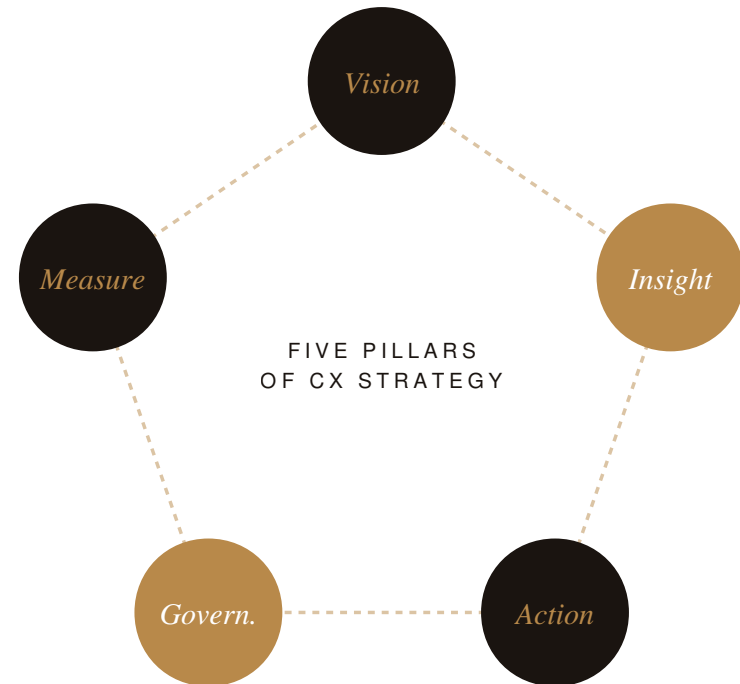


CX Strategy. A framework.

*For mid-sized companies —
200 to 2,000 people.*

Mid-sized companies are caught between two playbooks that don't fit. The founder-led, gut-feel approach that worked at 50 employees no longer scales. The enterprise CX machinery built for 10,000-person organisations is too heavy. This paper is the practical framework we use with our mid-sized clients — five pillars, a maturity ladder, and a 90-day plan to get from "we should do CX" to "we have a working strategy."



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The mid-sized paradox.

A company of 50 people does customer experience by instinct. The CEO knows the top ten customers personally. Bad service in the morning gets fixed by the afternoon. There is no strategy because no strategy is needed.

A company of 10,000 people has CX directors, voice-of-customer programmes, operating cadences, and a whole subdiscipline of consultants serving them. The strategy is heavy, expensive, and tuned to the scale.

Between those two worlds is the mid-sized company — roughly 200 to 2,000 people. CEOs no longer know every customer. The team is too big for ad-hoc service recovery to work, but too small to support an enterprise-grade CX machinery. The patterns that worked at fifty break. The playbook written for ten thousand is overkill.

This is the moment when CX stops being "everyone's job" (which means no one's job) and becomes a strategic capability that has to be designed. This paper is the framework we use with clients in exactly that position — mid-sized, growing, and ready to stop running CX on goodwill alone.

WHAT YOU'LL GET

- A five-pillar framework specific to mid-sized companies.
- Deep dives on each pillar, with what good looks like in practice.
- A maturity ladder to honestly assess where you are today.
- A 90-day starter plan from kickoff to first quarterly review.
- Six pitfalls that wreck mid-sized CX programmes specifically.
- A self-assessment scorecard you can run with your team this week.

WHO THIS IS FOR

- CEOs and COOs of mid-sized companies considering a CX investment.
- Newly appointed CX directors or managers in their first 100 days.
- Marketing, ops or product leads asked to "own" CX without a roadmap.
- Boards and advisors evaluating CX as a strategic priority.

WHAT'S NOT HERE

- Vendor selection, software comparisons, or organisation-chart templates.
- The aim is to clarify the strategy — the structural and operational decisions follow naturally from it.

CHAPTER 1

The mid-sized company is different.



Why neither the start-up nor the enterprise playbook fits.

Five structural realities that change the rules.

Mid-sized companies are not "small enterprises" or "big start-ups." They have a distinct set of structural realities that determine which CX approaches work and which collapse on contact with operations. Designing a strategy without naming these realities is the most common reason mid-sized CX programmes fail in their first year.

