Customer Experience Primer for 2020

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Successful customer experience programs do more than identify and solve customer issues. They demonstrate the business benefits of CX, build a long-term CX strategy and lead the shift to a more customer-centric culture. This requires the right organization, governance, insights, assets and metrics.

**Scope**

Successful CX requires a high-impact strategy built on best practices that ensure continuous experience improvement and foster a customer-centric culture.

The topics we cover include:

- **Customer experience strategy and best practices**: Gaining a strong command of customer insight, deploying CX best practices and tools, and organizing a sustainable CX program

- **Customer-centric culture**: Enabling customer-focused decision making, driving leadership commitment to customer-first behaviors, and establishing and promoting customer-centric values throughout the organization

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Analysis

Gartner’s 2019 Customer Experience Management Survey shows that marketing departments are taking more CX responsibility than ever before. Getting your brand’s CX right and delivering on your brand’s CX promise through an effective and efficient CX strategy continue to be critical business imperatives. However, companies continue to pursue CX using an inside lens rather than a customer-centric approach, relying on internal assumptions, using incomplete or incorrect data, and establishing metrics that lead to the creation of a misinformed strategy. This causes negative downstream consequences, such as possible deprioritization of CX in the organization and a failure to deliver intended benefits.

Marketers seeking to capitalize on and benefit from the longer-term benefits CX offers must ensure their CX efforts identify and drive the use of actionable customer insights, CX assets, proper metrics, and customer-centric behaviors and processes throughout their organization.

Figure 1. Customer Experience Overview

Source: Gartner

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To achieve this, CX leaders must:

• Integrate user research and testing methodologies as constant and integral activities to uncover customer insight, optimize experiences and support innovation.

• Create actionable CX through focused, deliberate delivery of customer insight and voice-of-the-customer data, and peer perspectives.

• Ensure essential CX tools such as personas and journey maps are utilized and understood throughout the entire company.

• Promote and support standardized CX processes and customer-centric decision making and culture throughout the organization.

• Influence change across the entire customer journey by collaborating with leaders throughout the organization.

• Ensure that CX standards and behaviors are met in customer-impacting initiatives and projects.

• Utilize the proper metrics that reveal the longer-term brand and financial benefits customer satisfaction, advocacy and loyalty offer.

• Proactively seek ways to build satisfaction and advocacy, staving off potential industry disruptors and preventing customer pain points from forming.
Successful CX requires knowledge of best practices and a well-considered execution plan. That plan must be based on an outside-in view of customer wants and needs as defined by your customer insight and research methodologies. It takes tools such as personas and journey maps to inform customer-centric decisions and design, as well as a CX execution strategy that defines priorities, justifies investment, drives cross-functional collaboration and supports customer centricity.

Our research centers on the following topics:

- Customer-Centric Culture
- Customer Experience Strategy and Best Practices
Customer-Centric Culture

Customer experience is dedicated to improving the end-to-end journey for customers. Therefore, it is important to influence employee decisions and behaviors across the enterprise by establishing and promoting customer-centric values, disseminating actionable customer insights throughout the organization and securing leadership commitment toward a long-term goal of continuously improving the customer experience.

Questions Your Peers Are Asking

• How can I promote and support employee customer-centric behaviors, values and decision making throughout the organization?

• How do I engage other leaders to encourage top-down visibility and commitment to customer-centric best practices, goals and outcomes?

• How do I change the marketing department’s objectives, goals, processes, measures and rewards to foster customer centricity?

Recommended Content

• "Customer Centricity at Key Decision Points (Lam Research)"

• "Design Thinking Improves Customer Facing Projects (FedEx)"

• "Creating a CX Catalyst Program (Verint)"

Planned Research

• How to make common CX tools like journey maps and personas more actionable for employees

• How to influence top-down action to help create a more customer-centric culture

• How to help employees to be more empathetic toward customers

• Which questions to ask to measure organizational customer centricity

• How to measure stakeholder support and engagement in CX initiatives
Customer Experience Strategy and Best Practices

It is a struggle to define and maintain a customer experience that spans the entire customer journey and meet the goals and needs of customers and their organizations. A powerful CX mandate relies on shared customer insight, tools and frameworks that promote collaboration and unified understanding and the proper metrics to help prioritize and optimize initiatives.

Questions Your Peers Are Asking

- How do I select the best customer listening, user research and data collection methods to deliver the necessary quantitative and qualitative insights?
- What resources and assets does my CX program require to be successful?
- How do I understand and communicate the ROI of customer perception measures, such as customer effort score, Net Promoter Score and other measures of customer satisfaction?

