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# Guidelines for Customer Experience

## Maturity

### Version 1

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**Customer Happiness Department**

**Strategy and Corporate Development Sector**

**Dubai Health Authority**

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## INTRODUCTION

The Strategy and Corporate Development Sector plays a key role in regulating the health sector. The Strategy and Corporate Development Sector is mandated by the Dubai Health Authority (DHA) Law No. (6) of the year (2018) with its amendments pertaining to DHA, to undertake several functions including but not limited to:

- Developing regulation, policy, standards, guidelines to improve quality and patient safety and promote the growth and development of the health sector;
- Licensure and inspection of health facilities as well as healthcare professionals and ensuring compliance to best practice;
- Managing patient complaints and assuring patient and physician rights are upheld;
- Governing the use of narcotics, controlled and semi-controlled medications;
- Strengthening health tourism and assuring ongoing growth; and
- Assuring management of health informatics, e-health and promoting innovation.

The Guidelines for Customer Experience Maturity aim to fulfill the following overarching Dubai Health Sector Strategy 2026:

- Pioneering Human-centered health system to promote trust, safety, quality and care for patients and their families.
- Make Dubai a lighthouse for healthcare governance, integration and regulation.
- Become a global digital health hub.

- Foster healthcare education, research and innovation.
- Strengthening the economic contribution of the health sector, including health tourism to support Dubai economy.

## EXECUTIVE SUMMARY

The DHA Customer Experience (CX) Maturity Guidelines are a structured set of best practices that govern specific domains within an organization's customer experience competencies, ensuring consistency, quality, and compliance in delivering high quality customer experiences.

The CX Maturity Guidelines have been developed to:

- Introduce baseline capability foundations for all providers and payers to follow, supporting them to provide a minimum standard of CX across all facilities in Dubai.
- Drive an increased focus on CX in Dubai's healthcare sector.
- Increase the trust and reputation of Dubai's healthcare sector, through setting formal mechanisms to ensure a positive CX.

The CX Maturity guidelines can be effectively implemented through deploying protocols, which are a series of actionable instructions designed to drive targeted improvements in customer experience. These protocols address specific objectives within an organization, contributing to enhanced CX maturity by guiding teams through best practices.

## DEFINITIONS

- **Customer Experience (CX):** The overall perception and interactions a customer has with healthcare organizations, encompassing all touchpoints. CX aims to enhance customer satisfaction, trust, and loyalty by ensuring positive and consistent experiences.
- **Patient Reported Experience Measures (PREMs):** Tools and surveys used to capture patients' perspectives on the healthcare services they receive. PREMs help organizations identify areas for improvement and measure the impact of changes on patient satisfaction.
- **Health Policy and Standards Department (HPSD):** A department within the Dubai Health Authority responsible for developing regulations, policies, standards, and guidelines to improve the quality and safety of healthcare services.
- **Dubai Health Authority (DHA):** The governmental body responsible for overseeing the healthcare system in the Emirate of Dubai.
- **Third Party Administrators (TPAs):** Organizations that manage various administrative functions on behalf of healthcare providers and payers, including claims processing, provider network management, and customer support services.
- **Electronic Health Records (EHR):** Digital versions of patients' paper charts that provide real-time, patient-centered records accessible to authorized healthcare providers. EHRs include

medical history, diagnoses, medications, treatment plans, immunization dates, allergies, and test results.

- **Key Performance Indicators (KPIs):** Quantifiable metrics used to evaluate the success of an organization in achieving its objectives.
- **Unified Complaints System (UCS):** A centralized platform used by the DHA to manage and address patient complaints, ensuring timely resolution and tracking of issues to improve service quality.
- **04 Platform:** A unified customer platform with more than 40 Government Entities and other participating entities in Dubai, that is designed to connect Dubai customers, listen to their experience (suggestions, complaints, comments) in an aim to continuous improvement in Dubai's services and providing pioneering services to its customers.
- **Mawaheb Platform:** An online training and development platform provided by the DHA, offering courses and resources related to professional skills for healthcare staff.
- **Omnichannel Solution:** A seamless and integrated approach to customer interactions across multiple channels (e.g., website, mobile app, SMS) ensuring a consistent and unified experience regardless of the medium used.
- **Service Recovery:** The process of addressing and resolving customer complaints or issues effectively to restore satisfaction and loyalty.
- **Experience Statements:** Qualitative statements that reflect the sentiments and perspectives of different stakeholders (e.g., staff, management, customers) regarding their experiences.

## ABBREVIATIONS

- **CX:** Customer Experience
- **PREMS:** Patient Reported Experience Measures
- **HPSD:** Health Policy and Standards Department
- **DHA:** Dubai Health Authority
- **TPAs:** Third Party Administrators
- **EHR:** Electronic Health Records
- **KPIs:** Key Performance Indicators
- **UCS:** Unified Complaints System



## 1. BACKGROUND

Dubai's vision is to position itself as a global leader in customer experience for healthcare services, reflecting its commitment to excellence and innovation. Central to this vision is a set of engagement principles that serve as the foundation for shaping an organization's culture and approach to customer experience. These principles embody the core beliefs that guide healthcare organizations in delivering patient-centric, seamless, and compassionate care.

### Dubai CX Engagement Principles

- Treat customers with kindness, dignity and respect
- Personalize and tailor care for each individual
- Proactively engage customers and family caregivers
- Engage with customers in accordance with their communication preferences and information needs
- Make things easy for customers
- Ensure transparent and accessible feedback and suggestions mechanisms

### Five Pillars of Customer Experience Excellence Framework

The DHA CX Maturity Guidelines are anchored on the 'Five Pillars of Customer Experience Excellence' framework (Appendix 1), to enhance the CX maturity of Dubai's healthcare sector. Each of the Experience Guidelines targets a dedicated domain.

## **CX Strategy**

A well-defined and communicated CX strategy is a roadmap that provides organizations with a clear direction on how they will provide exceptional customer experiences.

