

# Expectations Vs. Experience:

The Good, The Bad, The Opportunity

## Table Of Contents

<b>Executive Summary</b> .....	<b>1</b>
<b>Brands Are Falling Short Of Customer Expectations</b> .....	<b>2</b>
<b>Best-In-Class Companies Are Seeing Higher Revenues And Better Results</b> .....	<b>3</b>
<b>What Separates The Best From The Rest?</b> .....	<b>5</b>
<b>A Future Full Of CX Opportunity</b> .....	<b>7</b>
<b>Key Recommendations</b> .....	<b>11</b>
<b>Appendix A: Methodology</b> .....	<b>12</b>
<b>Appendix B: Supplemental Material</b> .....	<b>13</b>
<b>Appendix C: Endnotes</b> .....	<b>14</b>

### ABOUT FORRESTER CONSULTING

Forrester Consulting provides independent and objective research-based consulting to help leaders succeed in their organizations. Ranging in scope from a short strategy session to custom projects, Forrester's Consulting services connect you directly with research analysts who apply expert insight to your specific business challenges. For more information, visit [forrester.com/consulting](http://forrester.com/consulting).

---

© 2016, Forrester Research, Inc. All rights reserved. Unauthorized reproduction is strictly prohibited. Information is based on best available resources. Opinions reflect judgment at the time and are subject to change. Forrester®, Technographics®, Forrester Wave, RoleView, TechRadar, and Total Economic Impact are trademarks of Forrester Research, Inc. All other trademarks are the property of their respective companies. For additional information, go to [www.forrester.com](http://www.forrester.com). [1-WL5MEJ]

---

Project Director: Mark Brozek, Senior Consultant, Market Impact Consulting

Contributing Research: Forrester's eBusiness and Channel Strategy Group

## Executive Summary

One word defines business executives' attitudes toward digital customer experience (CX): complacency.

Globally, executives have woken up to the importance of digital in forging great customer experiences to win, serve and retain their ever-fickle customers. But too many look to their close competitors to benchmark their efforts, thinking it's good enough to be the leader in a mediocre pack. Your customers expect more. Their expectations are forged by their experiences of leading brands across industries.

In response, executives talk the talk of digital transformation. But our study found that while the language has become a boardroom staple, most businesses still lack the wherewithal to execute on their ambition.

In April 2016, Accenture Interactive commissioned Forrester Consulting to evaluate global enterprises' CX transformation efforts. To explore this trend, Forrester developed a hypothesis that companies understand the benefits of providing excellent customer experience but are failing to execute and are falling further and further behind their customers' expectations.

In conducting 702 online surveys and 11 in-depth interviews with customer experience decision-makers, we identified a cluster of CX high performers.<sup>1</sup> These high performers prioritize experience transformation as a mindset through a set of distinct behaviors that help drive their success and separate them from their peers. The study shows that what sets them apart is the fundamental way that they think about and execute customer experience and digital transformation.

**“Against the competition, we are right in line. Relative to our customers' expectations, we are absolutely behind.”**  
— Head of digital transformation at an insurance enterprise

### KEY FINDINGS

Forrester's study yielded three key findings:

› **The good.** Almost everyone understands that digital transformation is the key to driving customer experience, and that customer experience is the key to competing in the age of the customer. Across the globe, companies are building out their CX agendas and the technologies

needed to support them, and they are seeing benefits from these efforts. Our CX high performers are doing things differently and outperforming their peers, driving better business results including increased revenue, better differentiation, and increased customer satisfaction and loyalty.

- › **The bad.** Companies are complacent with incremental improvements in their customer experiences, while customer expectations are growing at a lightning pace. Customers' expectations are driven by their best experiences — not their averages ones — yet brands think that they're succeeding by being in the middle of the pack. Enterprises lack many components of a CX strategy that will wow their customers. Some of the biggest deltas lie in their executive sponsorship, agility, analytics, and partnerships.
- › **The opportunity.** Our study indicates that there are still areas that no one has mastered. Everyone, including the CX high performers, recognize a wealth of opportunities to advance their experience transformation efforts, especially in the areas of people and skills, engaging customers, and optimizing metrics.

---

*“People see the world through a digital lens now. The digital experience and the customer experience are one and the same now; there is no delineation.”*

— Coordinator of digital strategy and marketing at a major food retailer

---

## Brands Are Falling Short Of Customer Expectations

Brands must increasingly up the ante on their digital efforts in order to keep pace with customers, who now expect (and even demand), easy, frictionless, and personalized experiences in their moments of need. Enterprises across the world prioritize improving the customer experience, and building out their digital ecosystem is the primary vehicle to facilitate this. However, customers' expectations are a moving target, and many companies find themselves slipping increasingly further behind despite significant efforts to catch up.

