Overview

Technology plays an integral role in the operations and future strategy of a service organization, but which technologies to invest in and when are key considerations that customer service and support leaders often weigh against tight budgets.

To help inform their decisions, we surveyed nearly 250 customer service and support leaders around the globe to understand the latest trends in technology adoption as well as where organizations are getting the most out of their investments today and where they anticipate future returns.

Learn about the adoption trends, value and anticipated value of 50 established and emerging technologies used by customer service and support leaders in their functions. Alongside the Technologies in Service 2020 Bullseye infographic, we examine some of our most notable findings in depth.

Key findings

• Service and support leaders are bullish on technology, investing in technologies across the board and anticipating returns to increase in the next two years.

• Benefits are not immediate. Newly deployed technologies tend to take a couple of years to realize their full potential, and leaders should manage expectations accordingly.

• The largest shifts toward deployment in the service technology landscape are in customer-facing channels and technologies that optimize channel operations.

• However, the technologies where organizations get the most value are those that boost employee performance and productivity.

• Service leaders see a lot of potential value in analytics, but staffing and budgetary constraints are deterring investment.

The technologies in service 2020 bullseye

We surveyed 248 service and support leaders around the globe on established and emerging technologies utilized in their functions.

For each technology, we asked service leaders:

• To what extent is it currently being used?

• How valuable is it to organizations today?

• How much value do you anticipate it will bring in the next two years?
The resulting graphic is our Technologies in Service 2020 Bullseye. The bullseye provides a snapshot of these technologies within five distinct segments: channels and capabilities, customer engagement, voice of the customer, employee performance and productivity, and infrastructure (see Figure 1).

Within the corresponding segment, each technology is represented in three dimensions on the bullseye:

**Location:** The layer of the bullseye indicates each technology’s relative level of deployment in relation to the other technologies within the segment. The closer to the center, the more embedded the technology is today.

**Size:** The size of the circle representing the technology indicates its current level of value in relation to the other technologies within the segment. The larger the circle, the more valuable the technology.

**Color:** The color of the circle indicates the anticipated future value of the technology in two years’ time in relation to the segment’s other technologies. Red indicates relatively lower future importance compared with yellow, with green representing the most valuable future technologies within the segment.

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### Figure 1: Technologies in Service 2020 Bullseye

*Current adoption*

Degree of adoption is measured by extent and nature of deployment throughout organizations.

- Exploring
- Adopting
- Embedded

*Current value*

Current value is measured by the perceived current value of technologies currently in use throughout organizations.

- Low
- Medium
- High

*Future value*

Future value is measured by the anticipated future value of the technology for the organization in two years’ time.

- Less
- Same
- More

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n = 248

Source: 2020 Gartner Technology Roadmap Survey
Technology trends in service 2020 analysis and findings

In this analysis, we delve deeper into the data to highlight broader value and adoption trends throughout service and support technologies. We have updated our list of technologies to reflect the latest innovations in the field, including new variations of other long-established technologies such as interactive voice response. In addition to outlining this year’s findings, we contrast these results with 2018’s value and adoption trends to track how they have changed over time.

Finding 1: Service and support leaders remain bullish on technology

While new and emerging technologies are typically accompanied by considerable buzz, the buzz can mask whether organizations are actually investing. However, in analyzing the results of our survey, we found service leaders are not only vocally optimistic about technology but are backing up their optimism with action.

Tracking service leaders’ deployment of technologies over the past two years, we found a marked increase in technologies that were fully deployed and a decrease in those being piloted or investigated (see Figure 2). In just two years, the percentage of technologies fully deployed increased 10%, from 45% to 55%.

Figure 2: Adoption shifting toward deployment

n = 248
Source: 2020 Gartner Technology Roadmap Survey
In addition to deploying more technologies, service leaders also anticipate these technologies will only continue to increase in value to their organizations, with 80% of the technologies we surveyed expected to return more value in the next two years than they do now.

**Finding 2: Returns aren’t immediate; manage expectations accordingly**

Another finding with important implications for service leaders is that a technology’s value increases considerably the longer a technology is deployed. This increase is notable in technologies once they have been deployed for over two years (see Figure 3).