Dimensions:

- Establish CX strategy and value proposition.
- Leverage customer insights and understanding (journeys and personas).
- Develop a range of CX initiatives to enhance customer experiences.
- Ensure alignment towards achieving common CX goals.
- Allocate funding for the development and execution of CX initiatives on an ongoing basis.

## **People and Collaboration**

Employee skills and culture ensure organizations are equipped and empowered to consistently provide outstanding customer experiences through creating a positive, empathetic environment.

Dimensions:

- Train staff in Customer Experience.

- Nurture a CX and human-centered culture.
- Recognize staff for exemplary performance.
- Equip and train staff for effective Service Recovery.

## Governance

Effective governance and interaction frameworks align CX initiatives with an organization's overall strategy, clearly define accountability, and promote collaboration between employees and leadership.

Dimensions:

- Establish CX responsibilities.
- Develop clear reporting lines and accountabilities through a defined governance framework.
- Outline an interaction framework mapping collaboration between teams, organizations and customers.
- Establish CX reporting and communication channels.

## Capabilities and Touchpoints

CX capabilities and touchpoints enable seamless, consistent, and personalized customer experiences across all touchpoints, supported by integrated digital and physical channels and optimized processes.

Dimensions:

- Understand customers through CX research / insights and the voice of the customer.
- Offer multiple engagement channel choices in alignment with key customer preferences.
- Enhance CX through digital tools and technology.
- Manage customer data through a customer management system.

## Experience Measurement

Effectively collecting, analyzing, and utilizing customer experience data is key to continuously improve healthcare experiences, enhance customer satisfaction, and drive strategic decision-making.

Dimensions:

- Define metrics across channels and stages of the customer journey to measure CX.
- Establish real-time feedback loops to enable quick responses to negative feedback.
- Ensure continuous monitoring and reporting to support data-driven decision making.

The CX guidelines and protocols have been designed in-line with the following five foundations to ensure that they are effective, fair and implementable by all.

## Foundations for CX:

### **1) Develop CX maturity of both providers and payers**

Support payers and providers across all current maturity levels.

### **2) Embed a patient-centered culture with CX focus**

Increase the focus on customer experience, providing human-centered healthcare.

### **3) Applicable to all providers and facility types**

All facilities, including general and specialist hospitals and clinics and polyclinics must be able to apply the protocols.

### **4) Respect and uphold market competitiveness**

Foster a competitive market environment, avoiding practices that could inadvertently favor one organization over another.

### **5) Encourage continuous and proactive improvement through KPIs & PREMs**

Ensure long-term sustainability and market leadership.

**There are two levels of protocols:**

#### **Foundational Protocols**

Aiming to establish a baseline level of healthcare CX maturity, ensuring organizations meet minimum obligations and uphold essential quality benchmarks.

#### **Advanced Protocols**

Advanced Protocols aim to further elevate CX maturity, focusing on innovation and the delivery of leading healthcare customer engagements and experiences.

## 2. SCOPE

Customer facing Healthcare organizations operating in Dubai including Healthcare providers, payers and TPAs.

## 3. PURPOSE

The purpose of this document is to establish comprehensive guidelines and protocols aimed at enhancing Customer Experience (CX) maturity within Dubai's healthcare sector. These guidelines are designed to develop the organizational capabilities which ensure consistent, high-quality interactions between healthcare organizations and customers, thereby improving customer satisfaction, fostering trust, and elevating the overall standard of healthcare services in the Emirate of Dubai. By implementing these guidelines, the Dubai Health Authority seeks to create a customer-centered healthcare environment that promotes excellence, innovation, and continuous improvement.

The guidelines and protocols outlined in this document are recommendations to support healthcare organizations in enhancing their customer experience maturity, designed to be flexible and adaptable to the needs and resources of individual organizations.

In order for organizations to understand their current level of CX maturity, a self-assessment tool (*Appendix 2*) has been developed to measure CX maturity levels. The tool works to assess an organization's current CX maturity level against each of the five Experience Guidelines and allows for easy analysis of current maturity levels, to inform whether Foundational or Advanced Experience Protocols would be the most appropriate for implementation.

#### 4. APPLICABILITY

The experience guidelines and protocols are intended for the following stakeholders:

##### **Providers:**

- Direct customer engagements
- Understanding customer needs
- Care coordination

##### **Payers and Brokers:**

- Managing the financial aspects of care and processing claims
- Determining coverage and reimbursement policies
- Negotiating rates with providers
- Ensuring that customers have access to necessary services

##### **Third Party Administrators (TPAs):**

- Streamlining claims processing
- Providing dedicated support
- Managing provider networks
- Utilizing technology, offering health education customizing healthcare plans.

##### **DHA:**

- Owning the CX Framework & Guidelines

- Providing additional support

### **Touchpoint owners:**

#### **Direct Channels**

- DHA website
- Email
- Call center
- 04 Platform
- Unified Complaints System (UCS)

#### **Indirect Channels**

- Sheryan
- Mawaheb
- Nabidh
- E-Claims platform (Dubai Health Insurance Corporation)

## **5. GUIDLELINE ONE: Strategy**

A well-defined and communicated CX strategy is a roadmap that provides organizations with a clear direction on how they will provide exceptional customer experiences.

### **5.1. Protocol 1.1.A. Develop foundational CX strategy**

**Level:** Foundational



**Overview:** Establishing a foundational customer experience strategy will set the direction to enhance customer satisfaction and improve the overall experience. This strategy should sit within and be aligned to the organization's corporate strategy.

The strategy should establish key CX goals which are measurable and work to foster a more patient-centered environment.

