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GARTNER AT A GLANCE

This data is accurate as of **March 10, 2016.**

Founded in 1979 and currently employing more than 7,900 associates, Gartner delivers the technology-related insight necessary for our clients to make the right decisions, every day.

We serve clients in more than 90 countries. Clients outside the U.S. provided 40% of our 2015 $2.0 billion revenue.

Our interactions with **clients in more than 10,000 distinct enterprises worldwide** enable us to make connections, understand patterns and discover trends that no other research firm can envision.

Our community of more than **1,100 analysts** engaged in over **230,000 one-to-one client interactions** in the past year.

3.1 million end-user searches per year and **4 million end-user document page views** give business leaders in high-tech and telecom enterprises intelligence about their customers, competitors and markets to help them grow their business.

We field 850 media inquiries per month worldwide from leading business and trade publications, online news portals and broadcast media interested in what we have to say about the business of technology.

The Wall Street Journal, The Economist and The Financial Times, along with more than 30 other leading business publications worldwide, consider Gartner a trusted, independent source. **They quote us an average of 70 times every week.**

74% of the Fortune 1000 and 75% of the Global 500 support their key technology decisions with Gartner advice. These varied and worldwide connections produce insights that benefit all our clients.

Each year, **50,000 technology and business professionals from around the globe attend our 60+ worldwide conferences.** They benefit from our market-leading research, unique insight and unsurpassed peer networking. **We are the world's leading IT conference provider.**

Gartner **clients have access to a terabyte of continually updated market data,** covering 2,000 vendors across 175 technology markets in 100 countries.

End users, technology providers and investors use **Gartner Hype Cycles** to **track and monitor the commercial viability of over 2,000 technologies in 110 IT, business and consumer markets.**

Gartner clients continually monitor their provider portfolios with **the Gartner Magic Quadrant,** a methodology that has become **a standard for market analysis in 150 technology segments.**

Gartner analysts had more than 19,000 briefings with more than 3,500 distinct vendors in the past 12 months, helping IT buyers, sellers and investors make the right decisions about their investments in markets, products and customers.

Gartner Executive Programs clients get customized advice and participate in peer networking opportunities as **members of the world's largest community of CIOs.**

The annual CIO Agenda, published by **Gartner Executive Programs and Gartner Research, is developed from the responses of 2,944 CIOs, representing $250 billion in CIO IT budgets and 84 countries.** It provides insight into trends in CIO priorities and investments.

$400 million in aggregate cost savings to clients are produced from the **3,200 engagements delivered each year by the 600 Gartner consultants.**

Clients improve business performance by benchmarking their spending and best practices against our IT performance repository, the largest in the industry, **drawing on more than 5,000 IT benchmarks a year.**

Clients use gartner.com and our various product portal sites to easily access our insight for help in making both daily and long-term decisions. Each year, **thousands of active users search 119,246 documents across 1,350 technology and business topics on our websites.**

Multinational clients get consistent global insight from **an analyst community that speaks 50 languages.**

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The Top 10 Strategic Technologies for the Customer Experience

Ed Thompson

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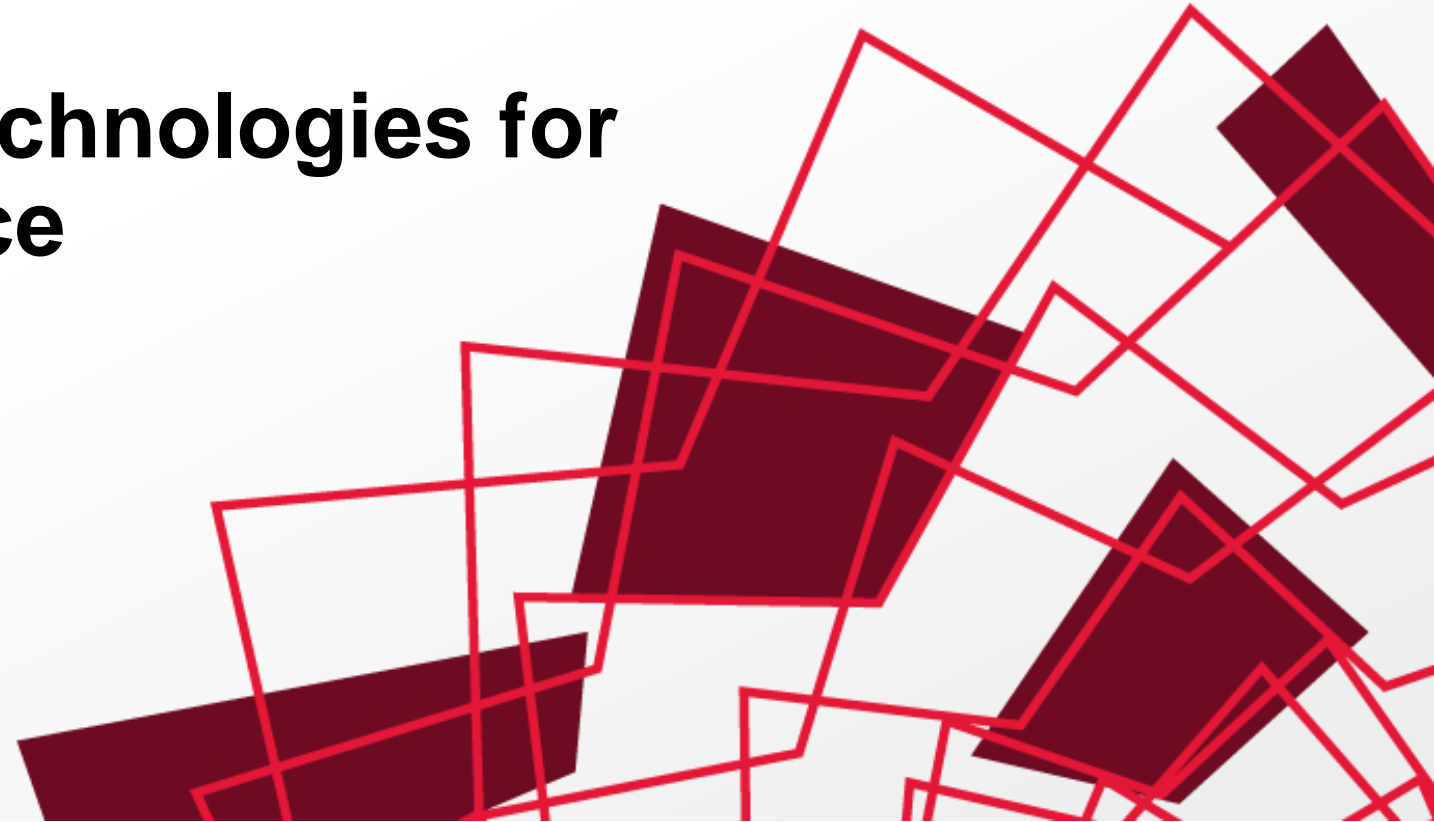
A Great Customer Experience Takes Years to Build and Can Be Destroyed in a Moment

