Future of Work Trends: Top 3 Customer Experience Trends

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Initiatives: Executive Leadership: Talent; Digital Workplace Strategy

Over the next few years, converging technologies and customer expectations promise changes in how companies manage customer experience and how work gets done. Executive leaders supporting the future of work can use this research to strategize how organizations and their employees can keep up.

Overview

Opportunities

- The “everything customer” will challenge employee problem solving skills — in a good way.

- Total experience elevates the role of the employee in delivering great experiences.

- Machine customers will change the way we think about customers and how to serve them.

Recommendations

Executive leaders supporting a future of work initiative should:

- Arm employees with a simple, flexible and responsive user experience (UX) that empowers them to find solutions and make decisions that keep customers happy.

- Create employee experience journey maps to visualize moments that matter to both customers and employees.

- Ensure your digital workplace application portfolio can support selling to, marketing to and serving machine customers by prioritizing capabilities such as self-service, artificial intelligence/machine learning (AI/ML) and the ability to transition between omnichannel modes.
Strategic Planning Assumptions

By 2026, basic buying and selling experiences will be commoditized, and businesses will differentiate based on connected customer and employee experiences.

By 2026, 60% of large enterprises will use total experience to transform their business models to achieve world-class customer and employee advocacy levels.

By 2030, a billion requests for customer service will be raised automatically by company-owned bots.

What You Need to Know

Pandemic-fueled customer behaviors and converging technologies promise substantial changes in how companies manage customer relationships. There are equally dynamic changes ahead for employee experiences (EXs) and how work gets done. Let’s face it, employees are essential to delivering a good customer experience (CX). When CX and EX are disconnected, it often leads to upset employees and upset customers. The opposite is also true. Yet investments in CX far outpace investments in EX according to discussions with Gartner clients. Most organizations are currently unprepared to deal with this, so it is important to understand how changing consumer behaviors and expectations will alter the future of work (see Figure 1).

Future of Work Reinvented
Organizations must shape their future by planning for and understanding how work will be influenced by technological, generational and social shifts for both customers and employees over the next decade. Improved business outcomes, such as flexible response to customer demand and improved value propositions, will require continuous improvement in work outcomes and talent management strategies. Organizations who are setting customer experience goals must align their ambition with the strategies for the workplace, digital enablement, and for attracting and managing talent.
Today, 80% of B2B organizations and 65% of B2C organizations are at the beginning stages of CX maturity (see Survey Analysis: Customer Experience Maturity and Investments Priorities, 2020). This means there is plenty of opportunity to change mindsets and do a better job of connecting the future of work to the future of the CX. In this research, we will present three emerging trends in CX, their direct impact on the future of work and how organizations can prepare.

The Everything Customer

*Analysis by Don Scheibenreif and Tori Paulman*

**SPA:** By 2026, basic buying and selling experiences will be commoditized, and businesses will differentiate based on connected customer and employee experiences.

**Description:** The everything customer is a mindset — a growing set of attitudes that we see emerging due to technology and the continuous actions of digital giants and other bold companies that use customer insight to do amazing things. It is based on the idea that digital technology has created a customer who wants seemingly conflicting things at the same time. For example, a customer may want all the features in a mobile application while also wanting it to be easy to use, wanting personalized attention while being treated like everyone else, and wanting to be simultaneously connected and left alone. To customers, wanting opposing things at the same time is perfectly normal, but it does create dilemmas for all types of organizations seeking to serve them.

**Why Trending:** Leaders in technology have been steadily raising expectations of what customers should expect from the companies with which they do business. From one-hour delivery of food and groceries to your doorstep, to seeing your doctor online, to having your mortgage approved in minutes instead of days, use of technology is creating the everything customer. Also, consider this:

- Seventy-five percent of customers expect to receive excellent or good service from companies, but only 49% report actually getting it (see State of the Customer: Understanding Customer Service Expectations).

- Ninety-one percent of customer-facing employees said they understood the needs of customers, compared with only 73% of non-customer-facing employees (see Understanding Employee Barriers to Customer Centricity).

- If the company’s customer service is excellent, 78% of consumers will do business with them again after a mistake. ¹
Implications: Organizations that serve customers must accept the fact that customers will want seemingly opposite things at the same time. A successful model for the future of work places the individual — the human — at the heart of its design.

Taking a human-centric approach will ensure positive outcomes for customers and employees alike. Organizations used to think of their customers as segmented into similar demographic groups with similar likes, problems, needs and values. But the everything customer has shown us that customers are demanding. They will demand as much as they can get away with. This is not new. And, there are certain requirements you won't meet in order to excel at other customer requirements. Are you and your employees set up to meet or exceed those high-level demands and deal with the trade-offs? The workforce of the future will be responsible for assessing the demands of the always-on, hyperconnected customer, in real time.