**Activities:**

1) Define CX Strategy

- a. Define the CX goals for the organization, in alignment with the broader organizational objectives and outline the desired outcomes.
  - i. CX strategy canvas can be found in Appendix Document 3.
- b. Define the target audience(s) of the CX strategy.
- c. Provide an outline of the key CX initiatives, and how they will work to achieve the CX goals.
- d. Set the measurement criteria for the strategy, including KPIs.
- e. Develop a high-level timeline for the implementation of the strategy.
- f. Define the key stakeholders responsible for the delivery of the strategy.
- g. Consult with key stakeholders, including customers and staff members to ensure relevance and feasibility.
- h. Optional: Define the budget for implementation, including an outline of the investment required for each initiative.

2) Document and formalize the strategy

- a. Document the strategy in detail in a way that can be understood and accessed by all staff members.

### **Experience Statements:**

- As frontline staff, we feel supported by our leadership to deliver exceptional customer experiences.
- As management, we feel comfortable in communicating the vision of the leadership team regarding CX.

## **5.2. Protocol 1.1.B. Develop comprehensive CX strategy**

**Level:** Advanced

**Overview:** Developing a comprehensive customer experience strategy will ensure that the organization has a detailed plan to deliver a positive CX experience.

A comprehensive strategy should clearly articulate the CX goals, how they will be achieved, how success will be measured and who will play a key role in delivering the strategy.

### **Activities:**

- 1) Develop comprehensive CX strategy
  - a. Define the CX vision for the organization to ensure it is customer-centric and achievable in a defined timeframe.

- b. Establish detailed goals that align with the broader organizational objectives and outline the desired outcomes.
- c. Define the target audience(s) of the CX strategy, including incorporating key insights from a variety of target customer segments.
- d. Develop detailed charters for each of the key CX initiatives, and outline how they align to the CX goals.
  - i. Illustrative initiative charters can be located in Appendix Document 4.
- e. Set the measurement criteria for the strategy, including KPIs.
- f. Develop a detailed timeline for the implementation of the strategy.
- g. Develop a detailed budget for implementation for each of the initiatives.
- h. Incorporate customer feedback loops and continuous improvement mechanisms to ensure the strategy remains agile and relevant.
- i. Document the strategy in key languages (e.g. English, Arabic, Hindi, Urdu).

#### **Experience Statements:**

- As frontline staff, we incorporate CX into our daily operations and know we each have a part to play in delivering exceptional CX in-line with our strategy.
- As management, we understand how to assess the success of our strategy, and feel supported by leadership to remain agile in line with customer needs.

### **5.3. Protocol 1.2.A. Communicate the CX strategy to all staff**

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**Level:** Foundational

**Overview:** Communicating the CX strategy to all staff is crucial because each staff members plays a key role in delivering the customer experience.

Understanding the strategy enables staff members to align their actions with the CX strategy goals, ensuring consistency and working to achieve the goals of the strategy.

**Activities:**

1) Communicate CX strategy

- a. Implement awareness sessions, meetings or workshops, informing the staff of the organization's CX Strategy.
- b. Priorities channels of communication which are the most effective (email, WhatsApp, bulletin) and enable stakeholders to ask any questions.
- c. Regularly distribute key messages in relation to the CX strategy across key channels.

**Experience Statements:**

- As members of staff, we understand the CX strategy and how we can align our day-to-day actions to support it.
- As members of staff, we feel comfortable in knowing where to go to in order to learn more about the CX strategy.

## 6. GUIDELINE TWO: People and Collaboration

Employee skills and culture ensure organizations are equipped and empowered to consistently provide outstanding customer experiences through creating a positive, empathetic environment.

### 6.1. Protocol 2.1.A. Complete DHA provided CX training

**Level:** Foundational

**Overview:** Completing the DHA provided CX training will equip staff with the foundational skills and knowledge needed to deliver exceptional customer experiences consistently.

CX training fosters a customer-centric mindset, empowering staff to understand customer needs, handle inquiries effectively, and resolve issues with empathy.

**Activities:**

- 1) Complete CX trainings on the Mawaheb platform
  - a. Regularly check the Mawaheb platform for any training courses related to CX and CX techniques and methodologies.



- b. Share communications through a variety of channels (emails, SMS, newsletters) to inform staff members of the training courses and set a completion deadline to encourage timely completion.
- c. Track staff completion rates, and tailor subsequent communications to further encourage training completion.

#### **Experience Statements:**

- As customer facing staff, I feel confident in knowing the basic CX skills and methodologies, enabling me to provide better customer experiences.

### **6.2. Protocol 2.1.B. Provide accredited CX training for CX staff**

**Level:** Advanced

**Overview:** Certifying CX team staff with recognized, accredited CX training will allow them to develop more advanced skills and gain knowledge to enable them to deliver high quality customer experiences.

Certifying with globally recognized training ensures consistency with international quality standards and promotes best practices.

#### **Activities:**

- 1) Certify CX team staff
  - a. Research and select globally recognized CX training programs that align with industry best practices.

- i. Illustrative training programs can be located in Appendix Document 5.
- b. Evaluate the specific CX competencies required by staff to determine which accredited programs are most relevant.
- c. Facilitate access to accredited training providers or institutions to enroll in their programs.
- d. Plan and coordinate training sessions, ensuring they are accessible to all relevant staff members.
- e. Monitor changes in customer satisfaction and engagement metrics to evaluate the training's impact on the overall customer experience.

**Experience Statements:**

- As customers, we feel personally connected to the organization through the personalized experience we received.
- As staff members, our confidence has been boosted through receiving training from a globally recognized organization.

**6.3. Protocol 2.2.A. Establish staff recognition mechanisms**

**Level:** Foundational

**Overview:** Establishing staff recognition mechanisms will work to reinforce the value of exceptional customer experiences and motivate staff to consistently deliver outstanding experiences.

By acknowledging and rewarding positive behaviors, organizations can foster a culture of engagement and commitment, leading to enhanced customer satisfaction.

**Activities:**

1) Establish clear recognition criteria

- a. Determine specific customer service behaviors and outcomes that align with the organization's CX goals, such as empathetic communication, problem resolution, and going above and beyond for customers.
- b. Clearly document the recognition criteria and communicate them internally and externally to ensure customers and staff understand what is expected and valued.
  - i. Illustrative recognition criteria can be found in Appendix Document 6.
- c. Optional: Establish a process for periodically reviewing and updating the recognition criteria to reflect evolving customer expectations.

