



# 15 MAJOR CUSTOMER EXPERIENCE TRENDS IN 2021

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nextcontinent

# We are happy to publish the 15 major Customer Experience trends in 2021.

In 2021, companies of all sizes and sectors witnessed new Customer Experience trends.

This report on Customer Experience trends is the first of its kind—built on the vision of specialists from multiple countries and sectors, and enriched with our teams' expertise in the field.

As a global consulting network, our Nextcontinent teams pay close attention to all business and technology evolutions and their impact on organizations, cultures, ways of working, skills, and more.

We warmly thank the survey respondents for their time and the detailed answers they provided. As Customer Experience experts, they contributed depth and insight to this fascinating, fast-moving topic.

I hope you enjoy reading the 15 major Customer Experience trends highlighted in the following slides!



**François POUZERATTE**

*Nextcontinent - Managing Director*

# According to our respondents on the 2021 Customer Experience trends:



## Customer expectations

1. Is personalized marketing booming?
2. Is NPS still the king of Customer Experience indicators?

NO  
YES



## Impacts of digitalization

3. Are digital channels preferred throughout the Customer Experience journey?
4. Do companies systematically use data from several internal sources to better personalize their Customer Experience?
5. Do employees crunch data to better answer their customers?
6. Is Artificial Intelligence a leverage to improve Customer Experience?

NO  
NO  
YES  
YES



## Governance

7. Is Customer Experience always monitored at a central level?
8. Are Customer Experience projects always led by a dedicated team?
9. Is there a connection between a customer-oriented process and a financial decision?

NO  
NO  
YES



## Focus on employees

10. Does improving Customer Experience go together with improving the employee experience?
11. Are customer-oriented incentives compatible with employees' satisfaction?
12. Are the teams regularly trained to improve the Customer Experience?

NO  
YES  
YES



## Perspectives

13. How did Covid-19 impact Customer Experience digital projects?
14. What are the investment priorities?
15. How do the companies foresee Customer Experience in the near future?

# Is personalized marketing booming?

**Market positioning is undoubtedly linked to marketing strategy**, ranging from the least personalized actions (mass marketing) to the most personalized ones.

The movement toward personalization does not seem to be high; only **one** respondent chose a personalized marketing approach. While mass marketing is no longer able to meet today's customer expectations, it turns out that personalized marketing is not as profitable as it seems.

Most of the pioneer companies offer targeted marketing to their customers (**63%** of the responding companies), while companies that consider themselves to be aligned with their competitors mainly offer segmented marketing (**66%**).

While the **Service to Users sector targets segmented marketing** (**100%** of responding companies), the **BtoBtoC providers are oriented toward targeted marketing** and collect customer data throughout the entire value chain.

**Mass marketing** is undifferentiated marketing and advertising. It most often uses high-audience media and proposes a message or offer with little or no personalization.

**Segmented marketing** divides a population or market into homogeneous categories in order to address each segment in a specific and personalized manner.

**Targeted marketing** is like segmented marketing, with the addition of transactional and buying behavior data to refine the segmentation.

**Personalized marketing** uses targeted promotions and communications according to each customer's profile, based on their transactional data and behaviors in real time (*e.g., using Artificial Intelligence technologies*).



Only **one** French responding company has built a personalized marketing strategy (Retail, 50-499 employees).



**All Banking/Insurance responding companies say their Customer Experience positioning is aligned with their competitors'.**



**Small and medium-sized companies**, who are often challengers in their markets, can bring **new value propositions** through segmented or targeted marketing (new offers, new tools, etc.) to position their Customer Experience ahead of the main players in their sectors.



**We need to know more about our customers and customers of customers.**  
*Retail, Argentina, 1,000+ employees*



# Is NPS still the king of Customer Experience indicators?

NPS is used in all countries, closely followed by the Customer Conversion Rate and CSAT. Companies believe this brand-image indicator is the **best reflection of a successful Customer Experience**.

50% of the respondents that set up incentives for their employees refer to the NPS as the main indicator to measure performance.

However, the responding companies—mainly those with 1,000 employees—are tentatively exploring **new ways to measure Customer Experience**, such as Usage indicators, CPA (Cost Per Acquisition), Annual Survey Praxis (B2B satisfaction survey), etc.

Internally, more and more respondents search to **measure the customer orientation of the company and its employees**. The Customer Orientation Score (COS) is an example of a scientific operational diagnosis tool that companies of all sizes and sectors can use.

## Global ranking

- 1) **NPS** - Net Promoter Score measures the willingness of customers to recommend a company's products or services to others.
- 2) **Customer conversion rate** - The number of conversions divided by the total number of visitors.
- 3) **CSAT** - Customer Satisfaction collects customer opinions on very specific points, such as a product or service, a contact with After-Sales Service, a shopping experience, a website update, etc.
- 4) **Churn** - The customers lost per total number of customers in the period.
- 5) **CES** - The Customer Effort Score is a single-item metric that measures how much effort a customer must exert to get an issue resolved, a request fulfilled, a product purchased/returned, or a question answered.



**Churn** is a strong alternative indicator in France but is not used at all in Spain.



**Retail and Banking/Insurance** responding companies generally use multiple indicators to measure customer satisfaction.

**BtoBtoC and Service to Users** responding companies do not use CES at all.



Customer Experience indicators can (and should!) also be used as a financial argument. With customer satisfaction closely linked to customer engagement, a notable increase in customer satisfaction is a proof of profitability and acts as the impetus to unlock budgets for future projects.



We aim at deploying customer satisfaction measurement on a large scale across all channels and communicate it widely within the company. *Banking/Insurance, France, 1000+ employees*