Disconnected efforts to improve customer experience can often lead to a significantly worse employee experience, which, in turn, flows right back to the CX. How many times have you entered your information into a form or responded to chatbot questions only to be asked the same questions by an employee operator? If the customer doesn't close the chat immediately, this kind of interaction will quickly sour your CX with the human, but, it's not the employee's fault that the system doesn't pass along the critical information. Worse, employees can find themselves copying and pasting important, sometimes secure, customer information between two or more systems in order to satisfy a need.

Actions:

Arm employees with a simple, flexible and responsive UX that is consistent with customer interfaces and inclusive of features such as assistive technologies, which will empower them to find solutions and make decisions that keep customers happy.

Develop and implement customer-centric goals, such as improving Net Promoter Scores or reducing effort with the Customer Effort Score, which ensure customer-facing and non-customer-facing employees are rewarded and recognized for positively impacting customer experience.
Further Reading:

Video: The Everything Customer

How Product Managers Develop Resiliency With Diversity and Inclusion for the “Everything Customer”

Total Experience

*Analysis by Tori Paulman and Don Scheibenreif*

**SPA:** By 2026, 60% of large enterprises will use total experience to transform their business models to achieve world-class customer and employee advocacy levels.

**Description:** Total experience (TX) is a business strategy to create superior, shared CXs and EXs by interlinking CX, EX, UX and multiexperience disciplines. The goal is to drive greater customer and employee confidence, satisfaction, loyalty and advocacy. This is not just about making everything better for the customer and then eventually bringing the EX up to the same level. It’s about all of the experiences continually learning from each other, refining and creating an exponentially better experience across them all.

**Why Trending:** TX can attract, retain and cultivate greater customer and employee lifetime value, a calculation based on the longevity of the relationship and the value they bring to the organization. Losing profitable customers can impact future growth. But equally, the employee lifetime value has financial repercussions. When organizations lose employees they don’t want to lose, there is an initial hit to knowledge loss and productivity when an employee leaves. Think of the impact on existing team members and the cost and time of recruiting, onboarding and training new talent with varying degrees of time required to reach competency and having no guarantee of productivity.

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However, technology advancements allow greater opportunities for customers and employees to connect across multiple platforms with multiple ways of engagement (such as voice, gestures and touchpoints). “Connected” devices with cloud-based applications have proliferated across multiple organizations and in consumer electronics/vehicles, providing more opportunities to connect and gain meaningful insight about employees, customers and the way they interact with the technology. This means that employees can be more customer-centric through digital solutions, such as giving a discount or promo code, adding additional time to deadlines, unlocking exclusive content or providing additional services without having to go through layers of approval.

Implications: TX is not just about technology or building an app. TX is about how to use the technology and interactions to enhance, empower and embolden both customers and employees. TX comes to life in moments of truth when employees and customers meet. We see the EX benefits in these main areas:

- **Empower employees to make decisions in the moment**: Disney’s theme parks give a wide range of latitude to their “cast members,” or employees, such as allowing a guest late access to a ride or finding and delivering alternative merchandise when something is out of stock. Disney is regularly recognized for its approach to CX and employees are supported with the best tools to “create happiness.”

- **Reduce potential errors**: Domino’s AnyWare platform helps increase accuracy in order takings, increases visibility of demand and provides traceability for better order management.

- **Communicate more easily with customers via technology**: Hilton communicates with its guests via its app and leverages digital capabilities to remove friction from the guest experience, such as getting notifications when a door battery is running low or replacing lost receipts.

Executive leaders should evaluate how TX interlinks these experiences, increasing both customer and employee confidence and lifetime value. It’s about how these experiences make the customer and employee feel about themselves and the decisions they have to make. Fifty-seven percent of employees do not believe their company is enabling them to support customers in the most effective way; and yet, investments in EX are often not a priority.  

**Actions:**
Assemble a TX fusion team made up of key stakeholders representing CX, employee experience (EX), UX and multiexperience (MX).

Create employee experience journey maps to visualize moments that matter to both customers and employees and identify gaps that must be addressed to deliver on those moments.

Develop a business case that shows ROI for your organization by identifying key scenarios that reduce employee effort and result in better customer outcomes.

Align and validate EX application investments to CX goals and business outcomes by measuring both customer effort and employee effort by using metrics like NPS and Customer Effort Score.

Further Reading:

Raise Your Game by Going ‘All In’ on Total Experience

Build Links Between Customer Experience, Multiexperience, User Experience and Employee Experience

Success in the Digital Experience Economy Requires Connecting MX, UX, CX and EX

Transcend Omnichannel Thinking and Embrace Multiexperience for Improved Customer Experience

Create a Customer-Centric Culture by Focusing First on Your Employees’ Experience — Part 1: Empowering Employees

Machine Customers

*Analysis by Don Scheibenreif and Tori Paulman*

SPA: By 2030, a billion requests for customer service will be raised automatically by company-owned bots.
Description: A machine customer is a nonhuman economic actor that obtains goods or services in exchange for payment. Examples today include virtual personal assistants, smart appliances, connected cars and IoT-enabled factory equipment. These machine customers act on behalf of a human customer or organization. They will range from placing simple replenishment orders from one vendor to more complex purchasing tasks that involve multiple vendors and a lot more information to consider.