- Every employee can build or destroy the CX

- All technologies can be used to improve the CX

- Technology is not always needed to improve the CX

- Each organization has a unique mix of technologies

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Key Issues

1. What are the top 10 strategic technologies for improving the Customer Experience?

2. How are organizations using these technologies?

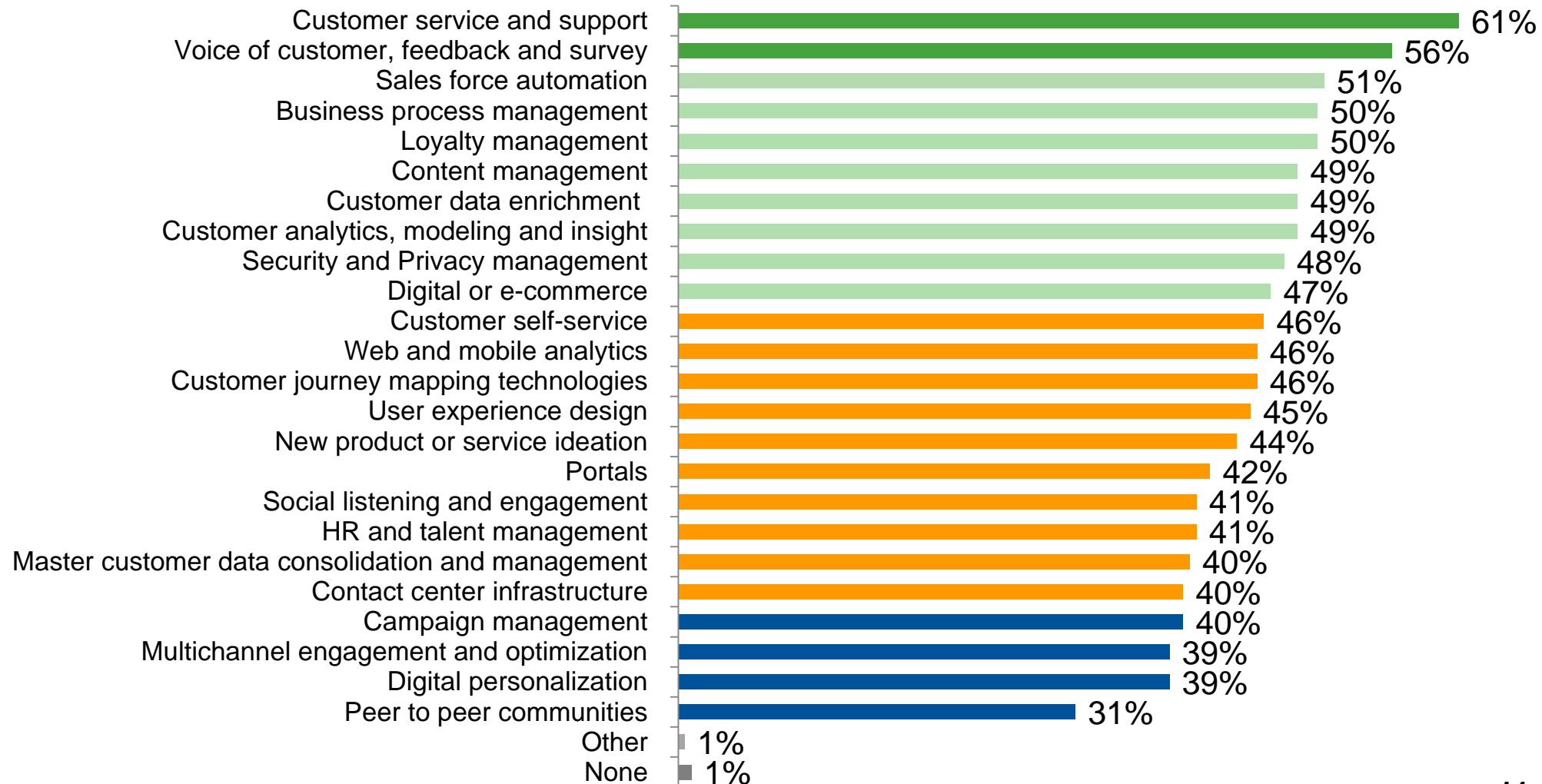3. How should organizations determine which technologies have the most positive impact?

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Seven Types of Customer Experience Projects