# Are digital channels preferred throughout the Customer Experience journey?

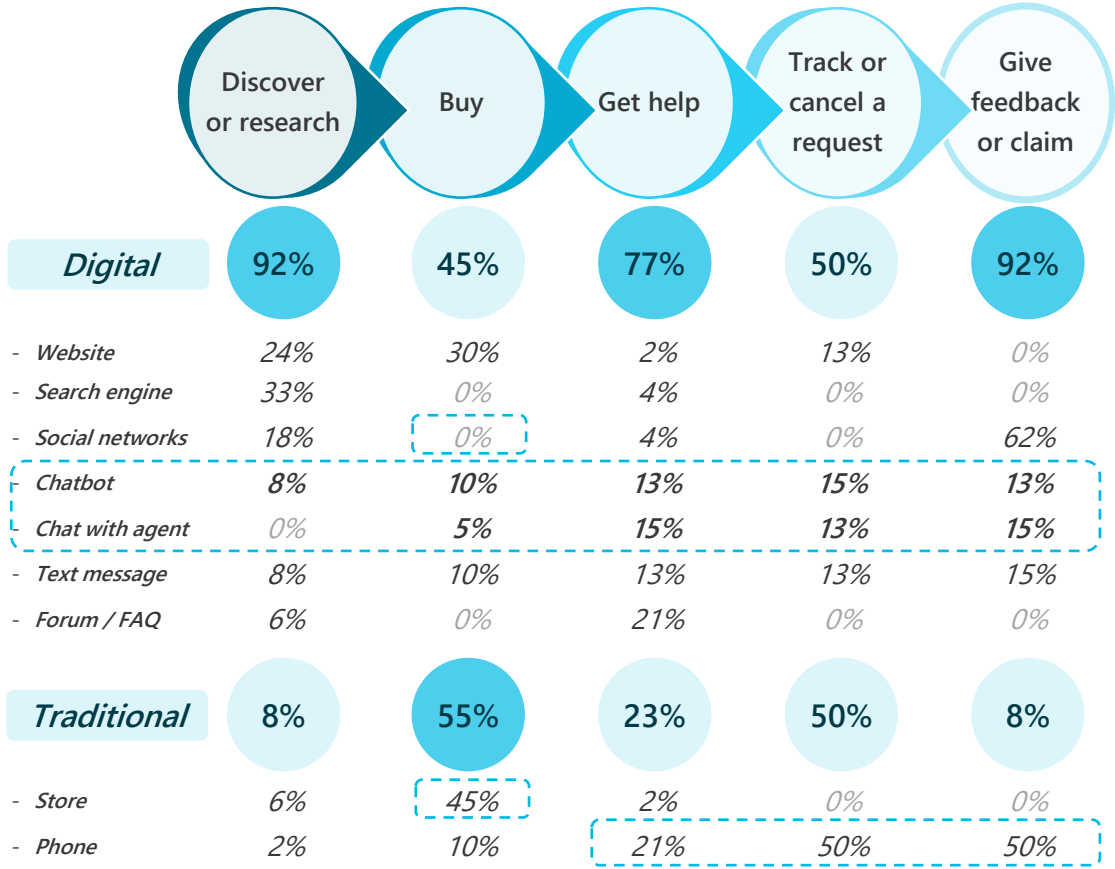
According to the responding companies, which all provide digital solutions, customers tend to prefer digital channels for most of their journey. Digital channels are particularly popular to discover or research (through search engines, websites, social networks), to get help (forums/FAQs, chats) and to give feedback or claims on a product/service (social networks).

Of the responding companies that consider themselves to be pioneers in Customer Experience, **40%** do not have any stores. They offer a fully digital customer journey.

However, **this does not mean neglecting the importance of traditional channels**, which are still preferred for buying (stores rank first) and for tracking or cancelling a request (most commonly by phone).

The rise of omnichannel leads to channel specialization by stage of the customer journey. It must be seen as an **opportunity to build differentiated strategies** according to the channel role in the customer journey.

Among the responding companies, even if digital channels are generally preferred, stores are preferred to buy, and phone is preferred to get help or give feedback.



→For more on the impact of digital on Customer Experience, see this [study](#)



→For more on the impact of Artificial Intelligence on Customer Experience, see this [white paper](#)



Eurogroup Consulting France in partnership with INRC (Institut National de la Relation Client)

“ We will optimize flow allocation to guide customers to the most appropriate channels or client advisors according to their requests, by encouraging the use of digital technology for simple requests. Eurogroup Consulting working group on Customer Experience, France, 2021 ”

# Do companies systematically use data from several internal sources to better personalize their Customer Experience?

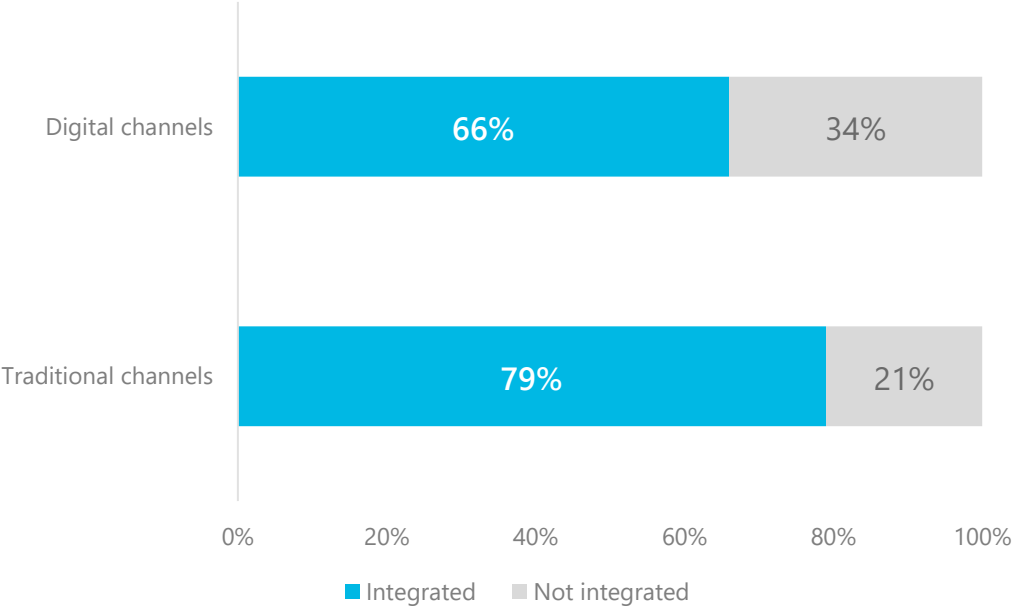
Most of the responding companies say they interface their channels to offer a seamless customer journey.

Such data integration also **reinforces the digital path and the link with traditional channels** by offering customers services such as online payments, click-&-collect, etc.

Today, **over 90%** of the responding companies use data from their websites or chat with live agent, and **79%** use data from their stores or phone channel.

Data integration appears to be higher when Customer Experience is at the center of a company's processes. This is particularly true for web channel and chat with live agent (**100%** of the respondents that place the customer at the core of their processes interface data from the channel), social networks, and stores (**86%** of the respondents).

Among the responding companies, most of the channels, traditional and digital, are interfaced.



Digital channels: Website, Search engine, Automated chatbot, Chat with live agent, Social networks, Forum, Text message

Traditional channels: Store, Phone



92% of Argentine responding companies interface their channels.

Service to Users and Retail are the sectors that interface channels most.



64% of Service to Users responding companies



62% of Retail responding companies



Small and medium-sized responding companies (< 500 employees) interface data from most of the channels.