01 The CEO no longer scales.
At fifty employees, the CEO is the de-facto CX function. At five hundred, they cannot. By two thousand, they cannot even keep up with the major incidents. CX has to be owned by someone — but not by everyone.

02 Cross-functional, not multi-functional.
Mid-sized companies have functions (sales, ops, product, support) but no formal cross-functional governance. CX lives in the cracks between them. The framework has to make those cracks visible.

03 Limited budget, finite attention.
Enterprise budgets allow you to throw bodies at the problem. Mid-sized programmes have one or two CX people and a partial budget. The framework has to be ruthless about what matters most.

04 Real data, no central system.
Mid-sized companies have customer data — in CRM, support, marketing, billing. Almost never in one place. The CX strategy has to assume disconnected systems and design around them.

05 Growth-stage politics.
Heads of functions are protecting their patch. Putting CX above (or across) them creates immediate territory issues. The framework has to acknowledge politics — not pretend they don't exist.

THE SINGLE BIGGEST MISTAKE

Mid-sized companies that copy enterprise CX playbooks usually have a strategy document by month three and zero adoption by month nine. The playbook fits the structure of a company they aren't. Build for what you actually have.

CHAPTER 2

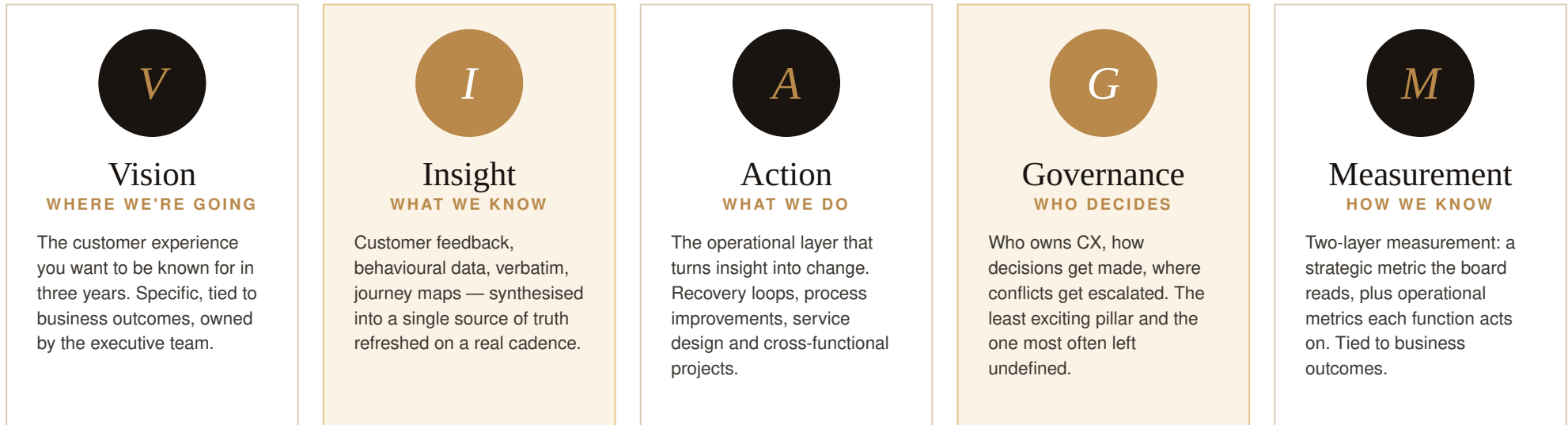
The five pillars.

Vision, Insight, Action, Governance, Measurement.

2

Five pillars. Skip any one and the strategy collapses.

A working CX strategy stands on five pillars. The first two (Vision, Insight) are about **understanding**: where you want to go and what you actually know. The middle one (Action) is about **doing**. The last two (Governance, Measurement) are about **sustaining**: who decides, and how you know it's working. Skip a pillar and the strategy becomes either a slogan, a dashboard, or a project list.



A SIMPLE DIAGNOSTIC

For each of the five pillars, ask: "Could a new hire on Monday read one page and understand it?" If three or more are "no," you do not have a CX strategy yet — you have CX activity. The next six pages explain what good looks like for each pillar.

