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COURSE BROCHURE

Advanced CX Strategy and Experience Investment Roadmap Course

11 – 22 January 2027
New York

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Registered in the United Kingdom and Saudi Arabia

Advanced CX Strategy and Experience Investment Roadmap Course

Ref: 618_22872 **Date:** 11 – 22 January 2027 **Location:** New York **Fees:** 14000 GBP

CX Strategy and Experience Investment Roadmap is a 2-week training course for CX strategy heads, customer experience managers and transformation leads, who leave with a Funded CX Strategy Roadmap for their organisation. Boards now ask experience leaders to show which initiatives earn their budget, not only which scores improved. Jupiter Prime Training provides this course on CX Strategy and Experience Investment Roadmap for senior experience owners.

Why CX Strategy and Experience Investment Roadmap Matters Now

Three forces shape this agenda today: finance committees that compare experience spending with every other capital request, transformation offices that bundle digital, process and people change into one portfolio, and customers whose expectations rise faster than budgets. Organisations that frame experience as an investment portfolio fund the few initiatives that move retention and cost; those that fund isolated projects end up with scattered pilots and fatigue. The course draws on the Net Promoter Score NPS and Customer Effort Score CES as outcome measures, net present value NPV appraisal, the balanced scorecard and ISO 10002 complaint evidence as an input to the business case.

Who Gains Most from CX Strategy and Experience Investment Roadmap

- Strategy owners who set experience ambition and link it to corporate objectives
- Experience managers who translate ambition into initiatives with owners and milestones
- Transformation leads who sequence experience work alongside digital and process change
- Finance partners who test benefit assumptions and approve experience budgets
- Executive sponsors who chair experience councils and resolve cross-functional conflicts

Executive groups that send a CX strategy head with a finance partner gain most, because ambition and funding logic are then argued in one language.

CX Strategy and Experience Investment Roadmap Capabilities

Participants practise turning experience ambition into a costed, sequenced portfolio that a finance committee can approve and a council can steer.

- Assess CX maturity across strategy, insight, design, measurement and culture dimensions — executive sponsors
- Build a CX business case with cost, benefit and risk assumptions made explicit — finance committees
- Calculate NPV and payback for experience initiatives under several scenarios — investment boards
- Weigh initiatives in a portfolio matrix of value, effort and dependency — transformation offices
- Design a CX operating model with roles, decision rights and funding routes — experience councils
- Specify roadmap milestones and leading indicators for quarterly steering — transformation sponsors

Key CX Strategy and Experience Investment Roadmap Terms

- CX strategy — a statement of the experience an organisation intends to deliver, for which customers, and how it supports business goals.
- CX maturity model — a staged scale that rates an organisation's experience capabilities, from ad hoc efforts to embedded practice.
- Experience business case — a document that sets costs, expected benefits, risks and assumptions for an experience initiative.
- Net present value NPV — the value today of future cash flows from an initiative, after discounting and subtracting its investment.
- Initiative portfolio — the set of experience projects managed together so funding follows value, capacity and dependencies.
- CX operating model — the structure, roles, rituals and decision rights through which experience work is run across functions.

CX Strategy and Experience Investment Roadmap Day by Day

Day 1: Setting Experience Ambition

- Corporate Strategy Linkage — Growth, Retention and Cost Objectives
- Experience Ambition Statements — Target Customers and Promised Outcomes
- Competitive Experience Positioning — Parity, Differentiation and Leadership Choices
- Stakeholder Expectations — Board, Finance and Frontline Perspectives
- Strategy Risks — Overreach, Fragmentation and Initiative Fatigue

Day 2: CX Maturity Assessment

- Maturity Dimensions — Strategy, Insight, Design, Measurement and Culture
- Self-Assessment Interviews — Evidence Behind Each Maturity Rating
- Capability Gap Profiles — Current Versus Target Levels
- Maturity Heat Maps — Communicating Gaps to Executives
- Quick Fixes Versus Foundations — Sequencing Capability Building

Day 3: Outcome Measures and Targets

- NPS and CES as Outcome Measures — Strengths and Limits
- Operational Lead Indicators — Repeat Contacts and Resolution Rates
- Balanced Scorecard Mapping — Customer, Financial, Process and People
- Target Setting Logic — Baselines, Ambition and Credibility
- Measurement Ownership — Who Reports, Who Acts