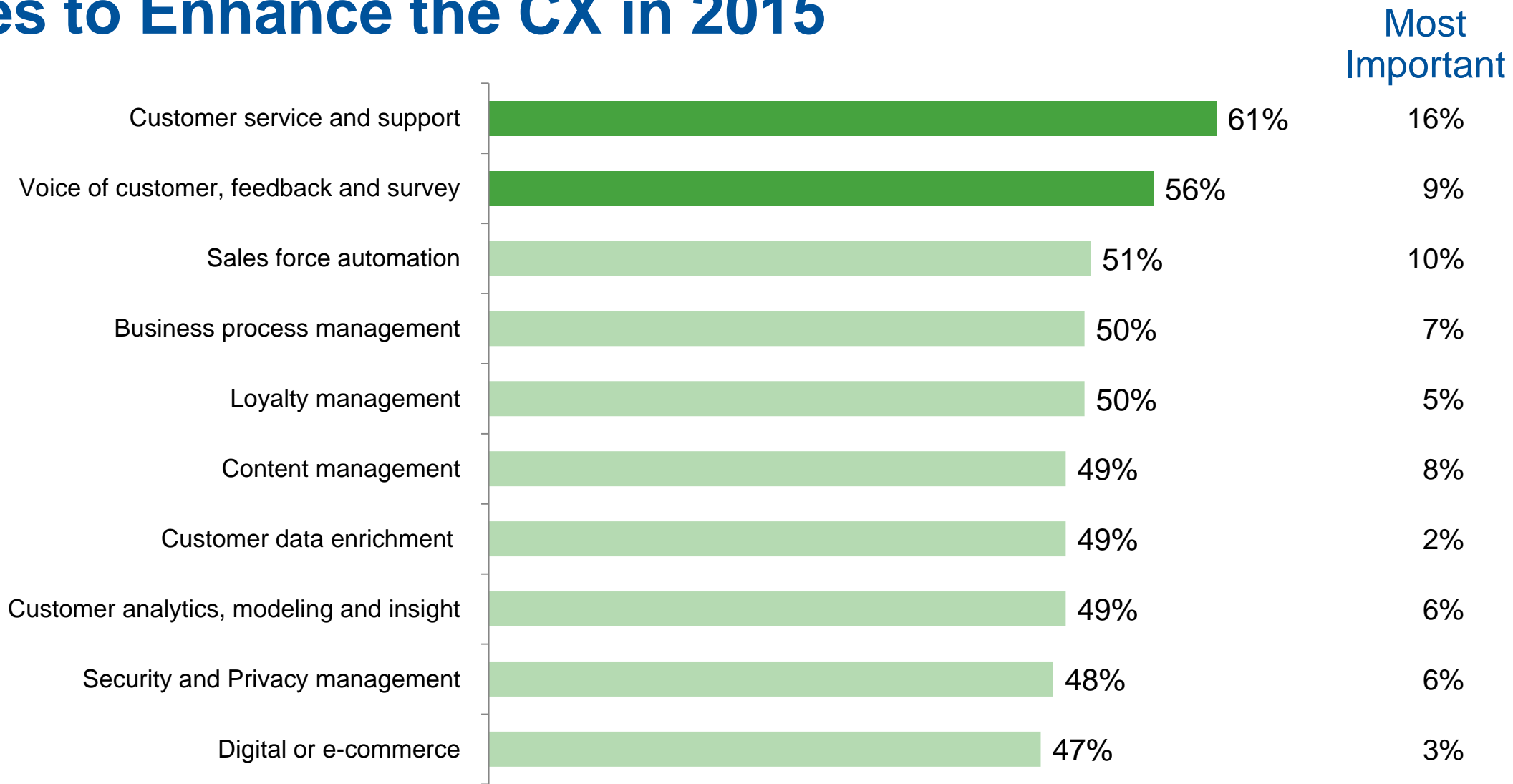| Listen, Think, Do	From Out to In	Act as One	Open Up	Get Personal	Alter Attitudes	Design Better
Collect Feedback Multichannel collection Real-time alerts and actions	**Find Moments of Truth** Process modeling Identify the weakest link Automate and escalate	**Achieve Consistent Experiences** Single view of customer Recognition	**More Accessible** Self-service Track for customer Add channels	**Personalize Products** Configure to order Mass customization New product development	**Empower Employees** Education and training Cultural values Ownership of the experience	**Have a Strategy** Executive enlightening Ideal and real experiences Program and project plans
Analyze Opinion Value analysis Market research Segmentation Propensity modeling	**Redesign Processes** Quality controls Trading efficiency and experience	**Share Answers** Knowledge management Skills inventory Better search	**Demonstrate Trust** Honor privacy Share data Use only what you need	**Customize Offers** Bundling product/service Personal pricing	**Recruit Differently** Profiling the personalities Balance teams Recruit to brand	**Brand Execution** Values and promise Reputation Communication
Start a Conversation Expectations setting Capturing intent Manage dialogue	**Adapt in Real Time** Real-time rerouting Analytical-driven process decisions	**Multichannel Availability** Multichannel integration Device-independent interaction	**Encourage Participation** Review and comparison Communities Social networks	**Stripped Down Simplification** One size fits all Standardization and scale	**Make Clear the Responsibility** Governance and policing Responsibility Compensation and contracts	**Design the Experience** Benchmark usability and empathy Digital design cool

A Top 50 Technologies Used to Help on CX Projects

Listen, Think, Do	From Out to In	Act as One	Open Up	Get Personal	Alter Attitudes	Design Better
Collect Feedback QA monitoring Event monitoring Survey tools, enterprise feedback Voice of customer Social listening	**Find Moments of Truth** Data mining Next best action Business intelligence WFO	**Achieve Consistent Experiences** Customer engagement center Master data management BPM	**More Accessible** Self-service APIs Remote monitoring Tracking Field force optimization	**Personalize Products** New product development D-commerce storefront Configure, price, quote tools	**Empower Employees** Learning management WFO Sales, CSS, Web analytics Enterprise social	**Have a Strategy** Consultants Advisors Researchers Designers Brand Makers Analysts
Analyze Opinion Customer value Analytics Data mining Segmentation Web analytics Sentiment	**Redesign Processes** Workflow Process analysis BPM modeling	**Share Answers** Knowledge management Search Web self-service Content management	**Demonstrate Trust** Data privacy Security tools Open data Partner management	**Customize Offers** Configure, price, quote tools Content management PIM, product catalog Order management	**Recruit Differently** Recruitment Induction Community management Talent Management	**Brand Execution** MRM Content Management Community Management DAM D-Commerce
Start a Conversation Campaign management Customer communication management Dialogue management	**Adapt in Real Time** Business activity monitoring Event-driven analysis	**Multichannel Availability** Multichannel integration Customer Journey Analytics	**Encourage Participation** Review and rating technologies Community management Social networks	**Stripped Down Simplification** One-click Order management BPM modeling Web design E-commerce storefront	**Make Clear the Responsibility** HCM Incentive compensation Employee contract management QA monitoring	**Design the Experience** UXP Web analytics Portals Web design Content management

