Global uncertainty has shown why organizations must renew their focus on putting customers at the center of their decision making. Gartner’s 2021 research will help application leaders plan and execute their CX and CRM initiatives to achieve improved customer satisfaction, loyalty and advocacy.

**Scope**

Customer experience (CX) and CRM must adapt to rapidly changing organizations, customers and environments. Gartner’s research explains how to align internal resources with external customer needs.

In addition to applications and software engineering leaders, other roles involved in this initiative are:

- Chief information officers
- Enterprise architecture and technology innovation leaders
- Chief marketing officers

The CX and CRM topics we cover include:

- **Understand customers:** Methods by which to obtain, store, analyze and take action on customer feedback.
- **Set customer experience strategy:** The development of the CX strategy and its resource allocation, tactics, technology, execution and measurement.
- **Coordinate CX across the enterprise:** Collaborative, cultural and organizational approaches to coordinating disparate activities to provide a seamless experience to customers.
- **CRM strategy and technology:** The objectives of customer relationship management (CRM), as well as the people, process and technology decisions needed to fulfill the CRM strategy.

Some content may not be available as part of your current Gartner subscription. Contact an account executive if you wish to discuss expanding your access to Gartner content.
CX can be defined as the customer's perceptions toward and feelings caused by the cumulative effect of interactions with a supplier's employees, systems, channels or products. Amid intensified competition for customers, flexible CX is needed, and employing a composable applications approach can help. Technology has enabled increasingly sophisticated methods of assessing customers’ needs, providing products and services to meet those needs, and doing so at the most opportune time. Organizations that
approach CX holistically — linking their technology to robust CX strategies, plans, management and culture — are best positioned to succeed.

CX goals are a subset of CRM goals. CRM is a business strategy that optimizes revenue and profitability while promoting customer satisfaction and loyalty. CRM technologies enable strategy and identify and manage customer relationships, in person or virtually.

With enterprisewide CRM, there are also considerable nontechnology components that require the close collaboration of several departments and projects (e.g., marketing, sales, customer success, customer service, digital commerce, field service and even cross-CRM). Also crucial is planning the CRM vision and strategy, and accounting for the CRM impact on CX, processes, organizational collaboration and leadership.

The pandemic has made customer interactions more virtual, mobile and distributed. Yet organizations are still often reliant on prepandemic customer plans. Global uncertainty necessitates that CX and CRM evolve to better navigate changing circumstances, rapidly evolving customers and geographically diverse operations.

Succeeding requires a solid CX and CRM foundation. Gartner’s research helps application leaders build their foundations via proven CX practices, including voice of the customer (VoC), measuring CX, and customer journey mapping, as well as the Eight Building Blocks of CRM series. To help application leaders position their organizations for what’s next, our 2021 research will also cover concepts like machines as customers, future trends and emerging technologies.

Topics

Consistently placing customers at the center of organizational decision making contributes to improved customer satisfaction, loyalty and advocacy. Succeeding in this area generates benefits not only for customers, but also for organizations and employees. Application leaders play a key role in transforming their organizations internally to align with external customer needs. Knowing how to identify and manage the most promising CX and CRM initiatives is essential.

Our research in this area addresses the following topics:

Understand Customers

The foundation of CX is understanding customers. To do this, organizations should collect direct, indirect and inferred VoC feedback. VoC applications collect, store and analyze customer feedback to provide a holistic view of the customer’s voice. Understanding customers can also be achieved through customer research. Organizations conduct project-based research to understand long-term customer needs, motivations, goals and behaviors.

Questions Your Peers Are Asking

- What are the best ways to collect and analyze quantitative and qualitative customer feedback?
What are the right methods for quantifying customer perception?

How can organizations turn customer feedback into action?

Recommended Content

- Some recommended content may not be available as part of your current Gartner subscription.

- **Magic Quadrant for Voice of the Customer**
- **How to Get Value From VoC in an Organization Focused on Cost Optimization**
- **Market Guide for Voice-of-the-Customer Applications**
- **How to Develop a Hierarchy of Criteria for VoC Vendor Selection**
- **How to Operationalize Your VoC Program**

Planned Research

- Starting out with VoC
- Maximizing the effectiveness of a VoC program
- VoC strategic approaches
- Understanding customer needs and how to act on them

Set Customer Experience Strategy

A CX strategy describes how an organization's finite internal resources will be configured to meet the external needs of customers. This includes strategic decisions on which customers the organization will pursue, the experience the organization will provide them with, and the resources required to do so — technology or otherwise. The strategy also includes methodologies by which to make the customer's experience a reality, like personas, customer journey maps and CX metrics.

