



# MANAGING CUSTOMER EXPERIENCE

Trend e aspettative tra personalizzazione e digitale

19 giugno 2019  
Fondazione Stelline, Milano



[www.ipsos.it](http://www.ipsos.it)



# Managing Customer Experience

## EXPECTATIONS IN A DISRUPTED WORLD

Tony Smith - Global Head of Territories Activation, Ipsos Customer Experience  
and Mystery Shopping

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# AN EVER CHANGING WORLD...



## Economic

- **Boom and Bust of nations (e.g. BRICS, MINT, PIGS), BREXIT, stop-start recovery, protectionism, populism**
- **Greater regulation and compliance, retrenchment**
- **Urbanization & suburbanization**



## Societal

- **Digital generation, always on**
- **Changing family composition and values, rising middle income,**
- **Ageing population and declining birth-rates**



## Technological

- **Smartphones, connected devices, AI and machine learning**
- **Open APIs and data sharing – new business models/competition**
- **Changing expectations as a results...**



## Consumer mind-set

- **Continued uncertainty, changed aspirations and motivations, self-service, overwhelming choice (and confusion) “Infobesity”, etc.**

# TECHNOLOGY IS IMPACTING ALL SECTORS





# THE CAR BUYING PROCESS

- Consumers spend an average 14.5 hrs – 59% researching online, 36% in one or more dealership
- 78% used 3<sup>rd</sup> party sites
- For dealerships, 56% of initial contact is “walk-in”
- Only 56% satisfied with the length of purchase process



GAME CHANGERS







超级试驾



# FINANCIAL SERVICES

53% OF THE WORLD BANK  
USING MOBILE APPS

73% USE ONLINE BANKING

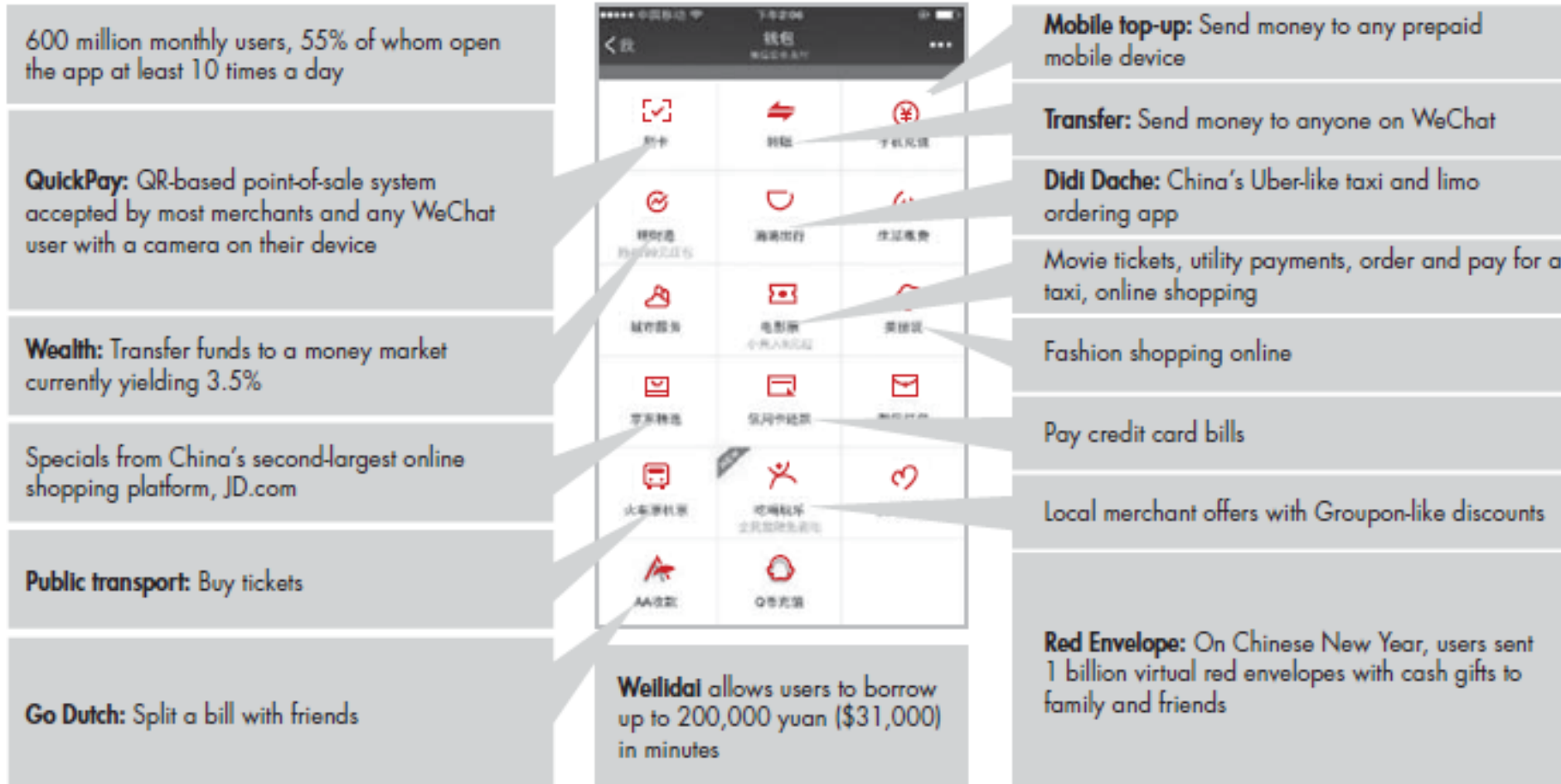
*"Customers' expectations are set by Uber and Skyscanner. How people can do things so quickly in other industries pays a role in how we do things in banking...to make customer experiences quicker, cleaner and smoother."*

**Maeve McMahon, Marketing Director  
at Royal Bank of Scotland**

**GAME CHANGERS**



# WECHAT FROM TENCENT-KING OF RELEVANCE





Australian Government

# OPEN BANKING


customers  
choice  
convenience  
confidence

December 2017

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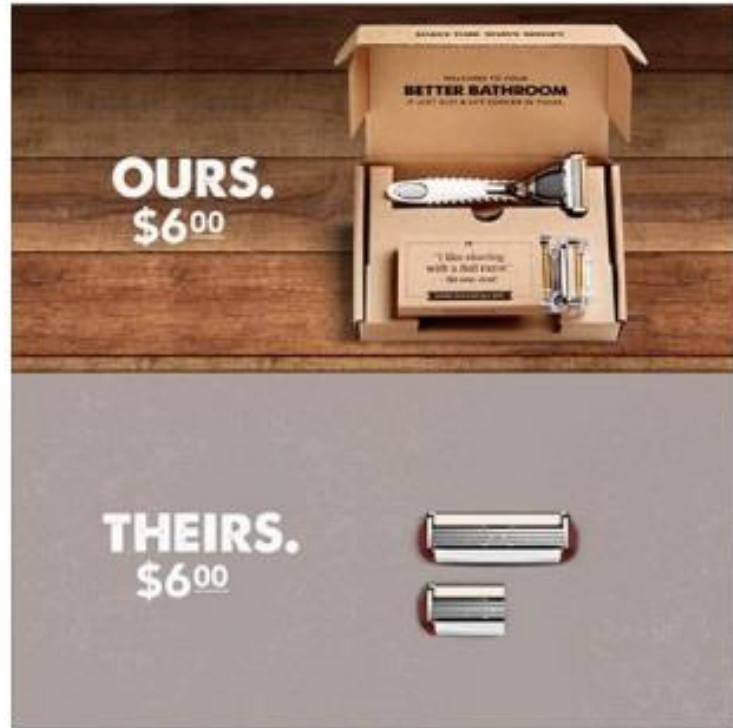


# FROM PRODUCTS TO SERVICES

 **Dollar Shave Club**  
Sponsored · 🌐 Like Page

When choosing between more and less, go with more. Dollar Shave Club delivers amazing razors and a free handle for just a few dollars. Zero commitment. Zero fees.

Try the Club → <http://dlrshv.es/CY6HeE>



Like · Comment · Share · 👍 505 💬 107 ➦ 86

# FROM PRODUCTS TO SERVICES





# WHAT DOES THIS MEAN FOR US IN CX?

- We need to continue to evolve our understanding of service expectations, how we perform and manage those expectations and experiences
- What do customers expect to be able to do (via each channel) and their benchmarks?
  - Jobs To Be Done
- With continued move to digital, make the most of interactions that matter, understand how to keep that emotional connection in an environment of fewer physical connections



# Managing Customer Experience in an ever changing World

# EMBRACE TECHNOLOGY IN EXPERIENCE DELIVERY

# Pro-active vs reactive customer service



**KONE using IBM Watson to anticipate issues with their elevator / escalator products and send out an engineer before the customer has to report the issue.**



**Disney use “MagicBands” to predict and prevent long waits for rides at Disneyland.**



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# **EMBRACE TECHNOLOGY IN MEASURING AND MANAGING THE EXPERIENCE**

# Technology is opening up new ways for insight and customer experience management



## Collection

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measure  
and observe



## Analysis

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analyse and  
integrate data



## Dissemination

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deliver and  
make insights 'stick'



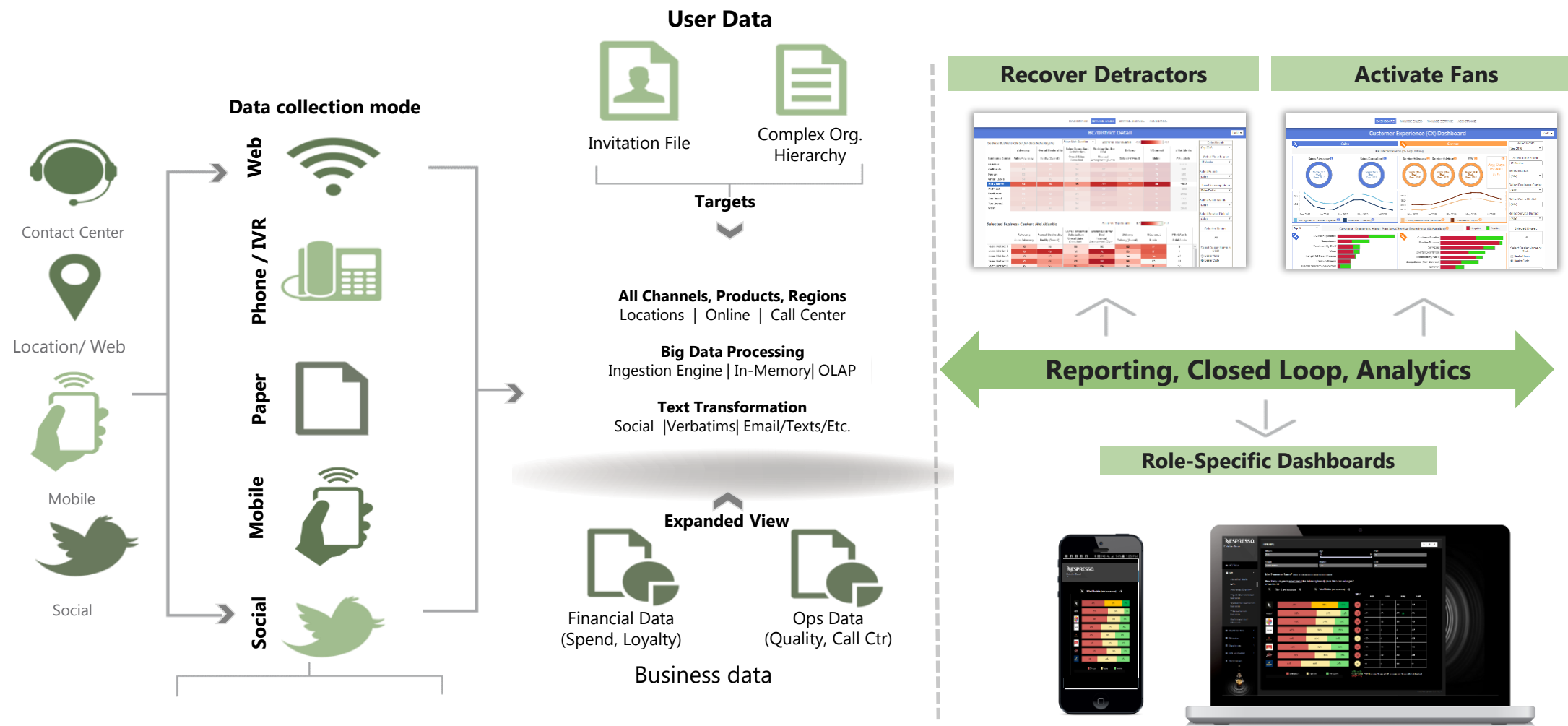
## Action

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Drive impact



# Technology platforms are a great enabler



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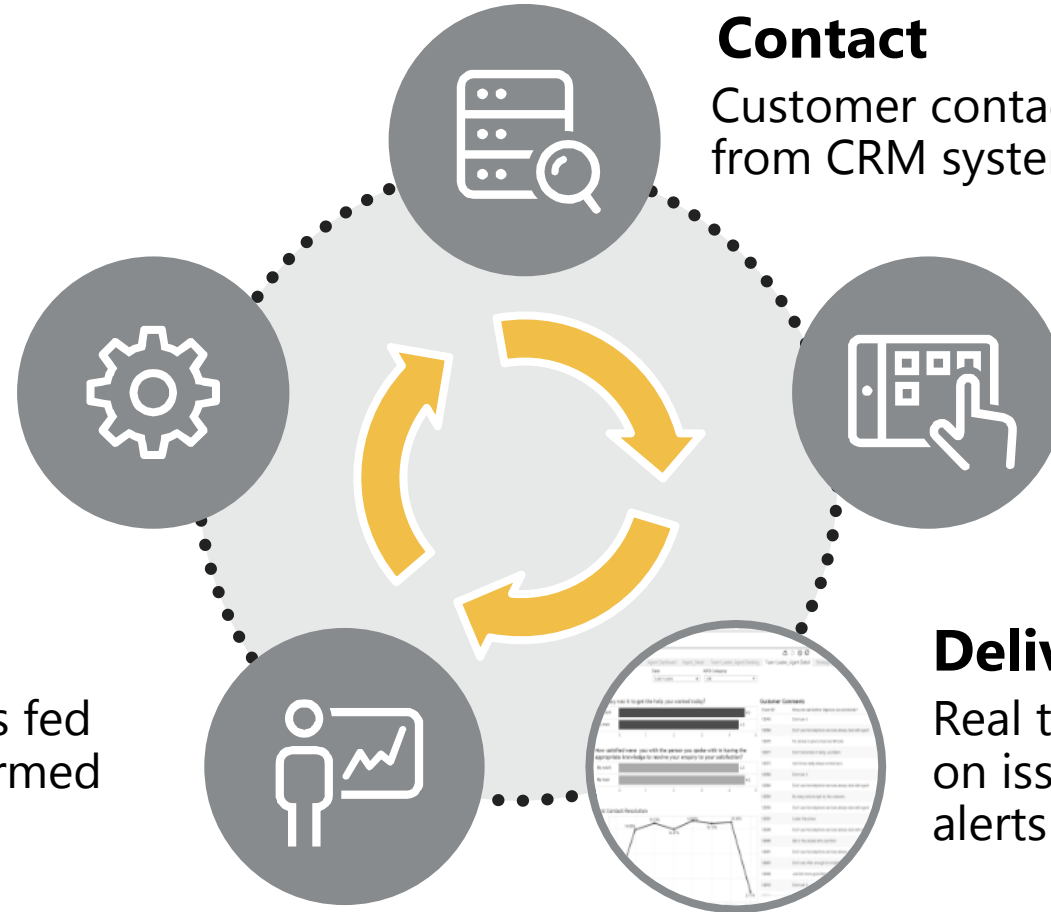
# Technology is helping us monitor and manage continuous customer feedback