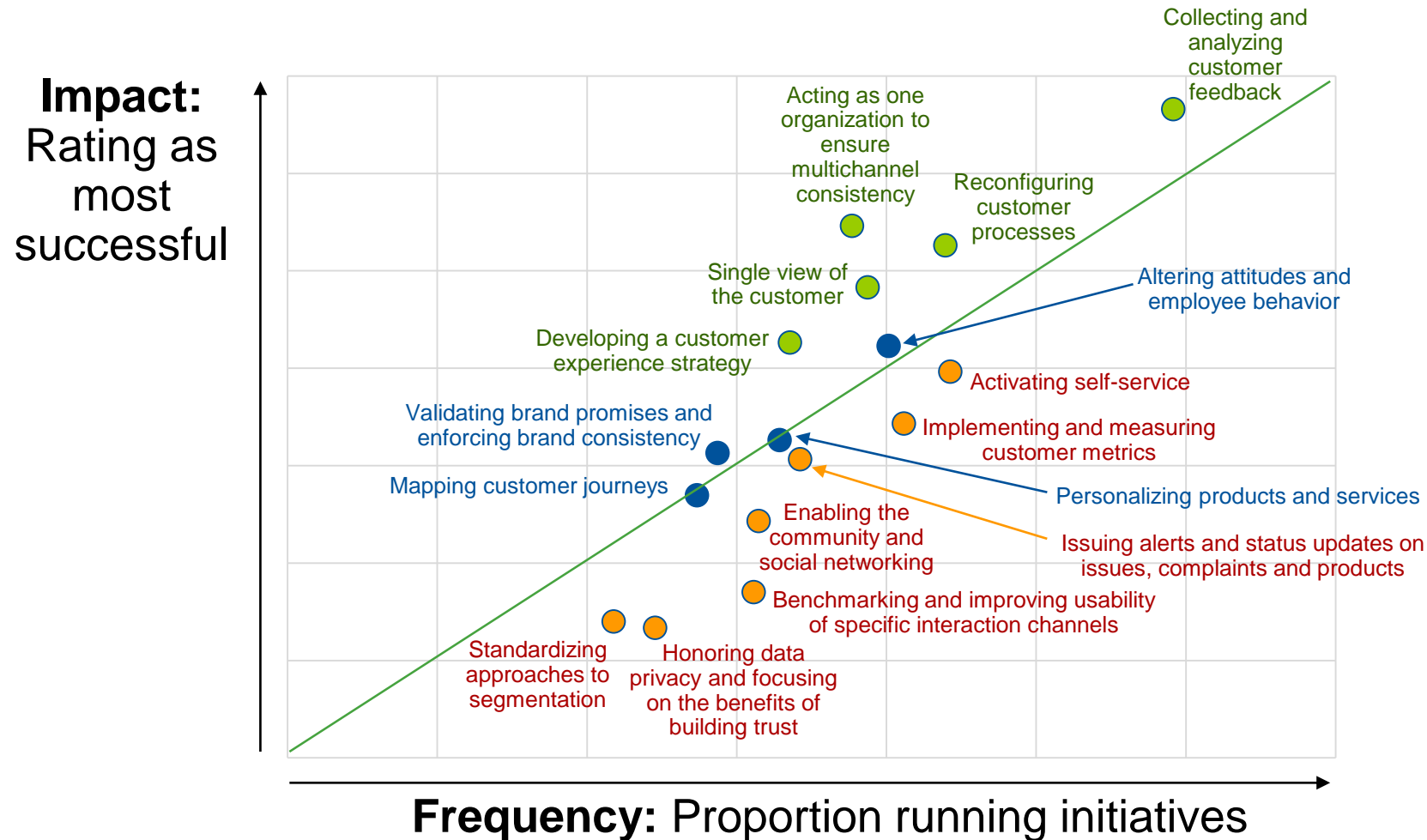# Chief Customer Officer Survey: Top 25 Technology Types to Enhance the CX in 2015

Technology	%
Customer service and support	61%
Voice of customer, feedback and survey	56%
Sales force automation	51%
Business process management	50%
Loyalty management	50%
Content management	49%
Customer data enrichment	49%
Customer analytics, modeling and insight	49%
Security and Privacy management	48%
Digital or e-commerce	47%
Customer self-service	46%
Web and mobile analytics	46%
Customer journey mapping technologies	46%
User experience design	45%
New product or service ideation	44%
Portals	42%
Social listening and engagement	41%
HR and talent management	41%
Master customer data consolidation and management	40%
Contact center infrastructure	40%
Campaign management	40%
Multichannel engagement and optimization	39%
Digital personalization	39%
Peer to peer communities	31%
Other	1%
None	1%

Multiple responses allowed

Q11a. Which of the following technologies do you see as part of enhancing the customer experience for your organization?   N = 189

Chief Customer Officer Survey: Top 10 Technology Types to Enhance the CX in 2015

Most Important

Technology	%	Most Important
Customer service and support	61%	16%
Voice of customer, feedback and survey	56%	9%
Sales force automation	51%	10%
Business process management	50%	7%
Loyalty management	50%	5%
Content management	49%	8%
Customer data enrichment	49%	2%
Customer analytics, modeling and insight	49%	6%
Security and Privacy management	48%	6%
Digital or e-commerce	47%	3%

Multiple responses allowed

Q11a. Which of the following technologies do you see as part of enhancing the customer experience for your organization?   N = 189

Criteria for Selecting Your Top 10 CX Technologies

1. Impact: Change to customer experience metrics

2. Frequency: How often the technology is used

3. Applicability: Breadth of uses

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Customer Experience Project Leader Survey 2014: Impact versus Frequency of CX Project Types

Impact: Rating as most successful

Collecting and analyzing customer feedback

Acting as one organization to ensure multichannel consistency

Reconfiguring customer processes

Single view of the customer

Altering attitudes and employee behavior

Developing a customer experience strategy

Activating self-service

Validating brand promises and enforcing brand consistency

Implementing and measuring customer metrics

Mapping customer journeys

Personalizing products and services

Enabling the community and social networking

Issuing alerts and status updates on issues, complaints and products

Benchmarking and improving usability of specific interaction channels

Standardizing approaches to segmentation

Honoring data privacy and focusing on the benefits of building trust

Frequency: Proportion running initiatives

Q03. Looking in more detail, which of these customer experience improvement initiatives has your organization conducted during 2014?
Q07. Of these customer experience improvement initiatives in 2014, which were the top three, in order, in terms of positive impact to customer experience for your organization?

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Applicability: Stages in the Customer Contract Life Cycle

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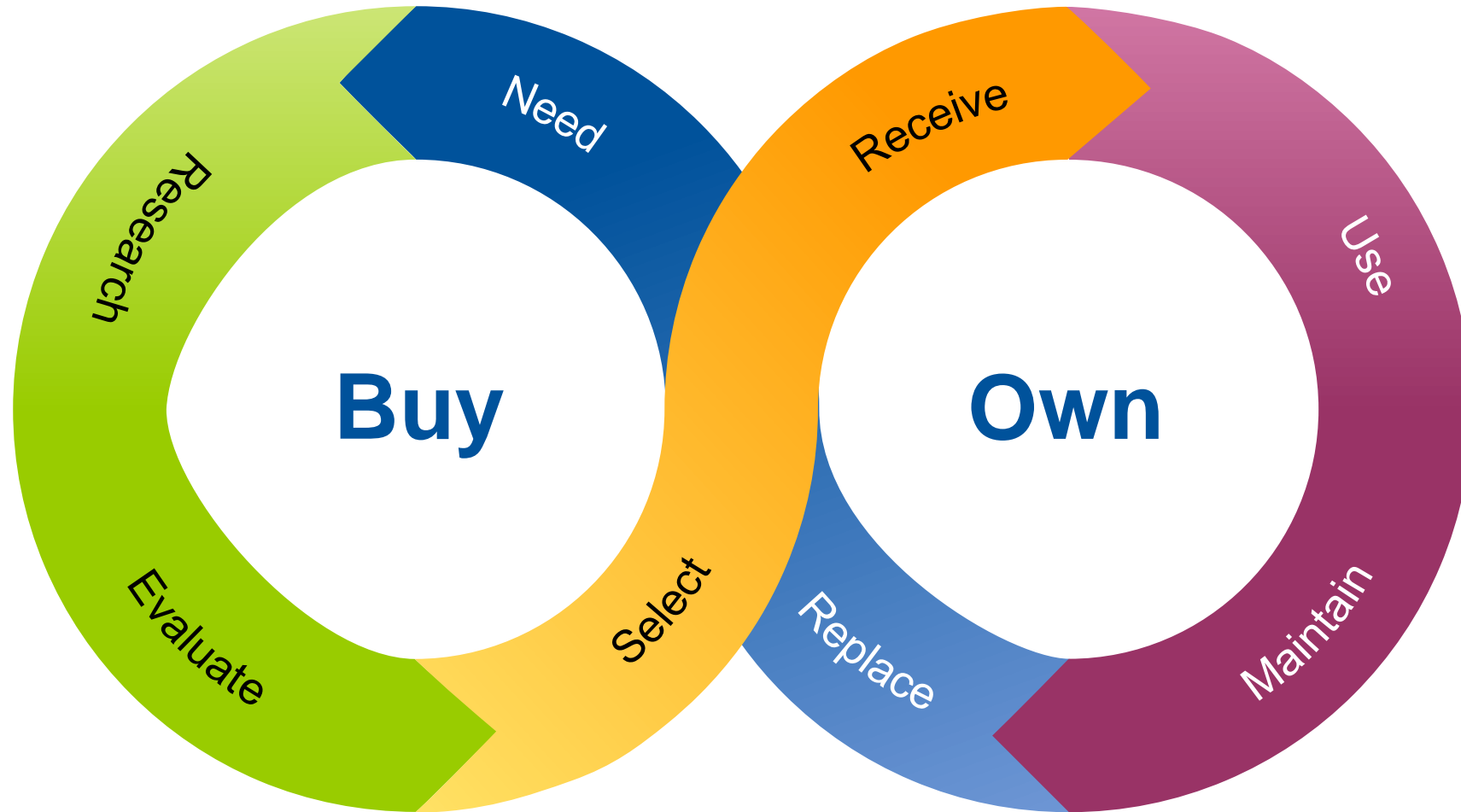
Top Ten Technology Types to Enhance the CX