Forrester's data shows that almost two-thirds of decision-makers at enterprises say addressing rising customer expectations is a high or critical priority, while half report that creating a comprehensive strategy for implementing technologies critical to digital transformation is a high or critical business priority.<sup>2</sup>

Our study found that:

- › **Businesses get that digital is everything.** Businesses now understand that their brands will be rated based on the digital experiences they create for their customers. Our study found that 74% of respondents believe that digital is reinventing the overall experience that they deliver to customers. We also found that developing and improving digital channels is the top action being taken to improve customer experience. Twenty-five percent more are doing this for digital channels than for traditional channels.

*“Customers are very much impacted by the digital experiences [that they have in their personal lives]. At the end of the day, their expectations are based on their most recent experiences, and that could be on mobile, in-store, or online.”*

*— Head of digital transformation at an insurance enterprise*

- › **CX efforts are falling short of expectations.**

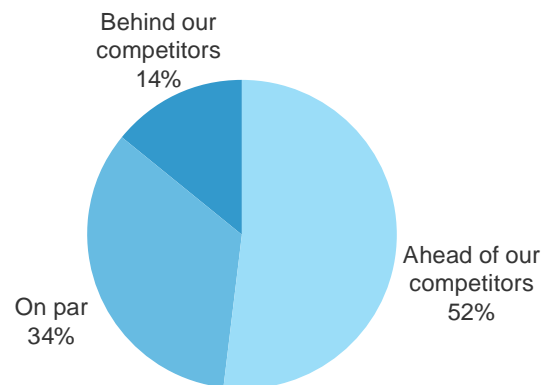
Complacency is evident when comparing how brands benchmark themselves against their direct industry competition versus how their own customers evaluate them against best-in-class companies regardless of industry. We found that while 52% of respondents believe that they are ahead of their competitors or “best in class” in their industries, only 7% are exceeding customers' expectations (see Figure 1). In 2015, 78% of companies

felt that they “met or exceeded” customers' expectations — a number that has come down 4 points to 74% in 2016, as customers' use of digital has advanced beyond the bulk of companies that serve them. What's worse, 24% of respondents who believe they “do not meet customer expectations” have a false sense of security that it is “good enough.” News flash: It isn't.

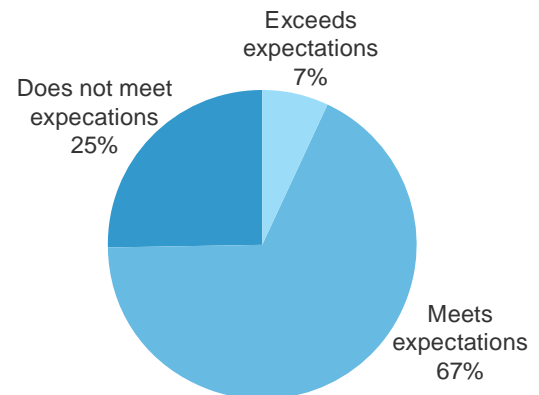
**FIGURE 1**

**Brands May Be Ahead Of Competitors, But They Aren't Coming Close To Wowing Their Customers**

**“How do you feel your brand's digital customer experience compares with competitors?”**



**“How do you feel your digital customer experience compares with your customers' expectations?”**



Base: 702 respondents responsible for customer experience at their organization across the globe

(Percentages may not total 100 because of rounding)

Source: A commissioned study conducted by Forrester Consulting on behalf of Accenture Interactive, May 2016

“The experiences our customers are having in their personal lives — whether they’re on mobile, browsers, whatever — are influencing their expectations in their business lives. It dramatically influences their expectations for companies they do business with. Against the competition, we are all in the same boat — we are just about meeting expectations.”

— Sr. vice president of digital at a US manufacturer

## BRANDS ARE PESSIMISTIC ABOUT THEIR ABILITY TO DELIVER ON THEIR CX AGENDA

- › **The gap between brands’ ambitions and capabilities is growing.** In 2015, we asked organizations to what extent they believed their company was ready to execute its digital strategy. We found that 78% of companies agreed that the processes and technology were in place, and 64% agreed that their organization was in place. In 2016, all of these measures are down (see Figure 2). Now only 69% agree that they have the right technology, 66% agree that they have the right processes, and 59% agree that they have the right organization. This is further evidence that customer demands — and businesses’ mandates to meet them — are advancing at a faster rate than companies can execute.
- › **CX efforts are more tactical than strategic.** To truly be successful, organizations must balance executing a digital strategy with transforming a business, which is no small task. In order to avoid disrupting the business, many companies implement point solutions that incrementally improve their channels and processes without truly transforming them. While these bolt-on solutions can be valuable stepping stones, companies will never be able to compete with the CX leaders that their customers are actually comparing them with until they dramatically change their mindset and re-architect their businesses with the goal of creating seamless experiences for the customer. Forty percent of respondents indicated that their customer experiences are inconsistent across channels, and only 33% believe that they are using data and analytics to a point of differentiation.

