

The Path To Customer Experience Maturity

by Megan Burns, December 30, 2014

KEY TAKEAWAYS

Companies Aren't Doing What It Takes To Achieve Their Customer Experience Goals

In a recent survey, 60% of customer experience professionals said that their executives want to differentiate the firm on the basis of customer experience. Sadly, that same survey revealed that fewer than half of those companies are systematically doing the things it takes to achieve that goal.

To Get To Customer Experience Maturity, Firms Must Pass Through Four Phases

Forrester found that firms that have successfully improved CX maturity all took the same four-step path. They learned to find and fix bad customer experiences, adopted practices that made good CX behavior the norm, created a more sophisticated CX toolkit, and adopted practices that helped define an experience that was truly unique.

Don't Try To Skip Steps On The Journey . . . It Won't Work

This path to customer experience maturity works because it takes into account natural dependencies among key CX practices, introduces new things gradually so that people can absorb them, and provides critical data and evidence to overcome cultural resistance to the outside-in perspective.

Customer Experience Professionals Need To Clear The Way For Others

To make new practices stick, customer experience professionals must lay out the road map for everyone to see, recognize positive behaviors that are already happening, bring in outside experts to help accelerate learning, and celebrate changes in the company's values and behavioral norms in addition to rising customer experience metrics.



The Path To Customer Experience Maturity

Road Map: The Customer Experience Maturity Playbook

by [Megan Burns](#)

with [Michael E. Gazala](#) and Carla O'Connor

WHY READ THIS REPORT

Companies have lofty goals for customer experience. Unfortunately, most customer experience professionals aren't doing even a fraction of the things required to achieve those goals. Customer experience professionals need a plan and a road map to help their organizations adopt the practices that will let them design, implement, and manage customer experience in a disciplined way that delivers the results firms want. But how can companies avoid missteps over the course of this complex transformation? Forrester studied companies that tried to adopt customer experience discipline over time. We concluded that firms that actually succeeded at this goal followed the same four-phase path. This is an update of a previously published report, describing the path to customer experience maturity for customer experience professionals and providing examples of organizations that are on it today.

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Related Research Documents

[The State Of Customer Experience Maturity, Q4 2014](#)

December 30, 2014

[How Companies Improved Their Customer Experience Index Scores, 2014](#)

May 20, 2014

[Customer Experience Maturity Defined](#)

January 21, 2014



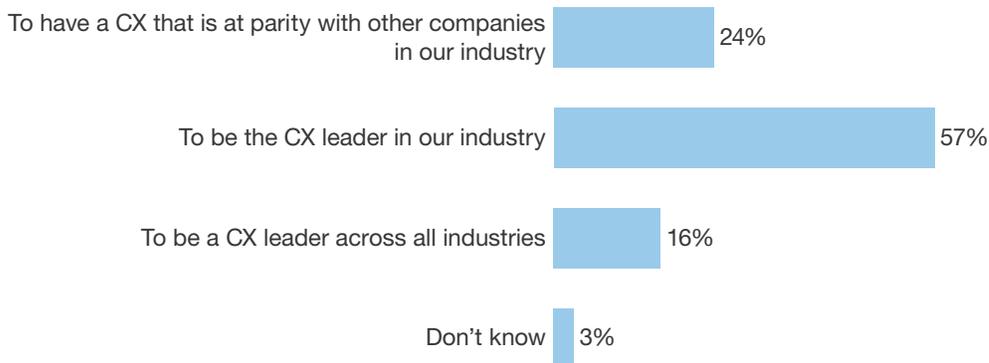
HEADED FOR FAILURE: MOST FIRMS WON'T SEE LASTING CX IMPROVEMENTS

Increasingly, companies rush to improve their customer experience. That's no surprise given the potential benefits: lower service costs plus increased revenue from better customer retention, greater wallet share, and superior customer acquisition.¹ Unfortunately for customer experience professionals, most of their firms won't see these benefits because:

- **Their ambitions are grand.** A recent survey of customer experience professionals revealed that 57% of executives aim to use customer experience as a competitive differentiator in their industry (see Figure 1). Another 16% have even higher hopes, looking to create experiences that differentiate them from any firm in any industry, not just their own.
- **But their efforts are weak.** The same survey revealed that firms aren't doing even a fraction of the things required to achieve such lofty goals. Only 61% measure customer experience quality on a consistent basis, leaving almost half with no way to tell if they're succeeding or failing. Only 18% report reviewing customer experience program status and metrics in staff meetings, putting nearly 82% at risk of wasting money by duplicating efforts and creating inconsistency. And only 15% consistently follow a design process (see Figure 2). That means that 85% of firms have no systematic approach to determine what a differentiated customer experience even looks like, let alone create one.