## Process

Improve the process to prevent future dissatisfaction

## Data

Data is combined with analysis fed back into organisation so informed decisions can be made



## Contact

Customer contact pulled from CRM system in real-time

## Device

Multi-mode customer surveys via a device agnostic solution

## Delivery

Real time delivery allows staff to act on issues straight away through hot alerts & closed loop feedback

GAME CHANGERS

# But technology on its own is not enough...

## Pre-launch

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## Implementation

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## Ongoing support

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## Post-launch

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**The technology core**

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# Platform implementation and management – detailed activities

## Implementation

- Sampling integration
- Cleaning rules design and implementation
- Data migration
- File transfer setup
- Set up survey fraud protection protocol
- Survey scripting
- Invitation design and scripting
- Report building
- Quality control
- Set up data cleaning rules
- Set up survey fraud protection protocol
- Set up QA process to ensure databases are consistent across Ipsos and client
- Create case management alert triggers and process
- Define escalation and closed-loop processes
- Hierarchy build and management
- Single sign on integration
- Historic data upload and quality control
- Dashboard mockup and sign off
- Conduct UAT
- Conduct end to end test
- Platform user guide creation
- Platform training

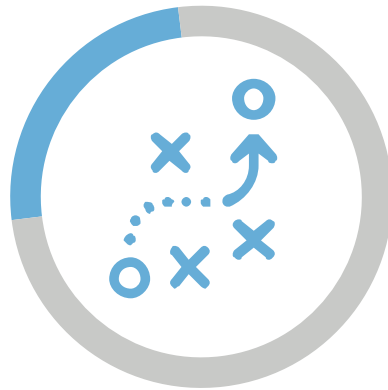
## Ongoing management

- Invitation maintenance
- Ongoing sample management
- Sample maintenance
- File transfer maintenance
- Sample change requests
- Survey change request
- Dashboard changes
- New dashboard/reporting set up
- New data integration
- Ongoing quality control
- Ad-hoc survey design and execution
- Ongoing platform training

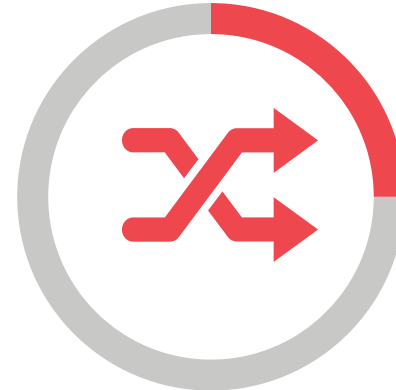
# Common reasons why CX Management programs fail



Inadequate  
**program  
design**



Poor  
**implementation  
& management**



No  
**prioritization of  
action that will  
drive ROCXI**



Lack of  
**time and insight  
to drive real  
change**

# A framework is needed for long-term CX success

## Engage

Helping your organisation **engage** around a common CX vision – from C-suite to frontline

## Listen

**Listening** to the 'Voice of your Customers' – across all touchpoints and channels. Creating a single source of customer truth

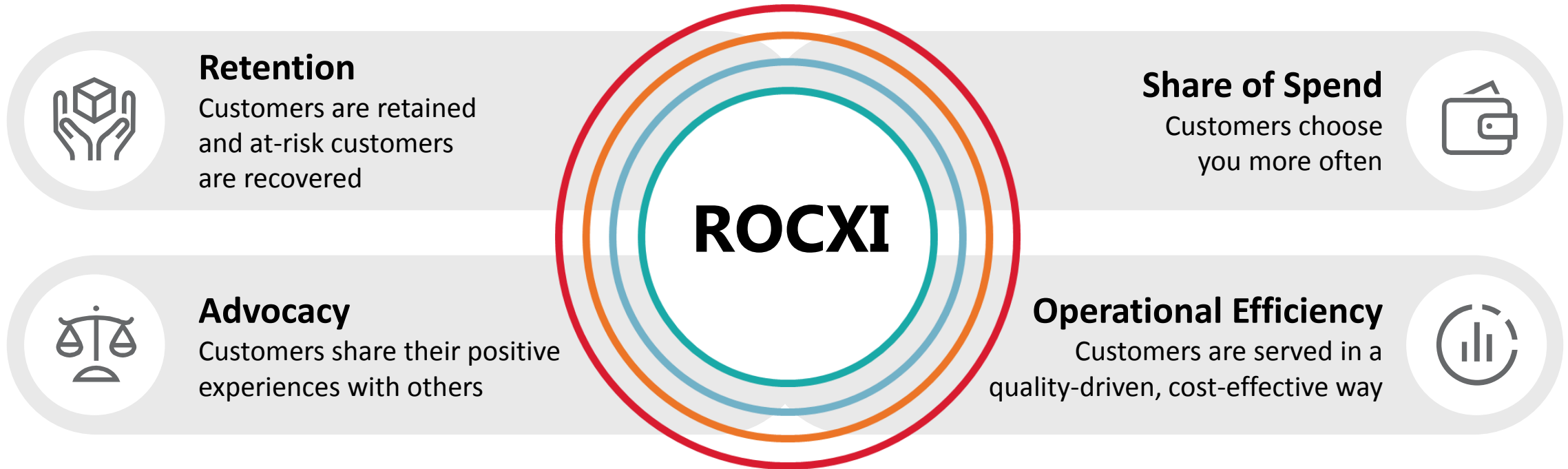
## Activate

**Activating** what needs to be done to ensure your CX delivers on your Brand Promise

## Embed

**Embedding** the structure and culture to drive continuous CX improvement and customer centricity

# To deliver a Return on your CX Investment





# Successful CX involves the entire organization



# WHAT ABOUT THE FUTURE?





**Everything that can be automated  
will be automated**

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**FROM...**

**HUMAN ROBOTS TO  
ROBOT HUMANS**

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# Managing Customer Experience

## CX JOURNEY

## L'IMPORTANZA DELLE ASPETTATIVE

Giulia Bertini, Head of Ipsos UU (Qualitative)

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## LA PERFORMANCE FUNZIONALE NEL SERVIZIO È **IMPORTANTE**, MA **NON È SUFFICIENTE**

Oggi le organizzazioni sono chiamate a sviluppare relazioni significative con i propri clienti

**ATTIVANDONE  
IL PIENO  
COINVOLGIMENTO  
EMOTIVO**





Ad esempio ... La visita a un concessionario di automobili deve sicuramente rispettare alcuni parametri di soddisfazione funzionali.

**MA QUAL È  
L'ESPERIENZA EMOTIVA  
CUI DEVE RISPONDERE?**



## JOBS TO BE DONE

**SVAGO  
PER UNA GIORNATA  
IN FAMIGLIA**



**LA PROIEZIONE  
DELLA PROPRIA  
REALIZZAZIONE**



**IL NEXT STEP  
DELLA FAMIGLIA**





Oppure ... La ricerca di informazioni e la selezione di un mutuo per la casa può assumere sfumature molto diverse.