**FIGURE 2**

### Organizations Aren’t Fully Prepared To Execute Their Digital CX Strategies



Base: 702 respondents responsible for customer experience at their organization across the globe

Source: A commissioned study conducted by Forrester Consulting on behalf of Accenture Interactive, May 2016

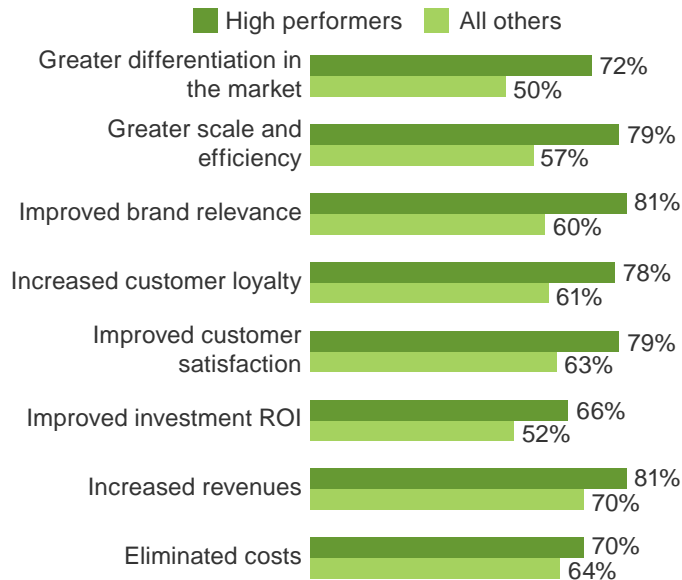
## Best-In-Class Companies Are Seeing Higher Revenues And Better Results

We identified a cluster of CX high performers — roughly 17.8% of companies — within our respondent base who are using their customer experience to drive brand differentiation. These respondents think about customer experience in a mature way. They reported that they are able to meet or exceed their customers’ expectations for customer experience 91% of the time—21 percentage points higher than their peers. Through these efforts, they are achieving higher rates of success across a number of key business metrics, including differentiation (+22%), improved brand relevance (+21%), customer satisfaction (+16%), customer loyalty (+17%), revenues (+11%), scale and efficiency (+22%), ROI (+14%), and cost savings (+6%) (see Figure 3).

**FIGURE 3**  
**CX Mastery Drives Business Benefits**

**“To what extent do you believe that your organization has realized the following benefits/outcomes of leveraging digital technology to improve customer experience?”**

(Answers of “better than expected”)



Base: 702 respondents responsible for customer experience at their organization across the globe

Source: A commissioned study conducted by Forrester Consulting on behalf of Accenture Interactive, May 2016

What is the true value of customer experience to a company? Forrester has found that there is a clear link between customer experience improvements and loyalty-driven revenue potential, based on increases in retention, enrichment, and advocacy.<sup>3</sup> Undoubtedly, companies across industries drive gains in all three of these areas by delivering better customer experience. However, there are a number of factors that must be considered when quantifying the dollars and cents value of CX. Forrester’s models show that:

➤ **The revenue impact of improving CX varies by industry.** There are four factors that shape the revenue impact of customer experience on companies: switching barriers, relationship value (multiplying the value of transactions by the frequency of transactions), recommendation effectiveness, and enrichment opportunities. Industries such as cable television providers have high market share in addition to significant switching barriers for their customers, so whether their customer

experience is awful or amazing, customers don’t have a lot of choice. In other industries, such as wireless providers, banks, retailers, and auto manufacturers, customers can easily switch vendors, their recommendations go a long way, and there are plenty of opportunities to enrich the sale. Those industries see a *lot* of benefit from even a one-point increase in their CX scores (see Figure 4).

**FIGURE 4**  
**The ROI Of CX Improvement By Industry**

**One-point improvement in CX Index score results in:**

	Annual incremental revenue per customer*	x	Average number of customers per company†	=	Annual impact per company
Wireless providers	\$2.13	x	82 million	=	\$175 million
Luxury auto	\$337.10	x	350,000	=	\$118 million
Upscale hotels	\$6.52	x	10 million	=	\$65 million
TV providers	\$3.56	x	17 million	=	\$61 million
Retail banks	\$3.92	x	15 million	=	\$59 million
Insurance firms (home and auto)	\$3.25	x	15 million	=	\$49 million
Internet providers	\$3.09	x	16 million	=	\$49 million
PCs manufacturers‡ (excluding Apple)	\$2.07	x	10 million	=	\$21 million
Credit cards	\$0.25	x	61 million	=	\$15 million

\*This analysis shows the effect on revenue potential of increasing CX Index scores by one point from the industry average CX score. Curves for individual brands differ from this industry curve. For brands that don’t have a linear relationship between CX and revenue, the revenue effect of improving CX by one point will vary greatly depending on the CX score that serves as the starting point for this analysis.

†Number of customers represents number of customers of a big player in the industry based on inputs that include Forrester’s Consumer Technographics®, Forrester’s analysts, and publicly available industry data.

