



## Innovation in Relationship Management Models: Organizational Structures Oriented to Customer Experience

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#### Summary

This article discusses how organizational design and operating models can be reconfigured to integrate sales, service, and operations around the customer experience, replacing functional silos with journey-oriented structures and value missions. Drawing on process organization, contingency theory, and business agility, we propose a framework that combines multidisciplinary squads/cells, dual governance (execution + innovation), and experience metrics as mechanisms for economic and behavioral alignment.

We argue that relationship management is, above all, an organizational project: choices of roles, rituals, and interfaces define the quality of perceived service as much as commercial techniques; therefore, the brand's "frontstage" must be coupled to the operational "backstage" through clear internal services, service level agreements, and end-to-end learning cycles (GALBRAITH, 2014; MINTZBERG, 1979; KOTTER, 2012; PINE; GILMORE, 2011; EDMONDSON, 2012).

**Keywords:** organizational design; customer experience; squads; dual governance; CX metrics.

#### Abstract

This paper examines how organizational design and operational models can be reconfigured to integrate sales, service, and operations around customer experience, replacing functional silos with journey-oriented structures and value missions. Drawing on process organization, contingency theory, and business agility, we propose a framework that combines cross-functional squads/cells, a dual operating system (execution + innovation), and experience metrics as alignment

mechanisms for economic and behavioral outcomes. We argue that relationship management is, above all, an organizational design problem: choices of roles, rituals, and interfaces shape perceived service quality as much as commercial techniques; therefore, the brand's "frontstage" must be tightly coupled to the operational "backstage" via clear internal services, SLAs, and end-to-end learning loops (GALBRAITH, 2014; MINTZBERG, 1979; KOTTER, 2012; EDMONDSON, 2012; PINE; GILMORE, 2011).

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## 1. Fundamentals of Experience-Driven Organizational Design: From Silo Logic to Journey Logic

Organizational design theory demonstrates that structure follows strategy: when the strategy is to compete for end-to-end experience, the structure cannot remain functional-departmental without losing coherence in value delivery. The Star Model and contingency argue that processes, people, metrics, and incentives must be reconfigured around the customer-perceived value creation flow, not around internal specializations (GALBRAITH, 2014; MINTZBERG, 1979). This shift shifts the organization's "center of gravity" from local internal efficiency to perceived effectiveness throughout the journey.

"Customer experience" is, in practice, a chain of decisions and handoffs that begins with the promise (marketing/sales), moves through activation and use (onboarding/service), and renews itself with retention and expansion (operations/continuous value). Without journey owners and interface rules between front-and back-stage areas, accountability gaps emerge: what belongs to sales "does not belong to support," what belongs to support "does not belong to operations." Journey-based approaches create cross-cutting accountability and allow for measuring time to first value, first-interaction resolution, and customer effort as shared goals (MEYER; SCHWAGER, 2007; PINE; GILMORE, 2011).

The concept of dual governance addresses the exploitation vs. exploration paradox: maintaining a stable execution engine while simultaneously running an agile network to innovate the experience where it hurts most (KOTTER, 2012). The "network" operates on value-based missions ("reduce effort," "accelerate onboarding," "reduce repeat calls") and spans departments without requiring massive initial reorganizations; the "hierarchy" ensures compliance, budgeting, and scale. The coupling between the two worlds occurs through rituals, OKRs, and roadmaps with clear prioritization.

On a human level, psychological safety and cross-functional learning are necessary conditions for squads to deliver more than the sum of their parts. Teaming shows that temporary and cross-functional teams learn faster when there is voice, listening, and systematic after-action reviews; without these, "multidisciplinarity" becomes a long meeting with little decision-making (EDMONDSON, 2012).

Experience-driven structures require explicit roles (e.g., Journey Owner, Product/Service Leader, CX Research, Ops) and the authority to adjust processes that cross boundaries. The internal service logic transforms departments into front-line providers with SLAs.

Operations, IT, and finance now deliver capacity and response times as internal products (API/service catalogs), with quality metrics aligned with NPS/CSAT/CES and journey-based cost-to-serve. This model reduces priority frictions, as the "internal customer" is the external customer's journey itself (GALBRAITH, 2014; CHRISTENSEN et al., 2016).

As an alignment mechanism, experience metrics are at the heart of the system: NPS for relationship, CES for effort, FCR for contact effectiveness, TTV (time-to-value) for initial impact, churn/expansion for results, and cost-to-serve for viability. It is important to balance outcome indicators with process indicators (transfer times, rework, handoffs), otherwise we risk "managing by satisfaction" without flow engineering (REICHHELD, 2011; PINE; GILMORE, 2011).