Figure 1 Executive Goals For Customer Experience In 2014

"How would you describe your executive team's goals for the customer experience program?"



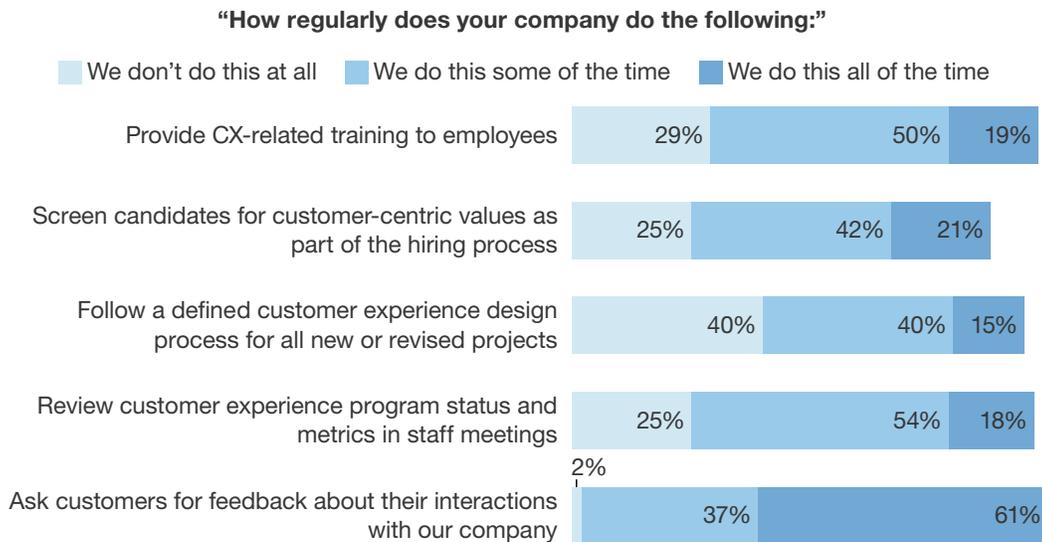
Base: 126 global customer experience professionals

Source: Forrester's Q4 2014 Global Customer Experience Peer Research Panel Online Survey

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Figure 2 Adoption Levels For Key Customer Experience Maturity Practices



Base: 126 global customer experience professionals

Note: “Don’t know” responses were not included.

Source: Forrester’s Q4 2014 Global Customer Experience Peer Research Panel Online Survey

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Companies Must Go Beyond Good Intentions And Adopt Business Discipline

To turn their aspirations into reality, companies must take their customer experience efforts from ad hoc to mature. That means getting to a state where employees routinely perform the set of practices required to design, implement, and manage customer experience in a disciplined way.² In our previous research, we identified 40 essential practices and grouped them into the six disciplines of our customer experience maturity framework (see Figure 3).³ When companies perform these practices, they:

- **Improve experiences over time.** Customer experience professionals at Courtyard by Marriott have adopted a range of essential practices, from designing new experiences to training employees on how to deliver those experiences. As a result, its Customer Experience Index scores have risen steadily each year from 2010, when its score of 75 placed it in the “good” category, to 2014, when it placed into the “excellent” category with a score of 90.⁴
- **Demonstrate business results.** A customer experience team at Fidelity Investments takes a systematic approach to improving customer experience and measuring the benefits derived from its efforts. In a single year, 160 projects passed through the experience improvement system and produced more than \$24 million in annual savings. The same team piloted an improved model for helping high-net-worth customers when they ran into trouble. That program produced a larger group of happy high-net-worth customers, who increased their investments with Fidelity by several billion dollars.⁵