**QUAL È  
L'ESPERIENZA EMOTIVA  
CUI DEVE RISPONDERE?**



## JOBS TO BE DONE

### LA PRIMA VOLTA, LA PRIMA CASA



### IL SOGNO DI UNA CASA IN MONTAGNA

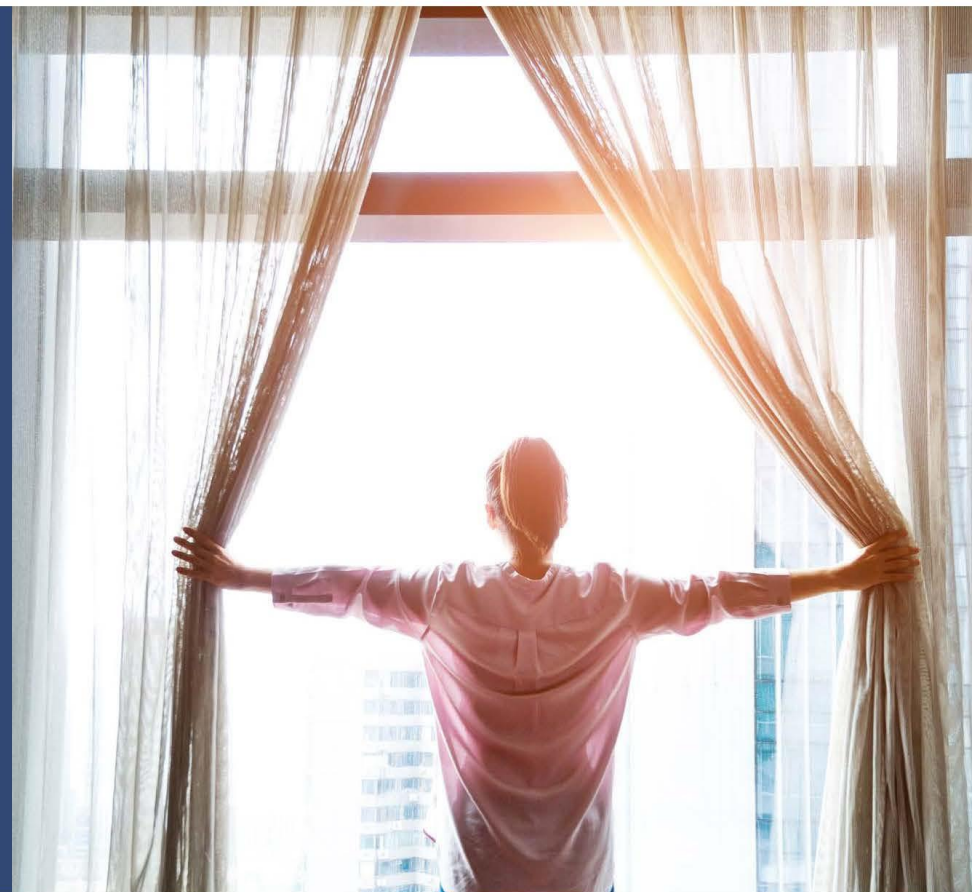


### LA CASA PER UN NUOVO INIZIO



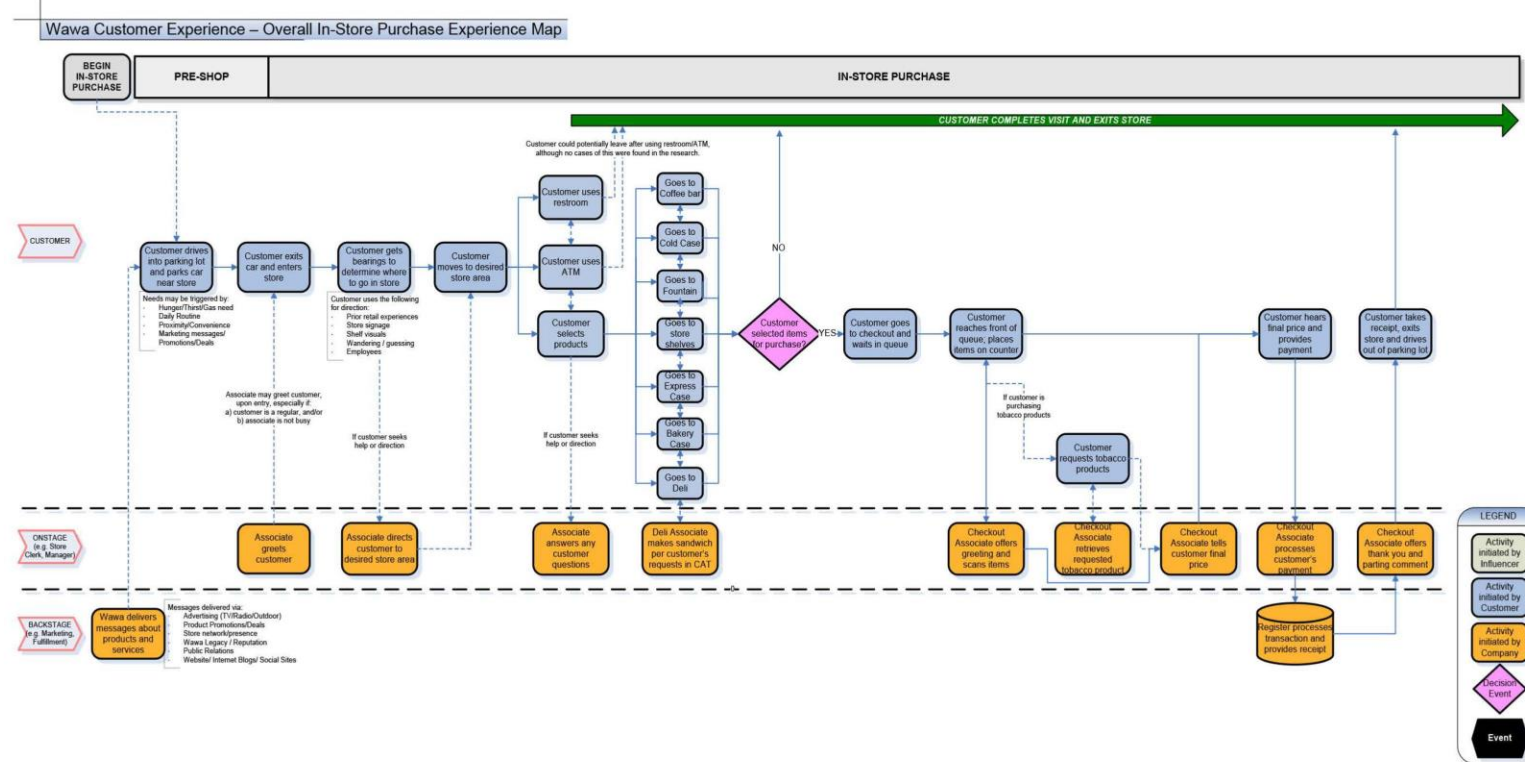
# LE ASPETTATIVE EMOTIVE SONO CRUCIALI

Il contesto in cui  
si generano le aspettative  
determina  
needs differenti

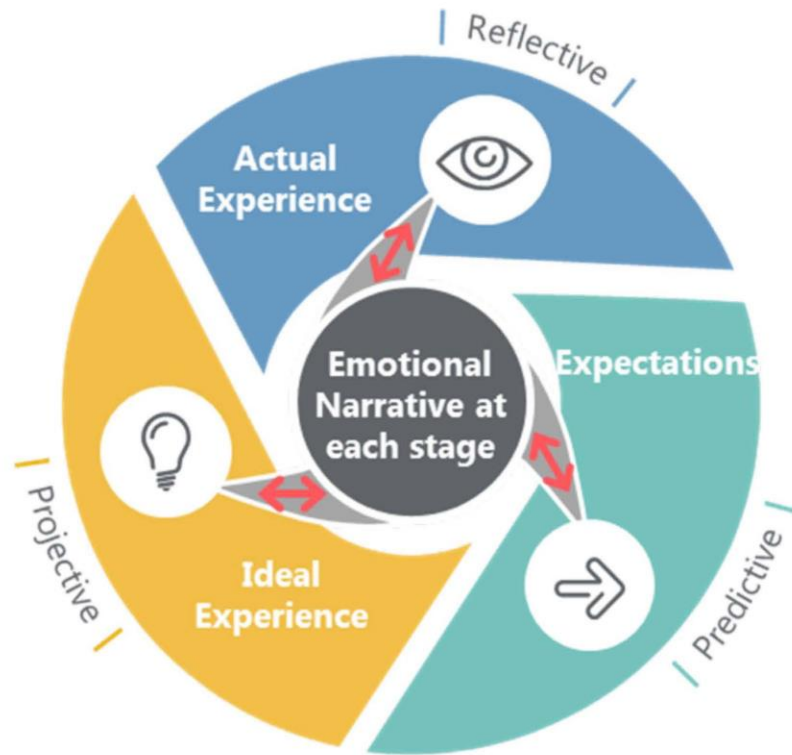




# PER QUESTO È NECESSARIA UNA EVOLUZIONE DELLA JOURNEY MAP



# CX JOURNEY FRAMEWORK

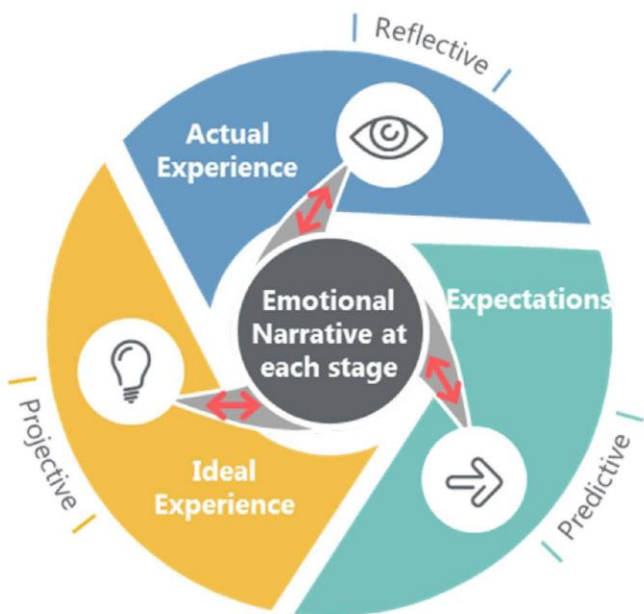


CX Journey offre una comprensione 'vivida' e puntuale dei diversi touch points del consumer journey e consente di analizzare eventuali gaps tra:

- l'esperienza attesa
- l'esperienza effettiva, per come si sviluppa momento per momento
- l'esperienza ideale /desiderata

# CX JOURNEY FRAMEWORK

## Tools per essere 'in the moment'



IMMERSIVE ETNO



CO-BROWSING



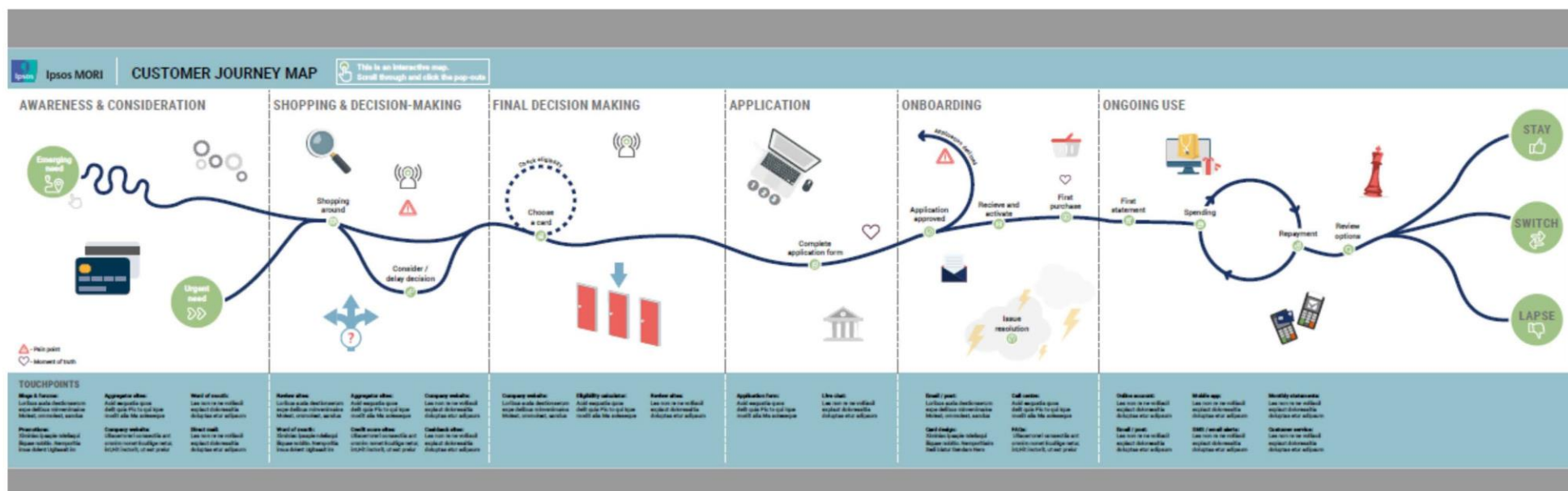
APPLIFE



CONVERSAZIONI ON LINE



# UNA VISIONE OLISTICA DEL CUSTOMER JOURNEY, CON LE EMOZIONI AL CENTRO



# CX JOURNEY CONSENTE DI OTTENERE ACTIONABLE INSIGHTS



**DEFINIRE QUALE  
SIA L'ESPERIENZA IDEALE  
IN RELAZIONE AI VARI TOUCH POINTS**

**IDENTIFICARE  
PAIN POINTS E MOMENT OF TRUTH  
PRIORITARI**

**PIANIFICARE  
UNA TRANSFORMATION STRATEGY  
PUNTUALE E FOCALIZZATA**

# PORTARE LA VOCE DEI CLIENTI ALL'INTERNO DELL'AZIENDA





“

**PEOPLE WILL FORGET  
WHAT YOU SAID,  
PEOPLE WILL FORGET  
WHAT YOU DID,  
BUT PEOPLE WILL  
NEVER FORGET HOW  
YOU MADE THEM FEEL.**

”





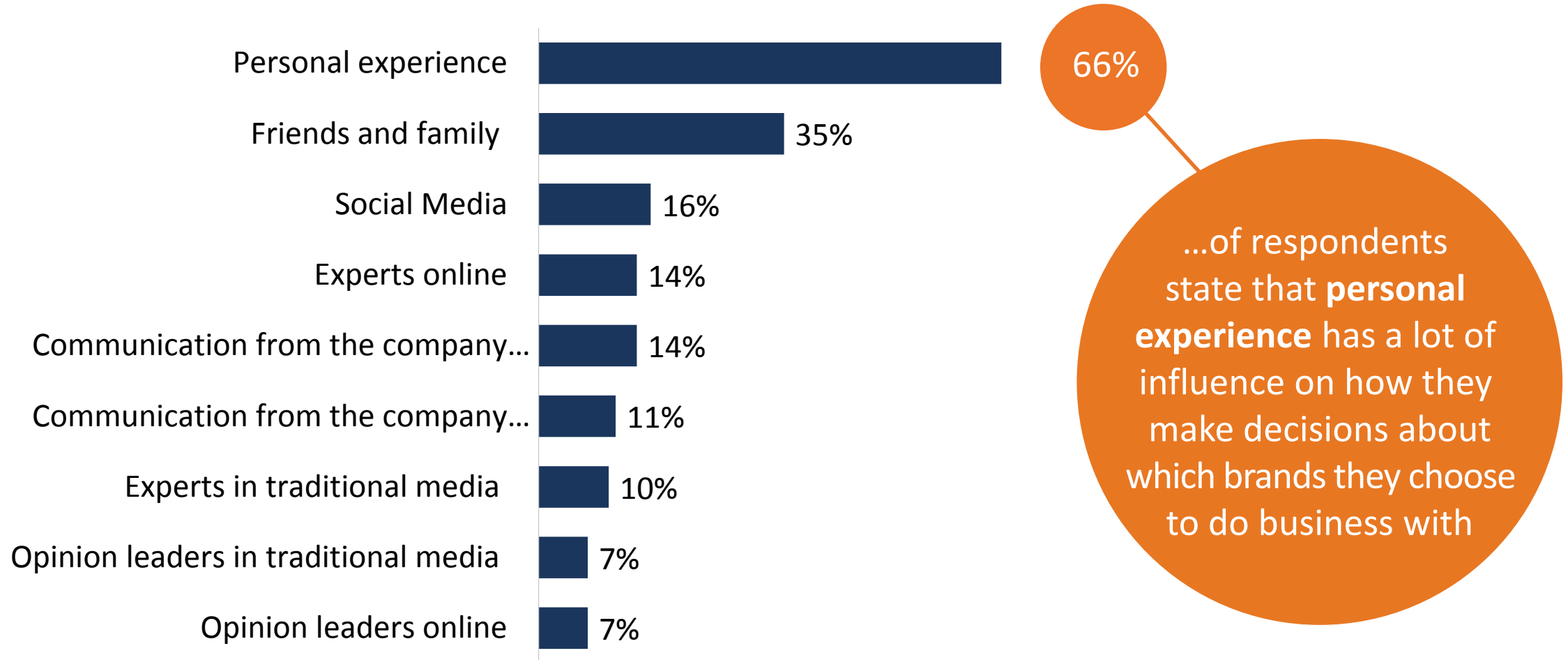
# Managing Customer Experience

**CAPTURING AND MANAGING  
MOMENTS THAT MATTER TO DRIVE  
STRONGER RELATIONSHIPS**

Jean-Francois Damais - Global Chief Research Officer

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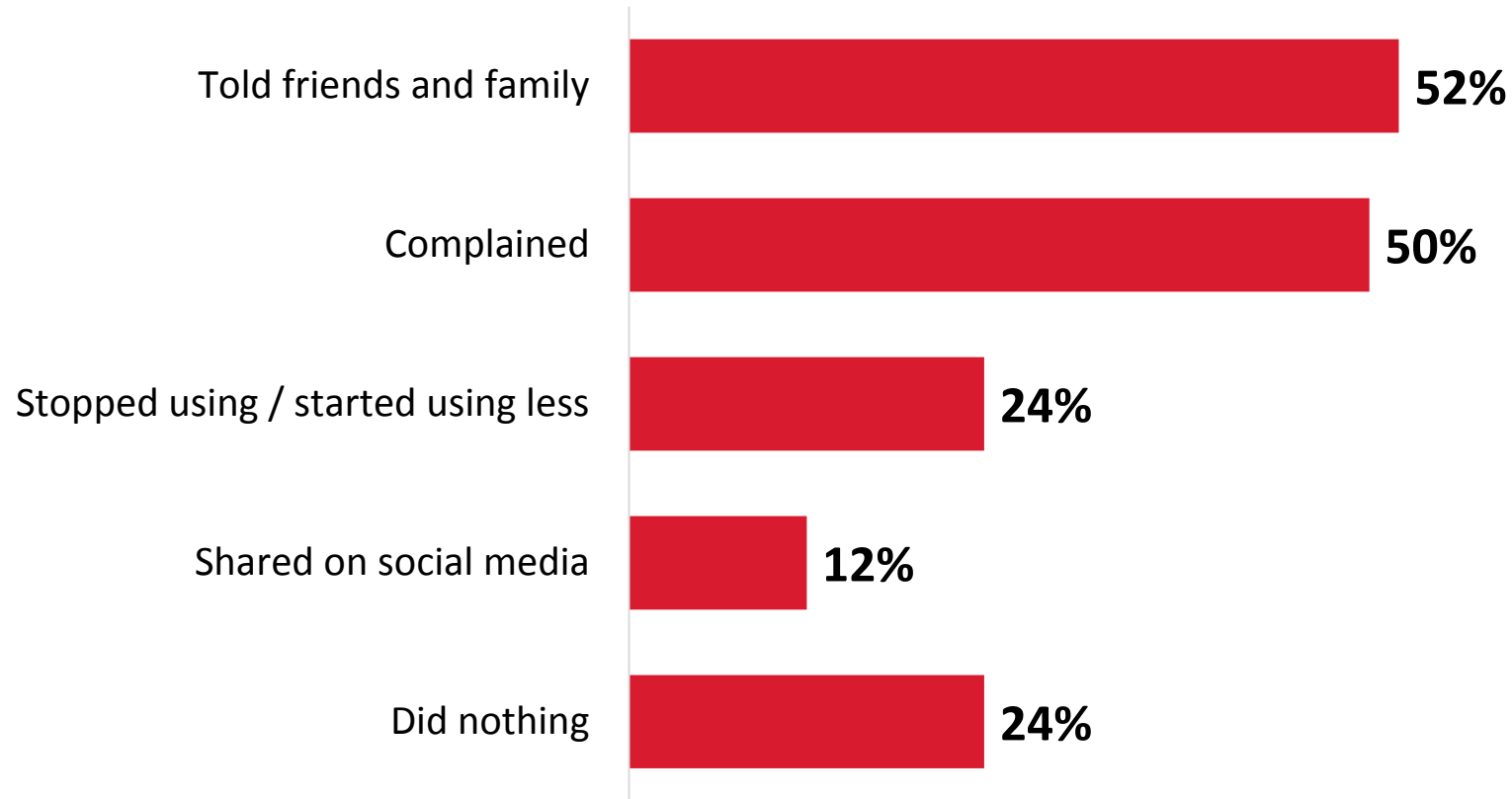
# Customer experience matters



