The customer service experience is key to the success of many enterprisewide customer experience ambitions, yet few IT leaders have a clear strategy in place. A lack of economic resources and political power continue to stifle potential progress.

Overview

Key Findings

- Customer service organizations struggle to measure the value they provide and the impact they have on the customer experience (CX) and its associated loyalty and growth.

- Sales and marketing measure themselves on how they aid revenue growth, giving them more power and a greater sense of “ownership” of the customer. Customer service largely remains a cost center, stifling the opportunity to embrace this strategic opportunity.

- Customer service organizations are under pressure to keep costs down, which means they often lack the people, processes and technologies required to deliver a compelling CX.

Recommendations

Applications and software engineering leaders responsible for customer service and support technologies should:

- Develop a strategy to set expectations with customers to prevent an experience perception gap.

- Redesign and optimally manage the customer service experience by adopting a more collaborative approach.

- Collect and act on a diverse set of customer and employee feedback sources as part of a broader, enterprisewide feedback initiative.
Introduction

Customer service is a key driver of loyalty. Gartner is seeing an increase in responsibility within customer service not just for the experience it provides customers, but also the overall management of the customer relationship. Gartner's customer service leader clients are increasingly asking questions about customer engagement and next-best-action programs. They are also beginning to explore the opportunity of greater alignment with other back-office fulfilment functions to facilitate a seamless end-to-end customer process. These are just some of the many dilemmas facing customer service leaders over the next few years (see 2021 Strategic Roadmap for Customer Service and Support: 10 Dilemmas).

However, with this greater opportunity comes greater responsibility, and few service organizations are adequately prepared. CXs are often disjointed and inconsistent across channels, and the agents that customers interact with lack engagement. Customers prefer to use different channels and modalities depending on the context of their interaction, but still expect the interaction to be personalized based on past interactions, making it even more complex to meet their growing expectations.

Organizations will continue to struggle to elevate the CX if marketing/CRM and customer service efforts are not aligned and driven by centralized decision making with clarity around roles, responsibilities and budgets.

If an enterprise CX program exists (see Infographic: Customer Experience Management Framework), customer service leaders should ensure that they are integral to its operation through a carefully appointed representative. It is also important to create a small customer service experience (CSX) team, with responsibility for the associated people, processes and technology investments. This team should develop a CSX strategy that aligns with the overarching enterprise CX strategy and that outlines the ambition and roadmap for the future CSX. This is within the team's control and remit, but will be constrained by the available budget and ongoing cost pressures, making it difficult to prioritize experience-focused projects. As a result, the CSX team's secondary goal is to secure an increase in allocated funding. As the CSX program matures, being able to show a return on the investment made, and being able to demonstrate how the customer service organization drives up a wider range of CX metrics, will help secure this additional funding. The enterprise CX lead is looking to prioritize investments regardless of department, and the enterprise CX committee member representing customer service is therefore lobbying for reprioritization and securing extra funding.
This is not a short-term task. There are numerous fundamental CX basics that need to be embraced within the customer service organization in order to provide the foundations that will allow this representative to build up a body of sustainable evidence to secure ongoing additional funding. In this research, we highlight some of these fundamental considerations.

### Analysis

#### Develop a Strategy for Setting Customer Expectations

There is often a disconnect between what a service organization is able to deliver (based on budget constraints) and what the customer is expecting. This creates an “experience gap” that results in dissatisfaction. It is important to set (or reset) an expectation of the nature and quality of the experience linked to the organization’s overarching brand and set of brand values.

Understanding and closing this gap is becoming more difficult as customers become increasingly demanding, with seemingly conflicting needs. Customers want service organizations to respect their privacy, but at the same time provide a personalized experience. They want organizations to provide a full-featured service experience, but at the same time be simple and effortless in what they do.

Some key considerations include:
1. **Agree expectations of a specific level of service quality:** This could be something as basic as a time commitment to respond to an email or the available hours for using chat. Customers have a starting point to go on and, as long as the organization delivers against this expectation, customers are usually satisfied, even though it might not be the fastest or best in the industry. Without this expectation setting, however, customers will set their own targets based on prior experiences with other brands, and what others tell them, and if this is more aggressive than the reality in your organization, then dissatisfaction is the likely outcome.