We want to become the best omnichannel player in the market, making sure we provide the best experience to our customers, no matter where and when they want to get it touch with us. *Retail, Spain, 1,000+ employees*





# Do employees crunch data to better answer their customers?

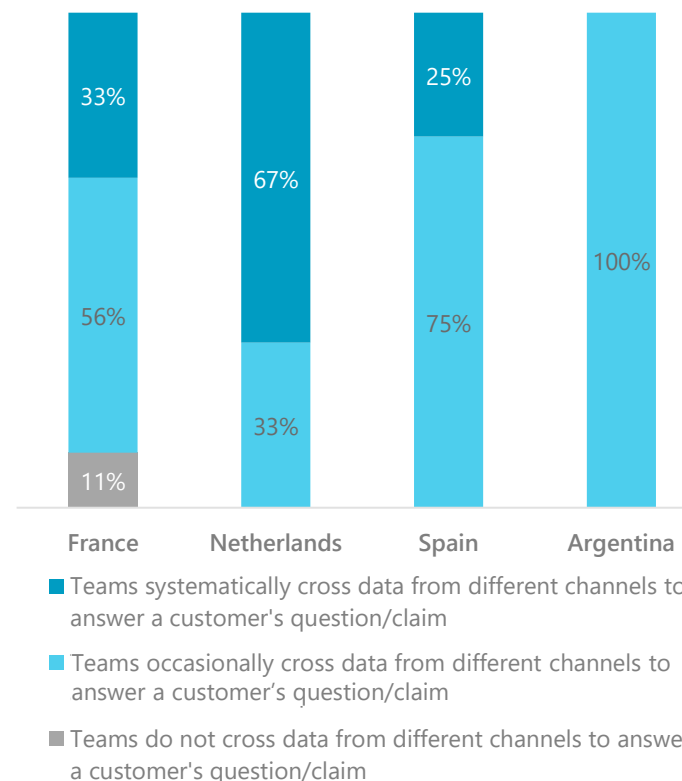
When channel integration is not fully in place, **95%** of the responding companies use employees to manually crunch customer data from multiple channels. **30%** of the respondents even ask their employees to systematically do so in order to better know their customers and answer their requests.

Manually cross-referencing data appears to be the second-best solution, but it has drawbacks:

- **Complex work and lost time:** Employees must perform additional low added-value tasks instead of focusing on the customer relationship.
- **Limited omnichannel management:** When data crunching is not performed systematically (**65%** of the responding companies do not systematically cross data, and **5%** do not cross data at all), information can be lost due to silos between channels.
- **A fragmented customer journey:** Finding the appropriate answers can take time, and people can make mistakes.

Nonetheless, among the responding companies that manually crunch data, only a few say they will probably automate the process with a digital tool.

*In the Netherlands, up to 67% of the responding companies ask their employees to search for data in multiple databases to answer a customer's question or claim.*



Employees from **Banking/Insurance** crunch data from multiple databases to know their customers and answer their questions or claims:



50 % of employees use data from other channels systematically.



50 % of employees use data from other channels occasionally.



Companies of < 50 employees tend to systematically cross data (**50%** vs. 33% for the others).



Companies whose channels are not interfaced could implement BI tools as a quick win to save their employees from manually investigating all their databases.

**We aim at developing the technological building blocks to better manage omnichannel interactions (email, telephone, Internet, etc.). Banking/Insurance, France, 1,000+ employees**



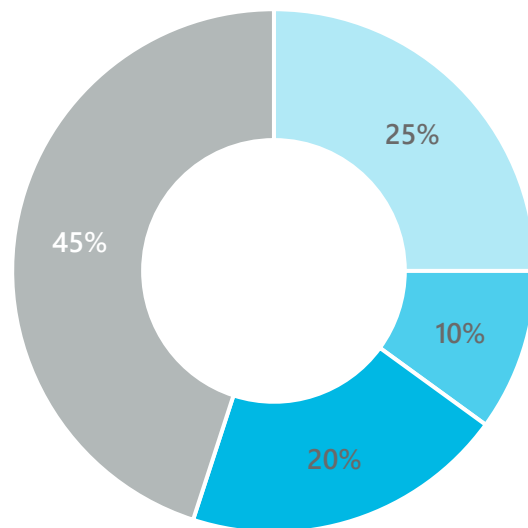
# Is Artificial Intelligence a leverage to improve Customer Experience?

Artificial Intelligence (AI) solutions are becoming key for all companies to manage their Customer Experience. While more than 50% of the responding companies already use AI technologies to improve their Customer Experience, half of the remaining ones (mainly with 1,000+ employees) plan to adopt one AI technology in the coming years.

A large majority of the responding companies that place Customer Experience as a top priority for their upper management include AI technologies in their Customer Experience. Today, 45% of the responding companies use AI to improve interactions with their customers (front office) and 30% to generate analysis and insights (back office).

While 75% of the Banking/Insurance respondents use an AI technology with a focus on the front office, 55% of the Retail respondents use AI technologies to improve customer interactions (front office) and generate analysis and insights (back office).

Over 50% of the responding companies use an AI technology, either for front office or back office.



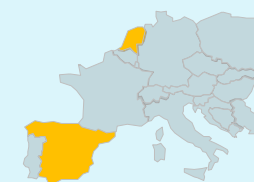
AI is used to improve interactions with customers

AI is used to generate analysis and insights

AI is used for both objectives

AI is not used

In Spain and the Netherlands, fewer than 1/3 of the responding companies use an Artificial Intelligence (AI) technology.



33% of Dutch responding companies use an AI technology

No Spanish companies on this panel use an AI technology.

Service to Users and B2B2C providers are the sectors with lower use of an AI technology:



67% of these companies do not use an AI technology, but half of them plan to adopt one in the coming year.



50% of these companies do not use an AI technology, but all of them plan to adopt one in the coming year.



All responding companies of 1,000+ employees that do not yet use an AI technology plan to adopt one in the coming year.

“Tomorrow’s client advisors will have to find in Artificial Intelligence a support to increase their skills and to work on their emotions. Service to User, France, 1,000+ employees”

# Is Customer Experience always monitored at a central level?

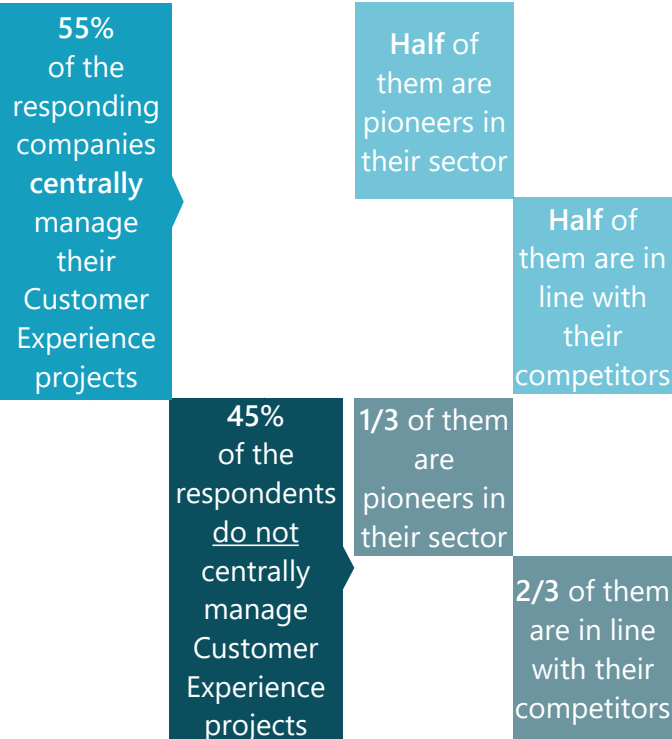
A large majority (95%) of responding companies indicate that Customer Experience is either all or part of their upper management's objectives and roadmap.