In terms of processes and methods, journey-oriented approaches rely on service design: frontstage/backstage blueprints, co-creation with customers, prototyping, and usability testing to remove cognitive load and pain points. This combines qualitative listening (interviews/ethnography) with telemetry (time on task, abandonment, reopening) and controlled experiments, avoiding decisions guided by untested hypotheses (STICKDORN; SCHNEIDER, 2011; SHAPIRO; VARIAN, 1999).

Culture is the environment in which the structure operates. Artifacts (visual language of journeys, metrics walls), rituals (dailies, reviews, retros), and values (respect for the customer's voice, learning) need to enact what we want to see, or the organizational chart "doesn't work." Without symbolic coherence, the organization returns to its previous equilibrium, and the experience becomes a slogan (SCHEIN, 2010). In short, orienting structure to experience means aligning architecture, processes, people, and symbols so that promise and delivery coincide.

Finally, economic viability completes the cycle: the experience-driven organization needs to reduce cost-to-serve while increasing lifetime value. This requires explicit trade-offs (e.g., elegant self-service + humans for complex cases), segmentation by time value, and operation by exceptions to protect margin without degrading trust (CHRISTENSEN et al., 2016; PINE; GILMORE, 2011). A good experience pays for itself when it eliminates rework, friction, and evasion.

## 2. Agile squad and cell structures for CX: roles, rituals, interfaces, and metrics

Journey-oriented squads/cells organize work by value missions (e.g., "Frictionless Onboarding"), not by department. Each cell brings together sales, service, operations, product, data, and design, with a Journey Owner responsible for composite results (NPS, CES, TTV, etc.).



FCR, churn/expansion, and cost-to-serve). The cell has a single backlog, prioritized by impact on the journey, and autonomy to change processes under guardian principles (brand, risk, compliance) defined by leadership (SCHWABER; SUTHERLAND, 2020; GALBRAITH, 2014).

Roles are distributed to avoid "ownerless crowds." Journey Owners ensure consistency and goals; CX Research provides field evidence (qualitative and quantitative); Service Designers translate insights into blueprints and proofs of concept; Sales/Success bring the voice of the customer and test roadmaps; Ops/IT convert decisions into processes/automation; Data measures causal uplift (not just correlation). Ops roles (RevOps, Customer Ops, Product Ops) standardize data and integrations, preventing each cell from "inventing its own CRM" (DENNING, 2018; STICKDORN; SCHNEIDER, 2011).

Rituals provide cadence and transparency. Short dailies to synchronize deliveries; biweekly reviews with a demonstration of the journey's impact (not just a feature demo); retros to learn from mistakes; monthly CER (Customer Experience Review) with leadership for portfolio decisions and trade-offs (service time vs. depth, automation vs. human touch).

Quarterly OKRs connect value narrative to measurable goals (KOTTER, 2012; EDMONDSON, 2012).

Interfaces with the functional hierarchy are formalized through internal service contracts. IT, Legal, and Risk operate as platforms: they offer catalogs (APIs, templates, standard clauses, privacy guidelines) and response SLAs to enable speed without breaking compliance. In return, squads respect corporate standards (data, security, brand) and submit sensitive changes to clear approval flows. This design avoids both "agile anarchy" and "blocking bureaucracy" (GALBRAITH, 2014; KOTTER, 2012).

Metrics form a composite dashboard: NPS/CSAT for relationship, CES and FCR for effort/effectiveness, TTV and AHT for time, churn/expansion for outcome, and cost-to-serve for viability. Each squad assumes process goals (e.g., reducing handovers, reopenings, turnaround time) and outcome goals, always with experimental measurement (A/B, geographic, by cohort) to avoid confusing seasonality with real progress (REICHHELD, 2011; SHAPIRO; VARIAN, 1999).

Prioritization uses an Impact  $\times$  Effort  $\times$  Evidence matrix: initiatives move up when they reduce effort and time to value with low operational overhead, supported by data (telemetry, call audits, surveys). Items that "sound good" but lack proof are considered bets with stage gates and exit criteria. This mechanism protects the focus and attentional capital of clients and teams (EDMONDSON, 2012; STICKDORN; SCHNEIDER, 2011).

The learning cycle closes with AARs (After Action Reviews) and standards repositories: what reduced CES in a segment becomes a template; what failed is documented to prevent it from happening again. Communities of practice (CX Research, Service Design, Ops, Data) intersect squads, maintaining technical consistency and evolving standards (MINTZBERG, 1979; EDMONDSON, 2012). Thus, the organization learns through a network, not just through the chain of command.