![Figure 3: Top three technologies with substantial increases in value from longer deployment](image-url)

Source: 2020 Gartner Technology Roadmap Survey
These findings suggest service leaders can likely expect relatively lower returns on investment in the first two years deploying a new technology. While it might not be surprising that technologies yield more value over time, this remains an important point to highlight as there is often pressure to demonstrate immediate returns from significant investments. This finding suggests leaders should exercise caution in managing their own, and other leaders’ expectations. Higher returns do come but can take a couple of years.

Finding 3: Largest investments are in customer-facing channels and channel optimization technologies

To understand which technologies companies are investing in moving forward, we considered which technologies saw the largest shifts away from the knowledge-gathering and piloting phases toward fully deployed. These analyses revealed a trend of increased investment in channels, particularly web chat, chatbots/virtual customer assistants and videoconference as well as technologies that optimize channels such as search engine optimization, voice biometrics or co-browsing/collaborative interfaces.

Before service leaders consider investing in new channels, we advise some caution. We recently observed similar channel investment trends in our study, “Delivering on the Digital Promise,” in which we noted that from 2014 through 2018, the average service organization had increased its channel offerings from 3.7 to 5.4.

However, we found no significant increase in customer satisfaction based on channel used nor an increase in customer loyalty when resolving issues within their preferred channels. Thus, adding more channels may lead to increased organizational costs and complexity while providing no significant improvement in the service experience.

While our research finds service leaders are wise to focus their efforts and resources on digital self-service channels, the ultimate goal should be helping customers obtain a resolution, not channel optionality. Therefore, service organizations should dedicate their resources toward optimizing their self-service capabilities to achieve resolution where feasible.
**Finding 4: Highest-valued technologies are rep-facing and back-office, rather than channels**

Though service leaders are investing most heavily in customer-facing channels, these technologies are not necessarily yielding the highest value. Instead, service leaders report seeing the highest returns — current and anticipated — from technologies that support back-office operations and optimize rep performance. These include technologies such as workforce management/scheduling software, assistance and task management, learning management systems or unified communications (see Figure 4).

**Figure 4: Selection of highest-value technologies focusing on employee performance and productivity**

- Service dashboard analytics
- Assistance and task management
- Recruiting and onboarding software
- Learning management systems
- Workforce management/scheduling software
- Employee metrics and recognition tools
- Quality monitoring
- Computer telephony integration
- Unified communications

Source: 2020 Gartner Technology Roadmap Survey
This trend reinforces several key findings from our previous research, “Unleashing Rep Productivity in the New Work Environment.” We found when reps feel the systems or tools they use enhance their ability to handle customer issues and simplify their day-to-day work, their productivity can increase by nearly 20%, customer satisfaction increases up to 11% and customer effort decreases by up to 9%.

However, service leaders looking to invest in these technologies should note an abundance of rep-facing systems, tools and information also have the potential to hinder rep productivity. To avoid this, service leaders should optimize the workplace for the rep experience, working closely with the front line to identify and remove pain points in systems and tools that place undue burden on the rep and detract from the value of these technologies.

**Finding 5: Leaders see promise in analytics, but budget and workforce limitations are holding back further investment**

The changes in adoption levels we found are not fully indicative of service leaders’ desire to pursue them. Of our 248 service leaders, 50% indicated there were technologies they viewed as potentially valuable to their operations but had no current plans to implement them for one or more reasons. Of these reasons, service leaders cited staff capacity and expertise or budgetary limitations as the two largest barriers to investment (see Figure 5).

![Figure 5: Top reasons for holding back on investment](image-url)
Further, among all the technologies organizations are not pursuing despite their potential value, the majority were various forms of customer service analytics. The top 5 were:

- Predictive analytics
- Social media analytics
- Digital analytics
- Text analytics
- Speech analytics

While analytics technologies are seen as promising, many leaders view them as “nice to have” rather than as crucial to their operations.
Conclusion

Our Technology Trends in Service 2020 study revealed several noteworthy trends in the service and support field, speaking to the current industry attitudes.

Service leaders are optimistic about the future of technology and backing that optimism with steady investments in established and emerging technologies. However, these investments do take a couple of years before they realize their full value, and service leaders should set expectations accordingly.

Interestingly, the most active areas of investment and deployment are not necessarily the technologies service leaders have identified as the most valuable. While service leaders are investing most heavily in channels, or technologies that optimize channel operations, the technologies service leaders most value focus on optimizing employee performance and productivity. Finally, a significant number of service leaders are eyeing various analytics as promising technologies but are unable to invest due to staff or budgetary limitations.

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