More than half of them rate Customer Experience as an absolute priority that is followed at a central level.

Respondents that indicate they follow Customer Experience at the ExCo level structure even more processes around the customer's perspective (55% of them know their customers' expectations and adapt their processes accordingly). This often gives them a leading position in their market.

On the other hand, it seems more difficult for companies that place Customer Experience at middle-management level to clearly track their processes from the customer's perspective (37% of the respondents vs. 55% for those where ExCo directly follows Customer Experience). They have a vision of the customer journey, but the customer perspective is not at the center of their decisions.

Companies are more likely to be pioneers in their sector when they manage their Customer Experience projects at central level.



French and Argentine responding companies place their customers at the center of their decisions.



Customer Experience is a top priority for 55% of the French respondents.

Customer Experience is a top priority for 100% of Argentinian respondents.



The most customer-oriented respondents operate in the Retail sector (55% of the companies), where strong competitive pressure seems to position the Customer Experience as a differentiating factor.



Companies with 1,000+ employees are the most customer-oriented (63% of the companies).

Might these companies have siloed processes, requiring the reengineering of their processes for an impactful Customer Experience?

Customer Experience is handled by our Product Management organization: Product Managers define the priorities and new orientations for Customer Experience. They rely on the other teams to carry out our Customer Experience projects (technical development, data, design, marketing, production...). Retail, France, 50-499 employees

# Are Customer Experience projects always led by a dedicated team?

Customer Experience digital projects are often led by **several departments**, with at least Marketing and IT involved.

Responding companies that involve all departments in their Customer Experience projects establish their **monitoring at the upper-management level** for more consistent corporate governance.

However, it seems that such project governance does not make it easy to create a competitive advantage. **Only 8%** of the companies that use their Marketing and IT teams to run Customer Experience digital projects consider themselves to be pioneers in their markets.

Among the companies that say their Customer Experience digital projects are led by a **multidisciplinary team**, **66%** position themselves as pioneers in their sector. Is this a key to success?

*Customer Experience projects are often led by cross-functional teams*

**35 %**

of the respondents include **several departments** in their Customer Experience digital project governance

**35 %**

of the respondents ask **both IT and Marketing** teams to run their Customer Experience digital projects

**30 %**

of the respondents say their Customer Experience digital projects are led by a **multidisciplinary team**

**Dutch and French** responding companies conduct most Customer Experience projects with cross-functional teams.



66% of Dutch responding companies conduct Customer Experience projects with cross-functional teams.



44% of French respondents conduct Customer Experience projects with cross-functional teams.



Small and medium-sized companies are more willing to run Customer Experience projects with a multidisciplinary team, probably due to their staff size.



We have a strategy where Customer Experience is a key component. We will work with specific project teams to make the necessary changes. *Retail, Netherlands, 1,000+ employees*



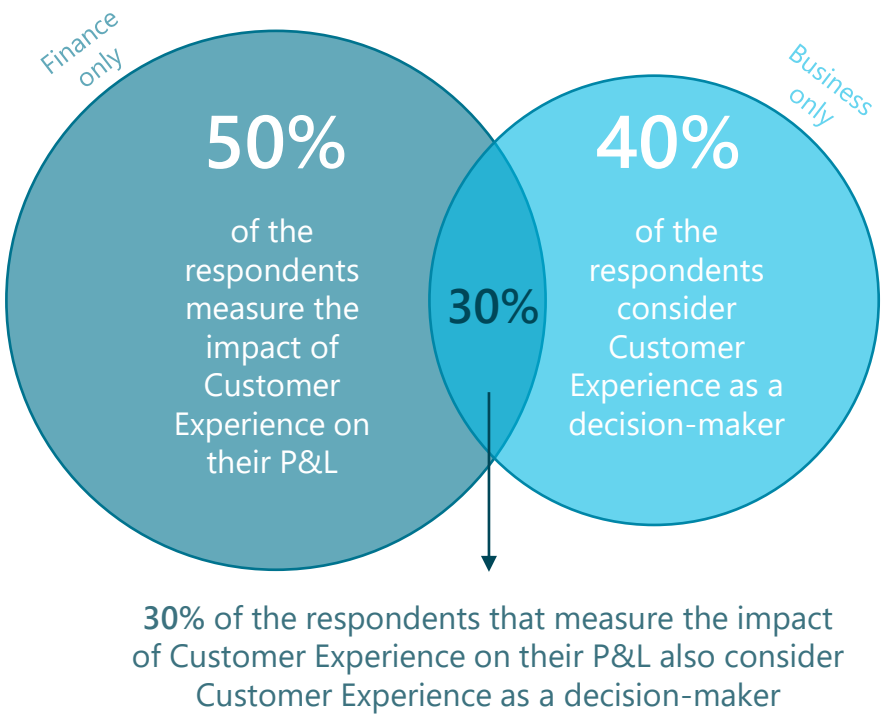
# Is there a connection between a customer-oriented process and a financial decision?

Most of the responding companies seem to still follow Customer Experience from a means perspective rather than from a results perspective.

Half of the companies measure the impact of Customer Experience on their P&L (Profit & Loss). 40% of them put their customers at the center of their decisions and processes.

Up to 30% of the companies make decisions weighing both the customer vision and the financial result. Not surprisingly, these companies also consider Customer Experience as a priority for upper management, indicating that Customer Experience is becoming a pillar of corporate governance.

Among the responding companies, even when Customer Experience is a top priority for upper management, it does not always weigh in both business and financial decisions.



Spain is on the leading edge; 75% of its responding companies measure the impact of Customer Experience on their P&L.



Retail leads in connecting the customer vision with financial results (64% of responding companies).

Respondents from Banking/Insurance are lagging behind; 75% of them do not measure the impact of Customer Experience on their P&L.



Medium-sized responding companies (50 to 999 employees) are best-in-class; over 65% of them measure the Customer Experience impact on their P&L.

Major responding companies may have a gap to fill: 42% of them measure the Customer Experience impact on their financial results—only 17% of which weigh it along with the customer vision.

“ It is now necessary to go further and introduce the Customer Experience dimension in other sectors (which generally do not have regular contact with customers). Retail, Spain, 500-999 employees ”

# Does improving Customer Experience go together with improving the employee experience?

At the global level, the measurement of employee satisfaction is growing: **60%** of the responding companies measure their employees' satisfaction, and **50%** of those that do not yet measure it plan to do so in the short term.

Responding companies that place the customer at the center of their decisions are more likely to monitor employee satisfaction and link incentives to Customer Experience results:

- **75%** of them measure employee satisfaction
- **75%** of them offer incentives based on Customer Experience results (*vs. 60% on average*)

At the same time, **over 70%** of the respondents that measure the impact of Customer Experience on their P&L also measure employee satisfaction and offer incentives as ways to contribute to profit generation.