CX Technology	Frequency of use	Impact	Applicability
Voice of the customer	High	High	"Buy" and "Own" phases
Business process management	High	High	"Buy" and "Own" phases
Multichannel customer service	High	High	"Own phases"
Customer analytics	High	Medium	"Buy" and "Own" phases
Master data management	Medium	High	"Buy" and "Own" phases
Content management	High	Medium	"Buy" and "Own" phases
Personalization	Medium	Medium	"Buy" and "Own" phases
UX design tools and platforms	Medium	Medium	"Buy" and "Own" phases
Loyalty management	High or Low	Medium	"Own" phases
Privacy management	Medium	Medium	"Own" phases
Sales force automation	High	Low	"Buy" phases

Key Issues

1. What are the top 10 strategic technologies for improving the Customer Experience?

2. How are organizations using these technologies?

3. How should organizations determine which technologies have the most positive impact?

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No. 1 Voice of the Customer

Challenge:

- GE Healthcare needed to create a great overall customer experience and improve response time to negative customer experiences.

Approach:

- Implemented Medallia's solution for a new CEM program.

- Taking action on a daily basis with real-time feedback.

- Using closed-loop feedback and mobile reporting for insight and trend reviews.

Results:

- Manual program managing hours decline from 3,000 hours to 400 hours per year.

- NPS increased from 70 to 84.

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No. 2 Business Process Management

Challenge:

- Alere Health provides point-of-care diagnostics and personal health support solutions. Alere's priority is helping its members quickly identify and close gaps in healthcare adherence.

Approach:

- CareAlert uses customer data to send timely, tailored messages to patients and caregivers via mail, email, fax and IVR in order to remind 4 million members about taking medication, getting a screening or test or booking an immunization particularly for managing chronic conditions.

- Used Pegasystems as a business-focused rule engine and analytics engine to redesign the processes from the outside looking in.

Results:

- Drove 96% global member satisfaction with CareAlert.

- CareAlert program demonstrated closure rates of 33% for overall gaps in care and 56% to 66% for pharmacy-related care gaps in 12 months.

No. 3 Multichannel Customer Service

Challenge:

- Surveys illustrated that Sprint was struggling with their store, website, IVR, routing, and contact center.

Approach:

- Continuing to work toward a single hub vision.

- Using a mix of proprietary databases and best-of-breed solutions (e.g., Nice, ClickFox).

Results:

- Improved services across 47 industries.

- Improved first call resolution by more than 1/3.

- Reduced calls per subscriber by more than 1/3.

- Reduced churn by 24%.

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No. 4 Customer Analytics

Challenge:

- Inconsistencies in orange juice due to variations in orange crop, sourcing and seasonality.

Approach:

- "Black Book" model algorithm developed by Revenue Analytics crunches data from up to *one quintillion* variables including satellite images, weather, expected crop yields, cost pressures, regional preferences and detailed data about the 600 flavors that comprise an orange, plus variables such as acidity and sweetness.

Results:

- Precise dynamic formula for how to blend orange juice for consistent taste, including pulp content, for its $2B orange juice business.

- After a hurricane or freeze, it can replan the business in 5 minutes to 10 minutes.

No. 5 Master Data Management

Challenge:

- Actively engaging a greater number of customer to ensure their satisfaction and retention.

Approach:

- Capturing and centralizing customer activity of 12M customers, including bank website browsing history, ATMs usage, call center, etc.

- Matching behavior versus dozens of offerings and potential acceptance using SAS.

Results:

- Launched "KnowMe" program to engage customers.

- Grew customer engagement (offers presented) from less than 1% to 25% of customers.

- Recommends nearby Westpac ATMs to save money when customer regularly uses another ATM.

No. 6 Content Management

Challenge:

- Produce entertainment content that optimizes interest, buzz, appeal, membership and viewership.

Approach:

- 25M users; 30M plays/day (including rewinds, fast-forwards and pauses); 1B hours of streaming video watched per month; 4M ratings/day; 3M searches/day.
- Geolocation, time and device information.
- Integrated Nielsen and social media data from Facebook and Twitter.

Results:

- Developed plot adaptation, scenes, colors and selected actors for its "House of Cards" series.
- Committed $100M for two full seasons of the show.

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No. 7 Personalization

Challenge:

- Urban Outfitters wanted effective upsell and cross-sell recommendations to the delight of their customers.

Approach:

- Implemented Baynote Dynamic Product Recommendations to improve product recommendation and customer experience.

Results:

- 700% growth in overall site sales linked to product recommendations.

- 27% of shoppers clicking on Baynote product recommendations.