‡Excluding Apple due to the high difference in price points

Base: 28,823 US online adult customers (ages 18+) of these industries who interacted with at least one brand within the past 12 months (bases vary by industry)

Source: Forrester’s Customer Experience Index Online Survey, US Consumers Q1 2015

- › **Even industries with lower revenue gains from CX can increase profitability in other ways.** In addition to causing companies to lose out on advocacy and retention, poor customer experiences hurt them financially in multiple ways, including increased service costs and higher pressure from regulators as customers file complaints. Furthermore, the worst experiences are the ones that net the highest returns for each one-point improvement on the Customer Experience Index (CX Index™), which indicates that companies in industries with nearly ubiquitously low CX scores can still get their money's worth from making enhancements. CX leaders outperform their competitors in just about every industry.<sup>4</sup>

## What Separates The Best From The Rest?

Our study found that CX high performers view experience transformation more as an organizational mindset than a series of projects. This difference in thinking supports the best practices that help make them so successful:

- › **Align senior sponsorship.** One hundred percent of our CX high performers agreed or completely agreed that their senior sponsorship is fully aligned, versus only 41% of lower performers. Having C-level buy-in is absolutely foundational to driving transformation. The CEO — who only 17% of total respondents feel is the primary driver of the customer experience agenda — must rally all of the various functional groups in the company toward a shared vision. Traditional CIOs, who own the company's digital tools and technologies, focus on back-end operational processes, or “keeping the lights on.” Traditional CMOs, who hold customer relationships, tend to have stronger creative and brand strategy skillsets than analytical and operational ones. In a transformed company, these executives — and others — must break out of their silos and collaborate, ensuring that the front and back of the house are working together to redesign processes in service of the customer.<sup>5</sup>

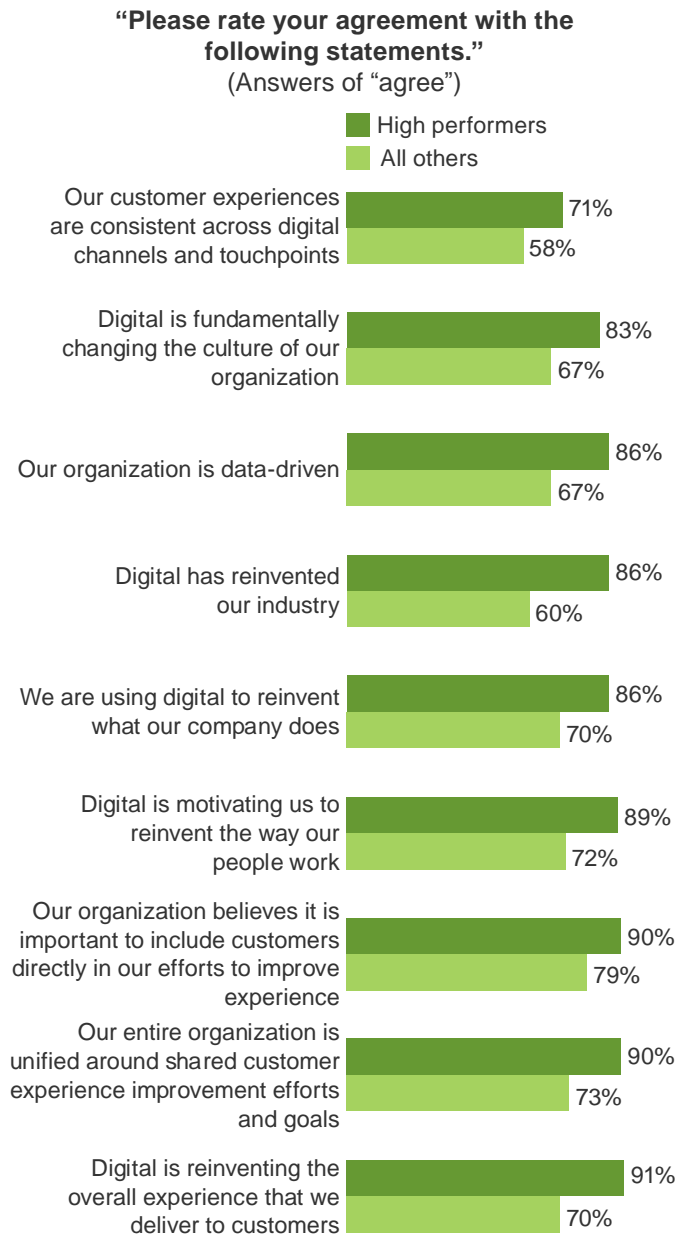
“Our COO is a huge vocal proponent for member experience, as is our CEO. We have a new president who is really pivoting his whole organization to be more about experiences than products. With that, he is making business leaders accountable for amazing experiences, and making it the most important thing that they're measured on.”

— AVP of experience design of a financial services group

- › **Adapt to a state of constant flux.** Constantly evolving customers require constant CX evolution, not a one-off improvement effort. Experience transformation requires preparing the company to pivot into a state of constant analysis and redesign. Shockingly, only 20% of our overall respondents believe that digital transformation is an ongoing initiative; 72% expect to be done with their digital transformation in four years or less. The goal should not be to implement solutions that solve discrete issues as they arise, but to intentionally plan a business agenda that recognizes the need to break down silos, embed analytics, and continuously improve.