The quality of the Customer Experience a company wants to offer depends on the quality of its employees' experience at work. Indeed, investment in People & Skills is the top priority for **40%** of the responding companies and ranks among the top three priorities for **95%** of the respondents.

## How companies measure employee satisfaction (examples)

- Annual climate survey analyzed with the Board of Directors and Management
- Regular "quality of worklife" barometer
- NPP - Net Promoter for People

**NPP** measures employee engagement. This indicator was invented by Apple as an adaptation of the NPS (Net Promoter Score) traditionally used to measure customer satisfaction. Apple invented NPP to foster employee engagement in its stores.

Spanish and Argentine responding companies take employees' satisfaction more into account.



**75%** of respondents measure employee satisfaction



Change is underway for French responding companies; **88%** expect to be measuring employee satisfaction in the coming year.

Employees from **Service to Users** and **Retail** companies regularly give feedback on their satisfaction:



**67%** of Service to Users respondents measure employee satisfaction.



**64%** of Retail respondents measure employee satisfaction.



Employee satisfaction is mostly measured by responding companies with fewer than 1,000 employees (**86%**), but large companies plan to do it in the coming year.

The situation during Covid created numerous aspirations such as: social responsibility, greater sense of mutual support, reevaluation of priorities and lifestyle, and awareness of others' needs in social, ethical, moral and human beings. How will the health and economic crisis we face influence the consumption, life and work habits of each of us? *Trends observatory, "How will the health and economic crisis we face influence the consumption, life and work habits of each of us?" Nextcontinent, 2020*



# Are customer-oriented incentives compatible with employee satisfaction?

As mentioned previously, **40%** of responding companies do not monitor employee satisfaction.

Surprisingly, there is no link between the monitoring of employee satisfaction and the incentives that companies propose to their teams based on Customer Experience results.

This is even more striking when looking at company size. Customer Experience-based incentives are mostly offered by large companies (1,000+ employees), while employee satisfaction is mainly measured by small and medium-sized companies.

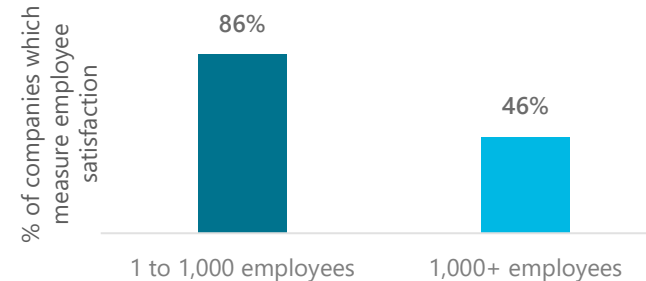


Giving equal attention to Customer Experience and employee satisfaction is not a new concept, but it is on the rise. In order to achieve long-lasting profitability, it is critical that companies of all sizes weigh the experience they offer their customers with their employee-satisfaction level and the performance they target. Establishing both individual and collective monitoring of these pillars is clearly a condition for success.

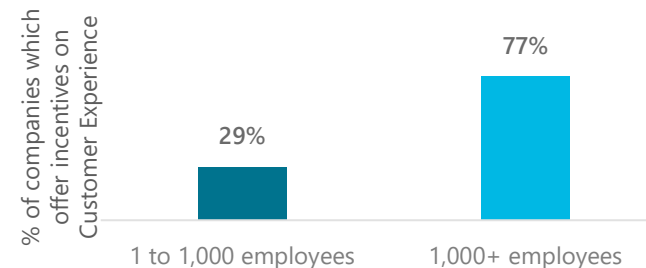
A significant part of the variable salary is conditioned by the expectation of objectives for the team on Customer Experience (satisfaction rate, etc.). *Retail, France, 1,000+ employees*

Extra bonus for loyalty, extra bonus for a perfect Mystery Shopper report, retail games for punctual sales actions, best employers goes with customers for loyalty trips. *Retail, Spain, 1,000+ employees*

Among the responding companies, employee satisfaction is mostly measured by small and medium-sized companies: 86% of the companies with <1,000 employees measure their satisfaction.



Among the responding companies, incentives are mostly offered by large companies: 77% of them offer incentives to their employees.



Most of the responding companies in France and Argentina offer incentives that encourage employees and managers to engage with Customer Experience:



75% propose customer-oriented incentives, but only 50% of them measure employee satisfaction.



67% propose customer-oriented incentives, but only 44% of them measure employee satisfaction.

In Spain, 50% of the respondents offer customer-oriented incentives, while 75% measure employee satisfaction.

Employees and managers from the **Service to Users** and **Retail** companies often receive customer-oriented incentives:



67% of the Service to Users companies offer incentives, but only 33% of them measure employee satisfaction.



64% of the Retail companies offer incentives, but only 36% of them measure employee satisfaction.

# Are teams regularly trained to improve the Customer Experience?

**85%** of the responding companies offer training in Customer Experience improvement to their managers and employees (soft skills, a customer-centric mindset, digital tools). This includes all responding companies that put the customer at the center of their decisions.

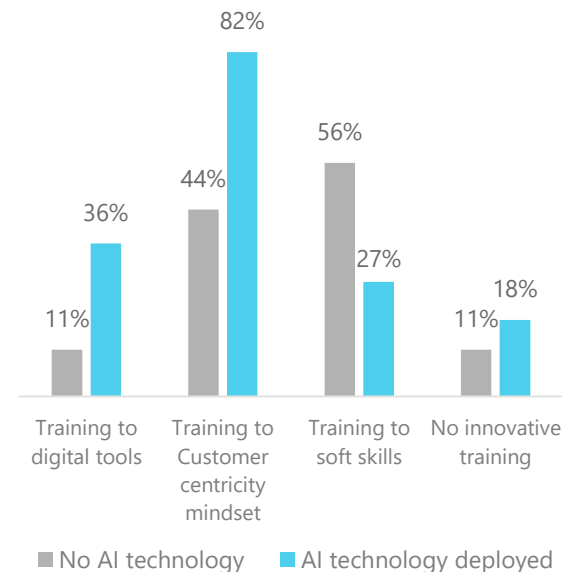
**Customer-centricity** seems to be the first topic managers and employees are trained in (**65%** of responding companies).

As for other training, employees are mainly trained to develop their soft skills (**65%** of respondents train employees in social-emotional skills). Managers are mainly trained to support the related changes (**55%** of responding companies train their managers in change management).

**Employees are less trained in digital tools** (including Artificial Intelligence) than are managers (**25%** vs. **50%**), independent of geographic region and company size.

**In addition to training, companies make efforts to reduce skill gaps**, especially by empowering employees to solve customers' issues (**90%**). It is also quite common to advise or train a colleague (**65%**).

*Responding companies that have deployed Artificial Intelligence (AI) solutions do not offer the same training to their employees. When AI is deployed, employees are first trained in digital tools and customer-centricity. Surprisingly, soft-skills training does not seem to be a priority.*



While responding companies in **France, Spain and Argentina stand out in the training they offer their employees**, companies in the Netherlands offer very limited training in Customer Experience improvement.

