

Rapid Review for Chief Experience Officer

Introduction

There are a number of different titles of a CXO including: Chief Customer Officer, Chief Client Officer, Executive Vice Principle or Senior Vice Principle Customer Experience.

A Chief Experience Officer (CXO), as the customer-facing executive who is ultimately accountable for customers and who is driving customer strategy at the highest levels of the organisation. [1] A CXO leads the healthcare enterprise in designing and implementing its population health strategy and guides the clinical staff through the execution of the strategy. [2] This definition eliminates middle to senior-level executives who may truly be customer centric and even responsible for customer experience within their organisations, but who don't appear to possess sufficient authority to act across organisational boundaries and make an impact outside a limited sphere of influence. While the CEO's customer focus is laudable and the CEO could also technically be CXO, there is no practical way the customer can be properly understood, served, and engaged with such a dual role.

Objective

To provide insight into the role of the Chief Experience Officers in industry and healthcare in terms of:

1. Who in industry and healthcare uses a CXO
2. General functions and responsibilities of CXO (including position descriptions)
3. Experience and impact of the role

Findings

1. Who in industry and healthcare uses a CXO?

The following companies employ a CXO:

Industry	Allstate, Dunkin' Brands, USAA, Philips Electronics, FedEx, Oracle, Nationwide, Virgin Australia
Health	Cleveland Clinic, Washington Hospital Center, JPS Health Network, Aria Health

2. General functions and responsibilities of CXO (including position descriptions)

Summary of CXO Position Description Roles and Responsibilities

See Appendices for more detail.

Criteria	Summary
Education	A Master's degree in a health related field and/or business management
Experience Skills and Abilities	A minimum of 3-5 years' experience clinical and business or leadership
Roles and Responsibilities	<ol style="list-style-type: none"> 1. Provide leadership in enhancing patient and family experiences/satisfaction 2. Understand and analyse data to inform strategy and monitor standards 3. Identify and implement strategies for experience improvement 4. Provide education and training for staff to implement improvements in patient experience 5. Develop frameworks and protocols related to patient experience 6. Serves as the expert for service excellence, maintaining an active understanding of current thinking and innovative interventions / programs regarding the patient experience 7. Coach leaders and staff for improved results, execution of best practices and chosen strategies and develops methods for celebrating goal attainment

3. Experience and impact of the role

Industry –

Findings from the Chief Customer Officer Council Study [1] indicated the following about the position of CXO:

- The CXO is becoming a staple of modern business: 22% of Fortune 100 companies and 10% of Fortune 500 companies have adopted the role.
- There are 408 currently active chief customer officers worldwide. 343 active CXOs are US-based, with the European Union as a whole representing 13 CXOs, Australia 6, and the remaining 18 work in Asia-Pacific, the Middle East, and Africa.
- The overall rate of adoption of the CXO role has increased in recent years; from 8 in 2000 to 408 in 2013.
- Current industry representation indicates 72/408 roles are in software and hardware, and 29/408 in healthcare.
- The average tenure has lengthened from 23 months in 2009 to 34.5 months in 2013
- The role is most commonly found in technology sectors and is largely concentrated in the US; however, worldwide adoption has increased in recent years. But despite its gains in exposure and duration, the position is still volatile, stemming from challenges to proving definitive ROI.

Based on the findings of this study, there are a number of recommendations and strategies for business leaders to consider, ensuring greater customer centricity and long-term profits. These include:

- **Define the CXO Role:** Ensure the executive team understands and supports the role of the CXO, its mandate, reporting structure, and authority. Ensure the CXO has sufficient positional authority and executive support to adequately influence the organization. Create a CXO dashboard that clearly defines accountabilities and metrics. Be equally clear about what the CXO role is *not* accountable for.
- **Establish CXO strategy to extend tenure beyond 34 months:** Focus heavily on short-term wins and publicize them highly to peers, employees, and customers. While doing so, execute for the mid-term and strategize for the long-term. Build a foundation for growth in the first years that helps you continue to establish and prove value in later years.
- **Prove value at every step:** As the data show, business demands an ROI, especially during a revenue downturn. Prove ROI at every opportunity. Create metrics that accurately measure the customer-centricity and especially engagement.
- **Expand authority and influence:** It should be the personal strategy of every chief customer officer to expand his/her influence and increase his/her authority.³ Borrow authority from other executives, and demonstrate value to earn greater authority and influence.
- **Create a robust public persona:** Customer feedback is a gift and an opportunity for engagement that yields much higher loyalty. Give customers easier access to you and your office for important issues. A public persona indicates greater value and enables greater upward mobility. Speak at conferences, participate in customer communities, and communicate your company's successes to the press.
- Related analysis indicates: 67% of evaluated companies saw positive fiscal effects during the tenure of the CXO, with an average growth excess of industry of 5.98%.

Healthcare –

The following provides a summary of the Cleveland Clinic experience [3]:

The starting point for Cleveland Clinic indicated poor performance for patient satisfaction,

"It ranked in the bottom 4% for staff responsiveness and room cleanliness, 5% for whether the area near a patient's room was quiet at night, 14% for doctors' communication skills, and 16% for nurses' communication skills. "Patients were coming to us for the clinical excellence, but they did not like us very much,"

This led to the creation of a new position, the chief experience officer. An outsider held the role for only 24 months and was followed by the appointment of an internal candidate, a senior physician, "someone who would fully understand the challenges of delivering a great patient experience while also focusing on medical outcomes and who would have immediate credibility". The internal candidate had recently moved his practice from the MetroHealth Medical Centre, a large county hospital in Cleveland, to the Cleveland Clinic, where he'd held a fellowship earlier in his career. He was already working on making the digestive disease institute a "patient centered" organization. Before building his surgical practice, he had worked in government administration and in political public-opinion research and had served on a community hospital's board. The role now occupies 80% of the work load.

For this work a \$9.2 million annual budget has been allocated and 112 people to help carry out the mandate of improving the patient experience an enterprisewide priority. The portfolio of the this team whose responsibilities include conducting and analysing patient surveys, interpreting patients' complaints, administering "voice of the patient" advisory councils, training employees, and working with units to identify and fix problems.

Over 4 years, (2008 - 2012), the impact can be summarised in the patient survey results which indicated the aspects of care where the Cleveland Clinic's ranking among hospitals surveyed was the highest possible score. These aspects of care included:

- clinician communication
- communication about medication and pain management
- levels of noise ("quiet at night")
- staff responsiveness and
- discharge information

Conclusion

The role of a Chief Experience Officer (CXO) in both industry and healthcare is emerging as the nexus between patients, families and staff aiming to enhance satisfaction and ensure positive interactions. Currently, there are a number of companies employing such positions however, they are predominantly US based. In Australia, there is a paucity of evidence of such roles in industry and even more so in healthcare. CXOs have been identified as an emerging role in healthcare in the US and have shown to improve satisfaction levels in healthcare however, limited evidence exists evaluating their effectiveness.

References

1. The Bingham Advisory. (2014) The CCO Council 2014 Chief Customer Officer Study. <http://www.ccocouncil.org/site/cco-study.aspx>
2. AMN Healthcare. (2014) Emerging Roles in Healthcare 2014. http://www.amnhealthcare.com/uploadedFiles/MainSite/Content/Workforce_Solutions/Survey-Emerging-Roles-in-Healthcare-2014.pdf
3. Raman, A., & Tucker, A. (2011). The Cleveland Clinic: Improving the Patient Experience. *Harvard Business School Technology & Operations Mgt. Unit Case*, (612-031). http://registration.smu.edu.sg/OEE/SMU_TCS_Alchemy_2013/Pre_reading_Dr_Z/The%20Cleveland%20Clinic%20Improving%20the%20Patient%20Experience%20.pdf