Higher performing companies have embraced this mindset at a much higher rate than their peers. Across a series of statements, they agreed that digital is fundamentally changing their company, industry, and the way they engage with customers. Their responses are double digits higher (from 12 to 26 percentage points greater) than their peers (see Figure 5). They also see higher value than other respondents in developing/improving digital channels (+17%), integrating cross-channel customer experiences (+16%), using communities and other types of social computing (+9%), creating a dedicated user/customer experience group (+15%), creating more valuable content for customers (+13%), developing virtual reality capabilities into their customer experiences (+11%), improving personalization efforts through assets like recommendation engines (+15%), and mobilizing employees as advocates (+16%).

**FIGURE 5**  
**CX High Performers Think Of Experience Transformation As A Mindset, Not A Project**



Base: 702 respondents responsible for customer experience at their organization across the globe

Source: A commissioned study conducted by Forrester Consulting on behalf of Accenture Interactive, May 2016

“The biggest challenge for transformation in general is mindset; you need people to understand and believe that any idea is worthwhile at a strategic level. The other part is the balance between running your business on a daily basis and then committing to transformation. Transformation is a big scary word, but what can you do as you make progress on all of your projects to incrementally improve things? We need to build the company we want to be five years from now, and we need to do that starting today.”

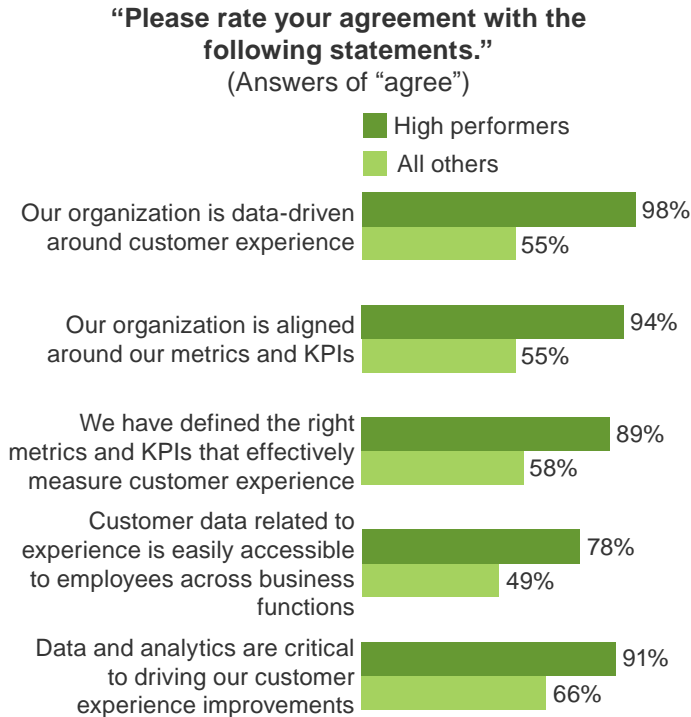
— Sr. vice president of digital at a US manufacturer

› **Turn data into insight and action.** Change happens extremely quickly in the age of the customer, threatening even dominant companies that aren’t looking for ways to continuously improve themselves. Fortunately, digital tools and channels provide companies with a wealth of data about their customers and systems that they can turn into business insights. By building a continuous connection to customers, analytical systems to act on the resulting data, and metrics to evaluate their successes, enterprises can boost their knowledge of and responsiveness to customers.<sup>6</sup>

Our study found that CX high performers have more sophisticated data and analytics practices than the rest of our respondent population (see Figure 6). High performers feel that their organization is data-driven around customer experience (+43 percentage points); that they have defined the right KPIs and metrics for CX (+31%) and aligned the business around these shared goals (+39%); that data and analytics are critical to driving CX improvements (+25%); and that customer data related to experience is easily accessible to employees across business functions (+29%).



**FIGURE 6**  
**CX High Performers Are More Sophisticated In Data Management Than Their Peers**



Base: 702 respondents responsible for customer experience at their organization across the globe

Source: A commissioned study conducted by Forrester Consulting on behalf of Accenture Interactive, May 2016

*“One of the mottos that I try to live by is ‘do what you do best and outsource the rest.’ We’re looking for partners that help us accelerate at a greater rate than we can with our internal capabilities, and also bring in best-in-class thinking to help kick off the process before we own the execution.”*

— Property telecom manager at a major US newspaper group

## A Future Full Of CX Opportunity

Overall, companies concur on the right actions to take to improve the experiences of their customers, but for a variety of reasons, many just aren’t delivering on them. Our study found major gaps (anywhere from 38% to 65%) between what’s seen as valuable to improve customer experience versus what organizations are actually executing across a broad range of efforts (see Figure 7). To help advance experience transformation, we’ve identified three core areas of opportunity that are applicable to brands at all performance levels:

› **Identify and secure partnerships.** In any transformation, companies are bound to uncover areas where they don’t have all the skills and resources that they need to move forward effectively and confidently. Leveraging partnerships intelligently can ease much of the burden of transformation, allowing the company to focus on what they’re good at and letting other fill in the gaps. Eighty-one percent of our high performers (+30% compared with others) feel that they have identified and secured their key partnerships, versus only about half of other respondents.