Pioneers in customer-centric mindset training are from the **Banking/Insurance** sector.



**100%** of the managers and over **50%** of the employees are trained in both customer-centricity and AI.

On the contrary, **Service to Users** companies offer few trainings to improve the Customer Experience.



Employees in medium-sized companies (500 to 999 employees) are better trained in topics related to Customer Experience because it is a top priority that is closely followed at a central level.

There is a biannual training program and then a customized ad-hoc program to complete the training.

*Retail, Argentina, 1,000+ employees*

Artificial Intelligence could provide customized training paths by identifying the employees' strengths and areas of improvement. *Service to Users, France, 1,000+ employees*



# How did Covid-19 impact Customer Experience digital projects?

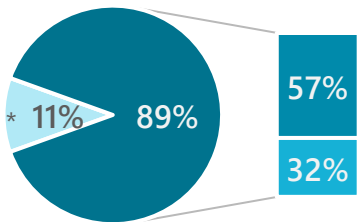
Over 89% of Customer Experience digital projects, existing and new, have been kept or accelerated by the Covid-19 crisis, independent of geographical region or company size.

Training efforts are aligned with this orientation. The responding companies that preserved their projects also invested in training in digital tools for their teams (priority is given to training managers at 59% of the companies).

As an example, some chatbots have been reoriented toward higher volumes of requests to keep the number of customer claims as low as possible.

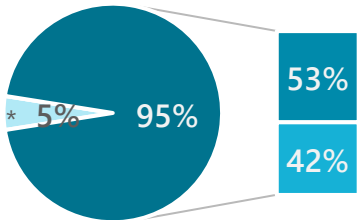
The money-saving argument seems to outweigh the creation of value, even if next year's investment priorities are People & Skills and Organization & Process.

Among the responding companies, Covid-19 did not stop the Customer Experience digital projects that were already in roadmaps and budgets before the crisis.



The Covid-19 crisis strengthens the projects. Most have been accelerated.  
The Covid-19 crisis does not impact the projects. They all keep running.

Among the responding companies, the Covid-19 crisis did not stop the upcoming digital projects linked to Customer Experience.



The Covid-19 crisis strengthens the projects. Most have been accelerated.  
The Covid-19 crisis does not impact the projects. They all keep running.

\* The Covid-19 crisis partially weakens the projects ; some of them are put on hold.

“ The Covid-19 crisis makes the generalization of home-office a stronger booster for digital projects than new technologies. The other projects, however, are put on hold.  
Thierry Chamouton, INRC (Institut National de la Relation Client), France ”

100% of the Customer Experience digital projects in France and Argentina have been kept or accelerated by the Covid-19 crisis, with a high acceleration:



75% of projects have been accelerated



63% of projects have been accelerated

Higher acceleration of Customer Experience digital projects is observed in the Banking/Insurance and Service to Users sectors:



75% of respondents have accelerated their existing projects



67% of respondents have accelerated new projects

In Retail, 18% of the Customer Experience digital projects that were already in companies' roadmaps and budgets were put on hold due to the Covid-19 crisis.



In companies of 500+ employees, a majority (60% to 100%) of existing and new Customer Experience digital projects have been accelerated as a valuable growth opportunity in this context.

# What are the investment priorities?

At the global level, the companies' investment priority to improve Customer Experience is focused on **People & Skills**. People & Skills are closely linked to **Process & Organization**, leading the companies to invest in more efficient processes. IT ranks among the companies' top priorities—but this does not always include Artificial Intelligence (AI) technologies.



All responding companies from the Bank/Insurance sector rate **IT** to be a top priority for investment.



**Artificial Intelligence** (AI) is not part of the investment priorities, independent of the cost reduction the technology can deliver over the long term.

Although the respondents with 1,000+ employees say they are willing to implement AI technologies, their projects will focus on pilots or some functionalities. The industrialization of AI within Customer Experience processes appears unlikely in the short term.

Most of the responding companies plan to gain Customer Experience expertise through **People & Skills**.

In this field, respondents prefer to make long-term investments through **training and recruitment** rather than carry out shorter-term actions, such as the distribution of incentives (Opex).

This trend is confirmed by the fact that, among the companies that do not use incentives (40%), **70% do not plan to implement any in the short term.**



Retail respondents are willing to focus their investments on both **Process & Organization** and **People & Skills**.



Although over 50% of the respondents with 1,000+ employees consider **Cost Reduction** to be a Top 3 priority, the other companies mainly plan to invest soon in Customer Experience, confirming the company leaders' hope in the future.

*Want to know more? Take a look at the [Barometer of the major French companies](#) (edition 2021)*

50% of the responding companies that invest in IT and People & Skills pay close attention to the impact of Customer Experience on their P&L. This raises the issue for those companies that do not measure Customer Experience in their P&L despite the investments to come.



The lockdown has accelerated our customers' appetite for digital solutions which become essential elements of the customer strategy but remain, at this stage, at the service of the human relationship. The deployment of digital solutions will be accelerated to meet this customer demand while focusing our efforts on the close relationship desired by the customer. *Banking/Insurance, France, 1,000+ employees*



# How do the companies foresee Customer Experience in the near future?

Exiting the Covid-19 crisis represents an opportunity for companies of all regions, sectors and sizes to question the need to reshape their Customer Experience. However, no major short-term organizational impacts are clearly identified yet.

While some responding companies are already engaged in improving their Customer Experience—

—others are just beginning to reshape their Customer Experience.



*"We will continue with the current strategy and digital transformation."*



*"We will keep pushing the team and continue focus on the customers."*



*"We are keeping the same strategy in terms of Customer Experience. The main adjustments are in the content distribution effort and customer acquisition budget by channel since we will look for a greater diversity of channels in order to be less dependent on certain acquisition channels that have become very expensive."*



*"We started to work on organizational design with focus on customer-centricity and omnichannel strategy."*



*"We need to bring the Customer Experience dimension to other areas which are not used to having regular contact with customers."*



*"We have launched our e-commerce as a first direct experience to customers. We now need to measure our Customer Experience maturity and redefine our processes to ensure excellent execution. We also need to create a brand experience and enrich it with premium services in order to improve the brand engagement."*



*"We must improve our digital communication."*



*"We will create a Customer Management Area and focus on digital transformation."*



**In Transport, the customer journey is both physical and digital (purchase and transport experience). The impact of the health crisis on travelers' behavior is not yet measured, therefore opening the field of possibilities (e.g., customer's subscription, nominative/personal transport cards instead of magnetic ones to avoid multiple manipulations, gel dispensers at agencies, marking on the ground, physical events modified both in volume and frequency, etc.).**





# Sectorial analysis: Service to Users



FRANCE



THE NETHERLANDS

## Customer Experience Strategy

With a **segmented** marketing strategy, 50% of the companies place themselves as pioneers in their market. The others are aligned with their competitors.