2) Deploy recognition mechanisms

- a. Deploy various channels for recognition nominations, including written or verbal feedback.
- b. Determine how often nominations and recognition will be awarded. (i.e. monthly / quarterly)
- c. Ensure all customers and staff are informed about the recognition mechanisms, including how they work, the types of recognition available, and the criteria for earning them.



- d. Collect staff feedback on the effectiveness and appeal of the recognition mechanisms to continuously improve and adapt them to meet staff needs.

**Experience Statements:**

- As a member of staff, I feel recognized and rewarded for my contributions to providing exceptional customer experiences.
- As leadership, we promote and actively encourage behaviors that demonstrate a commitment to providing positive customer experiences.

**6.4. Protocol 2.2.B. Implement a recognized recognition and awards program**

**Level:** Advanced

**Overview:** Implementing a robust recognition and awards program is key to fostering staff engagement and motivating staff to deliver exceptional customer experiences.

Though consistently acknowledging and rewarding outstanding contributions through a formal recognition and awards program, organizations will support a culture of customer experience excellence.

**Activities:**

- 1) Implement a recognized and established recognition program
  - a. Assess established and recognized recognition and awards programs (such as the DAISY award) to ensure alignment with wider CX and organizational goals.

- b. Once selected, register with the recognition organization/body and liaise to understand any key implementation steps.
- c. Distribute / create awareness materials to inform all staff members of the recognitions available, and the criteria for recognition.
- d. Engage organizational leaders and managers to champion the chosen recognition program, emphasizing its importance and integrating it into regular discussions around CX excellence.
- e. Develop regular communications to support the introduction of the recognition and awards program.

**Experience Statements:**

- As a member of staff, the recognition and rewards program motivate me to consistently deliver exceptional customer experiences.

**6.5. Protocol 2.3.A. Establish service recovery processes**

**Level:** Foundational

**Overview:** Service recovery processes are crucial to effectively address and resolve customer issues, which can turn negative experiences into positive outcomes.

By equipping staff with the processes and skills to handle service recovery, organizations can enhance customer satisfaction, build loyalty, and strengthen their reputation for exceptional customer experiences.

### **Activities:**

#### 1) Develop clear service recovery guidelines

- a. Investigate and understand common service failures that customers face, to understand when they occur and who is best placed to resolve them.
- b. Analyze the common issues and identify and develop the key actions and processes that would resolve a customer's negative experience and transform into a positive experience (e.g. timely apologies, immediate resolution, offering alternative solutions).
  - i. Illustrative service recovery framework can be located in Appendix Document 7.
- c. Launch service recovery processes to customer facing staff, including “how to” guides and examples of the processes in practice.

- d. Establish regular “refresher” sessions to ensure staff members maintain an awareness and understanding of the service recovery processes, to ensure they are actively deployed.

**Experience Statements:**

- As customer facing staff, I understand the importance of service recovery and deploying prompt support to customers when services are disrupted.
- As customers, staff promptly reassured us that services would be restored, and that the situation was out of the ordinary.

## 7. GUIDLELINE THREE: Governance

Employee skills and culture ensure organizations are equipped and empowered to consistently provide outstanding customer experiences through creating a positive, empathetic environment.

### 7.1. Protocol 3.1.A. Define a governance structure for CX team

**Level:** Foundational

**Overview:** Defining a clear governance structure for the CX team is crucial in establishing accountability and clarity, ensuring that all staff members understand their part in enhancing CX.

This allows for more efficient processes and ways of working, fosters greater collaboration, and enables teams to work more effectively towards common goals.

**Activities:**

1) Develop clear CX responsibilities

- a. Based on the size of the organization, determine the key CX responsibilities that need to be conducted (e.g., CX research, journey mapping, service recovery).
  - i. Illustrative CX team responsibilities can be located in Appendix Document 8.

2) Create a governance framework

- a. Appoint key leaders (e.g., Chief Customer Officer) and define clear roles within the CX team to ensure ownership and accountability for CX initiatives.
- b. Clarify decision-making authority and establish regular reporting structures to track CX performance.
- c. Define escalation paths for resolving issues, ensuring timely resolution.

3) Outline interaction frameworks

- a. Map key CX interactions and data sharing between customers, teams and other organizations to understand the stakeholders involved and the frequency of interactions.

- b. Analyze the interactions / data exchanges to investigate any opportunities for streamlining to increase efficiency.

**Experience Statements:**

- As a “CX team member”, I have a strong sense of purpose and clearly understand my role in enhancing CX.

**7.2. Protocol 3.1.B. Establish a dedicated CX department/function**

**Level:** Advanced

**Overview:** Establishing a dedicated CX department/function involves creating a specialized team focused on designing, implementing, and optimizing customer experience across the organization.

This department ensures a consistent, high-quality experience for customers by aligning CX initiatives with business objectives and continuously driving improvements.

**Activities:**

- 1) Establish dedicated CX department/function
  - a. Determine the key responsibilities of the CX department, such as customer journey mapping, service design, and performance analysis, and establish a

clear organizational structure with specialized roles (e.g., CX leaders, analysts, designers).

- b. Ensure the CX department is equipped with the necessary budget, tools, and technology, and grant it the authority to influence decision-making across departments to priorities customer-centric initiatives.

## 2) Ensure CX team presence across the organization

- a. Assign CX ambassadors or liaisons in key departments (e.g., marketing, sales, product, operations) to ensure customer experience considerations are integrated into all processes and decisions, fostering a customer-centric culture organization-wide.

## 3) Expand stakeholder engagement

- a. Involve both internal stakeholders (e.g., leadership, department heads, employees) and external stakeholders (e.g., customers, partners, suppliers) in the governance of the organizations CX through regular consultations, feedback sessions, and collaborative planning to ensure appropriate alignment and support across all parties.

