Break Out of the Customer Management Industrial Complex With Gartner’s CX CORE Model

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Customer engagement technologies have delivered automation at scale but missed helping organizations build holistic relationships. This research will help application leaders supporting customer experience think differently to build experiences with empathy for lasting customer relationships.

Overview

Impacts

- The global pandemic and related disruptions have shifted customer relationships and exposed the shortcomings of the “Customer Management Industrial Complex.”

- To meet the demands of disrupted customer relationships and fulfill the original promise of customer engagement technologies, a fresh approach to understanding how to create and manage relationships is needed.

- A new end-to-end approach to business operations is needed to serve customers and drive growth in times of continuous uncertainty.
Recommendations

For application leaders supporting CRM strategies and the customer experience (CX):

- Challenge the Customer Management Industrial Complex by introducing the CX CORE model to your peers and executive team, leading customer-facing business capabilities first and technology architecture second.
- Rearchitect your CX vision and approach to relationships by using the outside-in design element inherent in CX CORE.
- Drive CX innovation with coordinated experiences by updating internal process design to meet customers at a specific stage in the relationship.

Introduction

Most organizations lack deep customer empathy. It is something they haven't appreciated in the past until world events in 2020-2021 forced them to look at things differently. Sadly, many organizations providing products and services were often unresponsive to the changes required during the pandemic, or simply not aware of the need for changes. Customers, both B2B and B2C, want more understanding and flexibility from whom they do business, as these disruptions now look to be permanent.

Unfortunately, many organizations were and still are unable to respond to their customers' needs as most are trapped in what we call the Customer Management Industrial Complex, a persistent network of platform definitions, technology providers, service providers and customer end-user organizations involved in the management of customer relationships. The Customer Management Industrial Complex prescribes operational efficiency in functional silos under the guise of customer centricity and prioritizes short-term profits over long-term customer relationships.

We are now faced with an “empathy vacuum” — the void created by the engineered insincerity of the Customer Management Industrial Complex.
According to discussions with Gartner clients, many still struggle to get a current profile of their customers — despite billions of dollars spent globally on customer engagement technologies like CRM every year. Some have never even spoken with a customer. As a result, organizations often don't know who their customers are, much less understand what stage of the relationship they are in. Throwing more technology at the problem is the answer for the Customer Management Industrial Complex, but it is not the answer for your customers.

**Figure 1: Architecting Experience for Lasting Customer Relationships: Gartner’s CX CORE Model**
In this research, we present a bold, fresh, new model to do what CRM and other customer engagement technologies were meant to do before they got subsumed by their overhead and complexity: develop customer empathy and make the customer the starting point for creating business architecture. We have developed a model (Figure 1) — the Customer Experience CORE (Customers, Organization, Relationships, Experience) — to help you architect for experience in order to build lasting and valuable relationships that can flex with ever-present disruptions affecting customers, like the global pandemic. We offer an opportunity to step back from the Customer Management Industrial Complex and focus on what matters: relationships. We offer a chance to refocus and put the customer in the center of your organization and focus on the customers and their experience. Bringing attention back onto the customer will force you to reunderstand relationships, experiences, and service and product design.

This research is part of an ongoing series exploring these opportunities and is relevant to multiple roles such as marketing, CX, sales, customer service, supply chain, and IT.

**Impacts and Recommendations**

The Global Pandemic Has Shifted Customer Relationships and Exposed the Shortcomings of the Customer Management Industrial Complex

The pandemic and concurrent societal disruptions have brought a lot into focus for customers. People’s values have shifted. Friendships have changed. Work is changing. Social and environmental concerns are causing people — both consumers and B2B customers — to reassess who they want to do business with, and how. This is also true for citizens and employees. They want more control, and also more understanding and empathy from the organizations with which they interact.

