

This comprehensive structure for a **Customer Experience (CX) and Salesforce Transformation** is perfectly aligned with a Big Four implementation mandate, emphasizing the measurable link between platform investment and customer loyalty/revenue growth.

Here is the detailed action plan.

Comprehensive Action Plan: Customer Experience and Salesforce Transformation

Section	Content
Preamble/Role	Senior Partner, Big Four Consulting Firm. The company is a global B2C subscription service provider with fragmented customer data and siloed channels (Sales, Marketing, Service), resulting in high customer churn and poor cross-selling performance.
Core Mandate	Design a comprehensive action plan for a Customer Experience (CX) and Salesforce Transformation. The plan must integrate all channels onto a single Salesforce platform (Sales, Service, Marketing Clouds), optimize the end-to-end customer journey, and measure the ROI through customer loyalty metrics.
Objective	Increase Net Promoter Score (NPS) by 20 points (from +15 to +35) and achieve 100% platform adoption across Sales and Service teams by Month 18.
Compelling Why	The strategic imperative is Revenue Growth and Churn Reduction. The integrated platform will enable personalized cross-selling, projected to generate a \$150 million revenue uplift over three years, and reduce customer churn by 15% through faster, more consistent service. By streamlining agent processes, the project also reduces the Cost-to-Serve by 10%, making the entire service operation more efficient and profitable.
Approach	Phase 1: Customer Journey Mapping & Vision (Months 1-3): Map the current state and ideal (To-Be) customer journeys (Acquisition, Onboarding, Retention). Define key pain points, prioritized use cases, and the unified CX vision. Phase 2: Platform Design & Configuration (Months 4-9): Design the Salesforce Technical Blueprint (data model, integrations), configure the three Clouds (Sales, Service, Marketing), and prioritize MVP (Minimum Viable Product) features. Phase 3: Deployment & Enablement (Months 10-15): Execute phased deployment (Pilot, Wave 1 rollout), finalize data migration, conduct UAT (User Acceptance Testing), and launch extensive training for all end-users. Phase 4: Value Realization & Optimization (Months 16-24): Operationalize the CX metrics dashboards, establish a Continuous Improvement Cadence, and launch optimization sprints based on user feedback and NPS scores.

Section	Content
Organization	CX Steering Committee: Chaired by the Chief Commercial Officer (CCO), with the CIO, CMO, and VP of Service. Meets monthly to align priorities and ROI tracking. Product Owners: Dedicated Product Owner for each Salesforce Cloud (e.g., Sales Cloud PO) responsible for feature prioritization and backlog management. Sales/Service Enablement Teams: Dedicated functions within HR and Sales to lead training, playbook development, and user adoption measurement.
Processes & Governance	Unified Lead-to-Cash (L2C) Process: Redesign and govern a single, unified L2C process that ensures seamless handover of a customer record from Marketing Lead → Sales Opportunity → Service Case, eliminating data reentry and visibility gaps. System Prioritization Cadence: Implement an Agile/Scrum Cadence where feature requests are logged, scored by the Product Owners, and prioritized based on potential CX impact and ROI. Customer Feedback Loop: Integrate NPS and CSAT survey results directly back into the Service Cloud (to fuel agent coaching) and the Product Backlog (to fuel system development).
Key Deliverables	Phase 1: To-Be Customer Journey Map, three prioritized CX Use Cases, and CX Vision Document. Phase 2: Final Salesforce Technical Blueprint (including security model), Data Migration Strategy Document, and UAT Scripts. Phase 3: Completed Sales/Service Playbooks (detailing new ways of working), End-User Training Modules (role-specific), Successful Wave 1 Deployment Report. Phase 4: CX Value Realization Dashboard, New Agent Coaching Framework.
Critical Risks & Mitigation	1. Underestimating Data Migration Complexity Risk: Failure to cleanse and transform legacy customer data before loading into Salesforce. Mitigation: Dedicate a 5-person Data Quality Task Force to achieve 98% cleanliness on the Top 10 master data fields before UAT. Use a phased data migration strategy (migrate only required data first). 2. Sales Team Resistance to Change Risk: Sales reps resist new workflows or mandatory data entry, leading to low platform adoption. Mitigation: Ensure the new platform is 100% Mobile-Enabled and demonstrate how it reduces administrative burden and increases commission potential through better lead scoring. 3. Integration Failure with Back-Office ERP Risk: ERP (e.g., billing, fulfillment) systems cannot correctly sync with the new platform. Mitigation: Allocate 20% of the overall budget to Integration Testing and mandate a Joint ERP/Salesforce Cutover Plan signed off by the CIO and CFO before go-live.
Change Management Plan	Strategy: Emphasize the improved Employee Experience (EX)—the platform makes their jobs easier. Role-Specific Training: Implement 100% Mandatory Training based on the user's role (Sales vs. Service vs. Marketing), focusing on the To-Be Journey Flow. Leadership Sponsorship: CCO must host monthly "CX Wins" sessions, publicly rewarding teams that achieve high platform adoption and high NPS scores.

Section	Content
Crucial Additional Element	Key Customer Loyalty Metrics Post-Go-Live: 1. Customer Satisfaction (CSAT): Measured immediately after service interactions. 2. First Contact Resolution (FCR): % of issues resolved on the first contact. 3. Customer Churn Rate: Overall rate, and specifically for customers interacting with the new digital channels. 4. Service Cost-to-Serve: Cost per interaction for service teams.