With a **segmented** marketing strategy, all of the companies place themselves as **pioneers** in their markets.

## Process & Organization

Customer Experience is **always** considered a top priority for upper management. **Only 50%** of the companies place the customer at the center of their processes. The others have a vision of the customer journey, but it does not structure their processes. While half of the companies involve **cross-functional teams in project governance**, the other half have their Customer Experience teams lead projects.

Customer Experience is a **top priority** for upper management. It is closely followed at a central level, and there is a vision of the customer journey. However, the customer perspective does not structure the processes.

**All cross-functional teams** are represented in Customer Experience project governance.

## Technology & Data

Without channel integration, teams barely cross data from different channels to answer customer questions/claims. Artificial Intelligence (AI) is used in **half of the companies to improve customer interactions**. The others plan to adopt an AI technology in the coming year.

Without channel integration, teams **systematically cross data from different channels** to answer a customer questions/claims.

Artificial Intelligence is not used to interface data, with no plan to implement it in the coming year.

## People & Management

Managers are regularly **updated on Customer Experience/customer centricity** as well as advanced tools (including Artificial Intelligence).

Managers are not regularly trained in Customer Experience topics.

Employees are also updated on **customer centricity and trained in social and emotional skills**. In addition, they are **empowered to solve customers' issues** and encouraged to share good practices among their teams. Mentoring/Shadowing and clear career paths for all employees are also observed.

Employees are regularly trained in **social and emotional skills**.

In addition, companies **empower their employees to solve customers' issues** and encourage them to share good practices among their teams. Mentoring/Shadowing and clear career paths for all employees are also observed.

**100%** of the companies offer incentives to encourage and foster Customer Experience, but **only 50% monitor employee satisfaction**.

All companies **monitor employee satisfaction**. They have not yet implemented incentives to encourage and foster Customer Experience, but they plan to do in the coming year.

## Impact of the Covid-19 crisis

Covid-19 has accelerated Customer Experience digital projects in all of the companies. In the near future, companies will first **reduce their costs**.

**None** of the existing or new projects have been affected by the Covid-19 crisis. In the short term, the companies will focus their investments on **People & Skills and IT**.



# Sectorial analysis: Retail



FRANCE



THE NETHERLANDS



SPAIN



ARGENTINA

## Customer Experience Strategy

With a **personalized** marketing strategy, **100%** of the companies place themselves as **pioneers** in their markets.

**50%** of the companies position themselves as **pioneers**; they have a **targeted marketing** strategy (vs. a segmented marketing strategy in the other companies).

**75%** of the companies position themselves **in line with the industry average**, regardless of whether their marketing strategy is targeted or segmented.

**50%** of the companies position themselves as **pioneers**. They have a **targeted marketing** strategy (vs. a segmented marketing strategy in the other companies).

## Process & Organization

Customer Experience is **always considered a top priority** for upper management, and the customer is at the center of their processes.

Customer Experience is **always included in upper-management goals and roadmaps**, even if it is not the priority. There is a vision of customer journeys, but the customer perspective does not structure their processes.

Customer Experience is **always included in upper-management goals and roadmaps**. **25%** of the companies **consider Customer Experience to be a top priority for upper management**.

Customer Experience is **always included in upper-management goals and roadmaps**, even if it is not a priority. Companies have a vision of customer journeys, but the customer perspective does not structure their processes.

All cross-functional teams are represented in project governance.

**50%** of the projects are led by IT and Marketing together.

**75%** of the companies place the customer at the center of their processes, but there is no common approach to manage the projects.

There is **no** common approach to managing projects.

## Technology & Data

Without channel integration, teams **systematically cross data from different channels** to answer customer questions/claims. All companies use Artificial Intelligence (AI) to **improve customer interactions and generate insights**.

Without channel integration, **teams barely cross data** from different channels to answer customer questions/claims. **AI is not used**, and only **25%** of the companies plan to implement it in the coming year.

Without channel integration, **half of the teams systematically cross data** from different channels. **50% of the companies use AI**. The other companies do **not** plan to adopt it in the coming year.

Without channel integration, **teams barely cross data** from different channels to answer customer questions/claims. However, **all the companies use AI** to either improve customer interactions or generate insights.

## People & Management

Managers and employees are regularly **updated on Customer Experience/customer centricity** as well as **advanced tools** (including AI). In addition, companies **empower their employees to solve customer issues** and **redesign job descriptions** to identify the competencies that fit the position. **All companies offer incentives and monitor their employees' satisfaction**.

Managers are regularly **trained in new managerial practices** (transformation and change management) as well as advanced tools (including AI). Employees are not regularly trained in Customer Experience topics, but they are empowered to solve customer issues. Companies also promote mentoring.

Managers are regularly trained in topics such as **new managerial practices (change, soft skills), customer centricity and advanced tools**. Employees are regularly updated on **customer centricity and soft skills**. Various mechanisms are also implemented to minimize skill gaps, such as **empowerment, mentoring, and redesigned job descriptions**.

Managers are regularly trained in topics such as **new managerial practices (change, soft skills), customer centricity and advanced tools**. Employees are mainly updated in **customer centricity**. Mechanisms are also implemented to minimize skill gaps (**empowerment, mentoring and clear career path**).

**Half** of the companies offer incentives, but they do not measure employee satisfaction.

**75%** of the companies measure employee satisfaction; **50%** of the companies offer incentives.

**75%** of the companies both measure employee satisfaction and offer incentives.

## Impact of the Covid-19 crisis

No existing or new projects have been affected by the Covid-19 crisis. In the short term, companies will focus their investments on **People & Skills**.

**50% of the projects have been weakened** by the Covid-19 crisis. Some have even been stopped.

**25% of the companies have accelerated their digital projects**, but **25%** of them have had to slow down their projects.

**75% of the companies have accelerated their digital projects..**

In the short term, companies will focus their investments on **Processes & Organization**.

In the short term, companies plan to mainly invest in **People & Skills**.

In the short term, companies will focus their investments on **People & Skills and Processes & Organization**.

# Sectorial analysis: Banking/Insurance



## Customer Experience Strategy

All of the companies from the Banking/Insurance sector position **themselves in line with the industry average**, regardless of their marketing strategy (targeted or segmented).

## Process & Organization

**50% of the companies put their customers at the center of their decisions** and conduct Customer Experience projects with cross-functional teams.

Companies that are not customer-centric conduct their Customer Experience projects mainly with their IT and Marketing teams. **Only 25% of the Banking/Insurance companies monitor Customer Experience at the central level.**

## Technology & Data

Without channel integration, **half of the Banking/Insurance companies systematically cross data from different channels to answer customer questions/claims.**

Artificial Intelligence (AI) technologies are used by 3/4 of the companies, mostly to improve customer interactions. All of the other companies plan to adopt an AI technology in the coming year.

## People & Management

Managers are regularly **trained to new managerial practices** (including transformation and change management) as well as advanced tools (including Artificial Intelligence).