### **Experience Statements:**

- As the CX department head, I can take ownership of CX for the organization to empower my team to deliver exceptional customer experiences.

### 7.3. Protocol 3.2.A. Establish structured communication and reporting channels

**Level:** Foundational

**Overview:** Establishing structured communication and reporting channels ensures that CX updates and initiatives can be efficiently shared across the organization.

This enables teams to share insights, track progress, and address challenges promptly, ultimately leading to more cohesive CX delivery.

#### **Activities:**

##### 1) Establish regular and structured meetings

- a. Define meeting objectives and clearly outline the purpose and goals for each meeting to ensure focused discussions and outcomes in relation to CX.
- b. Set a consistent schedule for meetings (e.g., weekly, biweekly) to maintain regular communication and progress tracking.
- c. Ensure that all necessary stakeholders from different departments (including leadership) are included to foster collaboration and input.
- d. Record key discussions, decisions made, and action items, and distribute the minutes to all participants for accountability and follow-up.

##### 2) Create formal communication channels for internal CX insights





- a. Assess the types of internal insights and CX-related updates that would be shared across the organization.
- b. Set up formal channels, such as intranet portals, newsletters, or dedicated messaging groups, specifically for CX discussions, internal feedback and updates.
- c. Create clear guidelines on how to use these channels, including best practices for sharing information.
- d. Develop a routine for sharing CX insights, success stories, and CX metrics through the formal channels to keep staff members informed and engaged.

#### **Experience Statements:**

- As leadership, we have a clear communications structure in place to effectively share key CX updates across the entire organization.
- As customer-facing staff, we feel involved and aware of the various CX initiatives and can share our insights with the rest of the team.

### **8. GUIDELINE FOUR: Capabilities and Touchpoints**

Employee skills and culture ensure organizations are equipped and empowered to consistently provide outstanding customer experiences through creating a positive, empathetic environment.

## 8.1. Protocol 4.1.A. Gather customer insights

**Level:** Foundational

**Overview:** Gathering customer insights in a healthcare organization enables the identification of customer needs, preferences, and pain points, allowing organizations to tailor and personalize their customer experiences and improve the overall CX level.

### **Activities:**

#### 1) Develop customer personas

- a. Leverage existing customer data and insights to understand common customer demographics, needs, and behaviors.
- b. Identify common characteristics, such as age, health conditions, socioeconomic status, and digital engagement, to create distinct customer segments.
- c. Develop detailed profiles for each persona, including key traits, motivations, challenges, and communication preferences.
  - i. Persona toolkit can be located in Appendix Document 9.
- d. Continuously validate personas and refine them based on emerging healthcare trends or changes in customer behavior.

#### 2) Map customer journeys

- a. Map key touchpoints and customer actions across the healthcare journey.

- b. Identifying opportunities for personalized experiences which meet the specific needs and preferences of different customer segments and personas.
- c. Evaluate each stage of the journey to uncover areas of customer frustration or pain points and identify opportunities to enhance the patient experience.
  - i. Example customer journeys can be located in Appendix Document 10.

**Experience Statements:**

- As a customer facing member of staff, I am able to provide a more personalized experience as I am aware of the key touchpoints and common pain points faced by different customer groups.

**8.2. Protocol 4.2.A. Activate engagement channels**

**Level:** Foundational

**Overview:** Activating engagement channels provides customers with convenient and accessible ways to engage with services across a variety of platforms, both digital and offline.

By ensuring a robust presence across various platforms, organizations can interact with customers where they are, facilitating seamless communication and interaction throughout their care journey.

**Activities:**

## 1) Assess and select channels

- a. Leverage customer insights to understand how customers prefer to interact and communicate with the organization.
- b. Assess the effectiveness and accessibility of various channels (e.g., phone, email, kiosks, online platforms) for supporting customer contact and feedback and select the most suitable channels based on their ability to support specific customer requests, in a low-effort, and low-cost manner.
- c. Align each communication channel with specific stages of the customer journey, ensuring convenience and efficiency at key touchpoints.

## 2) Launch and optimize

- a. Deploy and launch selected communication channels, ensuring they are accessible, functional, and ready for customer engagement.
- b. Publicly announce the launch of new channels through marketing and communication efforts, ensuring customers are aware of the available contact methods and their benefits.
- c. Review performance data and customer feedback to identify pain points or bottlenecks in the process and assess if the channels are meeting customer expectations.

### **Experience Statements:**



- As a customer, I can engage with the organization at a time that is convenient for me, through a medium that suits my individual preferences.

### 8.3. Protocol 4.2.B. Deploy an “Omnichannel” solution

**Level:** Advanced

**Overview:** Deploying an omnichannel solution ensures a cohesive and unified interaction across all customer touchpoints, both online and offline.

This integration allows customers to transition smoothly between channels, enhancing their overall journey and satisfaction while enabling the organizations ability to respond more effectively to their needs.

#### **Activities:**

- 1) Integrate multiple customer channels
  - a. Implement a centralized platform that connects all customer channels, ensuring a seamless experience as customers transition between different channels (e.g., website, mobile app, in-person).

b. Standardize messaging and branding across all channels to provide a cohesive experience and reinforce the organization's identity, regardless of how customers engage.

2) Ensure real-time data synchronization

- a. Integrate data systems to ensure that customer information is accessible and consistent across all channels, allowing for personalized and informed interactions.
- b. Implement communication features that allow for smooth transitions between channels (such as allowing customers to start a conversation via chat and continue it over the phone without losing context or repeating themselves).

**Experience Statements:**

- As a customer facing staff member, I am able to continue providing support to my patients, picking up seamlessly from their last interaction with the organization.

**8.4. Protocol 4.3.A. Introduce foundational customer centric digital tools**

**Level:** Foundational



**Overview:** Introducing foundational customer-centric digital tools involves implementing platforms that enable organizations to track, manage, and respond to customer needs efficiently.

