

## Case Study

# Establishing a CX Center of Excellence

### Industry:

Credit Bureaus  
Financial Services  
Consumer Services

### Projects:

Journey Management  
CX Strategy & Roadmap  
Portfolio & Innovation Strategy  
Digital Product Design  
Executive Alignment & Buy-In  
Website & Portal Design  
Process Mapping & Governance  
Marketing Content Strategy

## The Challenge

During 2017 and 2018 Equifax, one of the major three credit reporting agencies, experienced a 30% customer retention loss (representing roughly \$34 million annually). They needed a partner who could completely refresh how products were developed and customers were engaged to ensure they delivered on expectations and provided value.



## Deliverables

- ✓ Stakeholder Discovery
- ✓ CX Center of Excellence Playbook
- ✓ Journey Management Handbook
- ✓ Design Standards
- ✓ Education & Training Curriculum
- ✓ Consumer Research
- ✓ Concept Development
- ✓ Workshop Facilitation
- ✓ Responsive Design
- ✓ Usability Testing

## The Solution

Based on insights from our Strategic Needs Discovery process, three distinct program paths were identified:

1. **Infusion of CX/UX best practices** into tactical projects currently in the development process. Working with Product Management, IT/Development, Marketing and CX/UX teams to enhance capabilities and ensure high-quality, consistent standards.
2. **Creation of CX, UX best practices**, including CX implementation strategy, content & portfolio strategies, executive alignment, CX frameworks, design standards, governance processes and training curriculum for current/future employees.
3. **Establish an Experience Management Center of Excellence team and playbook** that can be used as an ongoing reference guide for how to evolve to their next level of maturity (both CX and Digital Transformation).

### The Experience Management Center of Excellence XM CoE Playbook

A living-and-breathing reference to guide the Equifax Global Consumer Services brand from being product-centric to becoming an experience-led growth company. The document is intended as a companion to support their brand strategy as a way to continue to define, structure, and evolve customer experience as a discipline across the enterprise.

## Highlights



### DISCOVERY

2-3 Months

Alignment of customer insights with business goals to create CX roadmap.



### FOUNDATION

6-9 Months

Defining design and process standards, team structure, and mapping workshops.



### MOMENTUM

6-9 Months

Future-state journey design and prioritized action planning with clear KPIs.



### CONTINUOUS IMPROVEMENTS

Ongoing

Organizational readiness for faster market launches & tracking of successes.



Working with the CX team taught me how to set up, train, and run an efficient and effective CX Center of Excellence. They are experts in their field with extensive experience actually doing the work!

- CX Director, Equifax