For consumers, 85% of respondents to a Gartner survey said they’ve had difficulties as a result of the pandemic. ¹ Among the most common challenges reported were dealing with social challenges, maintaining their mental and emotional well-being, and adapting to limitations on their personal freedom (see Survey Analysis: Consumers Say COVID-19’s Gloomy Shadow Will Linger Through 2021). Some organizations, unable to contend with these changes, have fallen by the wayside, while others have become more aggressive, with ambitions to exploit the uncertainty to capture more market share and customers. On the B2B side, 43% of buyers across all age groups desire a seller-free sales experience (see How to Adapt to B2B Customers’ Evolving Digital Buying Preferences). ² And CEOs view more use of digital technology, more demand for digital channel flexibility, and higher expectations of CX as permanent changes in customer behavior coming out of the pandemic. ³
Customer engagement technologies like CRM systems, journey orchestration, call center platforms and customer data platforms are often installed by organizations individually over time without the thought of integrating them to support customer journeys. And selection decisions for such technologies are typically made with an eye toward accruing benefits to the organization — like increased efficiencies — as opposed to benefits for customers and their experiences. Frustration ensues when there is a large amount of feature overlap and data duplication across various CRM systems, fed by the Customer Management Industrial Complex. Clients get stuck when their ambitions of customer centricity are lost to struggles with integration.

These forces have led us to the conclusion that the Customer Management Industrial Complex, while very important to a business, is not enough to meet the expectations of customers, the employees who support them, and senior leadership when it comes to customer relationships.

Recommendations:

- Shift how the business measures success by balancing efficiency metrics with metrics that support the goal of lasting customer relationships.

- Reexamine your voice of the customer and other customer satisfaction research by identifying major shifts in customer sentiment, especially around expectations for customer empathy and flexibility. Are you aware of these shifts and prepared to adapt?

- Assess your existing roster of customer engagement technologies by asking yourself: How well do these technologies enable the customer experience and the jobs to be done? Are you achieving the level of integration you want? Are the related processes and data flows operating in silos or in a coordinated fashion to help you understand where the customer is in their journey with you?

A Fresh Approach to Understanding How to Create and Manage Relationships Is Needed

Gartner’s CX CORE model is designed to help organizations architect experiences for lasting and valuable customer relationships. It is a model that will act as an organizing principle for whatever role-based or functional technologies, people and processes you may use to manage your customer relationships.
It is time to put the R — relationships — back into the equation.

The components of the model are as follows.

**The Customer in the Center Surrounded by Relationship Stages**

There are many ways to define experience. For the CX CORE model, we will use Gartner’s definition of customer experience to guide us:

> The customer’s perceptions and related feelings caused by the one-off and cumulative effect of interactions with a supplier’s employees, systems, channels or products.
>  
> — Gartner Glossary

The key words here are “perceptions” and “feelings.” These underscore the importance of memories and emotion when someone does business with you. Customers remember how you make them feel.

We begin by identifying the customer. Most organizations have many customers; at the macro level these may be B2C or B2B, while at the micro level customers may be drawn from different demographics, etc. How can you improve CX without first clarifying and specifying who your customer is? The clearer you can define your customer, the easier it will be to architect the experience and the service you provide. Think of ideal customer profiles that are rich and diverse — with demographics and psychographics. The experience, perspective, needs and expectations of the customer powerfully shape experience.
Figure 2: The Customer in the Center and Surrounded by Relationship Stages

In Figure 2, the customer is in the center and is surrounded by the different stages of their relationship with a business. The relationship stages frame the experience — they help us understand what's happening with the customer and provide context for their perceptions. Stages also inform us on what actions we can take. A customer may move fluidly through different relationship stages — forward, backward, start, stop — and even exit the relationship altogether. Based on a review of multiple relationship models, we have determined the most relevant stage, as shown in our CX Core model and outlined below in Table 1.
Table 1: Relationship Stages in the CX CORE Model
(Enlarged table in Appendix)

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Source: Gartner

Note the inclusion of “struggle,” “crisis/recovery” and “exit.” These are not commonly discussed in CX models, but they need to be. It is unrealistic to assume that a customer will stay for life or even a year these days. You may have different labels for your customer relationships, so see this as a starting point for your own model. And, to make it even more interesting, we have to consider the state of the relationship within a stage. For example, you may have different states within the stage of a stage (happy, sad, angry). A change in state (angry to neutral) leads to a change in stage (struggle to commit).