Day 4: Building the Experience Business Case

- Benefit Logic Chains — From Experience Change to Financial Result
- Cost Categories — Technology, People, Process and Change Effort
- Retention and Cost-to-Serve Benefits — Evidence and Assumptions
- Complaint Evidence Under ISO 10002 — Quantifying Failure Costs
- Risk and Sensitivity Notes — What Could Weaken the Case

Day 5: Investment Appraisal for CX

- NPV and Payback Calculations — Comparing Initiatives Fairly
- Scenario Modelling — Conservative, Expected and Stretch Cases
- Benefit Realisation Plans — Owners, Timing and Tracking
- Funding Models — Central Budgets, Business Unit Charges and Stage Gates
- Appraisal Pitfalls — Double Counting and Optimism Bias

Day 6: Portfolio Prioritisation

- Initiative Inventory — Collecting Ideas Across Functions
- Value-Effort-Dependency Matrix — Ranking Candidate Initiatives
- Capacity Constraints — Change Load on Frontline and IT
- Portfolio Balancing — Quick Wins, Enablers and Big Bets
- Kill and Pause Criteria — Freeing Funds From Weak Initiatives

Day 7: Designing the CX Operating Model

- Central, Federated and Embedded Models — Choosing a Structure
- Roles and Decision Rights — RACI for Experience Decisions
- Experience Council Charter — Membership, Cadence and Escalation
- Funding Routes — Linking Budgets to Portfolio Decisions
- Capability Building — Skills Academies and Communities of Practice

Day 8: Culture and Change for CX Strategy

- Leadership Behaviours — Signals That Make Experience a Priority
- Employee Engagement Links — Frontline Ownership of Outcomes
- Change Story Development — Explaining Why, What and How
- Resistance Patterns — Silos, Metric Conflicts and Legacy Incentives
- Incentive Alignment — Rewarding Shared Experience Outcomes

Day 9: Steering and Sector Lessons

- Quarterly Portfolio Reviews — Rebalancing Based on Evidence
- Roadmap Visualisation — Waves, Milestones and Dependencies
- Executive Reporting Packs — One Page Strategy Health Views
- Sector Cases — Telecom Operators and General Insurers
- Strategy Refresh Triggers — Market Shifts and Missed Milestones

Day 10: Practising the Funded CX Strategy Roadmap

- Maturity Gap Summary — Applying Day 2 Assessment
- Business Case Draft — Day 4 Logic Chain for One Initiative
- Prioritised Portfolio — Day 6 Matrix Applied to Candidates
- Operating Model Sketch — Day 7 Roles and Decision Rights
- Funded CX Strategy Roadmap — Ambition, Portfolio, Funding and Milestones

Applying CX Strategy and Experience Investment Roadmap After the Course

- Run a CX maturity self-assessment with the leadership group and present a heat map with the three capability gaps to close first.
- Prepare a business case for one experience initiative with NPV, payback and sensitivity notes and submit it to the next investment committee.

CX Strategy and Experience Investment Roadmap Questions FAQ

What is CX strategy and experience investment roadmap work, and why does it matter now?

It is the practice of setting experience ambition and funding the initiatives that deliver it through a sequenced roadmap. It matters now because boards weigh experience spending against every other investment and expect evidence of return.

Which roles gain most from CX strategy and experience investment roadmap training?

CX strategy heads, customer experience managers and transformation leads gain most. Finance partners and executive sponsors also benefit, because business cases and portfolio decisions need their scrutiny before initiatives receive funds.

How does CX strategy and experience investment roadmap training differ from a journey analytics course?

It works at portfolio and funding level rather than inside individual journeys. You assess maturity, build business cases, appraise investments and design operating models, instead of mapping touchpoints and analysing journey data.

What do you bring back from CX strategy and experience investment roadmap training?

You bring back a funded roadmap. It holds a maturity gap summary, a draft business case for one initiative, a prioritised portfolio, an operating model sketch and milestones for quarterly steering.

CX Strategy and Experience Investment Roadmap: The Way Forward

The Funded CX Strategy Roadmap first informs which initiatives enter the next budget round and which wait. Strategy heads, finance partners and experience councils use it to steer quarterly reviews and release funds in stages. After the first review, revisit the benefit assumptions, because early results usually show which value chains were optimistic and which deserve more investment.