› **People and skills.** We asked respondents to assess the extent to which the skills required to deliver their CX agenda are fully developed. We found that none of the skills broke 50%, with leading-edge technical skills (such as Agile/Lean methods, business process redesign, and API design) near the bottom (see Figure 8). With the current pace of change in customer expectations, it’s understandable that companies lack confidence that their existing people, processes, and capabilities are going to cut it in the future. CX leaders must encourage business innovation, training, development, and the use of outsourced partners to help drive growth in these areas.

**FIGURE 7**  
**Brands Aren't Executing What They Know To Be Valuable**



Base: 702 respondents responsible for customer experience at their organization across the globe

Source: A commissioned study conducted by Forrester Consulting on behalf of Accenture Interactive, May 2016

Part of this process also includes breaking down silos so that you can maximize the impact of the skills that *do* already exist in your organization. Our study found that businesses lack internal collaboration, and that their efforts to foster more internal collaboration are focused on optimizing physical spaces. No more than 50% of respondents said they took part in any of the internal collaboration efforts we asked about. The percentages are fairly low among best practices such as customer journey mapping, creating a team that governs digital releases across channels, and assembling cross-functional task teams (see Figure 9).

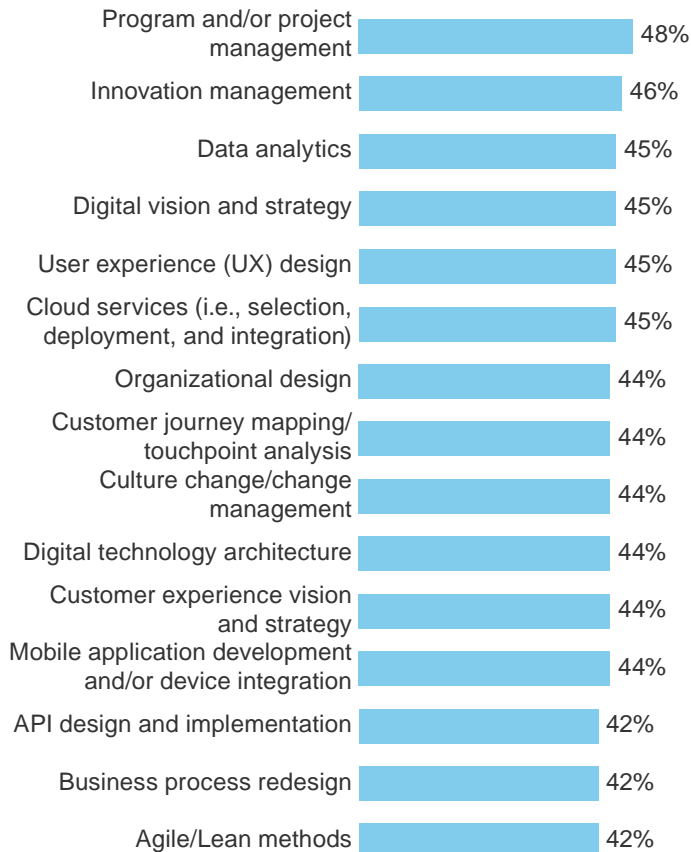
› **Engaging customers.** External collaboration — with customers in particular — is critical to an “outside-in” approach to experience transformation. Despite their beliefs that it is important to include customers directly in CX efforts, brands are still thinking “inside out,” making changes without consulting customers directly. While 81% of respondents believe that it is important to involve customers directly in CX efforts, only 57% actually do it. Furthermore, almost all respondents think it’s important to integrate cross-channel customer experiences, create a dedicated user/customer experience group, and create more valuable content for customers — but fewer than half do each of these.

**FIGURE 8**  
Organizations Lack CX Skills

“As related to customer experience efforts, to what extent do the following talents/skills exist in your organization?”

(Grouped)

Rank 8-10 (We have all the skills)



Base: 702 respondents responsible for customer experience at their organization across the globe

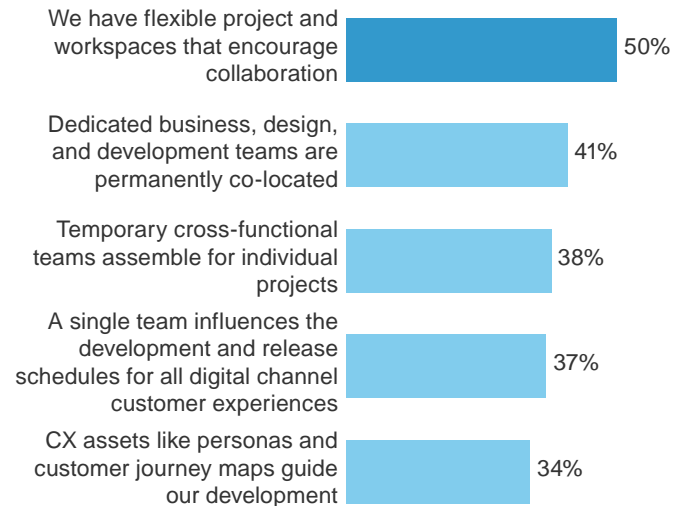
Source: A commissioned study conducted by Forrester Consulting on behalf of Accenture Interactive, May 2016