Experience Membrane
The dotted line surrounding the customer and the relationship stages is what we call the “experience membrane” (Figure 3). It surrounds the customer in whatever relationship stage they are in. Just as in biology, the membrane will let some things in and keep others things out — both from within the organization and even external to the organization. The membrane protects the customer from a well-intentioned, but uncoordinated and siloed organization. For example, if a customer is struggling with you, what typically happens? Is it a coordinated response or does each department approach it slightly differently? Sales schedules a meeting, marketing sends its scheduled campaign, customer service sends a routine survey, and the list goes on and on. Imagine what the customer is thinking: Are you even talking to each other and are you listening to me?

Figure 3: The Experience Membrane of the CX CORE Model

Intelligent Coordination

The customer, in their relationship stage and on the receiving end of experience, sits on top of a stack of technologies and capabilities present in your organization (see Figure 4). Surrounding these capabilities is what we call “intelligent coordination,” a capability that coordinates the activities of all resources involved in delivering a CX. We see it as a partnership between people and technology, as not all experiences will be automated, nor will they all be informed by analytics.
In the CX CORE model, we anticipate that intelligent coordination will do what organizations can't easily do today. It will bridge functional silos to deliver a relevant set of products and services — people and digital, in a coordinated fashion, designed for whatever stage of the relationship the customer is at — in as close to real time as is feasible.

Intelligent coordination orchestrates the following capability building blocks of delivering an experience for the customer:

- **Points of interaction** — These are all the physical and digital points of direct contact with customers. It includes employees as well as digital channels. The touchpoints are revealed by insights from customer research (voice of the customer), employee insights (voice of the employee) and customer/employee journey mapping.

- **Products and services** — The experience is mediated by the products and services you offer (how you deliver value to the customer). Business processes work to compose or assemble the right combination of people, touchpoints, technology and data to deliver a salient and effortless experience at the right time. It can include a variety of customer services, programs and content.
Applications and technology — These are the enablers of the experience. They may leverage legacy systems, contemporary applications or composable technologies like packaged business capabilities (PBCs), APIs and composable custom application platforms. Technology tooling like robotic process automation (RPA) and integration platforms can also help. The CX CORE model does not replace your existing technology architecture. It asks how it needs to be better leveraged to meet the challenge of more precise relationships.

Data, analytics and AI — The CX CORE model relies on real-time contextual data to identify the customer and sense the stage in the relationship, and the company operations to enable the orchestration of experiences at the right time without “creepiness.” AI technology can be a primary orchestrator. This is also where metrics will be captured. Together, data, analytics and AI embed smarter decision making across CORE at every stage of the life cycle.

Recommendations:

- Rearchitect your CX vision and approach to relationships by using the outside-in design element inherent in the CX CORE.

- Start with your ability to sense where the customer is in their relationship with you by assessing the robustness of your voice-of-the-customer initiative. Can it help you sense where people are at all points in time?

- Examine your product and service design practices across functions for particular situations or customer journeys by asking these questions:
  - Do you have the key customer journeys mapped and commonly understood by the people developing your technology solutions?
  - Do the journeys take into account the stage at which the customer may be?
  - Do the relevant customer-facing functions in your organization have the tools and data they need to effectively operationalize journeys?
A New End-to-End Approach to Business Operations Is Needed to Serve Customers and Drive Growth in Times of Continuous Uncertainty

The fluctuating nature of customer relationships, augmented by technology, means that you have to be much more situational in your approach. Customers are not static. A loyal customer today can easily be the lapsed or lost customer of tomorrow. The mechanics of the CX CORE model will come to life differently depending on:

- The customer and their role
- The situation
- The stage in the relationship
- Whatever functions are involved in delivering the experience (e.g., sales, marketing, data and analytics, customer service and support systems)
- Whatever technologies/frameworks are being used to orchestrate the specific experiences
- The current state of your technology architecture and integration

To show how this model can be applied to a common situation, let's imagine a B2B buyer who has been buying facilities maintenance supplies for the factory in which she is located. She has been buying exclusively from a broadline supplier after an extensive review of a number of competing suppliers. For the last six months, the results have been excellent. Product availability has been good, her account manager has been in regular contact with her, and the billing process has been seamless.

