

# CULTIVATING A CONTEMPORARY CUSTOMER EXPERIENCE ORGANIZATION

*Customer Experience Case Study*

## CLIENT SITUATION

Our client, a leading mortgage buyer, is a long-standing player in a mortgage market that is seeing more Customer Experience (CX)-savvy disruptors enter the space with increased velocity—promising technological advancement, unparalleled speed, and user-friendly efficiencies.

In this highly regulated environment, our client understood that the path to differentiation and growth was through CX.

The organization engaged North Highland to evaluate its existing CX capabilities, align its operating model and organizational structure, enhance its CX methodologies and ways of working, and coach its teams through change.

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North Highland helped guide a leading mortgage buyer through its customer-centric transformation. By aligning internal capabilities with CX best practices, we helped move the organization towards its goal of becoming the preeminent player in the single-family mortgage buying space, shifting its organizational paradigm from product-centric to customer-centric.

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## OUR APPROACH

### *Maturity Assessment*

To prepare for a full-scale CX transformation, we first assessed CX capabilities to determine current maturity levels by conducting discovery sessions with 45 stakeholders and leveraging an output framework that categorized our client's maturity across six core CX capability areas.

### *Strategy and Roadmap*

Armed with a solid understanding of existing capabilities, we designed a future state model and strategic roadmap that empowered leaders to focus on mission-critical initiatives. Our team developed a data-driven prioritization framework to ensure teams address the most impactful CX business opportunities and initiatives, paired with strategic recommendations to evolve the operating model, culture, organizational design, and engagement frameworks.

### *Ways of Working*

Recommendations were stress-tested in three "Ways of Working Labs" executed in two-week sprints where the team dissected methodologies and opportunities, evolving business-as-usual routines towards more innovative ways of working.

### *Leadership Behaviors*

Leadership behaviors are critical to encouraging organizational adoption, driving the launch of a 20-person Experience Leadership Council, which informed, inspired, and empowered senior executives to play an integral role in the co-creation process.

### *CX Toolkit*

We developed a comprehensive and intuitive 150-page CX toolkit to map out the components of a gold standard CX organization, in alignment with customer needs, values, and expectations.

### *Coaching and Mentoring*

When it was time for the client team to own execution, North Highland experts delivered hands-on coaching and mentorship for two months, guiding the strategic planning process and the creation of new CX initiatives while monitoring and course-correcting where needed to ensure sustainable, effective execution.

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## VALUE DELIVERED

North Highland translated organizational insights and experience best practices into tailored, actionable recommendations, then empowered our client to execute those recommendations in its own environment. The power of this approach comes from arming clients with data-driven insights, pragmatic recommendations, and hands-on coaching to quickly upskill teams to own next steps and continue to optimize. This work shifted employee mindsets towards greater customer-centricity, helped leaders prioritize mission-critical initiatives, and positioned the organization for future leadership grounded in best-in-class capabilities.

NORTH HIGHLAND ENABLED OUR CLIENT'S LEADERSHIP WITH A MORE CUSTOMER-CENTRIC OPERATING MODEL AND A RENEWED FOCUS ON CONTEMPORARY WAYS OF WORKING, COUPLED WITH A COMPREHENSIVE CX TOOLKIT DESIGNED TO IMPROVE AND STANDARDIZE WORK OUTPUT. OUR CLIENT'S OPENNESS TO REIMAGINE THE FUTURE AND HAVE REAL CONVERSATIONS WILL LEAD TO SUSTAINED CX EXCELLENCE.

## ABOUT NORTH HIGHLAND

[North Highland](#) is a global management consulting firm known for helping clients solve their most complex challenges related to **customer experience, performance improvement, technology and digital**, and **transformation**. We add value and support our clients across the full spectrum of consulting, from strategy through delivery. We bring the big ideas, then we make them real.

North Highland is an employee-owned firm, headquartered in Atlanta, Ga., with more than 3,000 consultants worldwide and 60+ offices around the globe. The firm is a member of [Cordence Worldwide](#), a global management consulting alliance. For more information, visit and connect with us on [LinkedIn](#), [Twitter](#) and [Facebook](#).