

# CUSTOMER EXPERIENCE PRIMER FOR 2017

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# SUMMARY

Marketing's role in leading and supporting customer experience is growing. This overview summarizes how Gartner's upcoming research will help marketing leaders win the battle for customers' loyalty and advocacy by serving their evolving needs and expectations.

## Scope

Customer experience (CX) management is the practice of designing and reacting to customer interactions so as to meet or exceed expectations and increase customer satisfaction, loyalty and advocacy.

Customer experience coverage in 2017 will include insight and guidance on:

- Defining the role of marketing in a broad-based customer experience strategy.
- Designing and executing an effective customer experience strategy.
- Understanding how marketing can positively impact long-term loyalty while also driving short-term results with the right balance of investments.
- Assembling the tools and techniques to collect and analyze customer data to better identify, diagnose and resolve customer experience gaps, and to drive customer experience innovation.

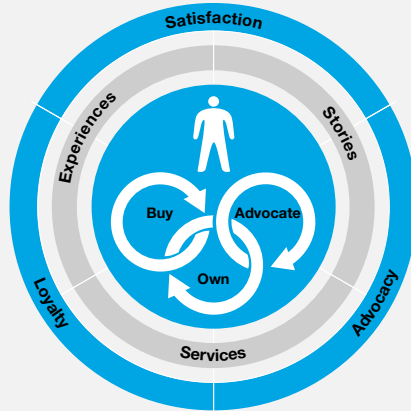


**Customer experience management is the practice of designing and reacting to customer interactions.**

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# ANALYSIS

Figure 1. Customer Experience Overview



Source: Gartner (January 2017)

In many instances, the marketing department leads the company's customer experience effort. And even if it isn't leading, marketing must provide considerable data, support and execution. Getting this right requires fresh and innovative thinking from marketing leaders, with new data, processes, platforms and metrics, not to mention a collaborative and cross-functional approach.

An excellent customer experience delivers better business and marketing outcomes, but its objectives are not primarily anchored in typical marketing measures. Customer experience impacts awareness, website traffic and conversion rate, but it is primarily focused on delivering highly satisfied customers who buy more, churn less and increase your brand's reputation, word of mouth and consideration.

The starting point for your customer experience management efforts is, of course, your customer. Your goal is to attract and grow customer relationships, earn customer loyalty and activate their advocacy. Use Gartner's 2017 customer experience research to help you bring the highest-value customer experience investments into focus, connecting your customer experience to business results, building better alignment within marketing and across other functions, and using data to inform how customer experience investments are prioritized.

## Top Challenges and How Gartner Can Help

For marketing leaders with a customer experience mandate, Gartner's 2017 research agenda will help you build and manage a sustainable customer experience program that creates competitive advantage. Our research will also aid your efforts to collect and analyze more data, creating a fuller and more actionable picture of your customers and their needs. Finally, it will help you to act, prioritizing investment and measuring results.



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## How can I organize, manage and measure an effective customer experience effort within the marketing organization or across the company?

Your role as a marketing professional leading or supporting a customer experience program is to leverage what the marketing department already knows about your customers, identify and fill gaps in that knowledge, and collect more information about customers' perceptions and emotions. You also must collaborate across the organization to change people, processes, systems and data. Finally, you must measure impact and justify the investments and strategies executed. Done right, your customers will be happier, your organization will produce better results for all stakeholders and your marketing programs will operate more efficiently and effectively.

When customer experience efforts are undertaken without a common framework and a unified set of goals and priorities, good intentions can result in a disorganized outcome that is difficult to measure. But when all stakeholders work together to identify the important customers, understand their needs, map their journeys, gather and analyze data, recognize customer experience problems and opportunities, and act accordingly, the outcome is a cohesive and successful customer experience result.



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Gartner's customer experience research agenda provides Toolkits, frameworks and best-practice advice for developing this framework and measuring outcomes. We will publish research on segment and persona development, customer-journey mapping and development of the front- and backstage blueprints that connect outside-in customer experience designs with the inside-out view of how your business actually operates.

### Planned Research

- **How Marketers Structure Customer Experience Teams for Success** — Customer experience teams are still relatively new and growing within many marketing departments. Hiring the right CX professionals and defining the right expectations are vital. This research will provide practical guidance on the skills and abilities you need.
- **How Satisfaction Can Be Correlated With Business and Financial Outcomes** — The most relevant metrics for CX are all leading indicators of success, such as satisfaction, loyalty and advocacy, but marketers are pressed to support quarterly financial and business outcomes. Use data analysis to correlate your leading and concurrent indicators in order to turn satisfaction or NPS into dollars.

## How can I capture customer feedback and insights and turn them into the right set of actions to improve customer experience?