Figure 3 The Six Disciplines Of Customer Experience Maturity

Practice	Description
Strategy	The set of practices that help you craft a customer experience strategy, align it with the company's overall strategy and brand attributes, and then share that strategy with employees to guide decision-making across the organization
Customer understanding	The set of practices that create a consistent shared understanding of who customers are, what they want and need, and how they perceive the interactions they're having with your brand today — replacing everyone's best guesses about customers with real actionable insights
Design	The set of practices that help organizations envision and then implement customer interactions that meet or exceed customer needs — spanning the complex systems of people, products, interfaces, services, and spaces that your customers encounter in retail locations, over the phone, or through digital media like websites and mobile apps
Measurement	The set of practices that let organizations quantify customer experience quality in a consistent manner across the enterprise and deliver actionable insights to employees and partners
Governance	The set of practices that help organizations manage customer experience in a proactive and systematic way — by assigning responsibilities and changing business processes
Culture	The set of practices that create a system of shared values and behaviors, which focus employees on delivering a great customer experience — with practices in the culture discipline falling into three categories: hiring, socialization, and rewards

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THE PATH TO CUSTOMER EXPERIENCE MATURITY

Forrester interviewed and observed dozens of firms that tried to adopt customer experience discipline over time. After analyzing our research, we concluded that companies that actually succeeded at this goal followed the same four-phase path (see Figure 4).

Phase 1: Repair

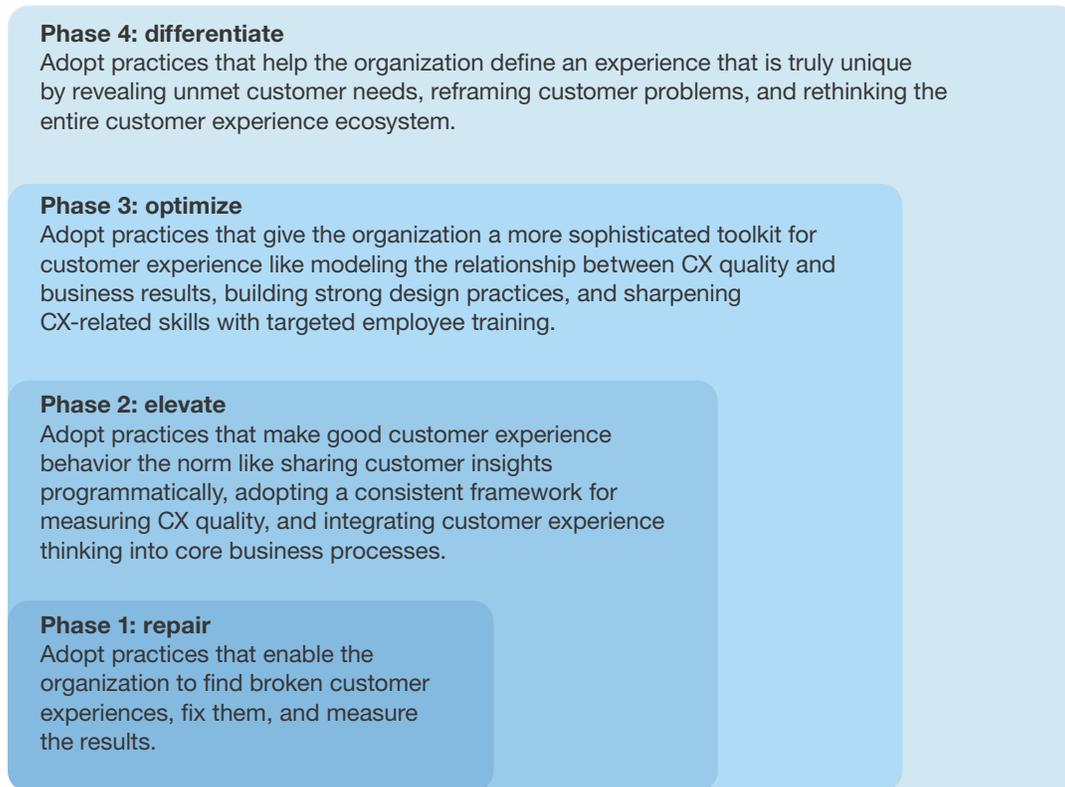
Before they set out to create experiences that delight customers, firms should first fix experiences that pain customers. By doing that, customer experience leaders begin to change the way their businesses operate. In these initial steps, they:

- **Identify problematic customer experiences.** To unearth customer pain points, companies must start or expand customer listening programs. While some companies treat this step as a one-time research project, most realize that it's the start of a continuous improvement process. The American Cancer Society (ACS) implemented a customer experience measurement program that included a biweekly survey sent out to all customers who interact with the company. ACS used the results of this survey to guide business objectives for regional divisions. It also started

sending voice of the customer alerts to event staff so that they could address any negative feedback in post-event/interaction surveys.⁶ Barclaycard's US division started analyzing every customer complaint, which it defined as "any customer expression of dissatisfaction regardless of channel, business line, or contact center."⁷ And in 2008, leaders at Rosetta Stone began gathering every piece of customer feedback — positive or negative — to find out what people liked and didn't like about the firm's new online experience.

- **Prioritize fixes.** To avoid being overwhelmed by how much there is to fix, firms should convene a cross-functional customer experience steering committee that decides where to begin. For example, Barclaycard US began holding a monthly meeting called the "Customer Accountability Forum" where the firm's top brass prioritized the customer agenda. Although many companies decide what to do based on instinct at this point, it's better to instill rigor from the start. For example, when Regions Bank formed its cross-functional team (made up of key decision-makers and their lieutenants), the group's first order of business was to create a detailed system for ranking projects.
- **Coordinate implementation.** Cross-functional teams need to meet on an ongoing basis to oversee the work they approve. At Barclaycard, execs use their monthly forum to work through any roadblocks that may impede existing projects. Similarly, business and technology leaders at Progressive Casualty Insurance gathered monthly throughout 2012 to work on projects like new policy and customer data platforms that now support a variety of improvements to the firm's end-to-end experience.
- **Measure results.** Customer experience professionals should look to the same satisfaction, loyalty, and customer experience (CX) metrics they used to find problems in the first place for evidence that they fixed those problems. Thanks to improvements in its analytics systems, Cablevision is now able to detect pending problems before they turn into an outage, significantly decreasing its volume of customer service calls.⁸ During the first stage of its evolution, the UK's Virgin Media streamlined its dashboards and distributed a Balanced Scorecard to track Net Promoter Score (NPS) improvement on a weekly basis.⁹

Figure 4 The Path To Customer Experience Maturity



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Phase 2: Elevate

Once they've learned what not to do, firms should prevent backsliding by adopting practices that make good behavior the norm. CX professionals need to bring about that change by creating systems to:

- **Share customer insights programmatically.** Employees need consistent up-to-date customer insights to help them make good decisions on an ongoing basis. The airline Emirates created customer journey maps to give its multilingual workforce a shared sense of the passenger experience (see Figure 5). Blue Cross Blue Shield of Michigan built a traveling “persona room” to give associates deep insight into the plan’s members.¹⁰ Courtyard by Marriott created a training program that brings new hires up to speed on what the brand already knows about guests. And Rosetta Stone started sending monthly reports of the top customer rants and raves across webinars, calls, chats, surveys, online reviews, Facebook, and Twitter.

- **Measure CX quality more thoughtfully and consistently.** In phase 2, measurement programs need to go beyond simply picking up on causes of customer dissatisfaction. They should start tracking progress toward delivering experiences that customers ultimately want and need. Rogers Communications used primary research to pinpoint the three things its customers want most and then adopted a single enterprise measurement program that scores every touchpoint on those three criteria.¹¹ Similarly, Edward Jones identified five attributes that define “The Ideal Edward Jones Experience” and adjusted CX metrics to match.¹²
- **Integrate CX into core business processes.** At this phase, CX professionals must work to build customer-centric discipline into standard practices and procedures. AT&T Mobility re-engineered its network planning process to consider customers’ attitudes alongside technical concerns. Leaders also added human factors testing to the process for evaluating new devices in order to make sure that the company picks ones that customers will like. BMO Financial Group held a workshop with 75 human resources (HR) professionals to go over the bank’s new CX strategy and discuss what they’d need to do differently to support it.¹³ Blue Cross Blue Shield of Illinois brought employees responsible for member communication in a range of departments into a cross-functional working group to make sure that they craft a consistent, unified message in the future.¹⁴
- **Reward customer-centric behaviors across the enterprise.** In most organizations, frontline employees already have some part of their compensation or rewards tied to customer metrics. To move up the CX maturity ladder, organizations need to expand those types of reward systems to include back-office employees. For example, grocery chain Kroger added a customer experience metric to its bonuses for senior leaders. Now all employees in the company have an incentive to deliver a better customer experience, not just the frontline employees.¹⁵