Finally, budget and incentives follow the structure. Squads receive budget envelopes tied to journey-based OKRs, with bonuses tied to cost-to-serve reduction, reduced effort, improved TTV/FCR, and LTV growth, subject to ethical constraints (transparency, privacy, and clear language). Bonusing only "sales" encourages promises that the operation fails to deliver; bonusing only "satisfaction" encourages generosity without viability. The weighted basket aligns experience and business (REICHHELD, 2011; PINE; GILMORE, 2011).

### 3. Dual governance and journey portfolios: prioritization, risks, and compliance

Dual governance combines a stable hierarchy of execution with an agile network of innovation, allowing the organization to operate with two systems in parallel: one optimizes reliability and scale; the other seeks discontinuous improvements in the customer experience throughout critical journeys (KOTTER, 2012).

At a practical level, this duality materializes in a portfolio of journeys with explicit owners, value targets, and budgets tied to CX outcomes and cost-to-serve, while the functional core ensures standards, security, and continuity. The coupling between the two domains occurs through synchronized rituals (portfolio reviews, QBRs, steerco) and contractual interfaces between journeys and internal platforms, avoiding both "agile anarchy" and "procedural stagnation" (GALBRAITH, 2014; MINTZBERG, 1979).

Portfolio prioritization must reflect customer value and business value under realistic capacity and risk constraints. A robust practice is to rank initiatives by Impact  $\times$  Effort  $\times$  Evidence, moving up the queue those that reduce customer effort (CES) and time to first value (TTV) with strong empirical support (telemetry, voice of customer, experiments), while items with weak hypotheses are considered bets with stage gates and abandonment criteria (REICHHELD, 2011; STICKDORN; SCHNEIDER, 2011). This logic preserves focus and reduces the temptation to spread teams thin across disparate demands.

Risk and compliance need to be built into the design, not tacked on at the end. In journeys that involve personal data and contractual promises, risk analysis considers probability versus impact on customer, brand, and operations, mapping preventive controls (data standards, segregation of duties, privacy checklists) and detective controls (logs, audit trails, sampling) with clear ownership (ISO, 2018; STICKDORN; SCHNEIDER, 2011). The result is a portfolio that accelerates without "outsourcing" risk to the last stage, where the cost of remediation is highest.

In the decision circle, governance defines numerical triggers that move budget between journeys. Persistent NPS drops at a critical touchpoint, an increase in reopenings at the service desk, or spikes in abandonment during onboarding serve as precursor signals to rebalance squads and activate playbooks (e.g., automating clarifications, adjusting workflows, and providing human support for complex cases) (PINE; GILMORE, 2011; REICHHELD, 2011). This reduces decision-making latency and prevents annual targets from freezing responses to emerging problems.



The hierarchy maintains standards and platforms that support the journeys. IT, Data, Legal, and Risk act as service layers with catalogs, SLAs, and APIs that squads can consume to accelerate deliveries without compromising security and compliance. In return, the agile network returns learning and prioritization that update standards, creating a virtuous cycle of continuous improvement.

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Portfolio transparency is essential to align expectations and behaviors. Executive Kanbans, capability maps, and journey-based value burn-ups make it clear where the company is investing attention and resources, reducing internal disputes and accelerating trade-off decisions (MINTZBERG, 1979; EDMONDSON, 2012). Visibility also educates: stakeholders begin to discuss flows and results rather than functional "fiefdoms."

Finally, dual governance only thrives with a proven methodology. Controlled experiments (A/B/cohort) and incrementality analyses support portfolio decisions, preventing seasonal correlations masquerading as progress from capturing budgets (SHAPIRO; VARIAN, 1999; EDMONDSON, 2012). The standard of evidence strengthens accountability and legitimizes course adjustments, even when popular measures fail the causal test.

#### **4. Service Blueprints and Frontstage-Backstage Integration: SLAs, Automation, and Exceptions**

Service blueprints describe, in a single view, what the customer sees (frontstage), what underlies the backstage, supports (systems, data, policies), and physical/digital evidence of the experience; they are the central tool for aligning promise and delivery (BITNER; OSTROM; MORGAN, 2008). By mapping lines of visibility, touchpoints, handovers, and queues, the blueprint makes dependencies and bottlenecks explicit, allowing cross-functional teams to test flow alternatives before investing heavily in technology. In experience-driven organizations, blueprints are living, versioned assets linked to process and outcome metrics (STICKDORN; SCHNEIDER, 2011).

Front-end integration requires internal service agreements that make the operational platform predictable for the on-the-job team. These SLAs specify response times (e.g., provisioning, patching, data fixes), change windows, quality standards, and endpoints.

scaling, always linked to experience KPIs (NPS, CES, FCR, TTV) and costs of serving. The goal is for the front stage to be able to promise with confidence, knowing what the house will deliver and in how much time (GALBRAITH, 2014; REICHHELD, 2011). SLAs without a link to CX become internal metrics that do not protect the experience.