Success in customer experience requires that marketing leaders responsible for CX select the right set of methodologies, data, analysis and metrics to deliver actionable insight. The appropriate tools and infrastructure must capture direct, indirect and inferred customer insights; funnel these insights to the stakeholders within the organization who can take action; “close the loop” with customers to help restore relationships; and identify the root causes of the issues for continuous improvement.

Gartner’s customer experience research provides Market Guides to help with vendor selection and best-practice insight and how-to advice to select the right metrics and methodologies to build a customer experience culture that continuously listens to and learns from the voice of the customer.

Investing in the right VoC strategies and platforms is essential to customer experience success.

## Planned Research

- **How to Create and Measure a Voice-of-the-Customer Strategy** — VoC platforms and strategies are essential to not only diagnose CX problems, but also to measure outcomes. Investing in the right VoC strategies and platforms is essential to customer experience success.
- **How the Right Reports and Dashboards Can Drive More Customer Experience Action** — This best-practice research will provide guidance on how to assemble and report on a linked hierarchy of customer experience metrics, aligning the right reports and dashboards to the right levels and roles within your organization.
- **How Integrating Other Data With Survey Response Improves Customer Experience Planning** — Although concerns about survey fatigue are rising, surveys remain a key component of VoC efforts. Marketers can supplement and improve their survey data by integrating other sources of indirect and inferred data.

## How can I execute data-driven customer experiences that deliver measurable results?

Many marketing leaders understand the concepts and goals of customer experience, but figuring out how to practically and economically execute CX improvements can be a challenge. Too many customer journey mapping efforts end with an attractive diagram, rather than a set of plans and actions. And too many customer experience programs end up chasing and fixing broken touchpoints, rather than considering how new digital technologies and channels can work seamlessly with real-world touchpoints to elevate brand affinity, loyalty and advocacy.

Marketing leaders can improve cross-functional customer experience by encouraging more effective collaboration; using, connecting and analyzing data in more powerful ways; understanding customers and their needs better than the competition; connecting systems to orchestrate more integrated and personalized experiences and building customer journeys that deliver customers to that potent state of brand love that creates loyalty and advocacy benefits.

### Planned Research

- **How VoC Systems Can Support Better Marketing Actions** — From personalization to determining the next best offer, data collected from VoC and other CX systems can help to improve your results in the Buy cycle of the customer journey.
- **How to Encourage and Reward Loyalty and Advocacy to Deliver Customer Experience Benefits** — The goal of improving customer experience is to increase loyalty and brand advocacy. Although both will occur organically when brands do the right things, marketers that deliver the most powerful customer experience benefits deploy strategies and tools to encourage loyalty and unleash WOM at scale.

- **How Mobile Drives Customer Experience Throughout the Customer Journey** — Brands recognize that exploiting the best of mobile technologies with real-world experiences and data can drive powerful experiences at every stage of the Buy/Own/Advocate customer journey.

### Related Priorities

Table 1. Related Priorities

Priority	Focus
Multichannel Marketing	Multichannel marketing represents orchestrated interaction across digital and traditional customer touchpoints to acquire, grow and retain customers, engaging audiences and extending relationships.
Data-Driven Marketing	Data-driven marketing (DDM) applies data and analytics to planning and execution processes in order to increase marketing's efficiency and effectiveness.
Marketing Management	Marketing management involves the sourcing, alignment and continuous optimization of people, processes, enabling technology and data to help deliver on business goals in a digitally led world.
Mobile Marketing	Mobile marketing involves using information about people's context (location, identity, relationships and intentions) to tailor information and products that increase customer engagement and sales.

Source: Gartner

# GARTNER RECOMMENDED READING

## Suggested First Steps

[“How Marketing Can Lead Organizationwide Customer Experience Maturity”](#)

[“Key Customer Experience Foundations for Marketing Leaders”](#)

[“Use Gartner’s Buy/Own/Advocate Framework to Map Customer Journeys and Deliver Better Customer Experiences”](#)

[“Customer Experience Is the New Competitive Battlefield”](#)

## Essential Reading

[“How to Align Customer Experience With Marketing Channel Operations”](#)

[“How to Manage Effective Customer Journey Mapping Processes”](#)

[“How Marketing Leaders Make Personas Actionable”](#)

[“How to Justify the Business Value of Your Customer Experience Investments”](#)

## Tools and Toolkits

[“Toolkit: A Marketer’s Checklist to Guide Customer Experience Efforts”](#)

## Analyst Profiles

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## Evidence

This research was created based on primary and secondary research, and client and vendor interactions.

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- Target the right audiences
- Choose the right channels
- Quickly shortlist marketing and technology providers
- Stay informed on market and competitors
- Save time and avoid costly mistakes

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