CHAPTER 3

Pillar deep dives.

What "good" looks like for Vision, Insight, Action, Governance and Measurement.





PILLAR 1

Vision — where the experience is going.

A CX vision is one or two sentences that describe the experience your company wants to be known for — specific enough to make trade-offs, ambitious enough to actually change behaviour. It is the answer to "what kind of CX company are we trying to be?"

A GOOD CX VISION IS...

Specific to your business. A telco vision is not a luxury hotel vision. "World-class CX" is not a vision — it is a marketing slogan.

Anchored in business outcome. Linked explicitly to retention, growth, advocacy or premium pricing — not floating as a values statement.

Owned by the executive team. Written by the CEO and direct reports, not delegated to marketing or the CX team alone.

Operational, not aspirational. Three-year horizon, not five. Tested against the question: "could we actually move toward this next quarter?"

Two examples (paraphrased from client work):

"Be the financial services provider customers recommend to family — measured by referral-driven new business contributing 25 % of new revenue within three years."

"Make every customer interaction feel effortless — reduce average customer effort score to 5.5/7 across all major touchpoints by end of year three."

COMMON FAILURE MODES

The poster vision. "We deliver exceptional customer experiences." Sounds plausible. Means nothing. Cannot be acted on or measured.

The values-disguised-as-vision. "We treat every customer with respect." That is a value. A vision describes the outcome, not the behaviour.

The 5-year fantasy. A vision so distant that no quarter's work moves it. By the time it becomes near-term, the world has changed.

The marketing-only vision. Written by the CMO, read by no one else. Operations, product and support do not feel ownership and act accordingly.

THE TWO-QUESTION TEST

1. Can you state your CX vision in one breath, without reading it? · 2. Does it tell you anything about a real trade-off this quarter? If either answer is "no," rewrite it before you build anything else.



PILLAR 2

Insight — what you actually know about customers.

Insight is the most over-resourced and under-synthesised pillar in mid-sized companies. Most have plenty of data scattered across systems — surveys, support tickets, CRM notes, analytics. Very few have synthesised it into something a decision-maker can use on a Tuesday morning.

Four data sources every mid-sized CX programme needs

- 01 Direct feedback.**
 NPS, CSAT, CES and verbatim from defined touchpoints. The most reliable source of customer truth — if you sample properly.
- 02 Operational signal.**
 Support tickets, complaint logs, churn reasons, returned products. Behavioural evidence of where the experience is actually breaking.
- 03 Customer interviews.**
 8–12 deep conversations per quarter. The most informative single source, and the one most companies skip because it's slow.
- 04 Behavioural data.**
 Product analytics, website behaviour, conversion paths. Tells you what people do; pair with feedback to learn why.

THE SYNTHESIS LAYER

Data alone is not insight. Insight is what happens when verbatim, surveys, tickets and interviews are reconciled into one story.

For mid-sized companies, the synthesis layer is the highest-leverage CX investment — it turns four disconnected streams into one decision-grade artefact.

Practically, this means: one dashboard, one journey map, one quarterly insight document, one named owner of "what we know about customers right now."

A WORKING CADENCE

alerts on individual detractors and serious complaints.

trend review across feedback, support and analytics.

synthesis document for the executive team.

refresh of customer journey maps and personas.



PILLAR 3

Action — turning insight into change.

Action is the pillar that distinguishes a CX programme from a CX dashboard. Insight without action is reporting. Action without insight is firefighting. The pillar lives in three layers, each with a different cadence and owner.

LAYER 1 · IMMEDIATE RECOVERY

The closed loop. When a detractor responds, someone reaches out within 24 hours. A real conversation, not a generic "we value your feedback" email.

Owner: the function closest to the customer (often support or account management).

Cadence: daily, automated triggers.

Why it matters: a recovered detractor often becomes more loyal than they were before the incident. The literature is consistent on this.

LAYER 2 · PROCESS IMPROVEMENT

The patterns from feedback. When ten customers complain about the same thing, fix the process. Not the individual responses — the underlying cause.

Owner: the function that owns the process (ops, product, billing, etc.).

Cadence: monthly to quarterly.

Why it matters: recovery without process change means you fix the same thing every week. Forever.