These tools can support a variety of tasks including appointment bookings, medication reminders, virtual consultations and health monitoring, ultimately to help create a personalized and seamless care experience.

### **Activities:**

#### 1) Introduce digital tools

- a. Assess customer pain points and communication preferences to determine which digital tools / use cases (e.g., digital appointment scheduling, medication reminders,) will best address these needs and improve the customer experience.
- b. Select the most suitable digital tools based on functionality, scalability (where relevant), integration capabilities, and cost, ensuring they align with wider business goals and enhance customer interactions across touchpoints.

#### 2) Implement and train

- a. Deploy the selected digital tools, ensuring smooth integration with current systems and processes, testing for functionality and ease of use.

- b. Provide training for staff on how to effectively use the new tools, including understanding features, workflows, and best practices for customer engagement, to ensure they can maximize the tools' capabilities.
- c. Develop promotional and educational materials for customers to encourage tool stabilization and facilitate a smooth customer onboarding.
- d. Conduct regular reviews to evaluate tool utilization and customer feedback to further refine the tools and make any necessary adjustments.

**Experience Statements:**

- As a customer, my healthcare experience is improved through utilizing digital tools that empower me to have greater control over my care journey.

**8.5. Protocol 4.3.B. Leverage innovative technologies to deliver enhanced customer experiences**

**Level:** Advanced

**Overview:** Leveraging innovative technologies in healthcare, such as AI-powered chatbots for medical inquiries, personalized patient portals for managing health records and treatment plans, and telemedicine platforms for remote consultations, can greatly enhance the patient experience.



These technologies enable healthcare organizations to provide real-time support, streamline care processes, and offer personalized, convenient healthcare services across digital channels.

### **Activities:**

#### 1) Innovative technology use case identification

- a. Research and evaluate emerging technologies like AI, machine learning, telemedicine, and wearable devices to understand their potential to address specific challenges in patient care, diagnostics, and administrative processes.
- b. Develop clear, actionable use cases that demonstrate how new technologies can enhance customer experiences or streamline internal operations. For example, using AI chatbots for patient triage or implementing remote monitoring for chronic disease management.

#### 2) Implement and monitor innovative technology solutions

- a. Develop a detailed implementation plan outlining the rollout process, timelines, and resources needed.
- b. Deploy the chosen innovative technologies, such as AI tools, telemedicine platforms, or patient portals, ensuring integration with existing healthcare systems where possible.

- c. Provide comprehensive training for staff and customers (if applicable) to ensure they are proficient in using the new technologies. This includes training on usage, troubleshooting, and best practices to maximize the technology's potential.
- d. Continuously track key performance indicators (KPIs), such as user adoption rates, response times, and patient satisfaction, to assess the effectiveness of the technology solution in real-time.

**Experience Statements:**

- As a customer, my experience is transformed by innovative technologies, making the experience smoother, more efficient and more personalized.

**8.6. Protocol 4.4.A. Implement foundational customer management system**

**Level:** Foundational

**Overview:** Implementing a foundational customer management system enables healthcare organizations to centralize patient data, streamline communication, and track interactions across touchpoints.

This system will help to improve patient engagement, optimize care coordination, and provide personalized services by providing healthcare organizations with a unified view of each customer's history, preferences, and needs.

### Activities:

- 1) Set up system and collect data
  - a. Select a system that fits the organization's needs (e.g. based on the number of customers, number of physical sites, etc.) and can capture and manage customer information including personal information, medical records, communications and billing.
  - b. Provide training for staff on how to effectively use the system to enter and manage customer details and data within the system.
  - c. Regularly evaluate the system's performance and make updates or improvements based on user feedback and evolving needs (e.g. through expanding the number of data fields)

### Experience Statements:

- As a CX team member, I can clearly analyse our customer data, which is stored in one place, allowing me to evaluate multiple variables easily.

## 8.7. Protocol 4.4.B. Implement specialized CX management system



**Level:** Advanced

**Overview:** Implementing a specialized healthcare CX management system involves adopting a system that is specifically designed to enhance customer interactions, streamline workflows, and capture valuable customer feedback across multiple touchpoints.

This system helps healthcare organizations personalize care, improve satisfaction, and identify areas for continuous improvement in the customer experience.

**Activities:**

- 1) Deploy a healthcare-focused CX management system
  - a. Select a CX management system specifically designed for healthcare that supports customer-centric features such as appointment scheduling, communication tracking, and real-time feedback.
  - b. Tailor the system to address healthcare-specific requirements, such as tracking customer interactions, providing personalized care recommendations, and integrating with clinical workflows.
  - c. Where possible, integrate the CX management system and other healthcare systems such as Electronic Health Records (EHR), billing software, and appointment scheduling tools to create a unified customer profile.
  - d. Provide training sessions for staff on how to effectively use the CX management system.

- e. Ensure relevant departments have access to the system, to be able to derive insights that will work to further inform the organizations CX initiatives.

**Experience Statements:**

- As a customer facing staff, having access to a unified customer profile enables us to have greater access to information and provide a more personalized experience.

**9. GUIDELINE FIVE: Experience Measurement**

Employee skills and culture ensure organizations are equipped and empowered to consistently provide outstanding customer experiences through creating a positive, empathetic environment.

**9.1. Protocol 5.1.A. Implement basic surveys for CX feedback collection**

**Level:** Foundational

**Overview:** Launching experience measurement surveys enables organizations to gather valuable insights directly from customers, ensuring their voices are heard.

Utilizing this feedback within decision-making processes allows organizations to make informed adjustments that enhance service quality and customer experience.