2. **Clearly communicate what customers can expect:** Letting customers know how long they are likely to be on hold when waiting in a call queue (and providing alternative options and having easily accessible service goal information on the website) are basic but important considerations. Introducing callbacks to allow the organization to reconnect when it is convenient for the customer, or the option to shift from one channel to another (such as by sending an invite to continue the conversation in a chat channel), allows customers to have their expectations set and make informed decisions. If they choose to remain on hold, they are then more accepting of the fact that it may take more time for them to be dealt with.

3. **Adopt a proactive approach to expectation setting:** Proactive communication is a hot topic and much more can be done in this area (beyond a simple notification that a parcel is due to arrive within a set time frame, for example). By analyzing the reason for inbound interactions, organizations can begin to prioritize opportunities for automating outbound proactive notifications. When setting expectations, it is important to determine the relevant specificity. Proactively telling a customer that a parcel will arrive between 8 a.m. and 6 p.m. will likely do more to frustrate them than appease. Providing a one-hour window would be more appropriate. Ensure that your expectations are set in line with the brand and the industry overall.

4. **Deliver what you promise:** An important aspect of expectation setting is within the service delivery itself, and critical to this is ensuring that employees have the relevant information on hand. For example:
A bank’s customer service department that dealt with mortgages was frequently called by customers asking when their mortgage application was likely to be approved. The agents didn’t have access to this basic back-office information and so learned over time that the best thing to say was “in two weeks.” This got the customer off the phone seemingly happy. Agents worked out that if they said five weeks, the customer would complain to them directly, and if they said two days, the customer would be back on the phone two days later complaining as well. Therefore, two weeks was a nice compromise, despite the fact they had no idea when it would actually be approved.

Examples of this reactive approach to expectation setting are rife, and such approaches should be eliminated wherever possible, through initiatives to ensure provision of appropriate data. Customer service leaders should make an inventory of promises made by their departments (see Drive Revenue and Customer Satisfaction by Building Trust). Analyzing voice and text-based interactions is likely a good source, as are customer complaints. Once documented and acted upon, the search can be widened to encompass any promise made to the customer. This would include those from other departments, such as sales (“My account manager told me the next version of the product would have that function”); marketing (“The advertisement said it’s easy to install – takes less than 20 minutes”) or finance (“I was promised I would get that refund by Thursday”). This information can be used to determine the source of the promises and to document who specifically is inaccurately setting expectations across the enterprise. The distribution of this important insight empowers the customer service department and helps to position it more strategically within the broader CX program.

Redesign and Optimally Manage the Service Experience

Improving the design and delivery of the service interaction experience is something most companies have as an ongoing goal. The experience should be designed so that its quality is in alignment with the brand’s values and be consistent with the overall corporate strategic plan. The associated customer expectations then need to be set (or reset) accordingly. Customer journey design is not new and its application to customer service is a welcome and thankfully common scenario. Quite often, however, the ambition behind the creation of the journey fails to materialize into reality (see How to Prevent Customer Journey Maps From Becoming Wall Art, How to Run a Virtual or In-Person Customer Journey Mapping Workshop and Quick Answer: How Do I Use A Customer Journey Map In Customer Service?).

There are also several aspects that are frequently overlooked during the design phase, constraining the resulting experience. When designing your service experience avoid the following six common mistakes:
1. **A blinkered approach to the boundaries of service provision**: Most traditional service organizations constrain the design of the service experience to their department. What is needed is to empower greater collaboration in customer service through digital workspaces that support the dissolution of the front-office/back-office divide (see [*A Collaborative Approach to Customer Service Will Drive Higher Customer Satisfaction*](#)).

2. **A dated understanding of the customer**: Customer needs and expectations are evolving dramatically. Few organizations have considered the emerging reality of how and when customers want to receive service, beyond support for traditional communication channels. An online gamer who wants to order a pizza from within the game while on a mission, or via Amazon Alexa or a smartphone, is seldomly considered or supported. Increasingly, organizations will need to think beyond just digital channel support to consider the associated modalities (such as touch and gesture-based commands) within their service provision and embrace a concept known as “multiexperience” (see [*Transcend Omnichannel Thinking and Embrace Multiexperience for Improved Customer Experience*](#)).

   Accommodating this will require revisiting journey maps and putting far greater emphasis on the use of analytics to determine the real-time state of mind of the customer (see [*Hype Cycle for Customer Experience Analytics, 2021*](#)). Finally, service organizations have yet to come to terms with the reality that, by 2025, their main customer segment may not even be human. Given the fact there are already more machines with the potential to act as customers than there are humans on the planet, it is not unreasonable to assume that, in the near future, support journeys will need to be designed to reflect the support needs of a car (booking itself in for a service) or a kitchen appliance (calling in a service engineer as it’s running inefficiently; see [*When Things Become Customers: What CIOs Need to Know About Emerging Virtual Customers*](#)).