which aspects of the customer experience contribute most to things like revenue per user (RPU), cost of service, and churn.¹⁶ Business leaders now know the factors that are most likely to create Detractors and, perhaps more importantly, the factors that are most likely to create Promoters.

- **Build strong experience design practices.** The experience design discipline helps companies combine customer insights and business analysis into a plan that employees execute. Most firms don't have this discipline and may even need help to understand what it is and how it differs from graphic design or product design. Those that need or want help can engage an outside design firm, as Virgin America did for the redesign of its home page.¹⁷ In contrast, Virgin Media chose to do some of its experience design in-house by co-creating experiences with its customers, a CX design best practice.
- **Sharpen employees' CX-related skills.** Firms must adapt training programs so that they tie directly to customer experience. Progressive Insurance added behavioral analytics to help managers give contact center agents personalized coaching. Virgin Media started cross-training employees to work outside of their areas of expertise during peak times so that no customer has to wait too long for service. And some firms now use empathy training to help employees connect with customers and each other on a more emotional level. Cleveland Clinic put all 42,000 of its employees through empathy training — even those who don't work directly with patients.¹⁸ And Virgin Media now builds empathy among its top 120 directors by requiring them to spend a week in a frontline job so that they know what to do to make things easier for those serving customers every day.

Phase 4: Differentiate

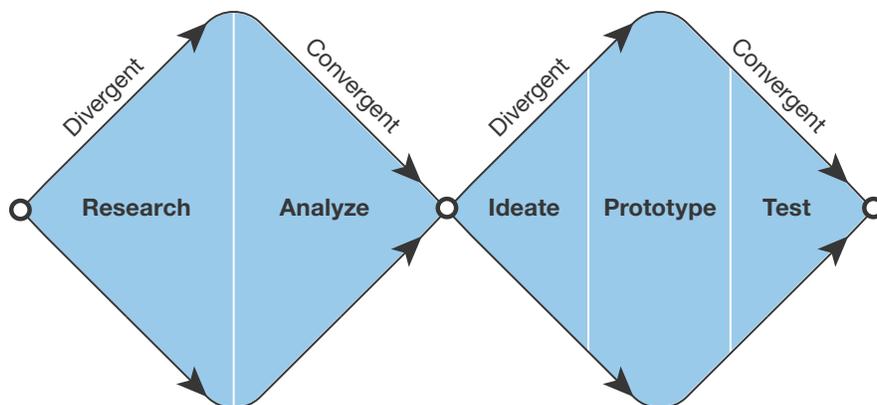
By the end of phase 3, organizations have acquired the ability to consistently deliver a good experience, detect when things go awry, and adjust accordingly. These skills are necessary but not sufficient for differentiating on the basis of customer experience. To have a shot at creating a true significant competitive advantage, firms need to adopt practices that:

- **Reveal customers' unmet needs.** CX leaders can stand out from the crowd when they use advanced research techniques to systematically mine for new types of insights. For example, when Bertucci's wanted to open a new restaurant called 2ovens, it hired consultancy firm Continuum to help determine what its target customers were looking for and visualize what this new restaurant would look like. Continuum got creative and made mood boards that captured the essential vibe of 2oven's target customers. By using these mood boards as a guide, all internal Bertucci's stakeholders were able to ensure that the menu, dining space, and website aligned to provide the necessary vibe.¹⁹
- **Reframe customers' problems.** Early CX design projects tend to focus on creative solutions to known problems. CX professionals can take design to the next level by helping people step back and see problems in an even broader context (see Figure 6). Nike created a whole new

category with its Nike+ ecosystem by going beyond runners' need for shoes to their desire to become better athletes.²⁰ Similarly, when utility company Southern Water needed to install water meters in every home to comply with new regulations, leaders didn't limit their thinking to that one event.²¹ Instead, the company engaged service design firm Ideo to craft an end-to-end experience that will achieve the UK's broader goal for switching to meters — getting residents to use less water. The experience they designed begins with an awareness-building ad campaign months before meter installers come to a neighborhood. It culminates with a completely redesigned bill that educates consumers and gives them the option to phase in pay-for-use billing over a three-year period while they learn to conserve.