**Activities:**



## 1) Design and launch experience measurement surveys

- a. Define the primary goals of the surveys and outline the key customer experience measurements that will effectively capture customer experiences and insights.
- b. Select the appropriate survey format (e.g., online, face-to-face, telephone) that aligns with customer preferences and accessibility.
- c. Draft clear, concise, and unbiased survey questions, incorporating a mix of quantitative (e.g., Likert scale ratings) and qualitative (e.g., open-ended) formats to gather comprehensive feedback.
- d. Distribute the survey to the target audience through selected channels (e.g., email, posters, SMS) and establish a clear timeline for responses.
- e. Inform customers about the survey's purpose and importance, emphasizing how their feedback will contribute to improving their experiences.
- f. Track survey completion rates, using reminders to encourage participation and maximize response rates.

### **Experience Statements:**

- As a management team member, I can better understand the organizations' customers through their survey responses, allowing me to make more informed decisions about the organizations CX approach and strategy.

## 9.2. Protocol 5.1.B. Collect publicly available customer insights and introduce external benchmarking

**Level:** Advanced

**Overview:** Collecting publicly available customer insights through gathering and analyzing feedback from sources like online reviews, social media, and forums aids to better understand customer perceptions, identify trends, and improve overall customer experiences.

By integrating external benchmarks, strengths and weakness can objectively be assessed, driving targeted improvements that elevate overall customer satisfaction.

### **Activities:**

- 1) Collect publicly available customer insights
  - a. Analyze publicly available data sources including Google Reviews, social media platforms, online forums and blogs.
  - b. Categories the data into positive, neutral, and negative sentiments to identify overall patient perception.
  - c. Highlight areas where feedback is consistently negative to priorities improvements and areas of positive feedback to reinforce strengths.
- 2) Introduce and utilize external benchmarking



- a. Research and select external benchmarking sources relevant to the organization's industry and customer demographics to ensure comparisons are meaningful.
- b. Incorporate key benchmarking metrics into surveys, allowing for direct comparisons between the organization's performance and industry standards.
- c. Regularly analyses external benchmarking data alongside internal survey results to identify performance gaps and areas for improvement.
- d. Communicate findings from benchmarking analyses with key CX teams, highlighting areas where the organization excels and where enhancements are needed.

**Experience Statements:**

- As a "CX team member", the use of external benchmarking ensures that our efforts are in line with or exceeding industry benchmarks.

**9.3. Protocol 5.2.A. Establish basic real-time feedback mechanisms**

**Level:** Foundational

**Overview:** Establishing basic real-time feedback mechanisms is essential for capturing immediate customer insights, allowing organizations to respond quickly to concerns and enhance the overall experience.





## Activities:

- 1) Identify touchpoints and leverage feedback tools
  - a. Identify key touchpoints in the customer journey where feedback can be collected, such as during appointments, after service interactions, or through digital channels.
  - b. Decide on and set up appropriate methods for collecting feedback at each touchpoint, such as simple printed surveys, push button feedback kiosks or SMS polls.
  - c. Conduct usability testing with a sample group to ensure that the feedback tools are easy to use and effectively capture the desired information.
  - d. Provide training for staff on how to encourage customers to engage with feedback tools and how to address any questions or concerns related to the feedback process.
  - e. Track participation and response rates for real-time feedback mechanisms, adjusting strategies as needed to improve engagement and data collection.
  - f. Ensure that collected feedback is integrated into existing data management systems for analysis and reporting, facilitating timely insights.

## Experience Statements:

- As a customer facing member of staff, I have faster access to customer sentiments allowing me to tailor my actions accordingly to enhance customer experiences.

#### 9.4. Protocol 5.2.B. Optimize real-time feedback and response

**Level:** Advanced

**Overview:** Optimizing real-time feedback and response systems ensures that customer insights are collected efficiently but also acted upon promptly, leading to swift improvements in service delivery.

By refining these systems, organizations can enhance their responsiveness to customer needs, ultimately boosting satisfaction through a more agile and customer-centric approach.

**Activities:**

- 1) Enhance and automate feedback processes
  - a. Analyze existing real-time feedback collection and response processes to identify areas for improvement.
  - b. Introduce automation to streamline feedback collection and response processes, through setting automated triggers for collection, reducing manual effort and enhancing efficiency in data handling.
  - c. Create automated responses for acknowledging feedback submissions, ensuring customers feel heard and valued immediately after providing their input.
  - d. Employ real-time analytics tools to monitor incoming feedback continuously, allowing for quick identification of trends and urgent issues that require immediate attention.



- e. Establish alert systems that notify relevant teams of critical feedback or negative sentiments in real time, enabling swift intervention and resolution.
- f. Design processes for closing the feedback loop by informing customers about actions taken in response to their feedback, reinforcing the value of their input.

**Experience Statements:**

- As a “CX team member”, I am able to gain immediate insights to areas where critical feedback has been provided, allowing me to deploy remediating actions promptly.

**9.5. Protocol 5.3.A. Introduce basic data and feedback analysis**

**Level:** Foundational

**Overview:** Introducing basic data and feedback analysis will work to transform raw customer insights into actionable information that can drive improvements in service and customer experience.

By systematically analyzing feedback, organizations can identify trends, strengths, and areas for enhancement, enabling informed decision-making and fostering a culture of continuous improvement.

**Activities:**

- 1) Conduct basic data analysis



- a. Compile feedback data from various sources into a centralized database for easier access and analysis.
  - b. Conduct basic analysis of key metrics including overall satisfaction scores, response rates, and common themes in customer comments, looking for key trends, patterns, and correlations.
  - c. Segment the feedback data by demographics, service types, or time periods to gain deeper insights into specific customer groups and their experiences.
  - d. Perform a basic sentiment analysis to categories feedback as positive, negative, or neutral, helping to identify areas of concern and satisfaction.
- 2) Share findings with relevant team members
- a. Summaries key insights, provide context, and utilize data visualization to clearly digest key insights where relevant.
  - b. Engage the appropriate audience are engaged, including leadership and relevant teams, by tailoring the message to their needs and decision-making role.
  - c. Present actionable recommendations with clear next steps, prioritizing based on impact and encourage feedback or discussion for alignment.

### **Experience Statements:**

- As a management team member, I can easily understand our CX performance and can use this data as an anchor for future next step decisions.