3. **Employee oversight**: Having employees that are engaged in their work is critically important for delivery of a positive CX, but few service organizations have a dedicated employee experience (EX) initiative running alongside their CX one. Numerous studies from Gallup, Harvard Business Review and other academic establishments irrefutably confirm the connection between the EX and its impact on the CX. Therefore, when designing the CX, it is imperative to also design the EX. Commitment to one without the other will stifle what can be achieved. An emerging Gartner concept called “Total Experience” explores the need for better appreciation of the EX and its alignment with CX (see [*Build Links Between Customer Experience, Multiexperience, User Experience and Employee Experience*](#)).
Customer journey mapping techniques can also be used for employees, to better design EXs. Viewing customer service through the lens of an employee also creates the opportunity to revisit technology procurement priorities. By focusing on technologies that not only elevate the CX or operational performance, but also improve the EX, is an important shift to make. Technologies such as a virtual personal assistant for agents, consolidated agent desktop and a robust voice of the employee (VoE) capability are deemed the most beneficial (see Maximize Your Customer Service Technology Investments by Balancing Customer and Employee Experience).

4. **A needless focus on customer delight**: When service organizations embark on a new CX initiative, the mindset is often to try to delight the customer and add a wow factor to the experience on the assumption that doing so will maximize customer satisfaction and loyalty. The reality, however, is somewhat different. As the quality of the service experience steadily improves, the associated impact on loyalty starts to wane. Once an experience meets a customer’s needs, there is little value in exceeding them, as it has little impact on loyalty. The associated resources would be better spent elsewhere. It has been shown that it is better to focus on providing an effortless experience rather than one that delights the customer. Referring back to the pizza ordering example, Domino’s has over 15 ways you can order a pizza, such as via Twitter or from your car’s infotainment system, or from home via your smart TV or Alexa, ensuing an effortless experience for customers (see State of the Customer: Understanding Customer Service Expectations).

5. **Underestimating the importance of knowledge**: Timely and contextual knowledge presented to agents in a clear and concise form is a pipe dream for most service environments, yet without it the service experience will always be in jeopardy. Agents typically have to access knowledge from multiple disparate sources and read it while simultaneously listening to the customer and navigating the intended CRM process flow. Knowledge is an underemphasized aspect of experience design and demands a higher prioritization. Gartner analysts have previously cited knowledge management (KM) as the No. 1 technology for enhancing the three main customer service perspectives of operational performance, CX and employee experience. Leading KM vendors can isolate knowledge from the various systems in which it resides and digitally orchestrate it independently for the agent, based on their real-time contextual needs (see Delivering Relevant Content and Knowledge to Customers Is Key to Great Customer Service and Improve Customer Self-Service Adoption by Automating Knowledge Capture and Curation).
6. **A lack of planning and connectivity spanning the four pillars of customer service:**

There are four key pillars for delivering great customer service:

- Helping the customer get effortlessly connected to the service organization via voice and digital channels.
- Enabling customers, both human and bot, to orchestrate the service processes via both self-service and/or assisted service.
- Having access to the relevant information, knowledge and insights to be able to resolve customer problems.
- Being able to manage the required staffing/resources, both human and nonhuman.

These four pillars have traditionally been viewed as discrete investments by different business owners and stakeholders leveraging different budgets within the customer service organization. Although a unified customer service and support (CSS) suite spanning these domains does not yet exist, there is inherent value in their alignment, and the market is shifting in this direction through R&D/technology acquisition and the creation of multivendor ecosystems (see Customer Service and Support Technology Primer for 2021). By aligning these domains, the CX can be elevated in so many ways, but these are rarely built into the experience design and the associated technology procurement cycle.

A few basic examples include being able to:

- Tailor the on-screen customer process to the maturity and performance of the assigned agent.
- Route a customer to an agent based on their recent performance on an associated topic.
- Conference in a live second agent who has performed well on a specific topic and has agreed to assist others as part of a gamification challenge.
These are just a few of hundreds of potential benefits that organizations will struggle to achieve while proliferating a siloed approach to procurement, or sourcing functionality independently from customer engagement center (CEC), workforce engagement management (WEM) and contact center as a service (CCaaS) vendors. When designing the CX, do not overlook the potential benefits of a connected cross-pillar service technology environment, as this will be a reality in the very near-term future.