LAYER 3 · EXPERIENCE REDESIGN

The structural changes. Sometimes the process is not what's broken — the whole experience is wrong. New onboarding flow, new pricing model, new service tier.

Owner: cross-functional, sponsored by an executive.

Cadence: once or twice a year.

Why it matters: this is where CX shifts from incremental to step-change. Without it, mid-sized companies plateau at "fine."

The most common failure: action without ownership

"Cross-functional" too often means "no one's job." The action pillar requires that **every** identified opportunity has a named owner (a person, not a team), a deadline, and a metric to verify the change worked. Without those three, the opportunity will drift quietly into the next quarter, then the one after that, until everyone forgets it existed.

THE HONEST TEST OF THE ACTION PILLAR

Pick the top three customer pain points your team identified last quarter. For each, ask: who owned it, what did they do, did the metric move? If you cannot answer for any of them, the action pillar is decorative.



PILLAR 4

Governance — who decides what.

Governance is the pillar most mid-sized companies underbuild — partly because it sounds bureaucratic and partly because it is the most political. But without explicit governance, CX decisions get made by whoever shouts loudest, and that is rarely the customer's voice.

Three decisions that have to be answered

- 01 Who is the named CX owner?**
 One person, one job. Not "everyone." At mid-sized scale this is usually a CX director, head of operations or VP marketing — depending on industry. The role title matters less than the explicit accountability.
- 02 What is the operating forum?**
 The recurring cross-functional meeting where CX is discussed and decisions are made. Usually monthly. Same attendees, same agenda structure, dedicated decision authority.
- 03 Where do disputes escalate?**
 When marketing and ops disagree about a customer-affecting decision, who decides? Almost always the CEO or COO. The escalation route has to be named in advance, not invented in the moment.

Realistic mid-sized governance patterns

PATTERN	WHEN IT WORKS
CEO-led with CX coordinator	200–400 people. The CEO retains ownership; a CX coordinator runs the operating cadence.
CX director under COO	400–1,000 people. Service-heavy or operational businesses. The CX director owns the framework; the COO holds decision rights.
CX director under CMO	400–1,000 people. Brand-led or e-commerce businesses. Works when marketing is the dominant customer relationship.
Federated centre of excellence	1,000–2,000+ people. Small central team sets standards; functions own execution. The end-state for most mid-sized companies.

A PRACTICAL RULE

Mid-sized companies should plan to **evolve** the governance pattern as they scale. The structure that works at 300 people often breaks at 800. Build for today; expect to redesign every two years.



PILLAR 5

Measurement — what good looks like, in numbers.

Mid-sized companies typically err in one of two directions: either too few metrics (one number, usually NPS, owned by nobody) or too many (every team tracks something different, none ties to outcome). The remedy is a two-layer measurement model: one strategic metric and a handful of operational ones.

LAYER 1 · STRATEGIC METRIC

One headline number reported to the executive team and board. Usually a relational NPS or a composite (ISI, OES) calculated quarterly.

Question: What is the overall direction. Is the customer relationship as a whole getting better or worse?

Owner: CEO, board, executive team.

Cadence: quarterly review, with annual target.

LAYER 2 · OPERATIONAL METRICS

Per-touchpoint transactional metrics — usually CSAT or CES, fired by event triggers. One per major touchpoint, owned by the team responsible for that touchpoint.

Purpose: diagnosis & action. Where is the experience breaking right now?

Audience: function heads, frontline teams.