## 9.6. Protocol 5.3.B. Implement advanced analytics

**Level:** Advanced

**Overview:** Implementing advanced analytics is crucial for uncovering deeper insights from customer data, enabling organizations to predict trends and behaviors that inform strategic decision-making.

Leveraging techniques such as predictive modeling and machine learning can enable organizations to enhance their understanding of customer needs, allowing for more personalized and effective service delivery.

### **Activities:**

- 1) Select and integrate advanced analytics tools
  - a. Select the most suitable analytics tools based on criteria such as functionality, ease of use, scalability, and cost-effectiveness.
  - b. Develop a detailed plan for integrating selected analytics tools into existing workflows and systems, outlining timelines, resource requirements, and key milestones.
  - c. Provide training sessions for relevant staff members on how to effectively use the advanced analytics tools, ensuring they understand both functionality and best practices.

- d. Enhance data management practices to ensure high-quality, consistent data input for the analytics tools, improving the accuracy of analyses and insights.
- e. Implement data governance standards to maintain data integrity, privacy, and security, ensuring compliance with relevant regulations and policies.
- f. Continuously assess the performance of the analytics tools, measuring return on investment (ROI) and adjusting as necessary to maximize effectiveness.

#### **Experience Statements:**

- As a “CX team” member, leveraging advanced analytics tools allows us to uncover greater insights into our customer experience performance, allowing us to develop more targeted approaches.

#### **9.7. Protocol 5.4.B. Perform detailed analysis of PREMs reports**

**Level:** Advanced

**Overview:** Performing a detailed analysis of Patient Reported Experience Measures (PREMs) reports involves reviewing patient feedback on their experiences with healthcare services to identify trends, pain points, and areas for improvement.

This analysis helps healthcare organizations understand patient satisfaction levels, improve care delivery, and make data-driven decisions to enhance the overall patient experience.

### **Activities:**

#### 1) Perform analysis of PREMs results

- a. Obtain the latest PREMs reports from DHA, ensuring the data is up to date and comprehensive. Organize the feedback into categories, such as appointment scheduling, quality of care, hospital facilities, and staff interactions, for easier analysis.
- b. Segment the data based on patient demographics (age, gender, nationality) and service categories (e.g., inpatient, outpatient, emergency services) to allow for identifying trends specific to different patient groups and services.
- c. Analyze the data to identify significant patterns, both positive and negative, in the patient experience, such as frequent complaints or areas where patients report high satisfaction.
- d. Based on the analysis, prioritize the areas that require immediate attention or improvements, considering the impact on patient experience, the frequency of reported issues, and the resources needed to implement changes.
- e. Provide evidence-based recommendations for improving patient experience, along with an action plan that includes timelines for implementing improvements.

### Experience Statements:

- As a management team member, the PREMs allow us to assess our performance against a criterion used across Dubai.

## APPENDICES

Appendix 1 - 'Five Pillars of Customer Experience Excellence' framework

Appendix 2 - CX Maturity Assessment Tool

The following appendices can be located as additional documents:

- Appendix Document 3 – CX Strategy Canvas Template
- Appendix Document 4 – CX Initiative Charter Template
- Appendix Document 5 – Illustrative CX Training Programs
- Appendix Document 6 – Example CX Staff Recognition Criteria
- Appendix Document 7 – Example Service Recovery Framework



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- Appendix Document 8 – Illustrative CX Team Responsibilities
  - Appendix Document 9 – Persona Toolkit
  - Appendix Document 10 – Example Customer Journeys

## Appendix 1 - 'Five Pillars of Customer Experience Excellence' framework



## Appendix 2 - CX Maturity Assessment Tool

This high-level tool is designed to help organizations perform a self-assessment to determine their current maturity rating. Based on this rating, organizations can review and implement the appropriate Experience Protocols to elevate their maturity rating.

### Key Steps:

1. **Complete the Self-Assessment Questionnaire** - Self-assess customer experience practices across 5 Experience Guidelines by completing the self-assessment questionnaire
2. **Analyze the Results** - Calculate the outcomes of the self-assessment questionnaire to understand the current maturity rating of the organization
3. **Review the Experience Protocols** - Based on the maturity rating scores for each pillar, review the Experience Protocols to determine if Foundational or Advanced would be appropriate for the organization

## Appendix 1 - CX Maturity Assessment Tool

### Self-Assessment Questionnaire

Experience Guideline	ID Number	Do you agree with the following statement?	Yes	Partially	No
<b>1. Strategy</b>	1.1	We have a well-defined CX strategy			
	1.2	Our CX strategy is well communicated to all staff			
	1.3	We ensure customer and staff representation & involvement in the development of our CX strategy			
<b>2. People &amp; Collaboration</b>	2.1	Our staff have completed CX training courses			
	2.2	We recognize and incentivize efforts by our staff for providing an exceptional CX			
	2.3	We have established service recovery processes			
<b>3. Governance</b>	3.1	We have clearly defined CX responsibilities			
	3.2	We have a well-defined governance structure for CX			
	3.3	We have well defined reporting and communication frameworks			

<b>4. Capabilities &amp; Touchpoints</b>	4.1	We gather customer insights and store and manage customer data			
	4.2	We activate multiple customer channels			
	4.3	We deploy a range of customer-centric digital tools			
<b>5. Experience Measurement</b>	5.1	We deploy basic surveys for CX feedback collection			
	5.2	We utilize basic real-time feedback mechanisms			
	5.3	We conduct basic data and feedback analysis			

#### How to calculate Maturity Score:

(Number of “Yes” x 2) + (Number of “Partially” x 1) + (Number of “No” x 0) = Maturity Score

#### Maturity Scale (per guideline):

Low Maturity - 0-1 / Medium Maturity - 2-4 / High Maturity - 5-6

#### Maturity Scale (total):

Low Maturity - 0-9 / Medium Maturity - 10-21 / High Maturity - 22-30