Another factor important to customers is ensuring that interactions are seamless and personalized across channels. On average, our CX high performers value qualitative customer feedback through sources like ethnographic, heuristic, and/or usability research 14% more than their counterparts. Building processes from the outside in through journey mapping and customer feedback is hugely important — and businesses often can't capture all of these insights quantitatively through big data analysis.

**FIGURE 9**  
CX Requires Better Collaboration

“In which of the following ways do you collaborate internally to improve digital customer experience?”

(Select all that apply)



Base: 702 respondents responsible for customer experience at their organization across the globe

Source: A commissioned study conducted by Forrester Consulting on behalf of Accenture Interactive, May 2016

“Voice of the customer is extremely important. Listen to what customers have to say, hear what their pain points are, [and] then remove those pain points by leveraging technology and digital, which are key enablers to do so. Key digital solutions are helping us remove issues customers are having.”

— Head of digital transformation at a global insurance company

› **Optimizing metrics.** Customer experience measurement is essential for companies to understand what's working and what's broken – yet most companies don't measure CX quality regularly, don't tie CX quality to business outcomes, and don't systematically share and act on CX metrics<sup>7</sup>. While most brands are capturing and reporting a variety of metrics, respondents suffer from data overload, failing to come to an agreement on what the most important metrics actually are. Further, metrics like acquisition and retention rates are the least frequently captured (35% and 38% respectively), despite 90% of companies believing that these metrics have value. Our study also found that only about 60% of companies are using a variety of tools and tactics to gather and act on customer insights. Companies must design strategies to collect data and set targets for their metrics to keep all stakeholders motivated and moving in the same direction.

Once again, our CX high performers surpassed their counterparts by overcoming obstacles to capturing and using CX metrics. They find it 35% less difficult to track customer interactions that span channels, 26% less challenging to get alignment across the organization on which metrics to use, 28% less challenging to aggregate data from multiple sources, 26% less challenging to connect a customer transaction to a specific person, 26% less challenging to understand what each metric really means, 23% less challenging to ensure quality and accuracy of data, and 22% less challenging to make use of the data they capture.

“The two metrics that are the hardest to solve are starting on one device and visiting us on a second device within the same experience, so just trying to understand how people are interacting across devices. It's very difficult to understand whether you visited us on multiple devices and track that as a unique item. Attribution is also very difficult.”

— *Chief digital and distribution officer of a global hospitality group*

## Key Recommendations

It's time to start thinking about experience transformation as an organizational mindset versus a series of projects and point solutions. Whether you are a CX leader or laggard, follow these recommendations to improve your CX mastery and power experiences that meet and exceed customer expectations:

### › Follow in the footsteps of the CX high performers:

- **Rally senior support.** Experience transformation demands close collaboration between your CEO, CMO, and CIO. If you are in one of these roles, then it's time you educate yourself on what it truly takes to be a leader in the digital age. If you report to one of these roles, then lobby to create a digital education program including executive intervention sessions, digital safaris, and outside-in inspiration sessions.
- **Adapt to a dynamic state of constant flux.** Brand experiences must be able to keep up with (and ideally outpace) their constantly evolving customers. To accomplish this, build speed and agility into your strategic planning, project approval, development, and delivery capabilities. This will allow your organization to continually experiment, analyze, and roll out robust change at scale.
- **Turn data into insight into measurable action.** Invest in the people, processes, and predictive analytics and data science technology needed to transform data into customer-centric insight. To drive business decisions, embrace customer-led measures of success like Forrester's CX Index or Net Promoter Score (NPS).<sup>8</sup> Then embed these metrics into your decision-making processes to ensure every decision you make is informed by customer insight.
- **Pick partners, not vendors.** Transactional vendor relationships aren't the answer. You need a small set of trusted partners that you can work with — partners that can help co-create strategy, drive innovation, and scale execution. Stop thinking in terms of 10-year cost management outsourcing deals, and start thinking in terms of value-added business partnerships.

