be part of the DNA of the company and must be maintained throughout. Once you have implemented the recommendations, come back to check on your progress.

Level 1: Unconvinced but interested

Awareness of customer centricity and its potential value for the business is low. The organization's strategy, culture, and structure are predominantly product focused, and there are no plans to implement a more customer-centric approach yet. However, business challenges drive the organization to look for alternative business models.

Recommendations and tools to help you get to the next level of customer centricity:

- Analyze your business challenges through a customer lens and identify opportunities to address challenges by becoming more customer-centric.
- Create buy-in within your organization by making a case for customer centricity.
- Get inspiration from other leaders and companies that have become more customer-centric.
- Draw on techniques that can help you as a leader to start transforming your organization.

Guide Process	Subprocesses	URL
WHY: Putting customers at the center produces loyal, active customers and moves your organization toward long-term competitive advantage.	Customer centricity – Customer-focused competitive edge	http://customersguide.cgap.org/why-go-customer-centric/customer-centricity
	Business Challenges – Solve acquisition, retention and expansion	http://customersguide.cgap.org/why-go-customer-centric/business-challenges
	Leaders – Advice from executives	http://customersguide.cgap.org/why-go-customer-centric/leaders
LEARN: Learn how to understand your customers better – their behaviors, needs, and wants – and generate the insights you need to start designing.	Collect – Learn what type of customer data to collect and how	http://customersguide.cgap.org/learn-from-customers/collect
DESIGN: The customer-centric process is about building products and services with customers in mind. Once you've drawn insightful customer information, you can design for better adoption and use.	Act – Form a team, design and prototype	http://customersguide.cgap.org/design-solutions/act
	Measure – Access customer and business outcomes	http://customersguide.cgap.org/design-solutions/measure
ORGANIZE: You'll know your organization is entirely customer-centric when employees are empathetic, and insights drive strategy, products, and experiences. Learn to move in that direction.	Change Management – Organize everything around customers	http://customersguide.cgap.org/organize-for-delivery/change-management
	Value – Value for your organization and your customers	http://customersguide.cgap.org/organize-for-delivery/value

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Level 2: Getting involved and buy-in

Leadership is committed to customer centricity, which is embodied in the organization's mission. There is general buy-in across the organization, but people do not know how to shift their product-focused strategy and operations to become more customer-centric. Staff has some awareness of customer pain points and when solicited are able to offer ideas for improving customer engagement, customer experience, or customer satisfaction. Some short-term projects have started, with demonstrated results, but have not yet led to structural changes in the company.

Recommendations and tools to help you get to the next level of customer centricity:
- Learn from your customers and build capabilities in your team to more systematically listen to customers
- Create a single customer view and strengthen data analytics functions
- Create a customer-centric culture and empower your employees and agents to deliver valuable customer experience
- Start a project to improve customer experience

Guide Process	Subprocesses	URL
WHY: Putting customers at the center produces loyal, active customers and moves your organization toward long-term competitive advantage.	Leaders – Advice from executives	http://customersguide.cgap.org/why-go-customer-centric/leaders
LEARN: Learn how to understand your customers better – their behaviors, needs, and wants – and generate the insights you need to start designing.	Collect – Learn what type of customer data to collect and how	http://customersguide.cgap.org/learn-from-customers/collect
	Analyze – Find patterns and insights in data	http://customersguide.cgap.org/learn-from-customers/analyze
	Generate – Produce insights and design principles	http://customersguide.cgap.org/learn-from-customers/generate
DESIGN: The customer-centric process is about building products and services with customers in mind. Once you've drawn insightful customer information, you can design for better adoption and use.	Start – The design process and where to start	http://customersguide.cgap.org/design-solutions/start
	Plan – Plan a project and customer research	http://customersguide.cgap.org/design-solutions/plan
	Act – Form a team, design and prototype	http://customersguide.cgap.org/design-solutions/act
	Measure – Access customer and business outcomes	http://customersguide.cgap.org/design-solutions/measure
ORGANIZE: You'll know your organization is entirely customer-centric when employees are empathetic, and insights drive strategy, products, and experiences. Learn to move in that direction.	Roadblocks – Challenges to change	http://customersguide.cgap.org/organize-for-delivery/roadblocks
	Value – Value for your organization and your customers	http://customersguide.cgap.org/organize-for-delivery/value

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Level 3: Formalized and dedicated

Leadership firmly believes and invests in customer centricity. The organization has a clear strategy which is implemented across all departments. Employees and agents have the necessary resources to deliver valuable customer experience. The organization has finished restructuring parts of its operations (e.g., IT, delivery model, HR, business intelligence) to more fully adopt the customer centricity business model. The organization is developing KPIs to measure progress on delivering value for the customer and the business, but these still need to be translated into metrics that can drive performance for employees, agents, and partners and reinforce the customer-centric culture throughout the value chain.

Recommendations and tools to help you get to the next level of customer centricity:
* Develop metrics to measure your progress toward customer centricity and embed them in your organization.
* Recruit, retain, and grow customer-centric employees and agents.
* Continue to empower your employees and agents.
* Strengthen your customer-centric architecture to make it more resilient.

Guide Process	Subprocesses	URL
LEARN: Learn how to understand your customers better – their behaviors, needs, and wants – and generate the insights you need to start designing.	Generate – Produce insights and design principles	http://customersguide.cgap.org/learn-from-customers/generate
DESIGN: The customer-centric process is about building products and services with customers in mind. Once you've drawn insightful customer information, you can design for better adoption and use.	Plan – Plan a project and customer research	http://customersguide.cgap.org/design-solutions/plan
	Act – Form a team, design and prototype	http://customersguide.cgap.org/design-solutions/act
ORGANIZE: You'll know your organization is entirely customer-centric when employees are empathetic, and insights drive strategy, products, and experiences. Learn to move in that direction.	Shift – Transition to customer-centricity	http://customersguide.cgap.org/organize-for-delivery/shift
	Change Management – Organize everything around customers	http://customersguide.cgap.org/organize-for-delivery/change-management
	Value – Value for your organization and your customers	http://customersguide.cgap.org/organize-for-delivery/value

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Level 4: Engaged and empowered

Your organization has achieved the highest level of customer centricity, which is fully embedded in its culture and strategy. Structures are in place to systematically analyze and improve customer experience with products, channels, and feedback, as applicable, and your people are able and engaged to deliver valuable customer experience. The organization has clear indicators that show the link between the customer-centric business model, firm performance, and value to the customer. Employees, agents, and partners have incentives and annual performance indicators that drive customer-centric behaviors.

Recommendations and tools to help you get to the next level of customer centricity:

- Continue to strengthen resources for your employees, agents, and partners.
- Find ways to demonstrate the value you are providing to all stakeholders.
- Be prepared to manage constant change and innovation.

Guide Process	Subprocesses	URL
DESIGN: The customer-centric process is about building products and services with customers in mind. Once you've drawn insightful customer information, you can design for better adoption and use.	Measure – Access customer and business outcomes	http://customersguide.cgap.org/design-solutions/measure
ORGANIZE: You'll know your organization is entirely customer-centric when employees are empathetic, and insights drive strategy, products, and experiences. Learn to move in that direction.	Change Management – Organize everything around customers	http://customersguide.cgap.org/organize-for-delivery/change-management
	Value – Value for your organization and your customers	http://customersguide.cgap.org/organize-for-delivery/value