Automation should be thought of as flow design, not as a cost-cutting shortcut. In blueprints, automation ideally eliminates queues, repetitions, and predictable errors, freeing up people for high-value exceptions and empathetic handling of complex cases. Automation of clarity (microtext, tooltips, wizards), decision-making (transparent rules), and execution (API-first integrations) reduces the cognitive load for customers and employees, as long as it is auditable and includes rollback controls (STICKDORN; SCHNEIDER, 2011; PINE; GILMORE, 2011). Automating opacity creates invisible friction that explodes at the end.

Exceptions are inevitable and must be designed in. The blueprint specifies "escape routes" with criteria, authorities, and channels to handle outliers (e.g., customer vulnerability, systemic failures, external contingencies). Instead of "stacking layers" of approval, an exception policy is designed with responsible parties and limits, coupled with logs for learning and governance. This approach reduces customer pain time and internal rework, while preserving compliance (EDMONDSON, 2012; REICHHELD, 2011).

At the operational level, flow engineering principles help. Little's Law links work in progress, arrival rate, and cycle time; variability at critical touchpoints amplifies queues and delays. Blueprints help identify where to buffer, where to decouple, and where to standardize to reduce variance without sacrificing customization, always measuring time to value.

**Monitoring closes the loop.** For each step of the blueprint, processing time, rework rate, root-cause errors, abandonment, and satisfaction are measured. Journey dashboards make flow health visible and connect occurrences to predefined actions: abnormal queues trigger temporary decoupling, extra windows, or human reinforcement; FCR drops trigger targeted training or route changes (REICHHELD, 2011; PINE; GILMORE, 2011). Without feedback loops, the blueprint becomes a poster.

**Finally, independent verification and AARs** maintain the reliability of the blueprint. Sample audits verify SLA adherence, data quality, and automation effectiveness; after-action reviews capture lessons learned from incidents and incorporate design improvements. This discipline transforms blueprints into knowledge assets that shorten decision-making time and reduce risk in future changes (EDMONDSON, 2012; BITNER; OSTROM; MORGAN, 2008).

**Integrating promise, process, and proof** is the essence of experience-driven organizing.



## 5. Internal platforms as “products”: catalogs, SLAs, and usage-based funding

Experience-driven engagement requires support functions—IT, Data, Legal, Risk, and Operations—to act as internal platforms treated as products, with owners, vision, roadmaps, and adoption metrics, rather than reactive “ticket factories.” This product *mindset* creates “paved roads” (standards, APIs, integration kits, *playbooks*) that reduce cognitive friction and cycle time for journey squads, generating a direct impact on customer-perceived TTV (*time-to-value*) and FCR (*first-contact resolution*) (GALBRAITH, 2014; SKELTON; PAIS, 2019). By defining what is offered and at what quality, the platform transforms internal capabilities into a credible promise for the front office.

To operate as a product, the platform needs an explicit catalog of services: what we deliver, to whom, how to consume it, which SLOs/SLAs, what limits and costs. Well-designed catalogs expose interface contracts (schema, *rate limits*, privacy requirements) and versioning standards, while also documenting dependencies and change windows. This transparency is a prerequisite for squads to plan reliably and for leadership to prioritize portfolios without negotiating “in the dark” (GALBRAITH, 2014; BITNER; OSTROM; MORGAN, 2008).

Service quality is governed by SLIs/SLOs/SLAs linked to experience.

Unlike disconnected internal metrics (e.g., generic *uptime*), SLOs should reflect what the customer perceives: API latency that impacts *checkout*, *provisioning* time that impacts onboarding, *data fix* time that prevents reopening. Error budgets and SRE-inspired *runbooks* align stability and change, converting degradations into action triggers (pausing *deploys*, reinforcing support, scaling infrastructure) before the damage reaches the journey (BEYER et al., 2016; SKELTON; PAIS, 2019).

The platform's economic design avoids two extremes—“everything free” (encourages irresponsible consumption) and “everything charged” (punishes innovation). Hybrid *showback/chargeback* and results-based *funding* models connect consumed capacity to value generated along the journey (e.g., reduced CES, reduced rework, increased FCR), preserving elasticity for high-potential experiments (KAPLAN; ANDERSON, 2007; STORMENT; FULLER, 2020). This allows squads to internalize cost-to-serve, and the platform obtains price signals to scale *roadmaps*.