Source: Ipsos

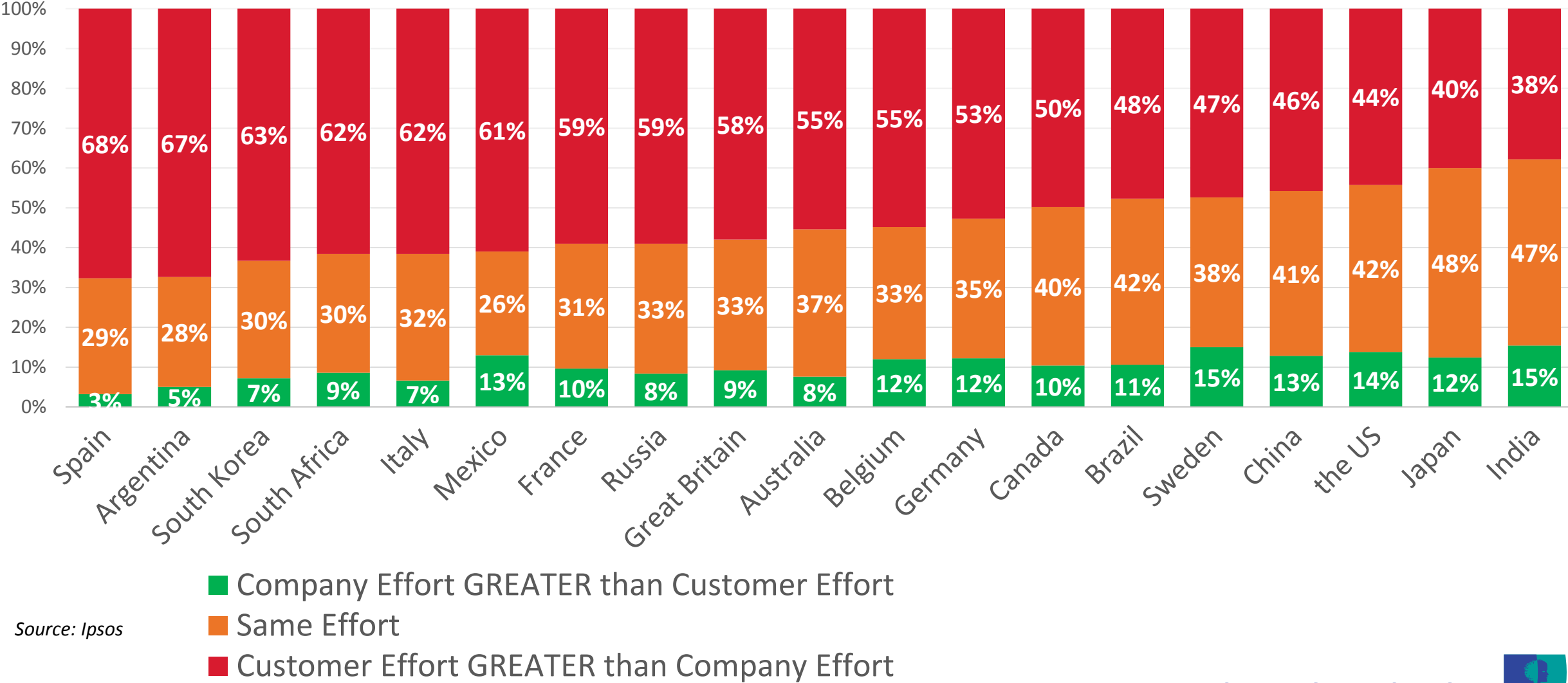
# 'Critical incidents' can make or break relationships

Behavioural outcomes following a negative experience



Source: Ipsos

# Customers are working harder than companies to get issues resolved!



Source: Ipsos



# Delivering a Return on Customer Experience Investment (ROCXI)



The link between **CX** success and **financial performance** is widely acknowledged



But managing the Customer Experience is **not easy**.

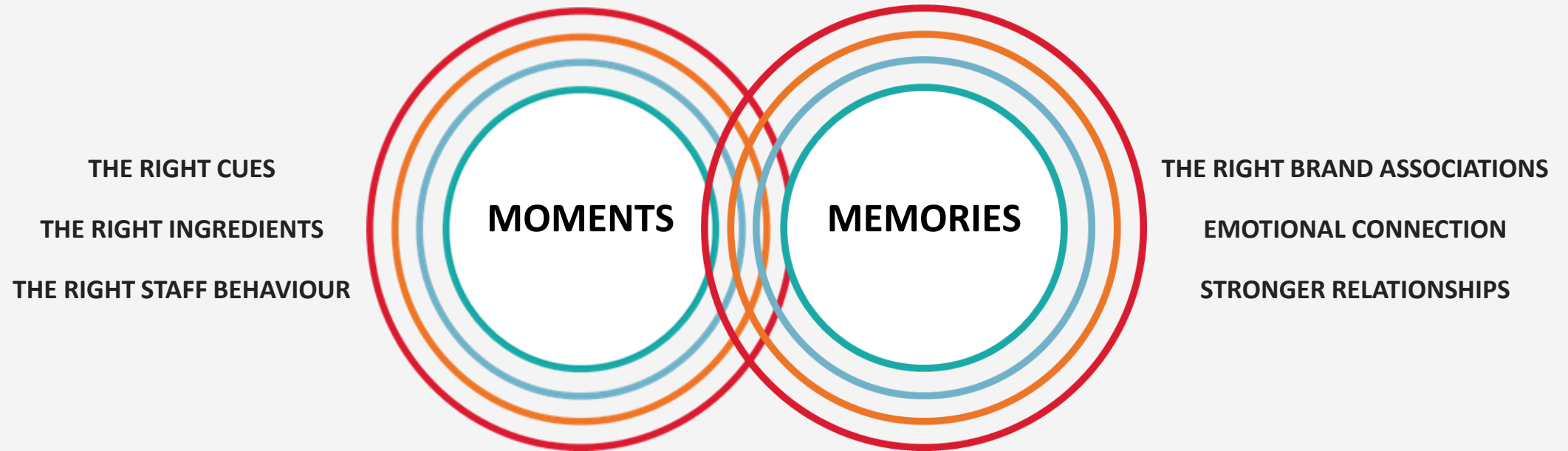
There is ample evidence many CX initiatives fail to deliver tangible results.



Optimising the CX to improve customer Retention, Share of Spend, Advocacy and Operational Efficiency; to deliver a **Return on Customer Experience Investment (ROCXI)**.

# CX STARTS WITH PEOPLE AND UNDERSTANDING CUSTOMERS

Customers make decisions that affect the bottom line. Organisations need to understand how customers make these decisions and how to influence them...at any point in time people are influenced by both



# Three key principles to successful CX delivery

- 1 Meeting expectations set by the Brand Promise
- 2 Providing the right ingredients to drive strong relationships – functional and emotional
- 3 Deploying the right Customer Experience through employees

# Successful brands align CX with Brand Promise

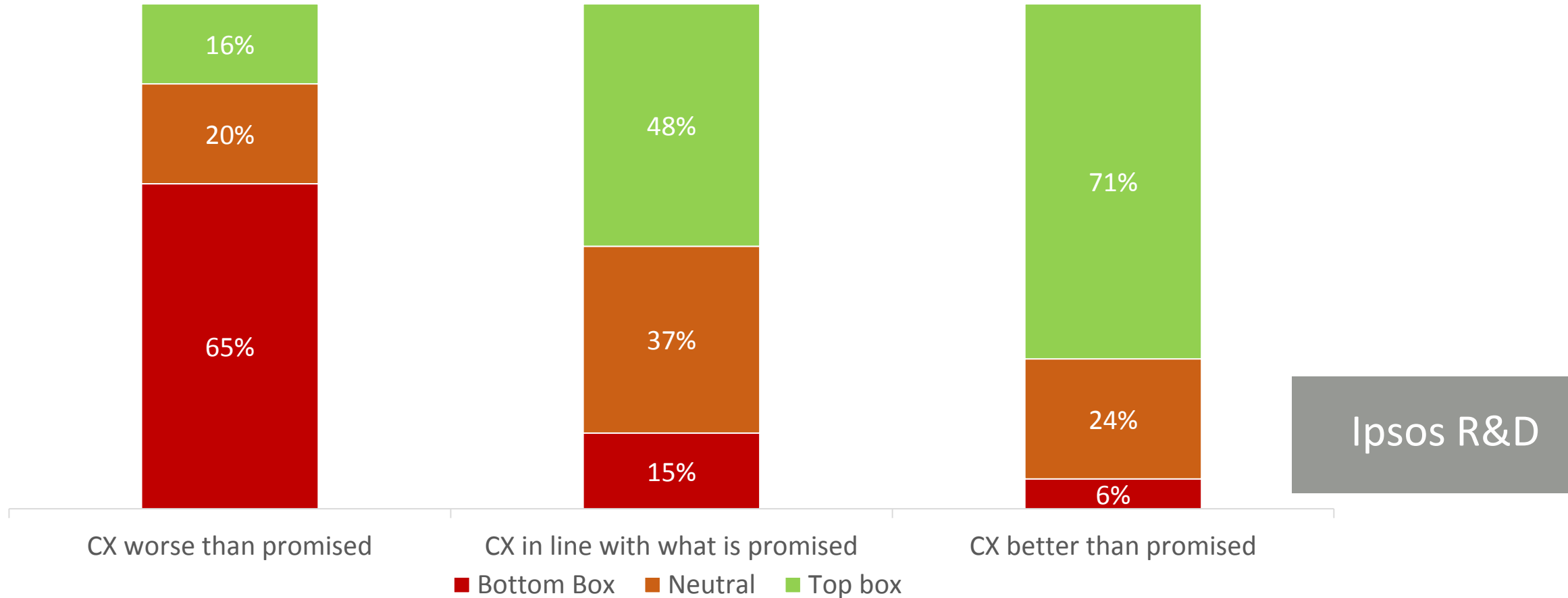
- Cognitive dissonance occurs when the experience does not match up to Brand Promise. When CX consistently fails to meet expectations, customers will most likely:
  - **Adjust attitude** towards the brand (*love them less*)
  - **Adjust behaviour** towards the brand (*stop using or use them less*).
- Conversely, when the experience consistently reinforces the Brand Promise, customers grow closer to the brand and use it more in the future.



**Measuring the extent to which CX delivers on the Brand Promise is imperative.**

**Understanding how to truly align CX with the Brand Promise is key to business success.**

# The impact of promise-experience dissonance on Likelihood to continue



Base: all respondents (excluding don't know) who said the experience was worse than or unrelated to what was promised (678); who said the experience was in line with what was promised (3,285); who said the experience was better than what was promised (772)



## CX ingredients to drive strong relationships

Beyond meeting functional needs, CX needs to create positive emotional response, memories and drive brand desire through day to day interactions.

This understanding feeds into the design and management of experiences which tap into human motivations, which, over time, lead to stronger brand perceptions and profitable relationships.



# Empowering employees to deploy the right Customer Experience

Empowering customer-facing staff without them having a true understanding of what customers need, feel and think, can be hugely detrimental to an organisation.

