

# CASE STUDY

**CUSTOMER EXPERIENCE  
DESIGN & OPTIMISATION LEAD**



# CUSTOMER EXPERIENCE DESIGN & OPTIMISATION LEAD

## Search Details:

We were approached by this agile fast paced growing insurtech who had recently undergone a new corporate structure and had some subject matter expert skill gaps in their senior leadership team, one of which was a Customer Experience Design and Optimisation Lead role.

This would be a strategic, matrix role who would need to manage the expectation of the business, client partners and deliver the desire and ambitions of the internal stakeholders and board.

They needed a technically competent Customer Experience Designer who could optimise their existing customer journeys, build their new product journeys, build the service content and lead technological and business change to achieve a better customer experience and service delivery.

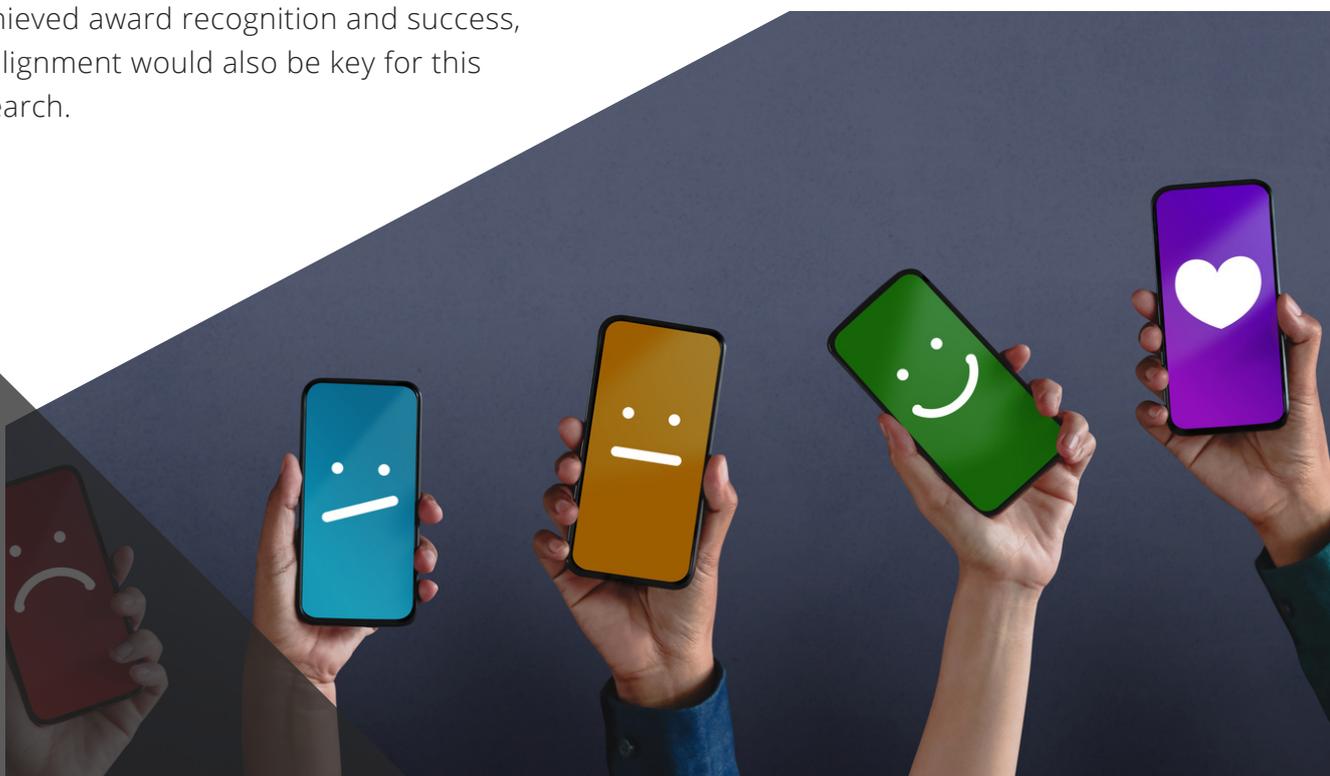
As they are a rapidly scaling business who have already achieved award recognition and success, a cultural alignment would also be key for this role and search.

**Client: Fast Growth Insurtech**

**Role: Customer Experience Design,  
Insight Analytics and Optimisation Lead  
Reporting to the Director - Customer  
Experience & Service**

## Requirements:

- Bring together service and journey design, customer experience optimisation, and the voice of customer
- The role will need a laser focus to look at new customer journeys and to optimise those existing journeys
- Excellent stakeholder engagement and influence to deal with projects stakeholders and partners.
- The ability to face off with senior stakeholders, internally and externally.
- Be good with partners, to temper their requirements, analyse and design a great customer journey and experience.



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## Search Details continued...

We met with the Director of Customer Experience to agree the search strategy and get a really good understanding of both the business and the role.

We laid out and mapped the entire process and agreed regular check ins to run through progress and to highlight any gaps, challenges or opportunities that might have been identified to ensure that the assignment was delivered on time and there were no surprises.

Working in close collaboration and in partnership with a fully transparent search process was important given that this was the first time we were working with this client and we built a great level of trust and really strong relationship due to this. We were on hand to give advice and consult throughout the process.

We carried out a national search identifying those individuals who were technically competent as journey designers and CX optimisation leads, who could also break down the data and customer insight to deliver a compelling narrative around the voice of the customer.

We delivered a shortlist of four individuals initially but as the process was progressing we received a late response to our outreach who we felt was a strong addition to the process and that the client should also consider. This individual and one other were selected to final stage and an offer was made to the chosen individual who duly accepted and has been doing a great job.

## Result:

"The adaptability was just great, the responsiveness, I felt supported throughout, you were on time and the quality was great, it was an easy relationship where I was excited to talk with you. Exceeded expectations." **Luke Kershaw, Director of Customer Experience and Service - Squaretrade**

See the [full testimonial video here](#)