**Collect and Act Upon a Diverse Set of Feedback Sources**

The CX requires ongoing management and refinement. It is not a “one and done” activity. To thrive, the service organization needs to have a robust process in place to collect and analyze both customer and employee feedback. It is imperative that the insight from this feedback is then acted upon or the whole reason for collection is undermined and customers become more reluctant to provide it (“What’s the point? — nothing ever changes.”). Actions can be as basic as recommending a specific agent coaching requirement, or the need to call back a likely unhappy customer, through to more long-term and strategic activities such as overhauling an IVR platform or redesigning a self-service portal.

There are three forms of feedback, and service organizations should attempt to collect and align all three to provide an optimized level of customer feedback:

1. **Direct feedback:** This is feedback that consumers intend to provide directly to the service organization, when either asked to do so or motivated by their service experience. It typically takes the form of a post-interaction survey, a complaint, market or user research, or a forum/panel.

2. **Indirect feedback:** This feedback is derived from instances where the customer is speaking about a service organization without specifically intending to furnish feedback to it. It includes collecting insight from review sites, social networks and throwaway comments within phone, email and chat session recordings.

3. **Inferred feedback:** This feedback results from the connection of operational data associated with the customer service journey, such as clickstream data from the self-service website, mobile app navigation data and contact center data, such as wait time, abandonment, callback, call length and call transfers (see Market Guide for Customer Journey Analytics and Competitive Landscape: Customer Analytics).
The alignment of these three types of feedback forms the basis of a voice of the customer (VoC) solution (see Magic Quadrant for Voice of the Customer). Although VoC should ideally be positioned as a centralized enterprisewide program spanning multiple departments and the associated user needs, some vendors specialize in helping customer service organizations with their feedback ambitions (see Critical Capabilities for Voice of the Customer). The potential richness of untapped feedback data residing within the customer service environment is also creating a greater desire from other departments (such as marketing) to work more closely with customer service leaders to gain access to this information. This can help to alleviate some of the associated cost of setting up the initiative within customer service.

There is much discussion regarding the long-term merit of surveying customers after a service interaction, which is driving an elevated interest in indirect sources of feedback and technologies such as voice and text analytics. These solutions have huge potential to unlock the CX and should be piloted wherever possible, but the traditional survey should not (yet) be jettisoned. As consumers become increasingly bombarded with survey requests, it is inevitable that "survey fatigue" will set in. However, it is Gartner’s opinion that rather than not do surveys at all, customers will instead become more selective — targeting those requests that are effortless and provide value.

By ensuring that a few simple best practices are adhered to, the survey will be a useful source of feedback for some time:

- Make sure the survey invitation is personalized (for example, “Hi, Jim. You called this morning and spoke to Pauline about your mortgage application. Can we ask you a few questions about your experience?”).
- Make sure it is well-thought-out and engaging, and limit the number of questions to three or four.
- Make sure it is delivered via the most appropriate channel after the interaction (usually the one through which the customer first connected) and in a timely manner.
- If possible, use artificial intelligence (AI) to embrace a more conversational approach, rather than ask rigid questions, and add support for voice- and video-based feedback where appropriate.
- Do something with the data. Report back to customers what insights have been obtained and what actions have been undertaken — both tactical and strategic — on a regular basis.
Finally, in addition to the three forms of VoC feedback, there is another huge source of CX insight that usually remains untapped in most service organizations: the information that employees have. It is important that employees have easy access (i.e., on their desktop, not hidden in an HR portal somewhere) to a tool that allows them to provide ad hoc feedback as it comes to mind. Employees should be encouraged to provide this feedback, and should be notified about the actions undertaken as a result of it. The information employees can provide about what's working and what's not working, and where improvements can be made to the CX, is a significant opportunity that most service organizations can and should exploit.

**Evidence**

This research is drawn from 20 years of CX coverage within Gartner’s CX Research Team.

**Document Revision History**

Managing the Customer Service Experience - 19 March 2020

---

**Recommended by the Author**

Some documents may not be available as part of your current Gartner subscription.

- *Transcend Omnichannel Thinking and Embrace Multiexperience for Improved Customer Experience*
- *Build Links Between Customer Experience, Multiexperience, User Experience and Employee Experience*
- *Maximize Your Customer Service Technology Investments by Balancing Customer and Employee Experience*
- *Delivering Relevant Content and Knowledge to Customers Is Key to Great Customer Service*
- *Critical Capabilities for Voice of the Customer*