At the technical-organizational level, the platform must be *API-first* and *event-driven*, with versioned catalogs, end-to-end observability, and data lineage for auditing. Adoption is measured by time to integration, effective use by squad, incident rate, and internal NPS, not just by “completed deliveries.” Without consumption and experience telemetry, the platform doesn't learn where to pave and where to discontinue (SKELTON; PAIS, 2019; GALBRAITH, 2014). Active portfolio curation is an essential part of platform maturity.

Adoption isn't a matter of “if they want it, they use it.” Platforms need internal *product marketing*: launch with clear use cases, *how-tos*, integration examples, and onboarding workshops; measure

*Awareness, trial, activation, and recurring use by squad; remove friction and discontinue underused services with a migration plan. Without evangelization and support, the catalog becomes a museum.*

Platform risk management uses KRIs (authorization errors, *timeouts*, SLO violations, ticket *backlogs*) as precursor signals for service scaling, *tuning*, or *sunsetting*. AARs and sample audits maintain reliability between what the catalog promises and what operations deliver, avoiding "silent misalignment" that sabotages squads and erodes trust between front- and back-stage teams (EDMONDSON, 2012; BITNER; OSTROM; MORGAN, 2008).

Platform, here, is product, contract and learning mechanism.

Finally, portfolio strategy: fewer but better services, prioritized by journey levers (reduced effort, accelerated TTV, first-touch resolution) and mitigated risk (built-in compliance). This curation links bottom-up investment (platform capex) to top-down returns (LTV, retention, expansion), completing the economic equation of an experience-driven organization (GALBRAITH, 2014; KAPLAN; ANDERSON, 2007).

## 6. Integrated metrics (CX + cost-to-serve + risk): executive dashboard and action rights

Experience-driven frameworks require an integrated dashboard that unites CX metrics (NPS, CSAT, CES, FCR, TTV), economic metrics (cost-to-serve per journey/cohort), and risk metrics (incidents, severity, MTTx, regulatory exposures) under a causal map that links flow (process) and outcome (value) (REICHHELD, 2011; KAPLAN; NORTON, 1996). This dashboard replaces "KPI islands" with a single narrative: how backstage changes reduce effort, improve resolution, and lower costs, while keeping risks within tolerance.

The core of the dashboard combines leading and lagging indicators. Leading indicators include TTV, CES, FCR, turnaround time, and reopenings; lagging indicators include retention/churn, expansion/LTV, and cost-to-serve. Risk is measured by KRIs (complaint spikes, SLO violations, backlogs, timeouts, unhandled exceptions) and compliance KRIs (data incidents, failed audits). Without this mix of leading and lagging, the organization reacts late to experience degradation (BITNER; OSTROM; MORGAN, 2008; ISO, 2018).

Action rights convert metrics into automatic decisions: FCR drops and CES jumps at a given touchpoint trigger human reinforcement, script adjustments, clarification automation, or self-service improvements; journey-relevant SLO violations pause deployments and redirect capacity toward stability; cost-to-serve growth without NPS gains requires design review and "pruning" of variations that only generate effort (BEYER et al., 2016; PINE; GILMORE, 2011). Metrics without triggers are mere decoration.

Financial integration requires ABC/TDABC to assign costs by journey, reflecting touches, queues, rework, and waiting capital. The result is a cost-to-serve that aligns with CX: where effort falls, variable costs fall; where reopenings fall, handling costs fall; where TTV falls, revenue advances. This flow accounting allows us to compare automation, training, and

capacity as equivalent investment options (KAPLAN; ANDERSON, 2007; SHAPIRO; VARIAN, 1999).

To avoid false positives, portfolio decisions must be supported by causal evidence — controlled experiments, cohort trials, and mixture models that address seasonality and carryover effects. Last-touch attributions exaggerate the impact of late actions and underestimate the role of backstage; only incrementality reveals the true contribution of service design and platforms to the reduction of CES and cost-to-serve (SHAPIRO; VARIAN, 1999; EDMONDSON, 2012). Without a method, the panel becomes a confirmation of beliefs.

The risk perspective uses tolerances and bands: defining thresholds for severity/recurrence (e.g., P1 incidents, leaks, authorization failures), maximum restoration time per critical touchpoint, and regulatory exposure per sensitive journey. When bands are crossed, playbooks already authorize containment, compensation, and communication without "asking permission," reducing decision latency and customer pain time (ISO, 2018; KOTTER, 2012). Risk ceases to be a brake and becomes a design guide.

At the executive level, the dashboard presents itself as an "efficient frontier" between CX, cost, and risk: quadrants show dominant combinations (e.g., self-service with clear language + human reinforcement for exceptions) and dominated combinations (e.g., excessive variety that increases CES and cost). QBRs and steercos use this visualization to reallocate funds between journeys and between exploration and stability, legitimizing trade-offs (KAPLAN; NORTON, 1996; PINE; GILMORE, 2011). Thus, the discussion moves from opinions to portfolio.