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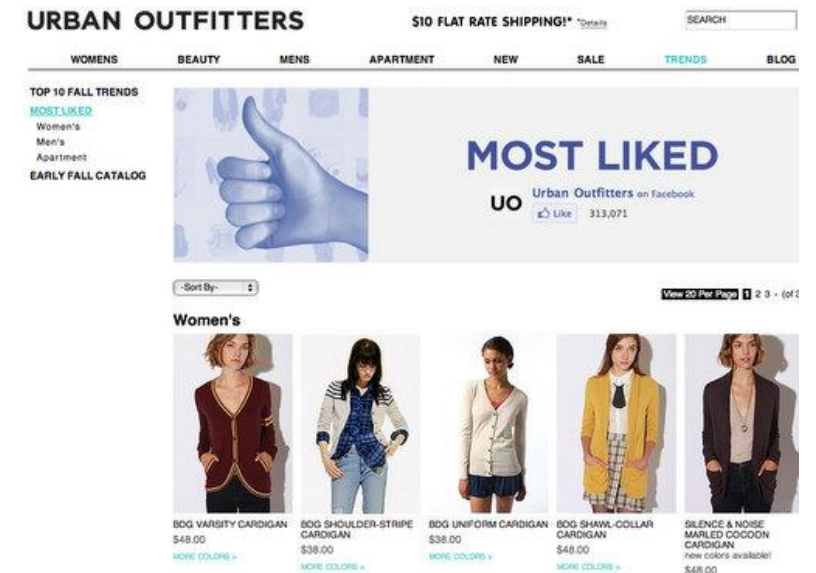
No. 8 UX Design Tools/Platforms

Challenge:

- Interflora was losing money by not sufficiently catering to mobile users.

- It wanted to create strong online presence on all platforms and increase sales on mobile.

Approach:

- Launched a new m-site with easy shopping and check-out, consistent branding with the desktop.

- Simplified shopping and three step check-out experience to enable on-the-move buying.

- Integrated Google Maps API to facilitate discovery of nearest Interflora stores.

Results:

- Increased volume of orders by more than 250%.

- Recurring visits up more than 20%.

- Bounce rates down by over 25%.

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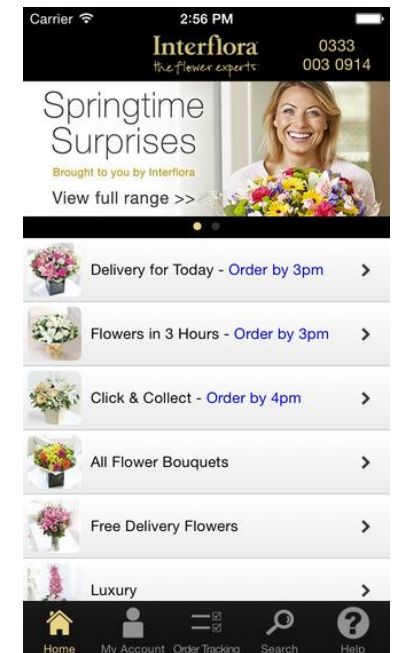
No. 9 Loyalty Management

Challenge:

- Leading audio, books, CDs, computer software and hardware, DVDs, televisions and video game retailer in France, Belgium, Spain and Portugal had obsolete existing loyalty application which was inflexible and costly to maintain.

- Wanted to improve customer segmentation, create a single customer repository, treat customers in a targeted manner, increase the loyalty program membership and improve promotion flexibility while significantly reducing costs.

Approach:

- Deployed Oracle's Siebel Loyalty Management application to 20 loyalty managers and 780 membership service managers integrated to 67 stores initially.

Results:

- Grown membership from 1.6 million to 5.6 million worldwide.

- Members buy 3 times more often and 10 times more on average than nonmembers.

- More effective, customized promotions, such as happy hour awards points.

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No. 10 Privacy Management

Challenges:

- Ontario's Municipal Property Assessment Corporation is required by law to assess all Ontario-based property values, and inform citizen owners of its findings in a secure, private and cost-effective manner.

- MPAC's challenge was to expand its trustworthy website reputation with a new architecture that embeds personal data protection.

Approach:

- MPAC launched AboutMyProperty embodying the 7 foundational principles of privacy by design — a framework from the Information and Privacy Commissioner of Ontario.

- MPAC only manages personal information in memory, and assigns encryption to all datasets. The site captures only what its users need and avoids unnecessary information hoarding. Privacy prioritizes how data will function.

Results:

- Unique visitors to AboutMyProperty increased by 439% postlaunch.

- Deeper trust of personal, Web-enabled information by Ontario citizens and commercial property owners.
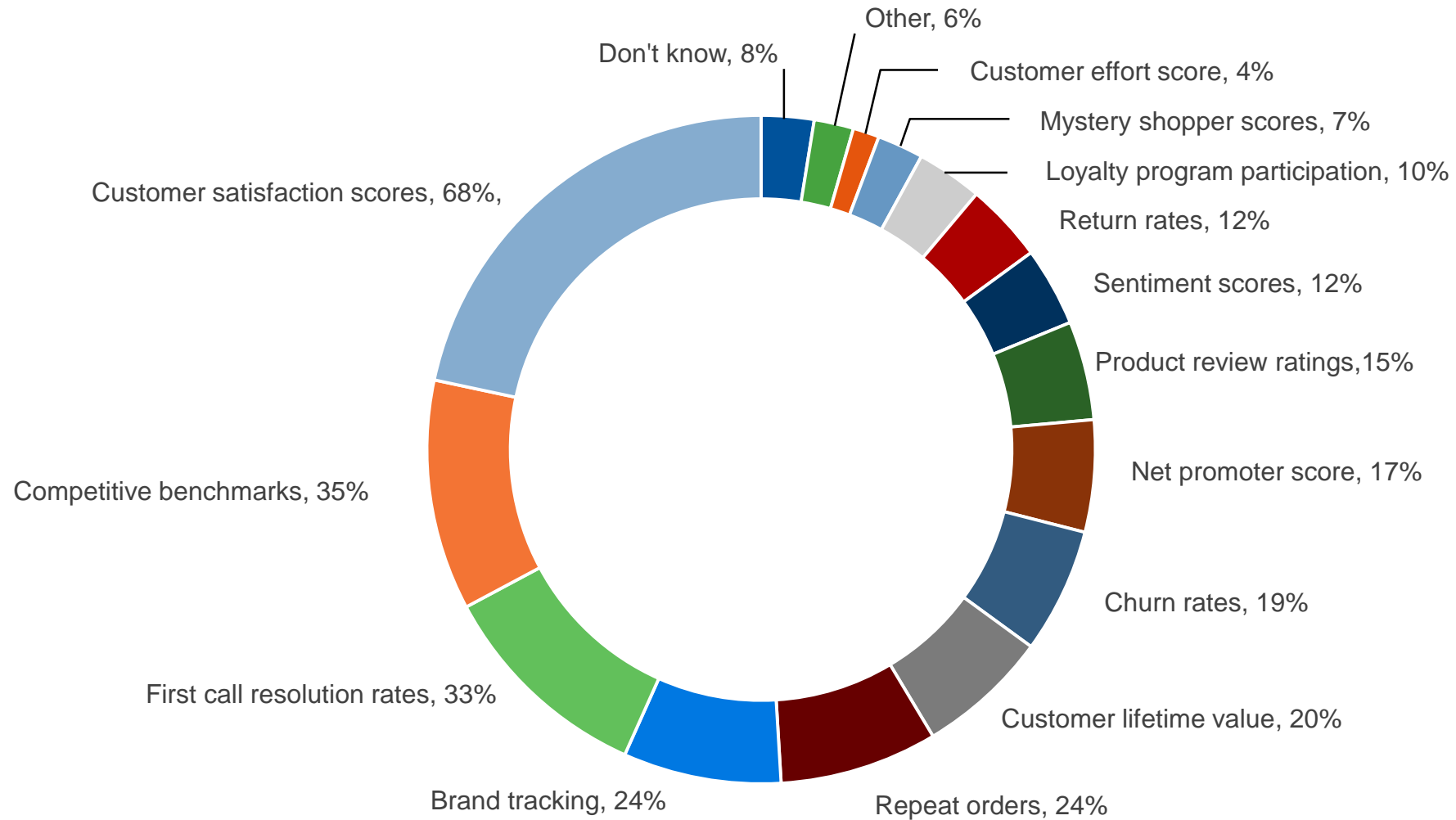
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Key Issues