Why Trending: Today there are more internet-connected machines with the potential to act as customers than humans on the planet. We expect the number of machines and pervasive AI with this capability, like virtual personal assistants, to rise steadily over time. They are increasingly gaining the capacity to buy, sell and request service. Machine customers will advance beyond the role of simple informers to advisors, and ultimately, decision makers. Over time, trillions of dollars will be in the control of nonhuman customers.

Implications: Human employees that will have to serve, market or sell to machine customers will find themselves asking some important questions:

- “Will these machine customers have some effect on the nature of my job?”
- “How will machine customers change how I work with my colleagues?”
- “Will I have interactions with human customers anymore?”
- “Will human employees see the machines as customers?”

Such questions can cause employees to reconsider their position in an organization, and even whether or not they want to work in a particular organization. If the relationship between human and machine is transactional, then machine customers could be viewed as a program to manage. However, if the machine customers are more interactive, such as asking for guidance or decisions, they would be likely to be seen as customers. Digital workplace technologies, including bots and robotic process automation (RPA), will also have to adapt. The old way of working, when interactions are with human customers directly, will no longer work. Interactions that employees have with one another to make decisions about the CX may go away. For example:
Sales will be largely programmatic, and the process will be automated. Salespeople are still needed, but mostly for B2B and large accounts where it becomes essential to understand the human customers who are ultimately responsible for the purchase. They could also study machine behavior, looking for patterns that could inform their sales strategy.

Marketing will also be programmatic and automated. Marketers will still be needed to understand the needs and behaviors of human customers, but they will have to consider how machines have become integral parts of the customer journey. Machine customers will buy based on information and process efficiency, not emotion.

Customer service organizations must know which product interactions are machine customers. Customer service agents would need extensive training so they would be aware of all possible troubleshooting options and make support decisions based on variables such as the ability of human or remote support. The good news: there are no angry customers to soothe.

At a day-to-day practical level, today’s culture of customer centricity will need to expand to include machine customer centricity and even cultural rituals may need to change.

Actions:

- Focus on the psychological safety of employees as the level of interactivity with machine customers increases.
- Prioritize developing the skills among existing employees to the programmatic and nonemotional behaviors of machine customers.
- Help employees understand that the work they do still matters, even if they are dealing mostly with machine customers, with recognition and rewards that emphasize their unique value.
- Evaluate digital workplace technologies such as real-time messaging and nudge engines that can include machine customers.
- Develop a machine customer persona and journey map to identify key intersections between human and machine experiences using the same techniques as customer journey mapping.
- Determine whether your digital workplace application portfolio has capabilities that support selling to, marketing to and serving machine customers.
Further Reading:

Machine Customers: The Next Massive Emerging Market

How Customer Experience Changes When Your Customer Is a Thing

Why Machine Customers May Be Better Than Human Customers

Meet Your Machine Customers: 10 Machines That Will Drive Business Growth in the 2020s

IoT-Based Thing Commerce Requires a Differentiated Customer Experience

Build User-Centric Product Teams to Continuously Deliver a High-Value Employee UX

Evidence

1 State of the Connected Customer, Salesforce.

2 The Un-Ignorable Link Between Employee Experience and Customer Experience, Forbes.

3 Gartner Surveys and Inquiries

In 2019, Gartner conducted the Customer Service Behavior and Expectations Survey of over 1,500 employees from a wide variety of companies. The sample included commensurate representation of various industries and business models, including B2C companies, B2B companies, hybrids and public-sector organizations. While participation was done anonymously (respondents were not asked to identify themselves or their employer), they were asked to choose among several random lists of companies to pick the list that included their company. This enabled the research team to correlate employee responses from companies based on that company’s historic Customer Effort Scores — leading indicators of superiority in customer service and loyalty. Employees were asked a battery of questions about their everyday work experience. These included detailed inquiries into how they assess the methods and outcomes being used by their manager and their company in the areas of customer experience, service and loyalty.
The 2019 Gartner Customer Service Behavior and Expectations Survey was developed, piloted and fielded by our customer service and support research team. The data was collected in January 2019 through a self-reported customer panel survey and includes responses from 8,398 customers around the world. The survey included multiple choice and open-ended questions and was aimed at understanding customer journeys, preferences and expectations of customer service.

2019 Gartner Understanding Employee Barriers to Customer Centricity Study:

- Survey of over 1,200 employees across all large private sector roles and industries
- Tested capabilities across five dimensions of customer-centric culture: customer focus, alignment, teamwork, empowerment, and agility and leadership
- Assessed capabilities using level of employee agreement with specific statements of observed or perceived organizational behavior

CX maturity level percentages based on Gartner inquiries:

- n = (15,766 inquiries on CX with 582 analysts), (CX leaders, marketing leaders, customer service leaders, sales leaders, CIOs, IT leaders, supply chain leaders)
- Gartner inquiry calls from January 2019 to May 2020