Questions Your Peers Are Asking

- How do I create and implement a CX strategy and plan?
- How do I quantify improvements in customer satisfaction, loyalty and advocacy?
- What technologies and trends have the potential to shape the future of CX?
- How do I create and deploy personas that are adopted and drive essential knowledge and action?
- How do I build a customer journey map and use it to improve CX?

Recommended Content
Some recommended content may not be available as part of your current Gartner subscription.

- Survey Analysis: Customer Experience Maturity and Investment Priorities, 2020
- How to Manage Customer Experience Metrics
- Video: How to Build and Use a Customer Journey Map
- The Essence of a Customer Experience Strategy
- Build Links Between Customer Experience, Multiexperience, User Experience and Employee Experience

Planned Research
- Structured methods for CX improvement
- Emerging technologies and their impact on CX
- Design and development of CX strategies
- Components of CX

Coordinate CX Across the Enterprise

Effective CX requires that activities across the organization in multiple departments be coordinated so as to provide a seamless experience to the customer. Missteps can lead to a disjointed experience for the customer, as well as internal inefficiencies and obstacles. Enterprisewide collaboration to advance CX includes building a customer-centric culture, assigning responsibility for CX roles and governance, defining a CX purpose, and establishing a collaborative environment for CX.

Questions Your Peers Are Asking
- How do I engage my IT team and business partners to adopt customer-centric behaviors, goals and outcomes?
- What are the most effective governance and organizational models for CX?
- How do I ensure cross-functional collaboration to drive CX improvements?
- How do I craft, secure commitment for and communicate CX strategies and values?

Recommended Content
- Some recommended content may not be available as part of your current Gartner subscription.
- What to Do When the C-Suite Endorses Customer Experience, but the Next Level Pushes Back
- The Customer Experience Leader’s First 100 Days: How IT Can Help
Planned Research

- Involving the broader organization in CX
- Making customers top of mind at an organization
- Coordinating CX with other teams
- Best practices in launching CX initiatives

CRM Strategy and Technology

Enterprisewide CRM requires that customer-facing processes for teams like sales, marketing, customer service and digital commerce be considered across the enterprise rather than as siloed entities. CRM strategy examines where to compete and how winning is defined. It also examines the capabilities needed for goals like revenue growth, improved campaign conversion rates or lower service costs. Such capabilities include the people, processes and technologies required to deliver the customer relationship strategy.

Questions Your Peers Are Asking

- How do I address employee/team/constituent influence on CRM?
- How do I measure and improve CRM process execution?
- How do I identify, evaluate, select, adopt and maintain CRM technologies?
- How do I plan for the future of CRM?

Recommended Content

- Some recommended content may not be available as part of your current Gartner subscription.
- The Gartner CRM Maturity Model: Supporting an Enterprisewide Approach
- How to Decide Whether to Issue an RFI Prior to an RFP in CRM Evaluations
- Executive Summary Video: How to Set Your CRM Requirements
- 3 Best Practices for an Effective CRM Application Integration Program
- The CRM Project Manager’s First 100 Days
More than 80% of CRM projects would be better described as marketing, sales, customer service or commerce application projects. Typically, they focus on delivering benefits for one department. Gartner covers the details of these projects in three other research initiatives: digital commerce and CRM sales...
technology, customer service and support technology, and marketing technology. If your CRM project is not enterprisewide, we would recommend the research in those initiatives. Similarly, there is likely to be merit in using the customer analytics research produced as part of Gartner's data and analytics strategies research.

Our CRM and CX research looks at external customers and stakeholders. Some CIOs consider internal stakeholders to be their customers. Many of the lessons from CRM and CX can be applied to internal customers, which are often employees, and we have research initiatives — such as digital workplace programs — that address this topic.

Document Revision History

CRM Strategy and Customer Experience Primer for 2020 - 24 January 2020
CRM Strategy and Customer Experience Primer for 2019 - 5 February 2019
CRM Strategy and Customer Experience Primer for 2019 - 5 February 2019

Related Priorities

<table>
<thead>
<tr>
<th>Initiative Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRM Strategy and Customer Experience</td>
<td>CRM and CX are critical priorities, but strategies must adapt as the organization, its customers and its environment evolve. Failing to get the fundamentals right puts the organization at risk.</td>
</tr>
<tr>
<td>Customer Service and Support Technology</td>
<td>Numerous technologies and best practices are needed to create a leading customer service organization and its associated operational, customer experience and employee experience aspirations.</td>
</tr>
</tbody>
</table>