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2. How are organizations using these technologies?

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Criteria for Selecting Your Top 10 CX Technologies

1. Impact: Change to customer experience metrics

2. Frequency: How often the technology is used

3. Applicability: Breadth of uses

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To Determine Impact Make Sure Your CX Metrics Are Clear

Customer satisfaction scores, 68%,

Competitive benchmarks, 35%

First call resolution rates, 33%

Brand tracking, 24%

Repeat orders, 24%

Customer lifetime value, 20%

Churn rates, 19%

Net promoter score, 17%

Product review ratings,15%

Sentiment scores, 12%

Return rates, 12%

Loyalty program participation, 10%

Mystery shopper scores, 7%

Customer effort score, 4%

Other, 6%

Don't know, 8%

Multiple responses allowed

Q12. To the best of your knowledge, how does your organization measure customer experience?   N = 289

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It's Not Likely to Be Your Budget
— Who Spends Most to Support or Improve the CX

Department	Percentage
Marketing	31%
Customer Service	15%
Sales	14%
A Centralized Customer Experience Department	11%
Operations	10%
IT	5%
Strategy and Planning	5%
New Product Development or R&D	4%
Supply Chain Management	2%
Customer Intelligence Department	2%
Human Resources or Human Capital	1%
Other	1%

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Many IT Projects Have Already Been Approved — A CX Technology Matrix Customer Service Example

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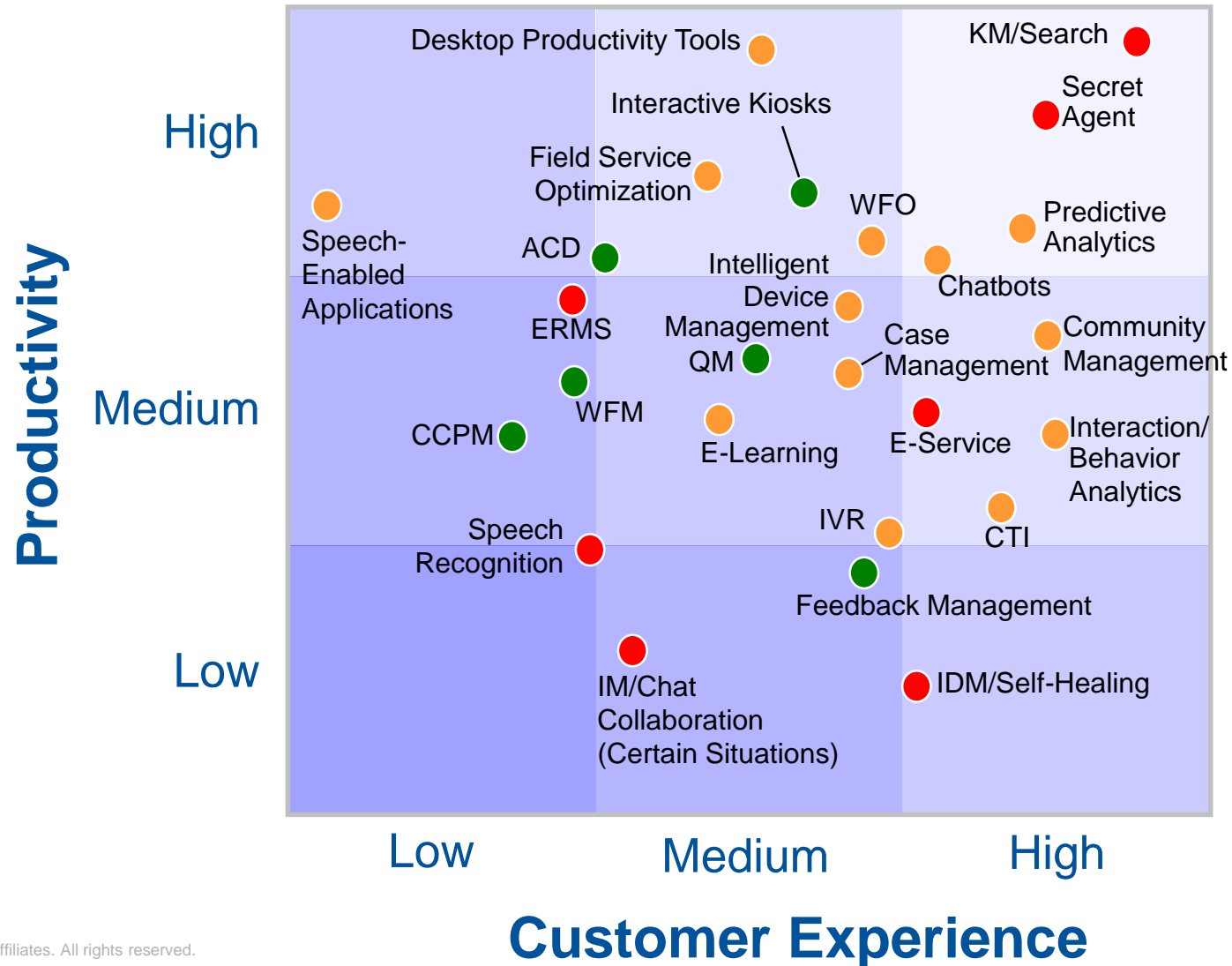
It Might Not Be Your Call — IT Department Competitors

Legend: ■ Sought so far ■ Will continue or add in 2015

Provider type	Sought so far	Will continue or add in 2015
Internal IT	52%	55%
Systems and applications integrators	48%	46%
Digital marketing agencies	47%	47%
Strategic business consultants	46%	40%
Research and/or advisory firms	41%	41%
Boutique customer experience consultants	39%	37%
User experience firms	34%	39%
Digital transformation consultants	32%	39%
None	6%	6%

Multiple responses allowed

Q09. Which of the following provider types has your organization sought to support improvements in the customer experience so far and which will it continue to use or add in 2015?