Appendices

Table 1. CXO Position Description Education and Experience Examples

Criteria	Examples				
<u>Education</u>	Master's degree in Nursing, Health Administration, Public Health, Business Administration, Healthcare or related clinical discipline is required. Statistical analysis skills and experience is a plus. Training in quality improvement, and/or project management, and/or Lean Six Sigma Green/Black Belt is desirable.	Master's Degree in health related field, MBA or greater than 10 years leadership experience in comparable Director role.	Candidate must have Bachelor's degree or Master's degree in business administration or related advanced degree	Master's degree in Business, Healthcare or a related field from an accredited university.	
<u>Experience Skills and Abilities</u>	<ol style="list-style-type: none"> 1. A minimum of five year current, directly related experience, in a hospital environment 2. A minimum of five years of leadership/managerial experience in health care or equivalent and a proven ability in planning and development of services, project management and leadership. 3. Demonstrated strong 	<ol style="list-style-type: none"> 1. Minimum 3 Years 2. Experience leading improvements in Patient Experience, required. 3. In-depth knowledge of health care systems, analysis and evaluation techniques. 4. Minimum of 3 years clinical healthcare experience. 5. Project management and leadership experience. 6. Previous supervisory 	<ol style="list-style-type: none"> 1. 10+ years of operational experience gained in an organization renowned for customer service and effective and efficient operations 2. Track record of progressively responsible leadership and service 	Five (5) plus years' experience in progressively responsible management of...(insert your own requirements)	

	<p>communication skills and customer service orientation/role</p> <p>4. Computer skills including word processing, spreadsheet, databases and intranet software.</p>	<p>experience.</p> <p>7. Demonstrated skill in human relations, communication and change theory applications.</p> <p>8. Knowledgeable with regard to Joint Commission Standards and CMS Regulations.</p> <p>9. Knowledge of hospital operations, systems and standards to develop strategy and accomplish objective goals.</p> <p>10. Understanding of statistical analysis and computer literacy preferred.</p>	<p>excellence</p> <p>3. Success in branding the customer experience Understanding of patient/customer satisfaction surveys</p> <p>4. Enthusiastic and passionate about patient/customer –centered care and the ability to build that passion in others</p> <p>5. Demonstrated ability to determine key needs, diagnose and address problems, and monitor progress of important initiatives and activities.</p> <p>6. Demonstrated success in establishing, facilitating and realizing learning objectives for a large organization.</p> <p>7. Knowledge of client</p>		
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			<p>relationship management systems and how they support branding strategies</p> <p>8. Ability to quickly respond to organizational constraints and industry pressures which occur in an environment of intense change</p> <p>9. Proven ability to conceptualize issues and develop pragmatic solutions</p> <p>10. High energy, drive for results and focus on creating value on a sustained basis</p> <p>11. Pursues innovation; drives the organization to advance the mission via breakthrough thinking</p> <p>Inspires excellence among staff and sets the tone for the</p>		
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			organization's further growth and success.		
<u>Sources</u>	https://www.healthcaresource.com/mswashington/index.cfm?fuseaction=search.jobDetails&template=dsp_job_details.cfm&cJobId=101505&source=Indeed.com	https://www.smarthires.com/showempjob.htm	https://www.healthcaresource.com/frankford/index.cfm?fuseaction=search.jobDetails&template=dsp_job_details.cfm&cJobId=101271&source=Indeed.com	https://www.healthcaresource.com/jps/index.cfm?fuseaction=search.jobDetails&template=dsp_job_details.cfm&cJobId=100992&source=Indeed.com	http://careers.primehealthcare.com/job/CA-Ontario/Chief-Experience-Officer/J3G6Y264YB1GGT3BC04