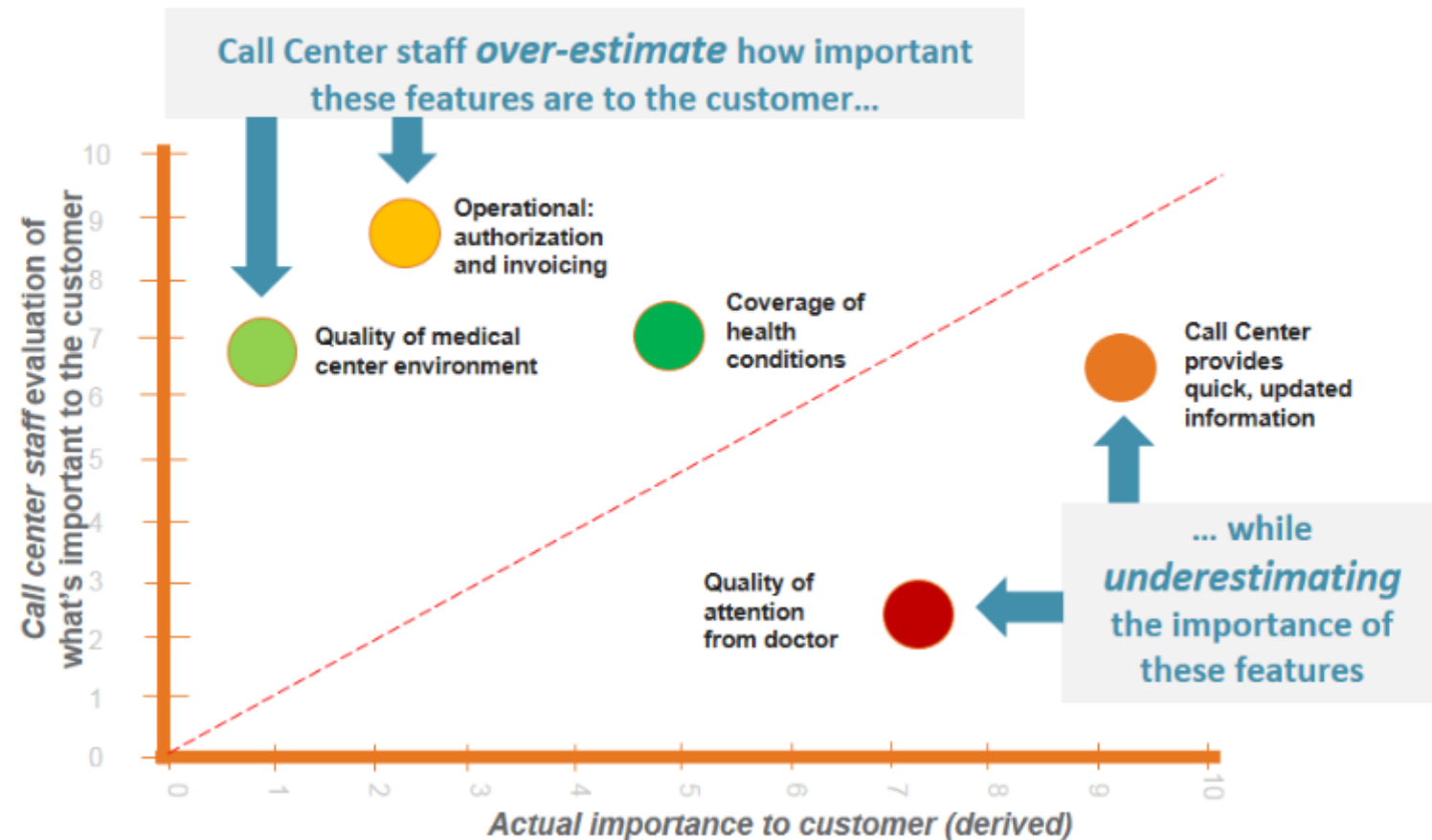
Identifying and closing gaps in employees' perceptions of what customers need from interactions and relationships is essential to any CX strategy.



# Customer employee mirror framework

## Do front-line employees *really* know what customers need?

Insightful analytics such as Customer vs. Employee Mirror Analysis reveal employee misconceptions that result in behavior that does not align with CX goals





# The Five Forces of CX – The science of strong relationships

# Businesses need to build relationship strength and profitable relationships

This is achieved by **getting customers to give you more of their business**, through:

- **Continuing** to be a customer
- Giving you a **higher share of their spend** in a given category
- Taking **additional products** and services

Customers will only do this if they:

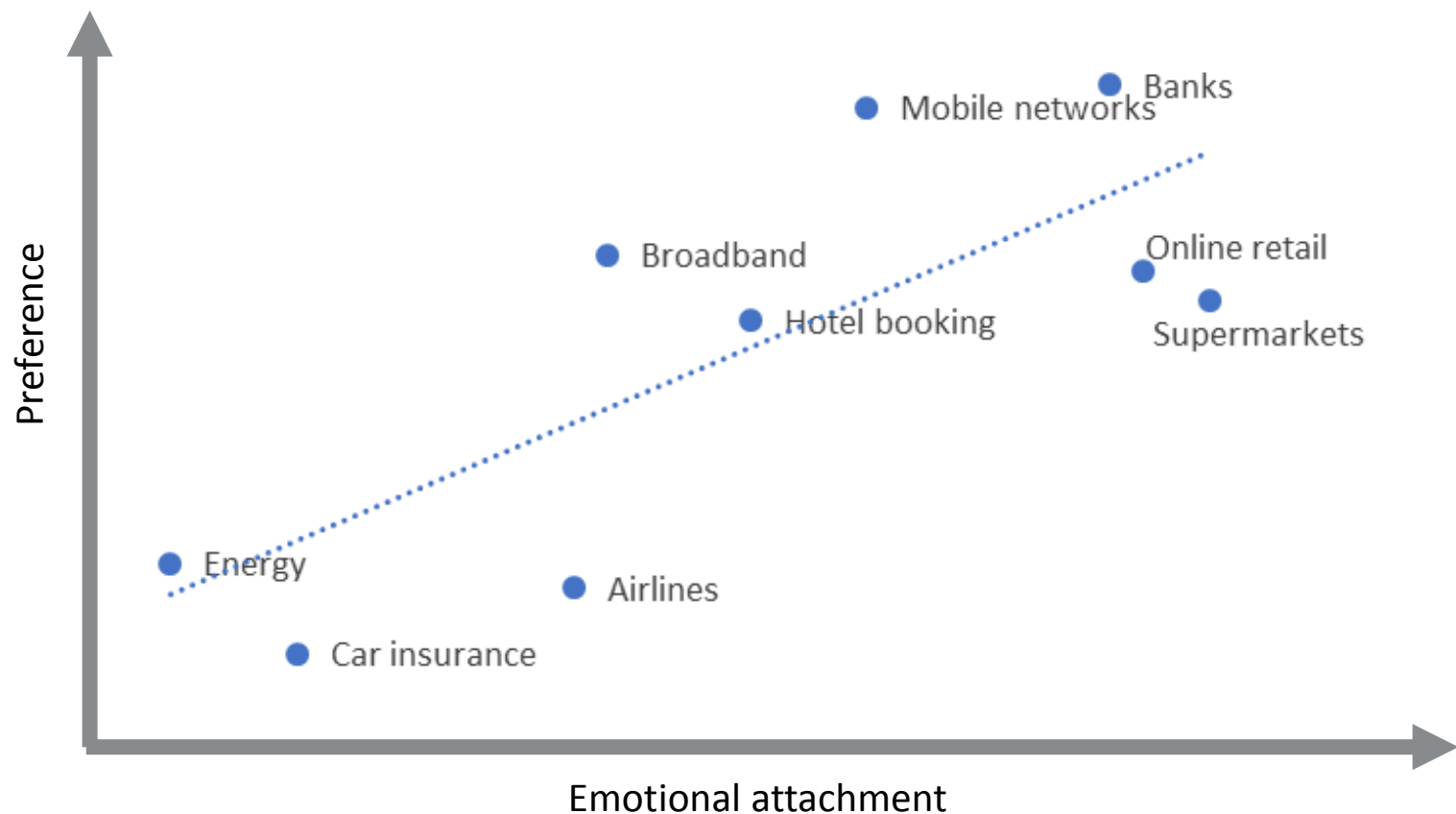
**Prefer your brand** = think you are better than your competitors (your rank)