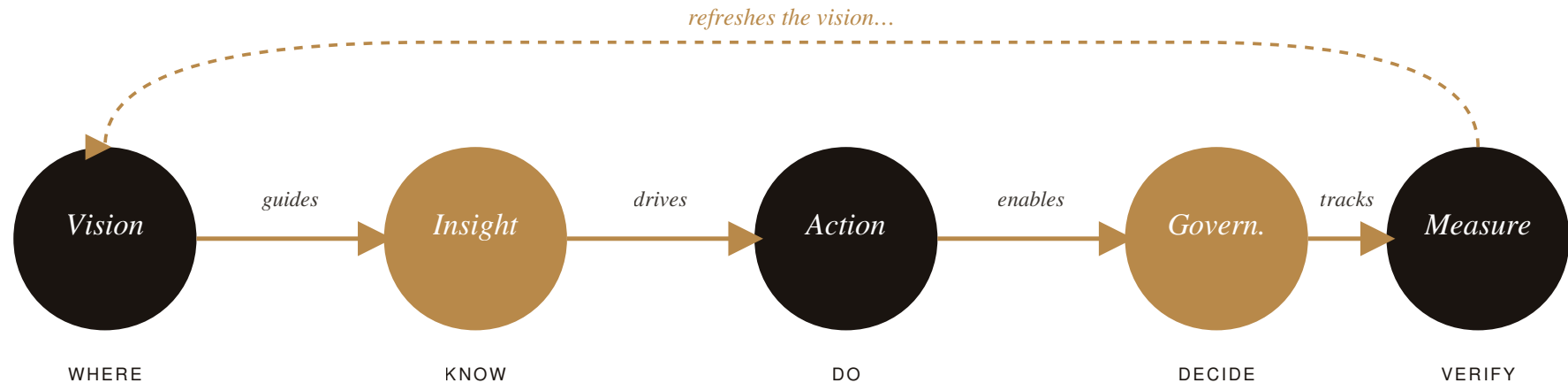
Cadence: continuous, with monthly reviews.

Three rules that prevent measurement theatre

- 01 Tie at least one metric to revenue.**
Without a financial anchor, CX metrics get cut at the first budget conversation. Link retention, repeat purchase or referral revenue to the strategic metric.
- 02 No metric without an owner.**
Every reported number has one named person accountable for moving it. "The CX team" is not a person. Vague ownership = stagnant scores.
- 03 Never tie bonuses to the score itself.**
Tie bonuses to the actions that produce good scores. Tie compensation to scores and you get score-gaming, not better experience. The literature is unanimous.

A strategy is more than five separate pillars.

Each pillar feeds the next. Vision tells Insight what to look for. Insight feeds Action with priorities. Action requires Governance to commit resources. Governance is held accountable by Measurement. Measurement refreshes Vision. The strategy is a loop, not a list.



WHEN THE LOOP CLOSSES

A working CX strategy is recognisable: insights from this quarter change next quarter's action; action changes the operational metric; the strategic metric trends; the executive team reviews and refines the vision. Each pillar has a heartbeat. The whole loop closes inside a year.

WHEN THE LOOP BREAKS

A broken strategy is also recognisable. Vision lives on a poster. Insight sits in a dashboard nobody opens. Action happens in firefighting mode. Governance only meets when something goes wrong. Measurement reports last quarter's number with no commentary. Each pillar may exist in isolation; the loop does not close.

CHAPTER 4

The maturity ladder.

Where you are honestly determines what to fix next.



Four levels. Honest self-placement matters more than ambition.

Most mid-sized companies move through these four levels over a two-to-four-year arc. Programmes that try to skip a level reliably stall. The fix is almost never "more ambition" — it is "more honest assessment of where we are."

<p>1 REACTIVE</p>	<p>"Surveys exist; nothing is owned."</p> <p>NPS or CSAT runs somewhere — usually in marketing or support. No defined owner across functions. Verbatim is read occasionally; no patterns are tracked. The strategic metric is not on any executive agenda.</p> <p>Typical company: 200–400 people, growing fast, no dedicated CX role. Next move: name one accountable executive and write the vision.</p>
<p>2 FUNCTIONAL</p>	<p>"One function owns CX; others ignore it."</p> <p>Usually marketing or service has built CX capability — runs surveys, has a dashboard, may have started journey mapping. Other functions treat CX as marketing's project. Cross-functional decisions are rare.</p> <p>Typical company: 400–800 people. Next move: elevate ownership above one function; establish a cross-functional operating forum.</p>
<p>3 COORDINATED</p>	<p>"Cross-functional; governance defined; loop closing."</p> <p>A named CX leader (director or VP-level). Multiple functions contribute to a single insight layer. The operating forum meets monthly with decision authority. Recovery loops exist. Some opportunities are tracked from feedback to change to metric.</p> <p>Typical company: 800–1,500 people. Next move: tie CX metrics to compensation (for actions, not scores); push the loop into the operating cadence.</p>
<p>4 STRATEGIC</p>	<p>"CX in the operating cadence; board metric; loop closes quarterly."</p> <p>CX is a board-level conversation. The strategic metric is reviewed each quarter alongside revenue. Cross-functional goals reference CX outcomes. Major experience redesigns are tracked. The vision is refreshed annually. CX is a competitive moat.</p> <p>Typical company: 1,500–2,000+ people, often industry-leading. Next move: sustain. The risk at Level 4 is regression after a key executive transition.</p>

CHAPTER 5

The 90-day starter plan.