- **Rethink the entire customer experience ecosystem.** A truly differentiating customer experience may require a company to operate in a drastically new way. CX professionals can partner with business process colleagues to develop a business architecture that's based on customer journeys instead of internal processes. For example, USAA has identified approximately 100 key experiences associated with customer journeys like buying a car or preparing to deploy abroad, all of which have owners and cross-functional teams held accountable for underlying processes.²² This approach helps the firm see opportunities that firms with a more traditional product-centric focus aren't likely to pick up on.

Figure 6 Double Diamond Of Divergent And Convergent Design Activities



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DON'T TRY TO RUN BEFORE YOUR ORGANIZATION LEARNS TO WALK

Many companies — driven by high ambitions — want to jump right into advanced CX practices without passing through earlier phases. Don't do it. The reason that the path described in this report works is because it:

- **Incorporates natural dependencies among the practices.** The practices in the customer experience maturity framework build on each other, and some can't be performed unless others are already in place. For example, business leaders can't govern based on CX metrics that don't exist yet. Employees can't assess how a new idea might change the customer journey if they don't know what that journey looks like today. And without a way to find latent needs, it's nearly impossible to figure out what to do to stand out from the crowd.
- **Builds new skills and competencies gradually.** At all costs, companies need to avoid a rush to failure. Because people and organizations have a finite capacity to absorb change, throwing too much change at them at once will cause confusion at best and backlash at worst. A multiphased approach makes the amount of change seem less overwhelming and gives people time to turn ad hoc activities into habits. And when all else fails, it gives companies time to move employees who won't come along for the journey out of the business and replace them with new hires who will.
- **Appeals to existing values and beliefs.** As part of our analysis for this research, we classified firms based on two facets of corporate culture: the degree to which they value stability over flexibility and whether they use internal or external cues to decide what to do.²³ In firms that value stability and control, trying to jump right to the elevate phase (phase 2) means asking folks who strongly dislike change to rethink how they do what they do without any evidence as to why change is needed. Even firms that value flexibility will struggle if they try to change too fast. Their entrepreneurial spirit usually comes with a strong resistance to anything that even smells like centralized coordination. CX pros need deeper customer insights to get fiercely independent groups to see the need for enterprise-level governance and collaboration.

RECOMMENDATIONS

CX PROFESSIONALS NEED TO CLEAR THE WAY FOR A SUCCESSFUL VOYAGE

To maximize their chances of success, customer experience professionals must make it as easy as possible for their firm to adopt new customer experience practices. The best way to do that is to:

- **Lay out the road map for change.** Stop impatient colleagues from skipping ahead by explaining what's going to happen when and why it's best to do things in that order. The team at Barclaycard US followed up on its successful complaint management system by creating a road map that spells out six work streams, each of which helps move different CX capabilities forward. Similarly, CX leaders at Sage Software North America drafted a three-year strategic plan that will help the firm lay a strong foundation and then build on it to reach its customer experience goals.
- **Recognize the good work that's already happening.** Most companies have at least some elements of customer experience maturity in place, and they can leverage those practices to move other parts of the business forward. For example, many contact centers have well-

developed systems for screening candidates for customer-centric values before they are hired and rewarding them when they deliver great experiences. The team that manages your website may already have a user-centered design process in place. Find these pockets of CX maturity by asking the people who lead each functional area to fill out our CX maturity assessment. When someone says that their team performs a given practice systematically, ask them for details. Use what they do as proof that such behavior is possible and as a template for enterprisewide processes.