Ethics and privacy serve as hard constraints on the dashboard: frequency caps, clear language, granular consent, and data minimization appear as "red lights" alongside CX and cost metrics, preventing local optimizations that violate trust and generate reputational liabilities (ISO, 2018; THALER; SUNSTEIN, 2008). A sustainable, excellent experience is one that respects autonomy and reduces effort with clarity and control.

Finally, AARs and independent audits keep the dashboard honest: NPS/CSAT/CES sampling, data trails, SLOs, and cost-to-serve; quarterly reviews that recalibrate triggers, bands, and standards. The dashboard then ceases to be a report and becomes a governance system— a living link between promise, process and proof, typical of organizations that treat relationship management as organizational design (EDMONDSON, 2012; GALBRAITH, 2014).

## **7. Talent, roles, and training paths for CX: psychological safety, *enablement*, and communities of practice**

The transformation to customer experience-driven structures fails less due to a lack of tools and more due to gaps in roles and competencies. The starting point is a competency model that translates strategy into technical knowledge (service design, causal analysis, CX metrics, and cost-to-serve), relational knowledge (facilitation, listening, negotiating trade-offs), and

adaptive (learning quickly, experimenting safely). Without this taxonomy, the organization hires “agility” without execution capacity and produces squads that only change the meeting cadence, not the outcome (GALBRAITH, 2014; MINTZBERG, 1979).

Psychological safety is a precondition for cross-functional learning. In contexts of high coupling between departments, team members must take interpersonal risks (ask difficult questions, expose flaws, challenge assumptions) without fear of symbolic punishment; otherwise, errors migrate to “discrete layers” and reappear as rework on the customer’s end (EDMONDSON, 2012). Explicit practices—understanding checks, process-focused *feedback*, working agreements—create norms of voice that support the quality of journey decisions (EDMONDSON, 2012; KOTTER, 2012).

Clearly defining roles avoids the “no one decides” common in agile networks. The Journey Owner is responsible for composite results (NPS, CES, FCR, TTV, churn/expansion, and cost-to-serve); the Service Designer maps *blueprints* and prototypes changes; the CX Research team ensures field evidence; the Ops team (RevOps, Customer Ops, Product Ops) standardizes data, integrations, and routines; and the Data/Analytics team conducts causal testing (A/B, cohort, MMM) and protects against correlation-based decisions (STICKDORN; SCHNEIDER, 2011; SHAPIRO; VARIAN, 1999). Roles with explicit mandates shorten decision-making time.

Career architecture should recognize Y (management or expertise) and XY (product/service leadership across journeys) trajectories. This retains service design, content, data, and platform SRE specialists without forcing them into purely managerial roles to advance. Progression criteria tied to impact on journey metrics (reduction in CES, FCR, and TTV; reduction in cost-to-serve; increase in LTV) align merit with value delivered, not ticket volume (GALBRAITH, 2014; KAPLAN; NORTON, 1996).

*Enablement* programs support the learning curve. Modular tracks cover: service design fundamentals, *blueprints*, and usability testing; CX metrics and flow accounting (ABC/TDABC per journey); causal methods (experiments, *uplift*, cohorts, MMM); governance and risk (privacy, SLAs, error budgets); facilitation and conflict management (STICKDORN; SCHNEIDER, 2011; KAPLAN; ANDERSON, 2007; SHAPIRO; VARIAN, 1999). The *enablement* metric is not “trained hours,” but rather performance *uplift* in squads.

Communities of practice cross cells to maintain technical standards and institutional memory. CX Research, Service Design, Data/Analytics, Content, and Ops hubs publish guides, component libraries, data patterns, *blueprint* templates, and experiment repositories (what worked, what didn't, and with what statistical power) (EDMONDSON, 2012; STICKDORN; SCHNEIDER, 2011). This reduces “seasonal reinventions” and raises the average delivery rate across squads.

Talent selection and onboarding deserve their own design. Simulation-based recruitment processes (case studies with *blueprints*, *journey reviews*, and constrained decisions) predict performance better than generic interviews. *Onboarding* should immerse the new hire in metrics, rituals, and *journey blueprints*, with cross-mentoring and 30–60–90-day goals anchored in evidence (KOTTER, 2012; PINE; GILMORE, 2011). Rushed onboarding becomes organizational noise that the customer feels.