N = 189

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Vendors Approach CX From Where They Originate
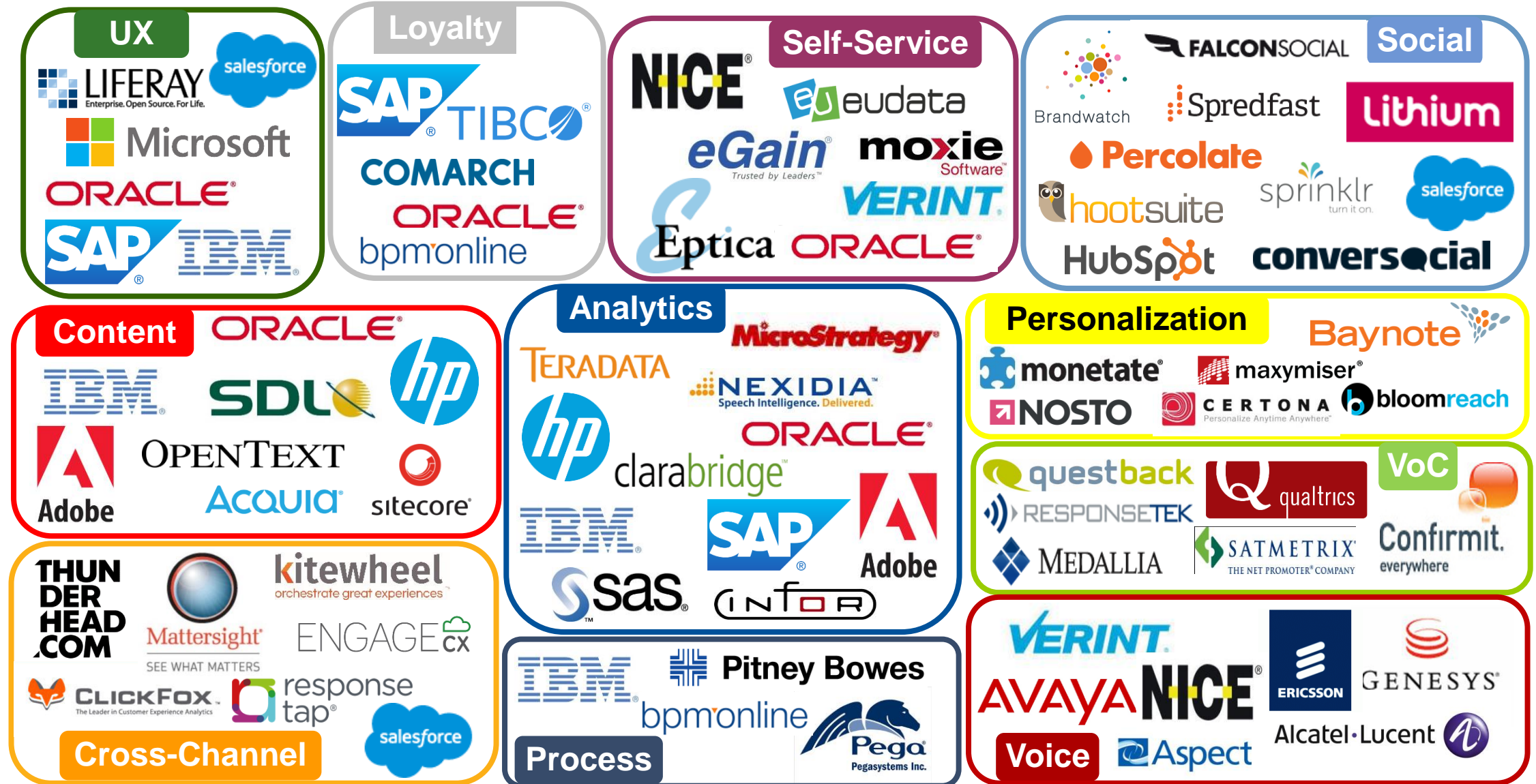
Vendor's CX Mergers and Acquisitions Will Continue

Action Plan for Customer Experience Leaders

Monday Morning:

– *Find out* what CX projects are already in place, who's running them and how they are measured.

– *Check* the 10 technologies listed here to investigate where and how you are investing.

Next 90 Days:

– *Build* your *own* Top 10 CX technologies list.

– *Get to know* the head of CX well, if they exist.

– *Fix* customer frustrations and get the basics right, then steal ideas from others before innovating.

Next 12 Months:

– *Make* IT part of the CX leadership council.

– *Recruit* skills in those technologies that have the biggest impact for your organization.

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Recommended Gartner Research

▶ **Customer Experience Is the New Competitive Battlefield**
Ed Thompson and Jake Sorofman (G00273269)

▶ **Gartner's Seven Types of Customer Experience Projects**
Ed Thompson (G00277302)

▶ **Survey Analysis: The State of Customer Experience Innovation, 2015**
Nick Ingelbrecht, Olive Huang and Michael Dornan (G00272782)

▶ **Reanimate Your Content Strategy for the Best Next Customer Experience**
Jim Murphy and Mick MacComascaigh (G00275873)

▶ **Technology Overview for Customer Journey Analytics**
Jason Daigler, Gareth Herschel, Ed Thompson and Gene Alvarez (G00273471)

▶ **15 Voice-of-the-Customer Best Practices Linked to Organizational Maturity**
Jim Davies (G00276714)

▶ **Powering Customer Experience With the Trusted 360-Degree View**
Bill O'Kane and Saul Judah (G00272027)

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Gartner Application Architecture, Development & Integration Summit 2016

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- Mastermind Interview Keynotes with industry leaders
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September 26 -28	Cape Town, South Africa	October 24 - 27	Gold Coast, Australia
October 5 - 7	Tokyo, Japan	November 6 – 10	Barcelona, Spain
October 16 – 20	Orlando, FL	November 15 – 18	Goa, India

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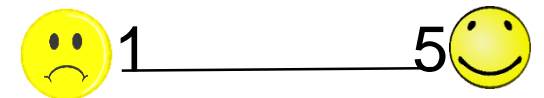# Increase the value of today's webinar experience

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