Recommended Content

- "Build a Voice-of-the-Customer Strategy to Harness the Power of Customer Data"
- "Integrate User Research and Testing Into Agile Processes to Improve Customer Experience and Products"
- "Create Persona-Driven Journeys to Inform Customer Experience Strategy"

Planned Research

- Survey results from a study of CX practitioners that show what works in CX
- Best practices for utilizing the right user research and testing methodologies to gain needed customer insight, support innovation and drive optimization.
- What operating models for CX governance are most effective.
- How to secure, retain and grow funding for CX programs.
- Understand the drivers of satisfaction and dissatisfaction and why eliminating dissatisfaction doesn’t equate to greater satisfaction.
Suggested First Steps

• “How to Turn Persona-Driven Customer Journey Maps Into an Actionable, Cross-Functional Customer Experience Plan” — Translate the desired-state CX vision into an actionable, cross-functional work plan.

• “The Customer Experience Marketing Leader’s First 100 Days” — Follow this organized 100-day process to generate early wins and lay a foundation for long-term success.

• “Commit Resources to the Most Essential Customer Experience Projects” — Recognize the types of CX projects required to lay the foundation and create executional and transformational success.

• “Tailor Customer Experience Data and Metrics to Improve Customer Centricity, Drive Action and Validate Business Outcomes” — Select metrics that promote customer centricity and CX action while tracking desired business outcomes.

• “Leverage User Research to Inform, Improve and Inspire Your Customer Experience” — Improve intelligence-gathering outcomes by adopting user research methodologies and applying the tailored insights to improve CX outcomes.

• “Where CX Leaders Get Data to Inform Personas and Journey Maps” — Improving brands’ CX requires personas and journey maps grounded in data to drive actionable insights.

• “Key Customer Experience Foundations for Marketing Leaders” — Leaders who are new to leading or supporting customer experience initiatives can use this research to put the key elements in place.

• “How to Justify the Business Value of Your Customer Experience Investments” — To gain resources and support for customer experience initiatives, make the case that this is a business imperative, not just a “nice to have.”

• “Measuring Customer Centricity With 11 Questions to Ask Employees” — This research provides a quick guide to measuring and improving customer centricity at your organization.
Essential Reading

• “2019 Customer Experience Management Study: Marketers Take More Control as CX Expectations and Budgets Rise” — Sourced from customer experience executives, the study shows how customer experience is evolving.

• “How to Make Your Customer Personas Actionable Using Data-Driven Insights” — To make personas actionable, marketing leaders must follow a data-driven process and stand ready to tailor personas when necessary.

• “Create Actionable, Insight-Driven Journey Maps” — Use this research to create effective, actionable customer journey maps.

• “Focus on the Most Difficult Customer Experience Decisions to Drive Employee Action and Deliver Success” — Learn how to build differentiated levels of customer satisfaction, loyalty and advocacy by tackling the most difficult customer experience decisions.

• “Driving Customer-Centric Decision Making” — This research addresses the decisions that functional and business leaders must make that impact customers, such as how and where to invest limited company resources.

• “Use Gartner’s CX Pyramid to Uncover Innovative Customer Experiences That Create the Strongest Customer Relationships” — Use the CX pyramid framework to forge powerful experiences that deliver greater customer loyalty and brand advocacy.

• “Cultivate a Customer-Centric Culture Within Your Organization” — Supporting or leading a customer-centric culture helps CX leaders drive better customer satisfaction, loyalty and advocacy.

• “How Customer Experience Leaders Overcome Common Obstacles When Building a Customer-Centric Culture” — Gartner research shows that more than 90% of customer experience executives are tasked with creating a customer-centric culture as a part of their mandate.

• “Understanding Organizational Climate Versus Culture” — This research outlines an essential distinction between organizational culture and climate to help build a customer-centric organization.

• “Boosting Customer Listening Effectiveness” — This research offers guidance on how to improve individual VoC-gathering methodologies.
Tools and Toolkits

- “Ignition Guide to Building a Customer Experience Journey Map” — This guide includes documents that will help you identify your key customer personas and gather new and existing customer data.

- “Ignition Guide to Creating an Executive Dashboard for Customer Experience” — This guide includes tools that will help CX leaders create a one-stop dashboard that tracks CX performance.

- “Target Audience Persona Creation Tool (B2B)” — This template helps marketers collect relevant segment information for a new product’s target audience.

- “Target Audience Persona Creation Tool (B2C)” — This template helps marketers collect relevant segment information for a new product’s target audience.

- “Ignition Guide to Developing an Organizationwide CX Recognition Program” — This guide will help CX leaders design a rewards and recognition (R&R) program that promotes such a culture.

- “Customer-Centric Culture Assessment” — This survey will help CX leaders capture feedback from customer-facing staff about where to improve customer centricity.
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