Today, however, it feels like things are not going as planned. The buyer has been receiving reports from several department managers complaining of late or incomplete orders, her account manager has left and the supplier has been slow to replace him, she gets random emails and catalogs from the supplier, and it has just announced a price increase on essential items her factory needs. The bright spot has been customer service. She has come to rely on it for support amid all the issues. Yes, she likes her supplier and she understands that mistakes happen, but they are happening too frequently and she is being blamed. The truth is she is struggling in her relationship with her supplier. To help her regain some sense of control, she has been diverting orders to her secondary broadline supplier for the last few months until she can sort through the situation. Unfortunately, she is weighing up a complete shift to this secondary supplier.
Now, there are two ways to respond to a situation like this: using traditional CRM processes or applying the ideas from the CX CORE model. Table 2 provides a comparison.

**Table 2: Comparing Customer Approaches With a Struggling Customer**
(Enlarged table in Appendix)

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<td>The account manager might see that the order run rate has been steadily dropping, but this account is one of a hundred for which his department is responsible. He notes the issue, but will wait until it gets worse before taking any action. He has a dozen other accounts that are doing much worse right now, and that is where he must spend his time so he can make his quota.</td>
<td>Advanced analytics alert the account manager that something is not right based on the behavior of similar customers — not just in purchasing, but also from the sentiment in email correspondence and voice analytics from the customer service calls. It also notes that the B2B buyer liked a number of tweets put out by a primary competitor.</td>
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Source: Gartner

We fully believe you know what needs to be done in key buying and relationship situations, but you are often hamstrung by siloed processes, functions and systems that are not integrated. We are merely suggesting that with some thoughtful customer research (such as customer journey analytics and voice of the customer), employee experience research, and product, technology and service design (grounded in customer and employee journeys), you will be in a better position to coordinate activities and deliver better experiences grounded in customer understanding.

**Recommendations:**
- Drive CX innovation with coordinated experiences by updating internal process design to meet customers at a specific stage in the relationship. Start by convening an internal CX steering committee to make the business case that a shift is needed from inside-out operational efficiency to outside-in architecting of experience.

- Develop a relationship model for your customers that goes beyond traditional metrics by working with customer-facing functions and customer analytics colleagues. Consider stages like develop, grow, struggle and even crisis/recovery.

- Upgrade your ability to sense where a customer or buying group is in their relationship with you by using persona development, customer journey mapping and customer analytics to identify the triggers for a relationship stage shift.

- Define the business capabilities needed to support your shift to more empathetic, coordinated methods of customer engagement by conducting business capability workshops with customer-facing functions.

- Assess your solutions, tools, data, analytics and AI landscape by conducting a comprehensive audit of your customer engagement technology architecture. Can your existing processes and systems sense where a customer is in their relationship with you? Do your employees have the tools and training to take action once the state of the relationship is known?

Other research notes in this series will explore the function-specific implications of the CX CORE model and how it will come to life in different situations.

**Evidence**

1. The Gartner Consumer Values and Lifestyle Survey: This survey is fielded among consumers ages 15 and older across 17 countries. For the purpose of this analysis, we leveraged U.S. data only. Quotas are set for employment (within age and gender when available) and for ethnicity. U.S. online respondents completed two 15-minute surveys. The first survey included screening, demographic, sentiment, values and lifestyle questions. The second survey was administered to the same sample and included category-specific (e.g., money and spending, health and beauty) questions. The first survey was conducted online among 3,000 respondents and the second survey among 1,642 respondents. Data was collected in August through September of 2020. The survey was developed collaboratively by a team of Gartner researchers who follow the market, and was reviewed, tested and administered by Gartner's Research Data and Analytics team.
2 Gartner’s 2021 Digital Buying Survey: This survey was conducted from November to December 2020 and included 982 B2B buyers located in the U.S., the U.K., Canada, Australia, New Zealand, Hong Kong and Singapore. Respondents were involved in making a purchase decision on behalf of their company that involved multiple potential vendors.

3 Gartner’s 2021 Gartner CEO and Senior Business Executive Survey: Gartner conducted this research from July 2020 through December 2020, with questions about the period 2020 to 2023. One-quarter of the sample was collected in July and August, and three-quarters from October through December. In total, 465 actively employed CEOs and other senior executive business leaders qualified and participated. The research was collected via 390 online surveys and 75 telephone interviews.

Recommended by the Authors

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

CIOs: Make Your Mark on the Customer Experience Initiative

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