Incentives and recognition close the loop. Rewarding only "sales" encourages impossible promises; rewarding only "satisfaction" encourages generosity without viability. The weighted basket—CX (NPS, CES, FCR, TTV), savings (cost-to-serve, rework), risk (SLOs, incidents)—aligns behavior with a sustainable experience (KAPLAN; NORTON, 1996; REICHHELD, 2011). Recognizing invisible work (standards, catalogs, automation) prevents the organization from pursuing short-term shortcuts.

Finally, reflective learning through AARs and *coaching* maintains progress. After-action reviews focused on process and root causes, and *coaching* for facilitation, clear writing, and negotiation of trade-offs, translate culture into repeatable competence (EDMONDSON, 2012). Without deliberate practice, the "experience-driven" structure regresses to a routine of ceremonies with little transformative power.

## 8. Deployment Roadmap: Phases, Cadence, and Independent Verification

The roadmap begins with a materiality assessment that maps critical journeys, pain points (high CES, low FCR, long TTV), rework costs, and risks (incidents, SLO violations, regulatory exposures). In parallel, the metric dictionary (concepts, formulas, sources, data quality), the dual governance model (rituals, rights of action, *steerco*), and the ethical principles (privacy, plain language, consent) are defined—without these foundations, the transformation becomes semantic (GALBRAITH, 2014; ISO, 2018).

**Phase 1 (0–90 days) — Foundation and *quick wins*.** Install a minimum viable dashboard for two pilot journeys (e.g., Onboarding and Support), with NPS/CSAT, CES, FCR, TTV, cost-to-serve, and KRIs (SLOs, queues, reopenings). Map *blueprints* of these journeys, remove obvious frictions (microtext, redundancies, useless steps), and run low-risk experiments with causal proof (A/B, cohort). Institute rituals (*dailies*, *reviews*, *retros*) and AARs from the beginning (STICKDORN; SCHNEIDER, 2011; SHAPIRO; VARIAN, 1999).

**Phase 2 (90–180 days) — Platforms as products and active dual governance.** Publish internal service catalogs with CX-aligned SLAs/SLOs; introduce error budgets and *runbooks* for stability; enable APIs and standards that accelerate squads; formalize Journey Owners and journey portfolios with prioritization by Impact × Effort × Evidence. Create communities of practice and *enablement* trails (BEYER et al., 2016; SKELTON; PAIS, 2019; GALBRAITH, 2014).

**Phase 3 (6–12 months) — Intelligent scale and standardization.** Expand the model to adjacent journeys, consolidate libraries (content components, roadmap standards, *blueprint templates*), implement ABC/TDABC per journey for cost-to-serve, and integrate product, CRM, and service desk data into an auditable lineage. Increase experimental maturity (*uplift, geographic/cohort testing*) and connect CX dashboards to budget decisions with actionable rights (KAPLAN; ANDERSON, 2007; KAPLAN; NORTON, 1996).

**Phase 4 (12–24 months) — Portfolio-wide optimization and prudent automation.** Deploy near-real-time orchestration (transparent rules; no black boxes), evolve mixture models with processable attention and SLO constraints, industrialize AARs and sample audits (privacy, data, SLO, cost-to-serve), and close the promise ÷ process ÷ proof loop in executive QBRs (REICHHELD, 2011; ISO, 2018; PINE; GILMORE, 2011).

Cadence sustains change: weekly for tactical (flow health, backlog, incidents, trigger decisions), monthly for tactical-strategic (portfolio review, platform roadmaps, thematic AARs), quarterly for strategy and budget (CX efficiency frontiers × cost × risk, trade-offs, *funding*) (KAPLAN; NORTON, 1996; KOTTER, 2012). Cadence without method becomes anxiety; method without cadence becomes bureaucracy.

Independent verification preserves credibility: data quality audits (completeness, timeliness, accuracy), NPS/CSAT/CES sampling, SLO reviews, and cost-to-serve calculations per journey; experiment reproducibility (plans, power, data, analysis).

Methodological transparency reduces internal disputes and increases external legitimacy (ISO, 2018; EDMONDSON, 2012).

Risk management uses *bandwidth* and *signaling*: spikes in reopenings, queues, SLO violations, data incidents, and regulatory complaints trigger *playbooks* (pausing *deployments*, reinforcing human support for exceptions, activating proactive communications, and structural corrections). The goal is to reduce customer pain time and shorten organizational TTR, protecting trust and results (BEYER et al., 2016; REICHHELD, 2011).

Finally, **political economy of change**: leaders sponsor journeys, tell before/after stories, and reward standards that save customer cognitive effort and internal rework.

The transformation ceases to be a “project” and becomes an operational regime, in which structures, rituals, metrics and incentives make organizational design the main instrument for relationship management (GALBRAITH, 2014; MINTZBERG, 1979; PINE; GILMORE, 2011).