- **Use outside experts to accelerate learning.** Most businesspeople haven't been exposed to disciplines and practices like customer experience measurement, ethnographic research, journey mapping, or experience design. Customer experience leaders will have an easier time of educating their peers if they bring in outside expertise. Fidelity's chief customer officer brought in the Stanford University Institute of Design to teach associates across the firm about design thinking.²⁴ When Kaiser Permanente started exploring co-creation in 2003, the company pulled together an ad hoc multidisciplinary team to learn design and innovation skills from the firm Ideo. Over a two-year period, the team gradually took control of the process, eventually starting its own design group, the Innovation Consultancy/ Kaiser Permanente, which now fully facilitates Kaiser's co-creation sessions.²⁵
- **Celebrate culture change in addition to CX improvement.** One of the biggest risks of any change effort is declaring victory too soon. Avoid this fate by combining CX quality scores with evidence of how quickly CX practices are becoming behavioral norms. Use the same analytics that track what customers do online to find out how often employees access new information about customers. Keep track of what percentage of employees have been through new CX training programs. Ask leaders for stories of missteps they prevented by asking questions about customer experience early in the planning process. And use HR surveys to ask employees if they feel like they have what they need to deliver an exceptional customer experience.

SUPPLEMENTAL MATERIAL

Methodology

Forrester fielded its Q4 2014 Global Customer Experience Peer Research Panel Online Survey to 126 CX professionals from our ongoing Marketing & Strategy Research Panel. The panel consists of volunteers who join on the basis of interest and familiarity with specific marketing and strategy topics. For quality assurance, panelists are required to provide contact information and answer basic questions about their firms' size and principal business.

Forrester fielded the survey from September 2014 to October 2014. Respondent incentives included a copy of a report resulting from this data. Exact sample sizes are provided in this report on a question-by-question basis. Panels are not guaranteed to be representative of the population. Unless otherwise noted, statistical data is intended to be used for descriptive and not inferential purposes.

Companies Interviewed For This Report

American Cancer Society	PricewaterhouseCoopers
AT&T	Regions Bank
Barclaycard US	Rosetta Stone
BMO Financial Group	Sage Software North America
Caterpillar	Sprint
Ford Motor	The Economist Newspaper
John Deere Financial	Virgin Media

ENDNOTES

- ¹ Years of Forrester data confirm the strong relationship between the quality of a firm's customer experience (CX) and loyalty. We built three simple models to estimate the impact customer experience has on three loyalty measures: willingness to consider the company for another purchase, likelihood to switch business, and likelihood to recommend. See the June 10, 2013, "[The Business Impact Of Customer Experience, 2013](#)" report.
- ² Forrester first published this definition of customer experience maturity in 2012. See the January 21, 2014, "[Customer Experience Maturity Defined](#)" report.
- ³ For a complete list of the 40 CX maturity practices, see the January 21, 2014, "[Customer Experience Maturity Defined](#)" report.
- ⁴ Forrester's Customer Experience Index is an annual benchmark of customer experience quality at more than 150 large US firms. See the January 15, 2013, "[The Customer Experience Index, 2013](#)" report.
- ⁵ Refer to Chapter 2 of the following book. Source: Harley Manning and Kerry Bodine, *Outside In: The Power of Putting Customers at the Center of Your Business*, Amazon Publishing, 2012 (<http://outsidein.forrester.com>).
- ⁶ ACS had no effective system in place to measure the experience it was delivering to its customers. To overcome this challenge, ACS completely rethought its approach to measuring the customer experience and developed a robust enterprisewide customer experience (CX) measurement program. See the May 28, 2014, "[Case Study: How American Cancer Society Used Measurement To Optimize Customer Experience](#)" report.
- ⁷ Source: Barclaycard US's submission to Forrester's US Voice Of The Customer Awards, 2012.