or

**Have no real choice** = are locked in by situational/personal factors

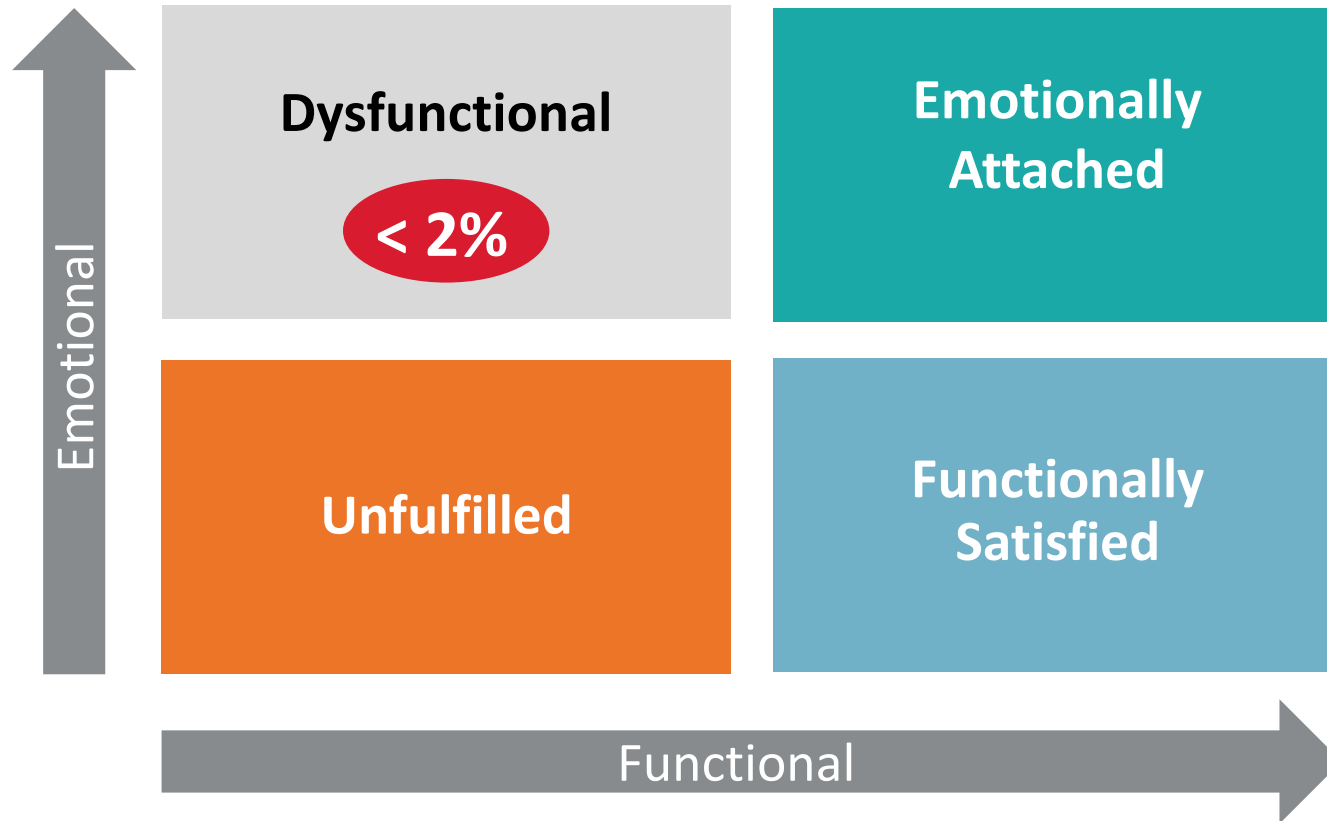


# Strong relationship between emotional attachment and preference is apparent at sector level

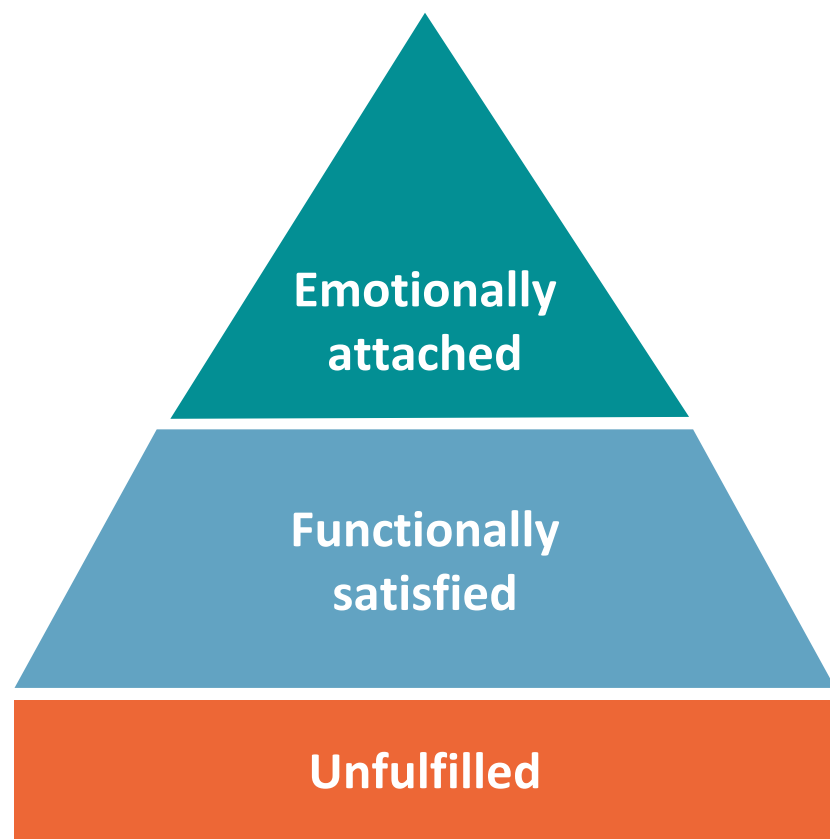


Source: Ipsos

# Creating a functional/emotional framework



# We need emotional attachment to drive preference and higher customer lifetime values



Preference

52

21

11

NPS

52

-4

-66

Likelihood to continue

70

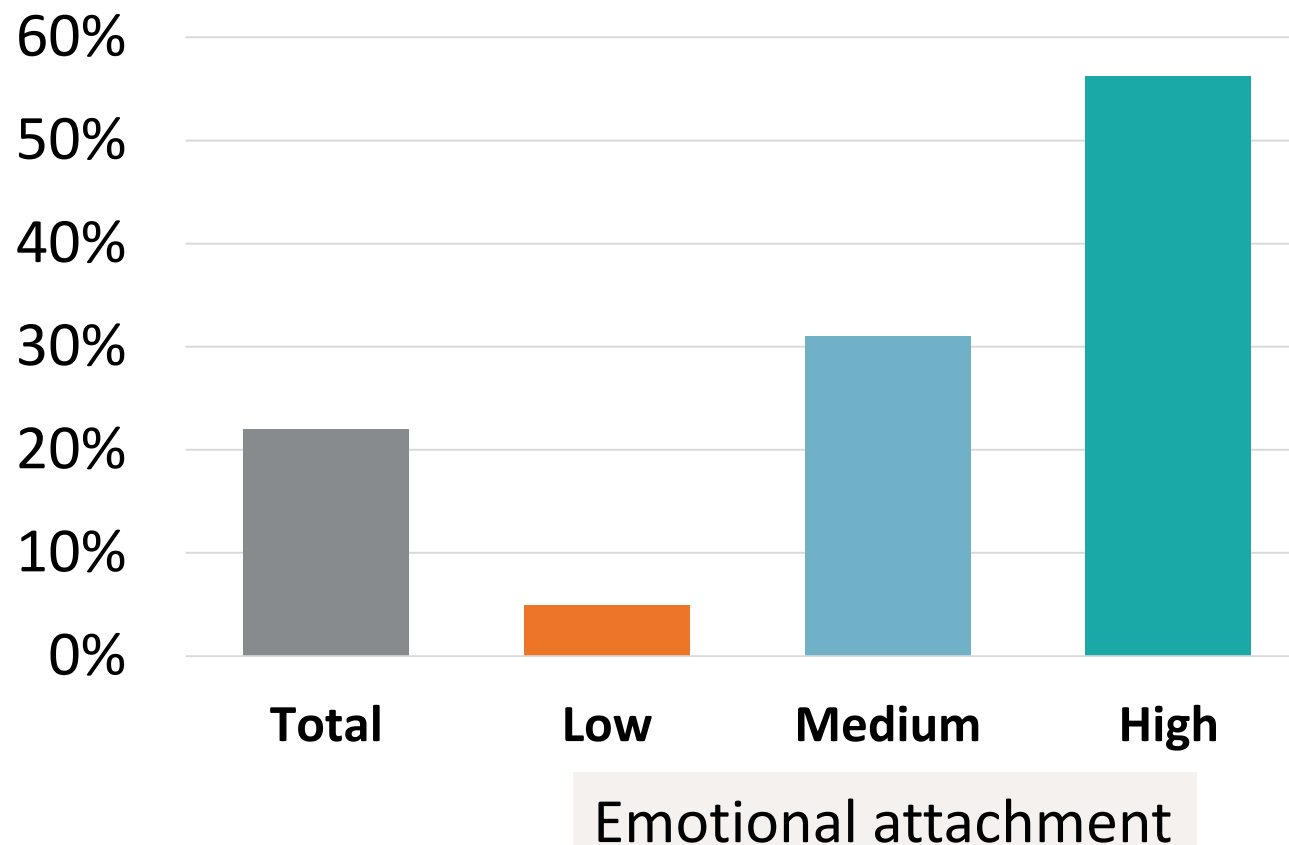
45

11

# And emotionally attached customers are more likely to be forgiving. Strong relationships insulate you from mistakes

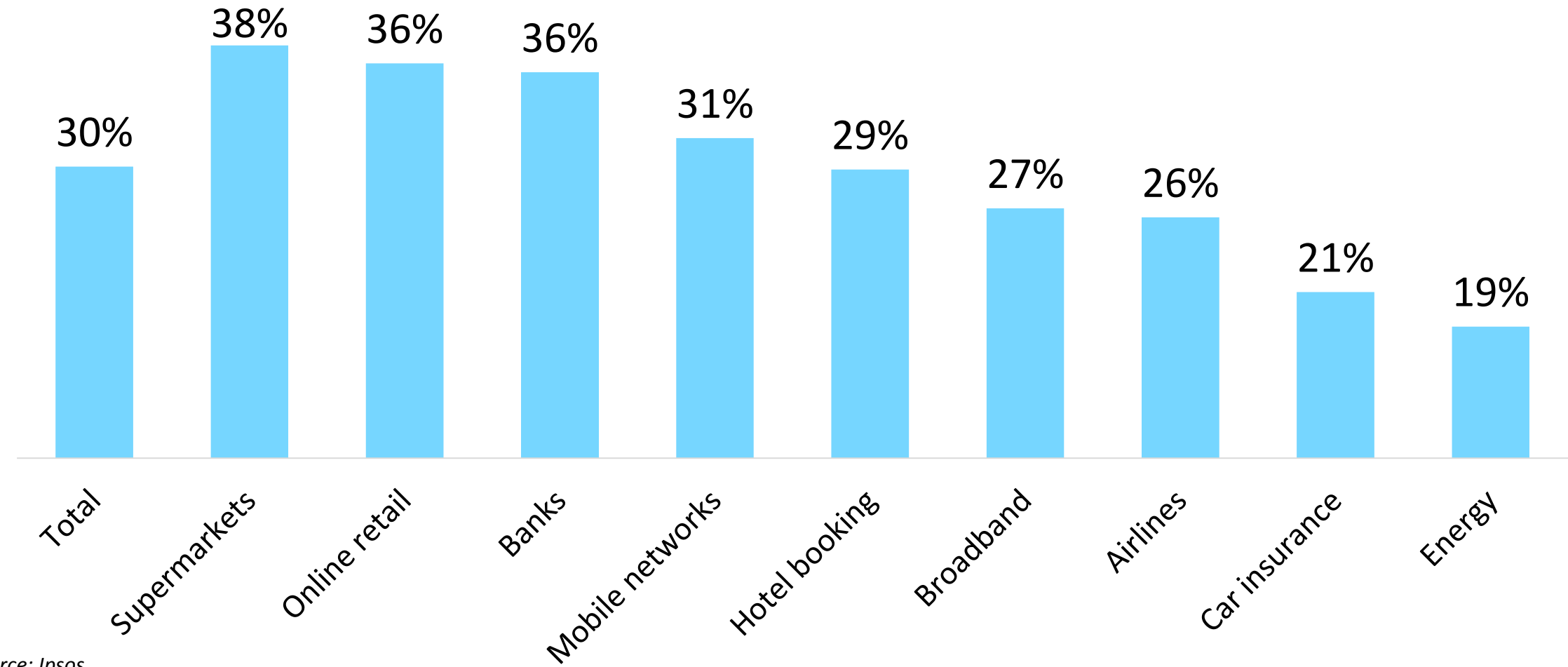


Likelihood to continue following a negative experience overall and by emotional attachment




Source: Ipsos

# Emotional attachment across sectors



Source: Ipsos



A photograph of two young women sitting on a stone ledge, looking away from the camera towards a large fountain in a park. The woman on the left has blonde hair and is wearing a mustard yellow sweater. The woman on the right has long dark hair in a ponytail and is wearing a blue and black striped shirt. In the background, there is a large red brick building with many windows and a person sitting on the steps of the fountain.

So, what is it that  
helps create an  
emotional bond?

# Applying Behavioural Science to Customer Experience

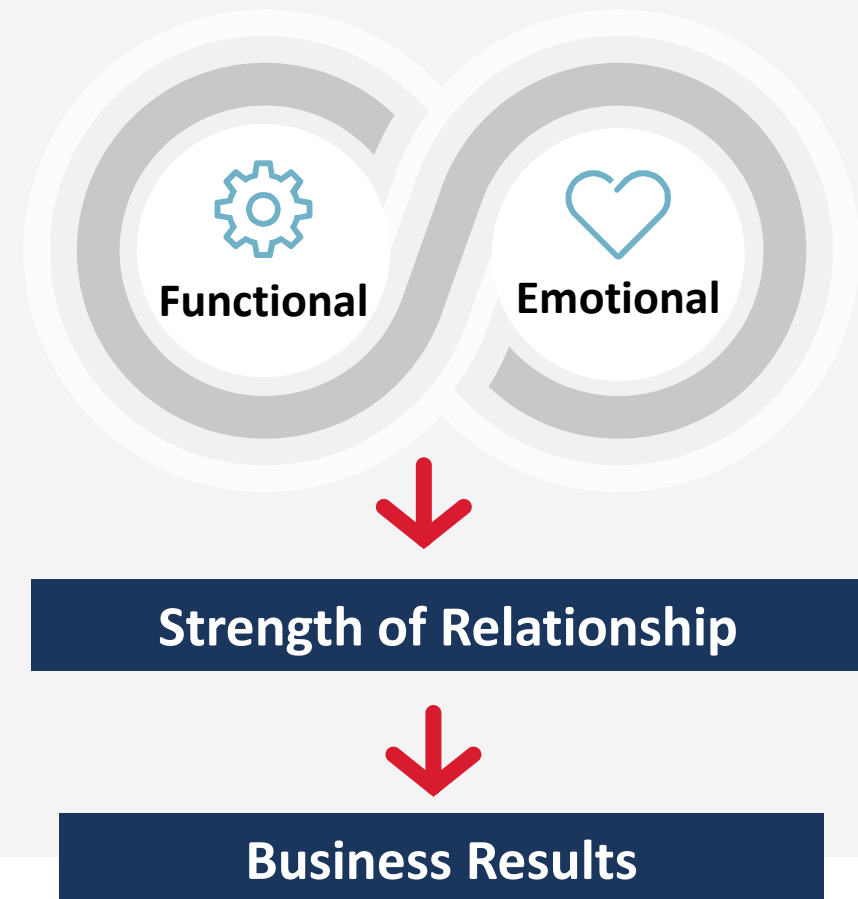
Designing and delivering CX in a truly human-centric way

Organisations have invested a lot of effort in making their processes more efficient (e.g. speed, ease, no friction)

Clearly functional aspects are important to meet basic needs and prevent dissatisfaction.

The psychology of human relationships can help achieve this goal by identifying the characteristics needed for strong, long-lasting relationships

By embedding core social motives, brands can move from creating experiences that are shallow and transactional to deep and truly relational.







## CX ingredients to drive strong relationships

We developed a framework for Customer Experience helping organisations to understand how to grow strong relationships with customers

Drawing on psychological literature telling us how social relationships are established and flourish (Fiske, 2003, 2004, 2008)

# Introducing the Five Forces of CX – The science of strong relationships

## **Fair Treatment**

Make customers feel that there is a fair exchange in their relationship with you

## **Recognition**

Make customers feel valued, respected and worthy of special treatment

## **Certainty**

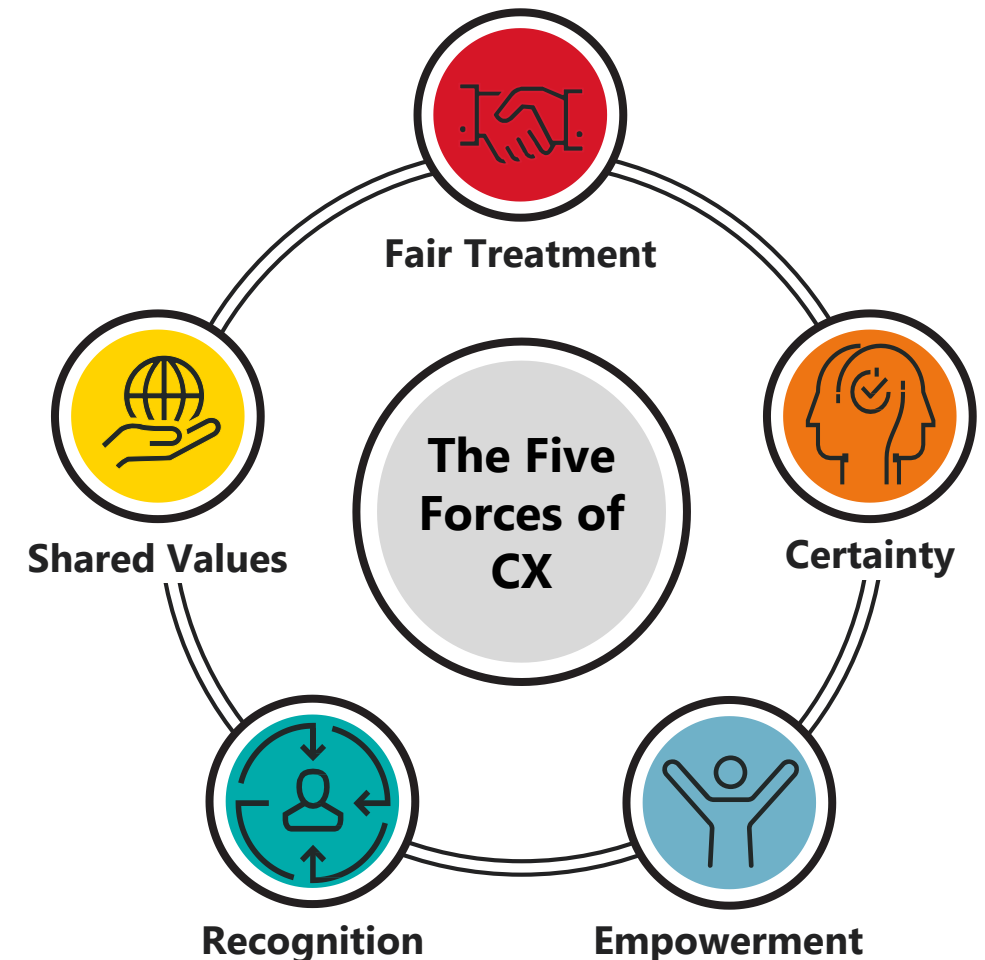
Make customers feel that things are clear, transparent and working as expected

## **Shared Values**

Help customers feel a sense of belonging and show you care about the greater good