Table 2. CXO Position Description Roles and Responsibilities Examples

Roles and Responsibilities Examples					
<ol style="list-style-type: none"> 1. This role will drive and foster a culture of patient and family centered care and service excellence, while improving patient & family experience and patient relations across the network. 2. The Chief Patient Experience Officer will work directly with the leadership team to assess and communicate performance and to create change at all levels of the organization. 3. This position will also be accountable to supporting and managing the organizational needs, as well as the design, implementation and evaluation of service excellence programs that facilitate the professional development and continuous learning of all team members. 4. Tasked with translating the concepts of service 	<ol style="list-style-type: none"> 1. The Chief Patient Experience Officer will drive and foster a culture of patient and family centered care and service excellence, while improving patient & family experience and patient relations across MedStar Washington Hospital Center (MWHC). 2. Provides strategic direction and leadership and works in partnership with all departments across the organization to assess and communicate performance expectations about the patient experience. 3. Accountable to support and manage the organizational needs, as well as the design, implementation and evaluation of patient experience programs that facilitate the 	<ol style="list-style-type: none"> 1. The Chief Experience Officer provides strategic direction and leadership to identify, plan, design and implement strategies to achieve excellence in patient experience and satisfaction while also promoting a culture of patient-centered care across the entire organization. 2. This position works in close partnership with senior leadership and is responsible for the development and execution of corporate wide strategies to achieve or exceed service excellence goals. 3. The Chief Experience Officer reviews, understands and analyzes the organizations patient experience data and uses this 	<ol style="list-style-type: none"> 1. Directs and coordinates efforts that result in a uniform, ideal patient experience within Aria Health 2. Directs efforts to assure a consistent approach to patient communication and treatment at every touch point within the continuum of care 3. Works with a team to assure standardization of processes, collection of information, and overall metrics that reflect the level of patient engagement and satisfaction. Also will have responsibility on an ongoing basis to be creative and innovate with technology and our care delivery system. 	<ol style="list-style-type: none"> 1. Provides oversight and responsibility for enhancing and continually improving the overall patient and family experiences throughout the JPS Health Network. 2. Develops and implements a network-wide patient experience strategy. 3. Clearly defines the optimal patient experience, including the behavioral changes necessary to achieve cultural transformation throughout the entire organization. 4. Instills a culture of service excellence, hospitality, ownership and results across the network. Assists the organization in understanding the relationship between employee, patient and physician satisfaction. 5. Partners with Human Resources to identify and 	<ol style="list-style-type: none"> 1. The Chief Experience Officer provides strategic direction and leadership to identify, plan, design and implement strategies to achieve excellence in patient experience and satisfaction while also promoting a culture of patient-centered care across the entire organization. This position works in close partnership with senior leadership and is responsible for the development and execution of corporate wide strategies to achieve or exceed service excellence goals. 2. The Chief Experience Officer reviews, understands and analyzes the organizations patient experience data and uses this data to develop an

<p>excellence, patient experience and patient relations into actionable behaviors, this individual will take a culture steeped in clinical excellence into the ever-changing environment of patient and family centered care.</p>	<p>professional development and continuous learning of all associates and providers.</p> <p>4. Translates the concepts of service excellence, patient experience and patient relations into actionable behaviors.</p>	<p>data to develop an in-depth strategy for each facility to achieve goals through consultation, coaching and direction of directors, managers, physicians and staff in service improvement methods.</p> <p>4. The Chief Experience Officer will understand and analyze current strategy effectiveness and tailor a plan for each facility to reach organizational goals.</p> <p>5. To that end, the Director will observe workflow, communications and interactions to develop recommendations and training. Patient experience surveys and results will be closely followed and presented to senior leadership with ongoing strategies to reach targets.</p>		<p>implement strategies that are aimed at creating an organizational culture that supports an improved patient experience.</p> <p>6. Develops the framework & protocols in which all patient experience initiatives will be deployed across JPS Health Network.</p> <p>7. Develops service, educational, and training programs throughout JPS relating to the patient experience Documents and communicates throughout the organization the shared vision for experience improvements.</p> <p>8. Strategically develops, refines and improves performance metrics and measurement methods using standardized and customized tools. Consistently measures results.</p> <p>9. Provides consultation,</p>	<p>in-depth strategy for each facility to achieve goals through consultation, coaching and direction of directors, managers, physicians and staff in service improvement methods.</p> <p>3. The Chief Experience Officer will understand and analyze current strategy effectiveness and tailor a plan for each facility to reach organizational goals. To that end, the Director will observe workflow, communications and interactions to develop recommendations and training. Patient experience surveys and results will be closely followed and presented to senior leadership with ongoing strategies to reach targets. Action plans to improve performance will be regularly</p>
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