- ⁸ Forrester interviewed CX professionals at brands that showed the biggest year-over-year improvement in our annual CX benchmark. See the May 20, 2014, “[How Companies Improved Their Customer Experience Index Scores, 2014](#)” report.
- ⁹ Net Promoter and NPS are registered service marks, and Net Promoter Score is a service mark, of Bain & Company, Inc., Satmetrix Systems, Inc., and Fred Reichheld.
- ¹⁰ Source: “2013 CXPA Innovation Award Submission,” CXPA, 2013 (http://www.cxpa.org/resource/resmgr/2013mie/blue_cross_blue_shield_of_mi.pdf).
- ¹¹ In just 18 short months, customer experience professionals at Rogers Communications (Canada’s largest telecommunications company) developed and gained support for a new customer experience measurement program. The program is poised to take the company from disparate siloed data to a holistic view of experience across all of a customer’s key moments of truth. See the December 20, 2011, “[How Rogers Communications Unified Its Approach To Customer Experience Measurement](#)” report.
- ¹² Edward Jones has raised its score on Forrester’s Customer Experience Index by eight points since 2011. In 2012, Forrester interviewed the company to find out what the firm had done to drive the first five points of that increase. See the July 2, 2012, “[How Companies Improved Their CXi Scores, 2012](#)” report.
- ¹³ Firms that seek to differentiate based on customer experience must transform the way their companies operate. Customer experience professionals have the tools required to guide this transformation, but they need the help of others to operationalize fundamental changes within the business. See the January 10, 2013, “[Adapt Business Process Improvement For Customer Experience](#)” report.
- ¹⁴ Blue Cross Blue Shield of Illinois was one of 25 firms whose scores went up by five or more points in Forrester’s Customer Experience Index, 2012. See the July 2, 2012, “[How Companies Improved Their CXi Scores, 2012](#)” report.
- ¹⁵ To create reward programs that effectively further their customer-centric goals, companies must first determine the employee behaviors that drive their intended customer experience and then change both formal and informal reward structures so that they motivate those behaviors. See the February 24, 2014, “[Drive Customer-Centric Employee Behavior With Rewards And Recognition](#)” report.
- ¹⁶ AT&T’s scores on our Customer Experience Index, 2013, went up by more than five points in both the wireless service provider and TV service provider categories. We spoke to leaders from the company’s AT&T Mobility unit to understand what actions drove those improvements. See the May 21, 2013, “[How Companies Improved Their Customer Experience Index Scores, 2013](#)” report.
- ¹⁷ This report explains how customer experience professionals need to embrace disciplined simplification to build innovative customer experiences. See the November 10, 2014, “[The Power Of Disciplined Simplification](#)” report.
- ¹⁸ Source: Harley Manning and Kerry Bodine, *Outside In: The Power of Putting Customers at the Center of Your Business*, Amazon Publishing, 2012 (<http://outsidein.forrester.com>).
- ¹⁹ This report provides a framework that will help customer experience professionals develop a strategic plan

to leverage their customer experience ecosystems to deliver new experiences that drive differentiation and long-term value. See the June 27, 2013, “[Customer Experience Innovation Demystified](#)” report.

²⁰ Nike+ combines technology in the company’s shoes with Apple products and features at [nikerunning.com](#) to help runners track their performance and improvement over time. See the January 18, 2011, “[Mastering Emotional Experience Design: Address Customers’ Real Goals](#)” report.

²¹ Refer to pages 105 to 108 of the following book. Source: Harley Manning and Kerry Bodine, *Outside In: The Power of Putting Customers at the Center of Your Business*, Amazon Publishing, 2012 (<http://outsidein.forrester.com>).

²² To deliver a great customer experience, firms must orchestrate a complex system of interdependent people, processes, and technology that Forrester calls the customer experience ecosystem. But pushing change across that ecosystem is hard. That’s why many CX leaders turn to business process improvement teams for help. See the January 10, 2013, “[Adapt Business Process Improvement For Customer Experience](#)” report.

²³ Forrester Research’s customer experience team conducted an internal research project that involved reviewing several sources about company culture.

²⁴ Fidelity, with initial help from the Stanford University Institute of Design — known as the d.school — involves a cross-functional set of employees as well as consumers through a research, ideation, and prototyping process when creating new products. The firm also includes employees from behind-the-scenes areas such as legal and compliance in these sessions. See the December 19, 2012, “[Reinvent Customer Experience](#)” report.

²⁵ Co-creation is the process of face-to-face active collaboration for the improvement and/or innovation of mutually beneficial products, services, or experiences. See the January 30, 2013, “[Executive Q&A: Customer Experience Co-Creation](#)” report.

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« CARL ERICKSON, client persona representing Customer Experience Professionals