## **Empowerment**

Help customers feel in control of the situation and in the driving seat



Source: Ipsos R&D 2019



# Analytical framework



Assess impact and performance of the CX Forces -> PRIORITISE

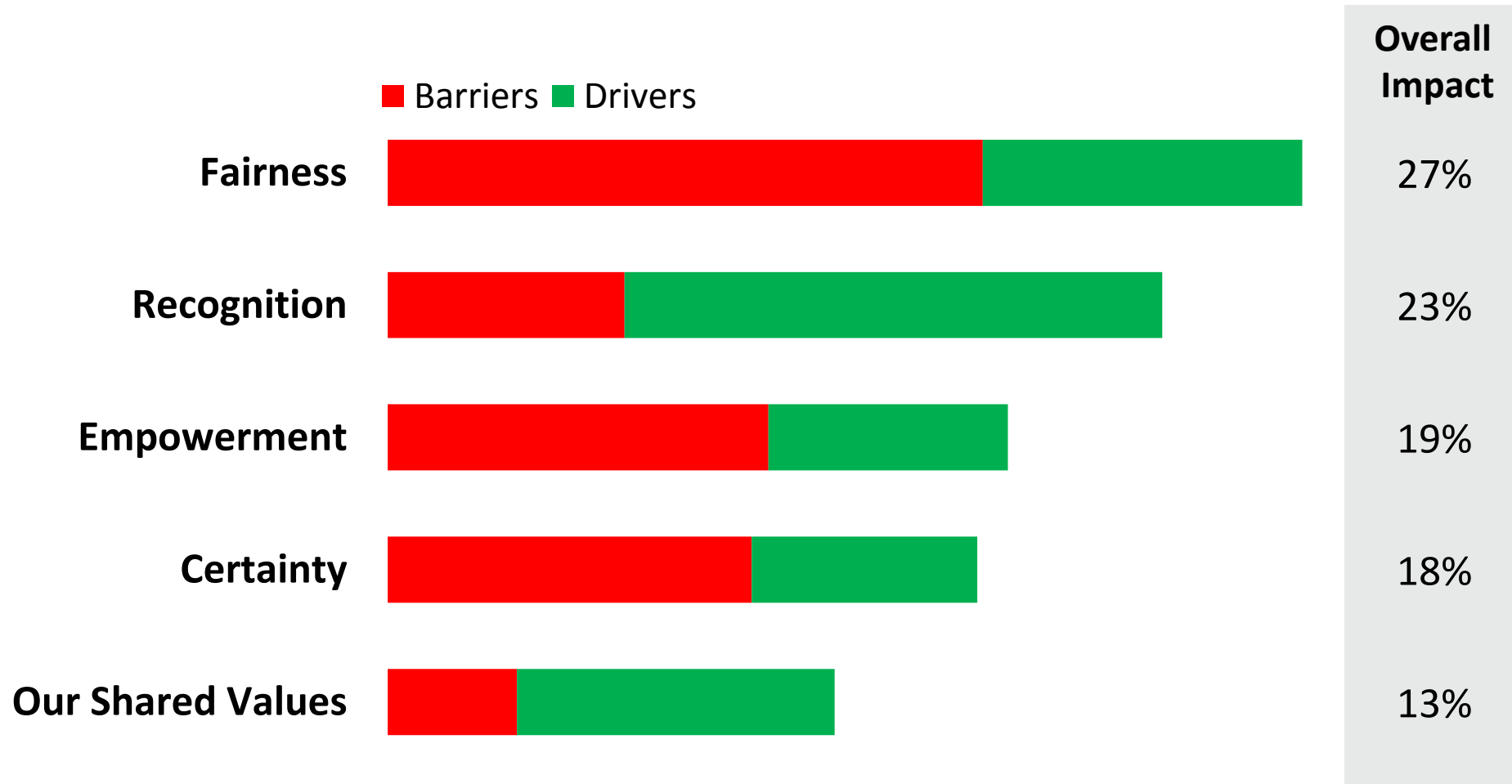


Diagnose whether the current experience drives the right response -> IDENTIFY GAPS



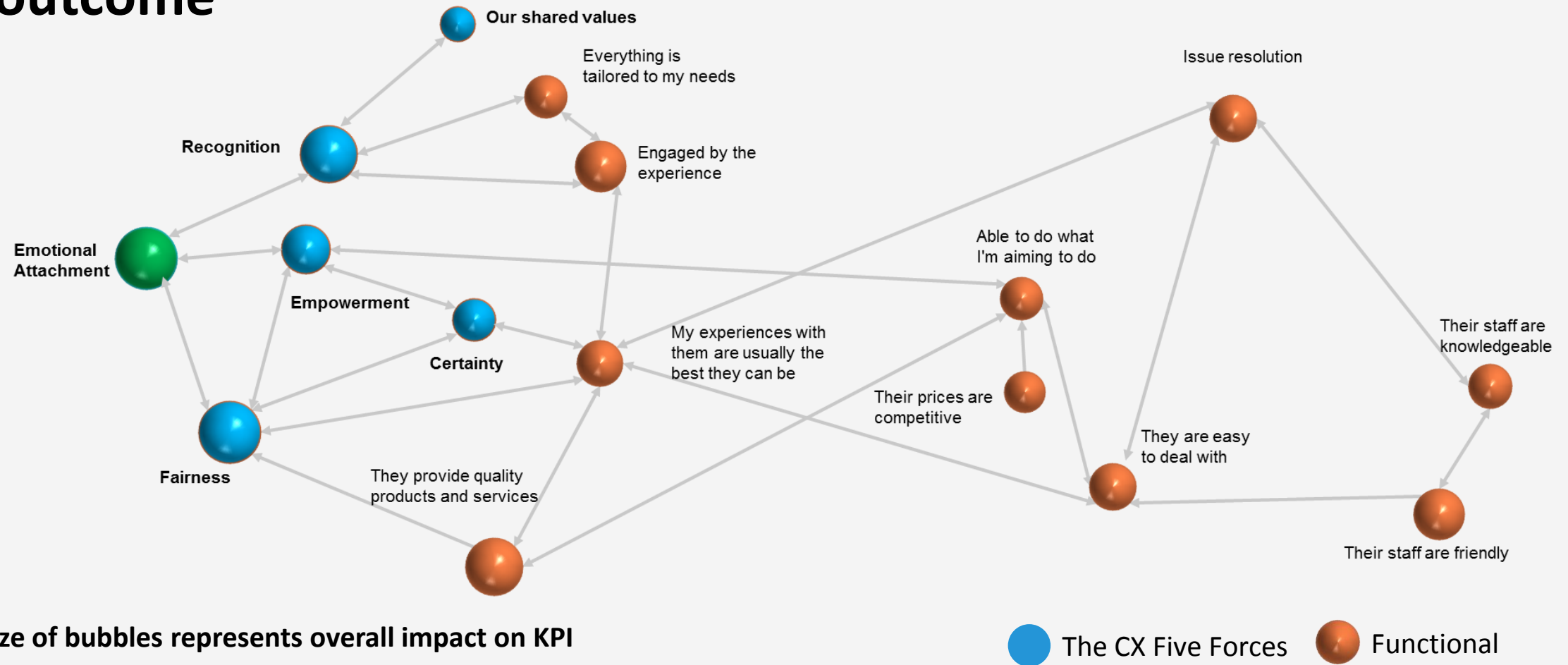
Optimise the CX/journey by dialling up the right Forces when it matters -> REDESIGN

# Assess impact of CX Forces onto Relationship Strength



Source: Ipsos

# Diagnose whether the current experience drives the right outcome



# Optimise the CX/journey

## An online journey



### Recognition

Welcome customers back to your online store. Show them products they may like based on their favourites

Set ability to put birthdays in a calendar so they can prepare for upcoming parties



### Empowerment

Give the customer choices of different styles or ability to personalise their choice



### Fair Treatment

Give discounts or create a loyalty scheme to entice customers to return



### Shared Values

Support a charity or cause and say £1 of this sale will be donated



### Certainty

Create an app to track delivery and be precise on date and time with a small window for people to be in

I need to buy party supplies for son's birthday



I look online and see if I can find something that fits with theme



I choose the supplies and go through to check out

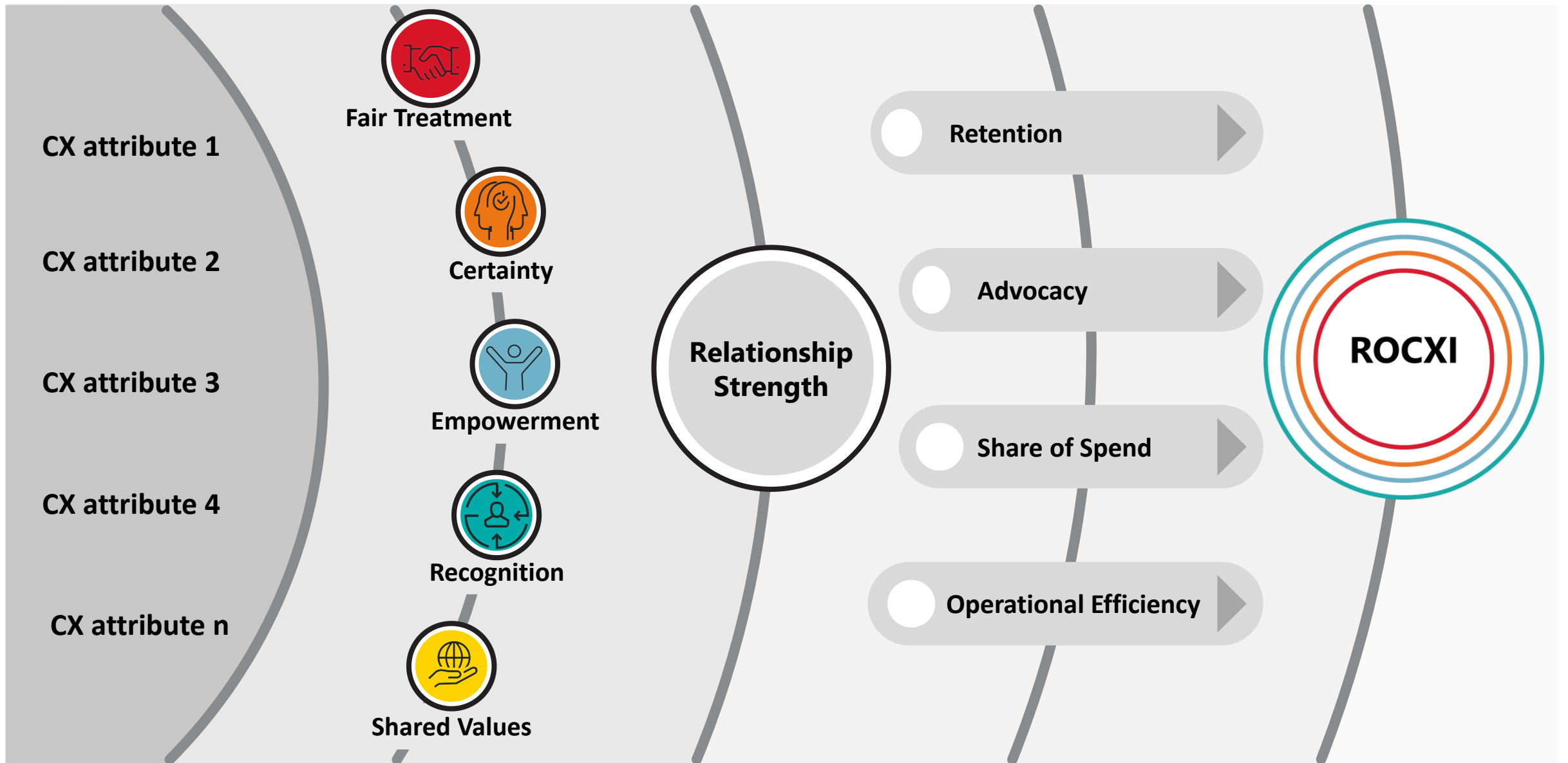


I make the payment and choose the delivery date and time



I wait for my parcel to arrive



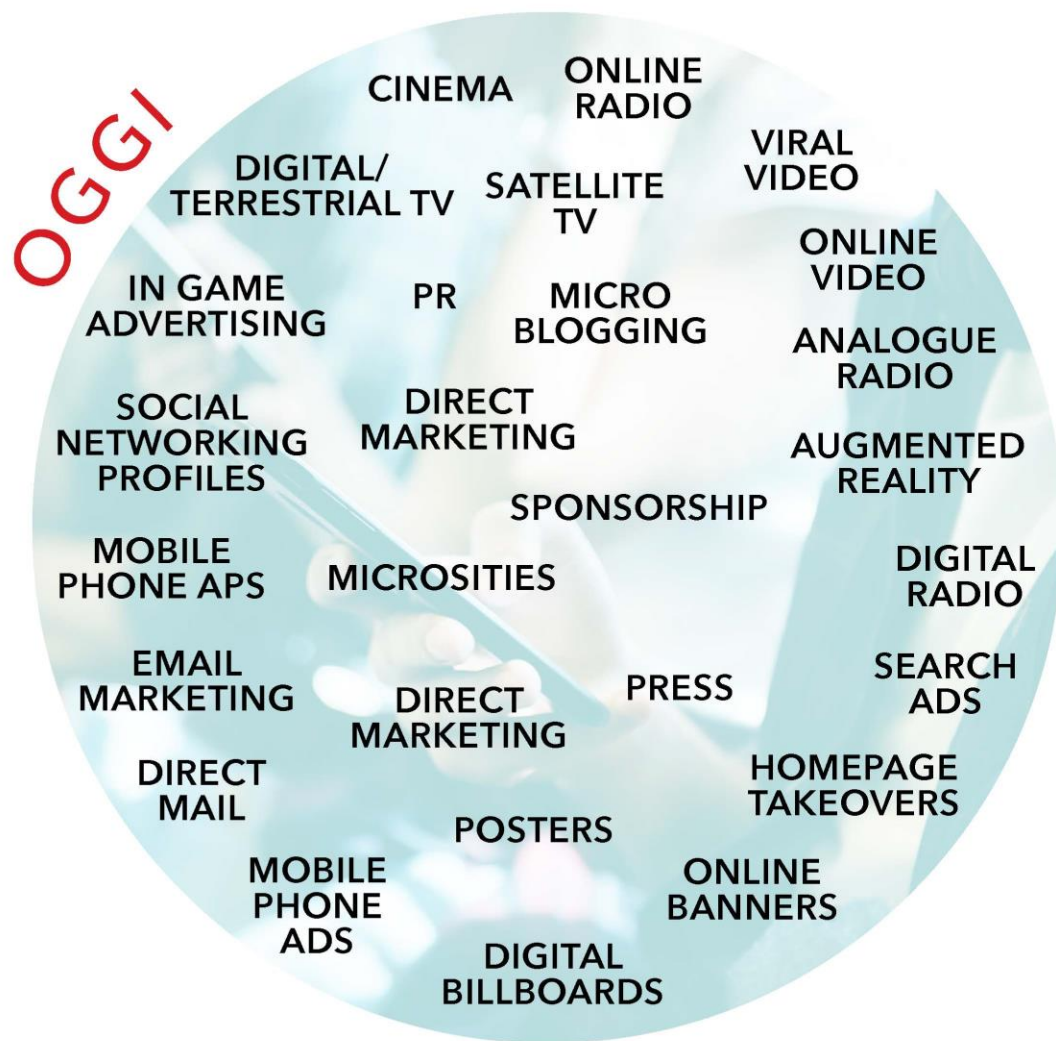




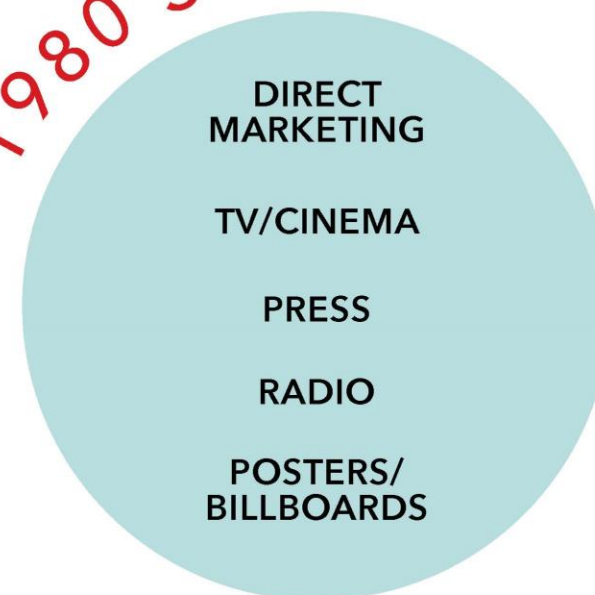
# Managing Customer Experience

## TREND E PUNTI DI VISTA tra personalizzazione, digitalizzazione e real-time

Federica Aceto - CX Leader



**1980'S**



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**69%**

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**GUARDA LE  
REVIEW ONLINE  
PER UNA  
MAGGIORE  
SICUREZZA  
NELL'ACQUISTO**

---

**72%**

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**È DISPOSTO A  
PROVARE UN  
PRODOTTO SE  
RICEVE MOLTE  
RECENSIONI  
POSITIVE**

---

**69%**

---

**GUARDA LE  
RECENSIONI  
PRIMA DI  
ACQUISTARE  
UN PRODOTTO  
ONLINE**





# LA PAROLA CHIAVE È ESPERIENZA

## PROVA VIRTUALE DEL PRODOTTO

BISOGNO DI AIUTO? | PERCHÉ ACQUISTARE ONLINE?