## Conclusion

The evidence gathered throughout this article supports that relationship management is, first and foremost, organizational design: when the strategy is to compete for experience, the structure needs to align architecture, processes, roles, metrics, and symbols with the customer's perceived value stream—not with the historical boundaries of departments. This shift from the “local efficiency” axis to

“journey effectiveness” materializes the classic proposition that structure follows strategy, now reinterpreted from the perspective of journeys and internal services (GALBRAITH, 2014; MINTZBERG, 1979; PINE; GILMORE, 2011).

We show that dual governance resolves the explore/exploit paradox: hierarchy preserves standards, security, and scale, while the agile network crosses functional boundaries to reduce effort (CES), accelerate time to value (TTV), and increase first iteration resolution (FCR).

Coupling through rituals, OKRs and *steercos* allows resources to be moved according to precursor signals (NPS drops, reopening spikes), reducing decision-making latency without creating anarchy (KOTTER, 2012; REICHHELD, 2011).

In this arrangement, journey-oriented squads/cells replace the “no one decides” approach with cross-cutting accountability: Journey Owners with a mandate over composite results and backlogs prioritized by Impact × Effort × Evidence avoid dispersion and favor rapid learning.

The Service Design + CX Research + Ops trio links insight, prototyping and execution, increasing the success rate and the ability to fine-tune in short cycles (STICKDORN; SCHNEIDER, 2011; EDMONDSON, 2012).

Frontstage-backstage integration depends on up-to-date service *blueprints*, SLAs that speak the language of experience (latencies the customer feels, *fixed-date* deadlines that prevent reopenings), and exception policies with accountability and audit trails. This flow engineering, reinforced by principles such as Little's Law, synchronizes capacity and demand, cuts queues and rework, and makes promises reliable (BITNER; OSTROM; MORGAN, 2008; LITTLE, 1961).

On the internal platforms side, adopt them as products — with catalogs, SLIs/SLOs, and *funding* by use/value — transforms IT, Data, and Risk into paved roads for journeys, reducing cognitive load on teams and cycle time for the customer. Error budgets and SRE *runbooks* convert degradations into action triggers before they impact the experience, while APIs/lineage ensure auditability and evolution without collapsing compliance (BEYER et al., 2016; SKELTON; PAIS, 2019).

We proposed an integrated executive dashboard that combines CX (NPS, CSAT, CES, FCR, TTV), economics (cost-to-serve per journey), and risk (incidents, SLOs, exposures). From there, action rights become explicit: Did you cross the CES band? Automate clarifications. Did FCR drop? Reinforce service and adjust the script. Did you breach a critical SLO? Pause *deployments* and redirect capacity toward stability. Metrics become operational policy, not ornament (KAPLAN; NORTON, 1996; REICHHELD, 2011).

Causal proof is a prerequisite for governance: A/B, cohorts, and MMM replace correlation narratives, anchoring portfolios and budgets in incrementality. This discipline translates backstage (platforms, standards, automation) into perceived value (less effort, more resolution) and viability (reduced cost-to-serve), avoiding allocations based on fashion or seasonal noise (SHAPIRO; VARIAN, 1999; EDMONDSON, 2012).



In the human factor, psychological safety and training pathways underpin the performance of agile networks: clear roles, Y/XY career paths, service design *enablement*, metrics and causal methods, and communities of practice that uphold technical standards. Without this foundation, "agility" becomes a matter of ceremony, and experience degrades into slogans (EDMONDSON, 2012; GALBRAITH, 2014).

Ethics and privacy are not add-ons: they are design constraints. Privacy by default, granular consent, clear language, and data minimization create a social license to innovate and reduce the regulatory VaR of journeys. When controls are built into platforms and routines, speed no longer clashes with compliance (ISO, 2018; THALER; SUNSTEIN, 2008).

Finally, the phased roadmap—foundation and *quick wins*; platforms as products and active dual governance; scale with intelligent standardization; orchestration and auditing supported by weekly/monthly/quarterly cadences and independent verification—transforms change into an operational regime. The result is an organization that designs its form to serve better, learns publicly, and grows through self-paying experiences (KAPLAN; ANDERSON, 2007; PINE; GILMORE, 2011).

In short, innovation in relationship models emerges when experience-driven structures align journeys, platforms, metrics, talent, and ethics under a single contract: coherent promise, process, and proof. This is the transition from commercial technique to organizational engineering—a prerequisite for building lasting relationships and healthy economies in markets where customer trust and time are the scarcest assets (GALBRAITH, 2014; REICHHELD, 2011).

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