From "we should do CX" to a working framework in one quarter.

5

Three months. Three phases. One working framework.

This is the plan we run with mid-sized clients standing up a CX strategy for the first time, or fixing one that has stalled. Each phase produces a concrete deliverable. Day 90 ends with a working framework, not a slide deck.

Days 1–30

Diagnose

Map current CX activity across the company — who does what, on which cadence, with which data.

Pull the last 6 months of feedback, complaints and CRM notes; synthesise top patterns.

Interview 8–12 stakeholders across functions to surface where the gaps are politically as well as operationally.

Place your programme honestly on the maturity ladder (Chapter 4).

Delivered by day 30: a one-page diagnostic with current state, top three customer pain themes, and the maturity-ladder placement.

Days 31–60

Design

Draft the CX vision with the executive team. One or two sentences. Tied to a business outcome.

Define the governance: named owner, monthly operating forum, escalation path.

Pick the strategic metric (NPS / CSAT / CES / ISI). Decide the operational metrics for the top 3–5 touchpoints.

Identify three opportunities to act on in Q1. Assign each a named owner, deadline, and success metric.

Delivered by day 60: a one-page CX strategy doc — vision, pillars, governance, metrics, Q1 priorities — approved by the CEO.

Days 61–90

Mobilise

Announce the strategy internally. Include every function lead in the rollout meeting.

Run the first operating forum with the new agenda; make at least one cross-functional decision in the first meeting.

Stand up the closed-loop process — detractors get reached within 24 hours.

Schedule the first quarterly executive review and define what data will be presented.

Delivered by day 90: a live CX strategy, a running operating cadence, and the first action on a real customer pain point already in flight.

A REALISTIC WARNING

Days 31–60 are the hardest. This is where executive disagreements surface, where ownership questions become political, and where the strategy can quietly become a marketing document instead of a cross-functional one. The CEO has to stay involved through this phase — not just sign at the end.

CHAPTER 6

Six pitfalls.

The mistakes that derail mid-sized CX strategies specifically.

6

The six failure modes we see in nearly every mid-sized programme.

These are not generic CX pitfalls — these are the ones specific to mid-sized companies. Enterprises rarely fall into them (because they have too much process); start-ups rarely fall into them (because they have too little ambition). Mid-sized companies hit all six.

- 01 Copying the enterprise playbook.**
Hiring an ex-bigco CX director who installs governance designed for 20,000 employees. The result is a six-month strategy document and zero behavioural change. Build for your scale, not theirs.
- 02 Founder-mode CX at 800 people.**
The CEO still personally handles big customer escalations. Works at 100 employees. At 800, it means strategic incidents get handled and 90 % of customers get nothing. Delegation has to be explicit.
- 03 Vision as marketing slogan.**
The vision was written by an agency, lives on the careers page, and means nothing to operations or product. It cannot be acted on. It cannot be measured. Rewrite it as a business outcome with a number attached.
- 04 Insight without action.**
A beautiful dashboard with NPS, CSAT, sentiment, journey maps — and no recurring decision-making forum that uses any of it. Insight that does not trigger action is reporting, and reporting alone does not move scores.
- 05 Function-silo CX.**
Marketing measures NPS one way; ops measures CSAT another way; product measures something else. No reconciliation, no single source of truth, executives see three different stories. The synthesis layer is missing.
- 06 Strategy by annual offsite.**
Reviewed once a year, frozen until the next offsite. Mid-sized companies move too fast for annual strategy. The framework has to be a living document, refreshed quarterly with at least one operational adjustment each time.

