Customer experience projects are often run in silos, and have disconnected objectives, which results in disjointed experiences for customers. To improve coordination, application leaders supporting customer experience should create a one-page customer experience strategic plan using this Tool.

When to Use

It is common for organizations to have an overall strategic plan, but they also need a separate, one-page customer experience (CX) strategic plan to bring greater focus, insight and management to CX. This tool for application leaders provides a template to address the three key questions of a CX strategy:

1. Where will we play?
2. How will we win?
3. What will we need to win?

It then invites the user to summarize these sections into an overall one-sentence aspiration, which highlights the objective of the CX strategic plan and the path to get there.

Directions for Use

- Download the one-page customer experience strategic plan template
- Once downloaded, complete the following two steps:
  1. Fill out the slides containing the individual components of the CX strategic plan by replacing the text in brackets [] with responses for your organization.
2. Copy-paste your answers into the one-page CX strategic plan on slide 3.

- Each component contains a blank template and a hypothetical example for “ABC Coffee Shop.”
- For audiences in need of a high-level overview utilize the 1-pager; for those in need of more detail show the individual component slides.
- Create your CX strategic plan by collaborating across departments like IT, CX, customer service, marketing, sales — and even customers themselves if permissible.
- Ensure your CX strategic plan aligns with your organization’s overall strategic plan.
- Develop additional materials in support of the CX strategic plan, and revisit it every six months (or sooner if faced with a significant change).

**Evidence**

A CX strategic plan can be an important asset by which to better coordinate CX activities, which is a high priority for organizations. The response, “Coordination and Leadership of CX Activities Across the Organization” was a top CX priority for 2020 (45%) just after the top response, Measuring CX (at 47%), according to 119 CX leaders that responded to a Gartner survey administered in May 2020 (n=119).

Gartner’s 2020 Customer Experience Innovation Survey was conducted online from 17 January through 24 February 2020 with 238 CX practitioners from seven countries in a wide range of industries and company sizes. After the start of the COVID-19 pandemic, we recontacted 119 of the original respondents to ask the same question again to determine how CX priorities had changed between January and May.

To qualify for the study, respondents had to be on a team setting strategic objectives and priorities for CX-related projects.

The results of this study represent the views of the respondents surveyed and not necessarily the market a whole.

**Recommended by the Authors**

*The Essence of a Customer Experience Strategy*

*Seven Types of Customer Experience Project*
Disclaimer: Unless otherwise marked for external use, the items in this Gartner Tool are for internal noncommercial use by the licensed Gartner client. The materials contained in this Tool may not be repackaged or resold. Gartner makes no representations or warranties as to the suitability of this Tool for any particular purpose, and disclaims all liabilities for any damages, whether direct, consequential, incidental or special, arising out of the use of or inability to use this material or the information provided herein.

© 2021 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark of Gartner, Inc. and its affiliates. This publication may not be reproduced or distributed in any form without Gartner’s prior written permission. It consists of the opinions of Gartner’s research organization, which should not be construed as statements of fact. While the information contained in this publication has been obtained from sources believed to be reliable, Gartner disclaims all warranties as to the accuracy, completeness or adequacy of such information. Although Gartner research may address legal and financial issues, Gartner does not provide legal or investment advice and its research should not be construed or used as such. Your access and use of this publication are governed by Gartner's Usage Policy. Gartner prides itself on its reputation for independence and objectivity. Its research is produced independently by its research organization without input or influence from any third party. For further information, see "Guiding Principles on Independence and Objectivity."