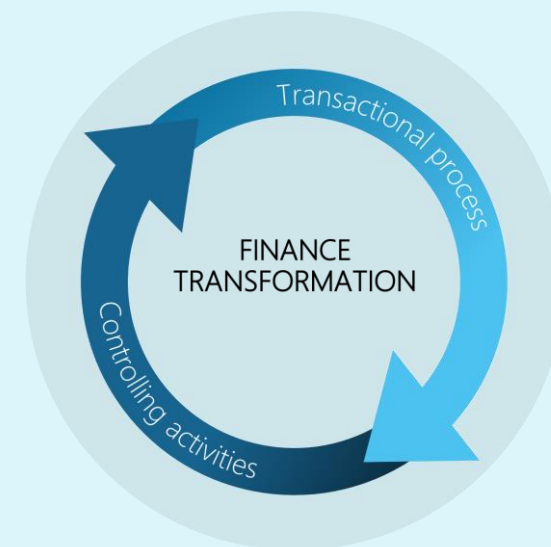
Employees are mostly updated on **customer centricity** and trained in **social and emotional skills**. In addition, they are **empowered to solve customers' issues** and encouraged to share good practices among the teams. Mentoring/Shadowing and clear career paths for all employees are also observed practices.

50% of the companies offer incentives to encourage and foster their Customer Experience. From the employee perspective, **only 50% of the companies monitor employee satisfaction.**

## Impact of the Covid-19 crisis

All Customer Experience digital projects kept running during the Covid-19 crisis; 75% of them have been accelerated.

→ To know more, see the latest news on how to [accelerate the Financial transformation](#)





# Sectorial analysis: BtoBtoC providers



## Customer Experience Strategy

With a **targeted** marketing strategy, 50% of the companies position themselves as **pioneers** in their markets. The others are aligned with their competitors.

## Process & Organization

Customer Experience is always included in upper management's goals and roadmaps. **50%** of the companies even **consider Customer Experience** a top priority for upper management, which is closely followed at a central level.  
However, although there is a vision of the customer journey, the customer perspective does not systematically structure the processes (50% of the companies).  
All Customer Experience projects are led by **IT and Marketing together**.

## Technology & Data

Without channel integration, the teams do not systematically cross data from different channels to answer customer questions/claims.  
Artificial Intelligence (AI) is used in **half of the companies to generate analysis and insights**. The other companies plan to adopt an AI technology in the coming year.

## People & Management

Managers are regularly trained in **new managerial practices** (transformation, change management and advanced tools, including Artificial Intelligence), expertise in technology or field, updates related to Customer Experience, and a customer-centric mindset.  
Only half of the companies regularly propose **updates related to Customer Experience/customer centricity** and training in advanced tools for their employees.  
In addition, companies **empower their employees to solve customers' issues** and encourage them to share good practices among teams.  
  
50% of the companies do not monitor employee satisfaction or offer incentives to encourage and foster Customer Experience—but all of them plan to do it in the coming year.

## Impact of the Covid-19 crisis






The Covid-19 crisis does not impact Customer Experience projects.  
In the short term, companies will focus their investments on **Process & Organization and IT**.



# Nextcontinent Customer Experience barometer - Methodology

This Customer Experience barometer is the first multi-country survey created by Eurogroup Consulting, a member of Nextcontinent, to assess the Customer Experience strategies and trends of key players from multiple sectors.

It has been conducted through:

<u>Multiple countries</u>	<u>Multiple sectors of activities</u>	<u>Multiple company sizes</u>
 France	 Retail	 • 1 to 49 employees  • 50 to 499 employees
 Spain	 Banking / Insurance	 • 500 to 999 employees  • 1,000+ employees
 Netherlands	 Service to Users <i>Transport/Mobility, Energy, Technology</i>	
 Argentina	 BtoBtoC providers <i>Industry, Services</i>	

20 companies were sent a 33-question survey, and they provided **anonymous** answers on their Customer Experience strategy, Organization & Processes, People & Management, Technology & Data as well as the impact of the Covid-19 crisis on their Customer Experience activities.

Both the analysis of answers and preparation of the final report were conducted by Eurogroup Consulting France.  
*The detailed survey answers are available upon request.*

# Our key findings on the 2021 Customer Experience trends



**63%** of the responding companies offer targeted marketing to their customers. Small and medium-sized companies, often challengers in their markets, can more easily **bring new value propositions into the market through segmented or targeted marketing** to position their Customer Experience in advance of the main players.



While **digital channels** seem popular to discover or research, to get help and to give feedback or claim on a product/service, **traditional channels** (stores and phones) are still preferred to buy or track/cancel a request. **The rise of omnichannel** must be seen as an **opportunity to build differentiated strategies** according to the channel role in the customer journey.

**Data integration appears to be higher when Customer Experience is at the center of a company's processes.** **100%** of the responding companies that place the customer at the core of their processes interface data from the web channel or from the chat with a live agent ; **86%** of the respondents from social networks and stores.

→ When channel integration is not fully in place, **95%** of the responding companies ask their employees to manually crunch customer data from multiple channels.



Customer Experience digital projects are often **led by several departments**, including at least Marketing and IT. Among the minority of respondents (**10%**) that indicate their Customer Experience digital projects are led by a **multidisciplinary team**, up to **43%** place themselves as pioneers in their sector.

→ It seems more difficult for the companies that position Customer Experience at middle-management level to structure their processes from the customer's perspective (**37%** of the respondents vs. 55% for companies where ExCo directly monitors Customer Experience).

→ **Over 89%** of the Customer Experience digital projects, both existing and new, have been kept or accelerated by the Covid-19 crisis, regardless the geographical region or company size.

Up to **30%** of the respondents make decisions weighing **both the customer vision and the financial result**. Not surprisingly, all such companies also consider Customer Experience to be a priority for upper management—a sign that Customer Experience is becoming a pillar of corporate governance.



Already, **60%** of the responding companies measure employee satisfaction—a sign that the quality of the Customer Experience a company wants to offer is closely linked to the quality of its employees' experience at work.

→ **50%** of the respondents that set incentives for their employees refer to the NPS as their main indicator for measuring performance. The responding companies, mainly those with at least 1,000 employees, are tentatively exploring **new ways to measure Customer Experience**.

→ The symmetry of attentions is not a new concept, but it is on the rise as companies of all sizes should weigh the experience they offer their customers with their employee satisfaction level and the performance they target. Establishing both individual and collective monitoring of these pillars is a condition for success.



At the global level, the companies' investment priority to improve Customer Experience is focused on **People & Skills**.

→ **85%** of the responding companies already offer training for their managers and employees to improve Customer Experience in areas such as soft skills, a customer-centric mindset, and digital tools—especially companies that put the customer at the center of their decisions. In addition to training, **companies make efforts to reduce skill gaps**.

→ As for IT, more than **50%** of the responding companies already use Artificial Intelligence technologies to improve their Customer Experience. **Half** of the remaining companies plan to adopt one AI technology in the coming years.

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