THE PATTERN ACROSS ALL SIX

Every one of these pitfalls has the same root cause: the CX strategy was treated as a deliverable rather than a capability. A deliverable gets finished, filed, and forgotten. A capability is rebuilt continuously, adapts to scale, and changes how the company makes decisions. The shift in framing is the work.

SELF-ASSESSMENT SCORECARD

Where is your CX strategy today?

Twenty statements across the five pillars. Score one point per statement you can honestly answer **true today** — not "we're working on it," not "in the strategy doc." The honest score matters more than the high score.

VISION (4 STATEMENTS)

- A written CX vision exists, one or two sentences long.
- The vision is tied to a specific business outcome (revenue, retention, advocacy).
- The CEO and direct reports can state the vision without reading it.
- The vision has been used in at least one real trade-off decision this year.

INSIGHT (4 STATEMENTS)

- Direct feedback (NPS / CSAT / CES) is collected on a defined cadence at defined touchpoints.
- Customer interviews (8+ per quarter) happen and feed into insight.
- Verbatim is analysed systematically, not read individually.
- A single quarterly insight document is produced for the executive team.

ACTION (4 STATEMENTS)

- Detractor responses trigger a defined recovery within 24 hours.
- Process improvements based on customer feedback are tracked in a backlog with owners.
- At least one major experience redesign happened in the last 12 months.
- Top three customer pain points have named owners and Q-by-Q progress.

GOVERNANCE (4 STATEMENTS)

- One named executive is accountable for CX.
- A cross-functional operating forum meets at least monthly with decision authority.
- Escalation routes for CX disputes are defined and known.
- Cross-functional goals reference customer outcomes, not just function-internal KPIs.

MEASUREMENT (4 STATEMENTS)

- A single strategic CX metric is reviewed by the executive team quarterly.
- Operational metrics exist for each of the top 3–5 touchpoints, with named owners.
- At least one CX metric is linked explicitly to a financial outcome.
- Bonuses are tied to *actions* that produce good scores, never to scores themselves.

HOW TO READ YOUR SCORE

16–20: Level 4 (Strategic). Focus on sustaining through executive transitions.

11–15: Level 3 (Coordinated). The loop is closing; tighten the operating cadence.

6–10: Level 2 (Functional). The biggest unlock is cross-functional governance.

Below 6: Level 1 (Reactive). Start with one named executive owner and the 90-day plan.

Build a capability, not a document.

A CX strategy is not something you write. It is something you operate. The document on the wall is the visible part of a much larger machine — the cadence, the decisions, the recovery loops, the quarterly reviews. The document changes nothing on its own.

Mid-sized companies that succeed at CX have one thing in common: they treat the strategy as a capability that gets rebuilt every two or three years as they scale, not as a deliverable that gets shelved after launch. The structure that worked at 300 employees gets redesigned at 800. The governance that fit a single CMO becomes a federated centre at 1,500. The strategy is alive.

Three takeaways worth more than the rest of this paper:

- 01 Build for your scale, not someone else's.**
Mid-sized is its own discipline. Copying enterprise CX playbooks is the single most common cause of stalled programmes.
- 02 The five pillars are a loop, not a list.**
Vision guides Insight; Insight drives Action; Action requires Governance; Governance is tracked by Measurement; Measurement refreshes Vision. Skip a pillar and the loop breaks.
- 03 Expect to evolve every two years.**
The structure that fits your company today will need to be redesigned as you scale. Plan for it. Build a strategy that survives the next 24 months, not the next 24 years.

How InsightSofa can help.

Beyond the feedback platform itself, our CX strategy team runs the **90-day strategy engagement** from Chapter 5 with mid-sized clients building their first strategy — or rebuilding one that has stalled. The deliverables are the ones we use ourselves across roughly forty client engagements spanning B2B, B2C and the public sector.

InsightSofa's platform is designed to fit mid-sized scale: feedback collection, AI verbatim analysis, journey maps and the action layer all live in one system — so the synthesis pillar is built into the tool, not bolted on later.

The fastest start is a 30-minute working session with our CX strategy team.

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This paper draws on the InsightSofa CX Strategy Team's experience working with mid-sized clients (typically 200–2,000 people) in retail, financial services, healthcare, manufacturing and B2B services.