LANCÔME  
PARIS


MAISON LANCÔME | ISCRIZIONE MAILING LIST | IL MIO ACCOUNT | IL MIO CARRELLO

VIRTUAL TRY-ON | MAKE-UP | TRATTAMENTI | FRAGRANZE | ESCLUSIVE ONLINE | BEST SELLER | CERCA

### VIRTUAL TRY-ON

**PRONTA A SPERIMENTARE?**

Prova le nostre icone Lancôme in pochi click.



DA SEGUIRE:

1. Apri una scheda prodotto dove è disponibile il Virtual Try-on.
2. Fai la prova "live" oppure "carica una foto".
3. Divertiti a vedere il prima|dopo, cambiare le shade e condividere il risultato finale con chi vuoi!

**FAI UNA PROVA LIVE**

## POP UP STORES





# 67%

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Ritiene che il  
servizio clienti sia

**TROPPO  
AUTOMATIZZATO  
E IMPERSONALE**



# 41%

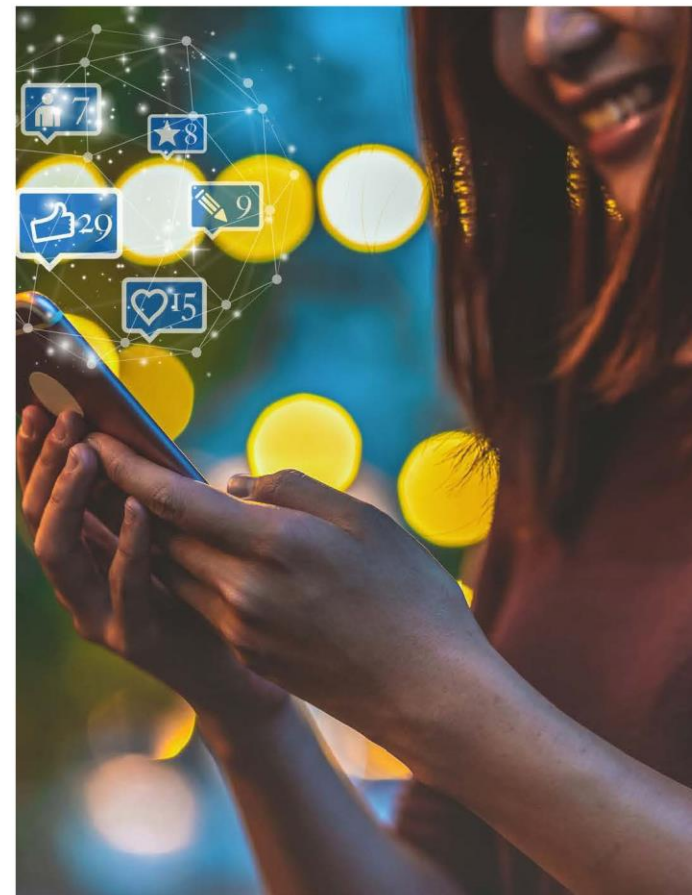
È a proprio agio nel fornire  
informazioni alle aziende online  
in cambio di

**SERVIZI E PRODOTTI  
PERSONALIZZATI**



# 46%

È contento di condividere  
le sue informazioni personali  
con le aziende  
e i brand che ama





## PERMETTERE ALLE AZIENDE DI UTILIZZARE I DATI CHE RACCOLGONO SU DI TE...

È qualcosa  
che i consumatori  
dovrebbero avere la

**POSSIBILITÀ  
DI RIFIUTARE**



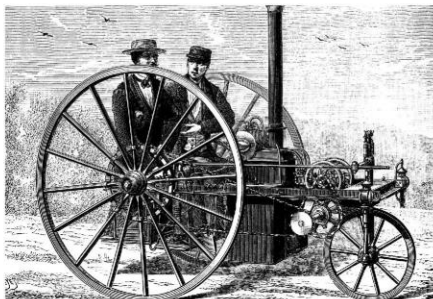
**66%**

## PERMETTERE ALLE AZIENDE DI UTILIZZARE I DATI CHE RACCOLGONO SU DI TE...



## TI SENTIRESTI PIÙ A TUO AGIO A CONDIVIDERE LE TUE INFORMAZIONI PERSONALI CON AZIENDE E BRAND CHE...





**NASCITA  
DELLA  
MACCHINA  
A VAPORE**



**INIZIA  
LA PRODUZIONE  
DI MASSA**



**NASCE  
L'INFORMATICA**



**LA DIGITAL  
TRANSFORMATION  
RENDE  
LE MACCHINE  
INTERCONNESSE**



# 56%

---

Sono disposti  
a pagare di più  
per una  
**MIGLIORE  
ESPERIENZA**





**LE OCCASIONI DI CONTATTO CON I CLIENTI  
SONO MOMENTI CRUCIALI CHE DEVONO  
ESSERE COLTI COME OPPORTUNITÀ  
PER RAFFORZARE  
IL LEGAME AZIENDA - CLIENTE**



OGGI NON È PIÙ SUFFICIENTE **METTERE IL CLIENTE AL CENTRO**,  
BISOGNA FARLO **IN MODO INTEGRATO**:

“

*Oggi abbiamo superato il concetto stesso di customer centricity  
a favore di una **visione olistica e integrata del customer journey***

”

**I TOUCH POINT** SONO UN'OCCASIONE PER ENTRARE IN RELAZIONE  
CON IL CLIENTE:

“

*I **diversi touch point** rappresentano non solo un momento di contatto,  
ma soprattutto un'occasione per **stare vicini al consumatore**  
una customer experience eccellente e personalizzata*

”

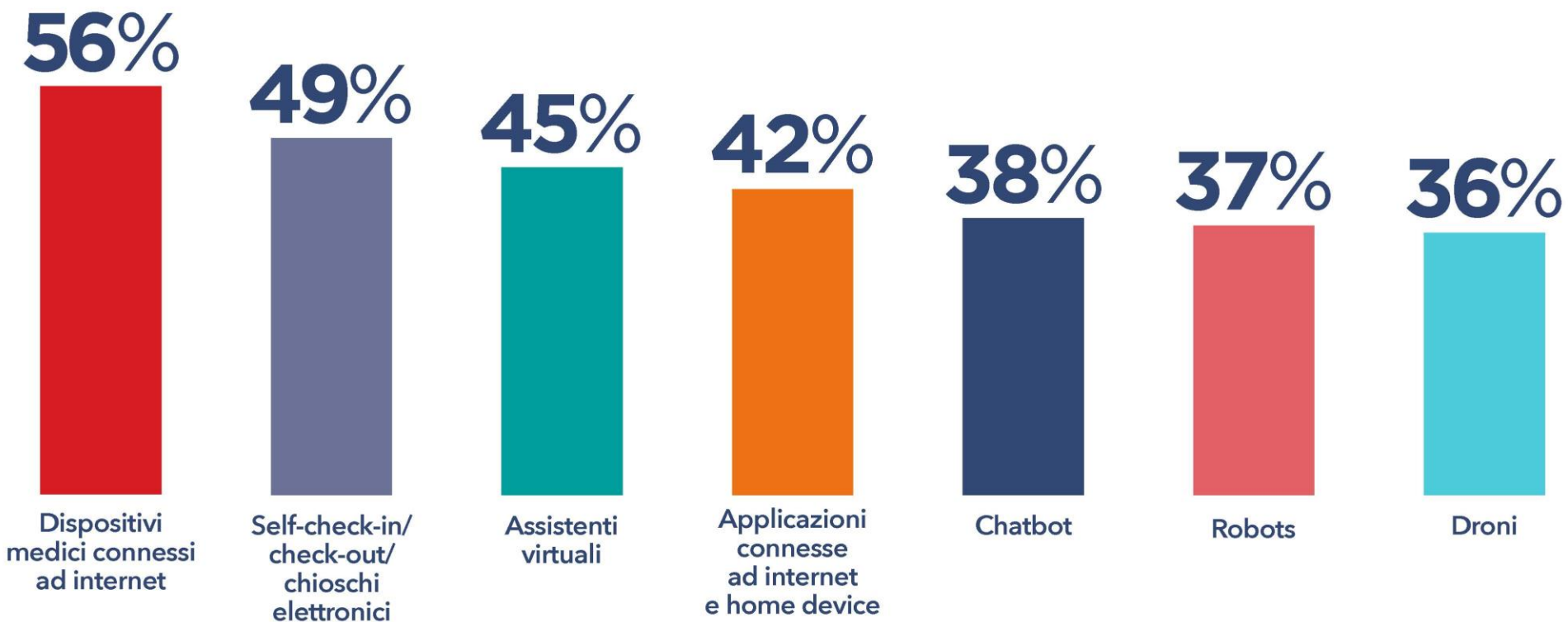
LA SEMPRE MAGGIORE DIGITALIZZAZIONE PORTA **ALL'INNOVAZIONE**  
**NELLE MODALITÀ DI RELAZIONE** CON I CONSUMATORI:

“

*Nell'era del digitale **servono nuovi strumenti** per stare in contatto  
con i consumatori, non solo all'inizio della relazione, ma **durante tutto**  
**il customer journey***

”

## QUANTO CIASCUNO DEI SEGUENTI PRODOTTI O SERVIZI AUTOMATIZZATI HA O AVRÀ UN IMPATTO POSITIVO SULLA VITA DELLE PERSONE?



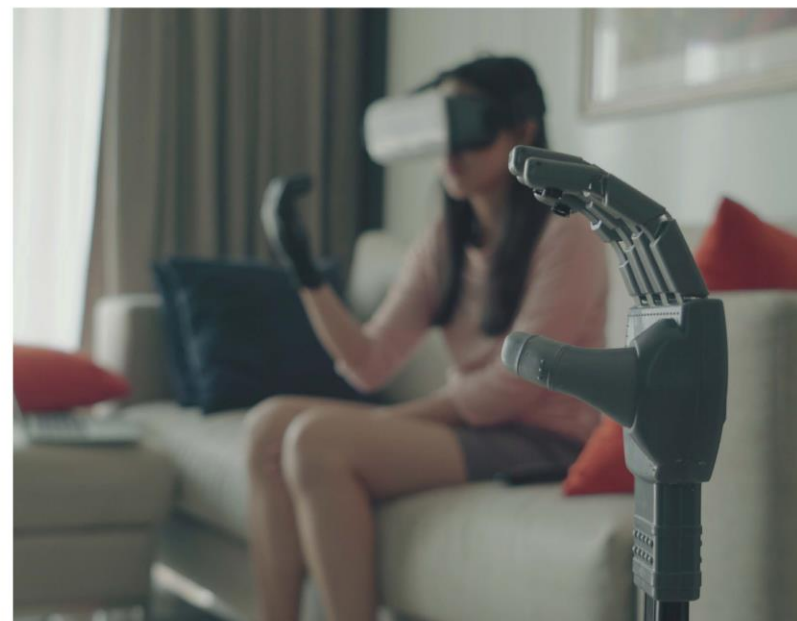


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Sfruttando tecnologia  
e innovazione digitale  
è possibile

**POTENZIARE  
IL SERVIZIO FORNITO  
DALLA COMPONENTE  
UMANA...**

**...MA SOLO LA COMBINAZIONE  
DELLE DUE PORTA AD UN SERVIZIO  
DAVVERO IMMEDIATO E  
PERSONALIZZATO, CHE RISPONDE  
ALLE ESIGENZE DEI CLIENTI**



AD ESEMPIO NEL **MONDO BANCARIO** SI PASSA

“

*Dalla digitalizzazione come strumento di efficienza alla **digitalizzazione come strumento di relazione** e valorizzazione della customer base*

”

E IL **DIGITALE** NON DEVE SOSTITUIRE **L'UMANO**

“

*Molte fintech hanno aggiunto un **elemento umano in appoggio all'esperienza full-digital**. La comprensione delle **esigenze del cliente** e la **conoscenza della sua storia** sono i veri KPI su cui sviluppare una customer experience eccellente e personalizzata*

”

PER UN'ESPERIENZA CHE SIA REALMENTE **OMNICANALE**  
**E PERSONALIZZATA**

“

*È indispensabile che i diversi **canali** siano **costantemente aggiornati** e condividano le medesime informazioni nello stesso momento*

”



# 5.1x