### › Exploit opportunities to advance experience transformation:

- **Shore up skills and incent collaboration.** The talent your company needs to facilitate transformation will likely come from both inside and outside the organization. As you build out your teams, it is critical that cross-functional goals are aligned so that employees are motivated to break down silos, work across functional areas, and collaborate to achieve the shared vision.
- **Engage customers to help reinvent their experience.** Too often transformation is driven by organizations using an inside-out approach. Involve customers directly into your design processes to gain critical insights that will help you solve existing issues and anticipate future needs. Push techniques like ethnography, design thinking, iterative development, and customer co-creation to the front and center of how you develop new products and solutions.
- **Optimize metrics.** Capturing and reporting a wide variety of metrics can be helpful but also confusing. Deeply examine and understand your metric behaviors, interrelationships, and priorities to create a true scale that can measure overall CX success for your organization.

## Appendix A: Methodology

In this study, Forrester conducted an online survey of 702 customer experience decision-makers from enterprises in the US, Canada, the UK, France, Germany, Italy, Spain, Brazil, Mexico, India, Australia, New Zealand, Japan, and China to evaluate their organizations' customer experience transformation efforts. Eleven industries were covered, including automotive, food and beverage, consumer product manufacturing, electronics/technology, manufacturing and materials, retail, travel and hospitality, telecommunications services, banking, insurance, and life sciences (pharma and medical devices). Survey participants included director, VP, and C-level decision-makers in IT, marketing and communications, operations, sales, customer service, and product development. Forrester additionally conducted in-depth phone interviews of 11 respondents fitting the same profile. Respondents were offered a small incentive as a thank you for time spent on the survey. The study began in April 2016 and was completed in May 2016.

## Appendix B: Supplemental Material

### RELATED FORRESTER RESEARCH

“Winning In The Age Of The Customer,” Forrester Research, Inc., April 6, 2015

“Master Design Thinking To Accelerate Your BT Agenda,” Forrester Research, Inc., April 18, 2016

“Does Customer Experience Really Drive Business Success?” Forrester Research, Inc., July 15, 2015

“Seven Steps To Successful Customer Experience Measurement Programs,” Forrester Research, Inc., February 4, 2016

“Digital Transformation In The Age Of The Customer,” a commissioned study conducted by Forrester Consulting on behalf of Accenture Interactive, October 2015 ([https://www.accenture.com/t20151016T070749\\_\\_w\\_/us-en/\\_acnmedia/Accenture/Conversion-Assets/DotCom/Documents/Global/PDF/Digital\\_2/Accenture-Digital-Transformation-In-The-Age-Of-The-Customer.pdf](https://www.accenture.com/t20151016T070749__w_/us-en/_acnmedia/Accenture/Conversion-Assets/DotCom/Documents/Global/PDF/Digital_2/Accenture-Digital-Transformation-In-The-Age-Of-The-Customer.pdf))

“Mastering Omni-Channel B2B Customer Engagement,” a commissioned study conducted by Forrester Consulting on behalf of SAP Hybris and Accenture Interactive, October 2015 ([https://www.accenture.com/\\_acnmedia/Accenture/Conversion-Assets/DotCom/Documents/Global/PDF/Digital\\_3/Accenture-Mastering-Omni-Channel-B2B-Customer-Engagement-Report.pdf](https://www.accenture.com/_acnmedia/Accenture/Conversion-Assets/DotCom/Documents/Global/PDF/Digital_3/Accenture-Mastering-Omni-Channel-B2B-Customer-Engagement-Report.pdf))

“Customer Desires Vs. Retailer Capabilities: Minding The Omni-Channel Commerce Gap,” a commissioned study conducted by Forrester Consulting on behalf of Accenture Interactive and SAP Hybris, January 2014 ([https://www.sap.com/bin/sapcom/en\\_us/downloadasset.2014-05-may-29-15.customer-desires-vs-retailer-capabilities-minding-the-omni-channel-commerce-gap-pdf.bypassReg.html](https://www.sap.com/bin/sapcom/en_us/downloadasset.2014-05-may-29-15.customer-desires-vs-retailer-capabilities-minding-the-omni-channel-commerce-gap-pdf.bypassReg.html))

“Building The B2B Omni-Channel Commerce Platform Of The Future,” a commissioned study conducted by Forrester Consulting on behalf of Accenture Interactive and SAP Hybris, November 2014 ([https://www.accenture.com/us-en/\\_acnmedia/Accenture/Conversion-Assets/DotCom/Documents/Global/PDF/Dualpub\\_1/Accenture-Building-Omni-Channel-Commerce-Platform-Future.pdf](https://www.accenture.com/us-en/_acnmedia/Accenture/Conversion-Assets/DotCom/Documents/Global/PDF/Dualpub_1/Accenture-Building-Omni-Channel-Commerce-Platform-Future.pdf))

### RELATED ACCENTURE INTERACTIVE MATERIAL

“Digital Transformation: Re-imagine from the outside-in,” Accenture Interactive ([https://www.accenture.com/us-en/~/\\_media/Accenture/Conversion-Assets/DotCom/Documents/Global/PDF/Technology\\_7/Accenture-Interactive-Digital-Transformation.pdf](https://www.accenture.com/us-en/~/_media/Accenture/Conversion-Assets/DotCom/Documents/Global/PDF/Technology_7/Accenture-Interactive-Digital-Transformation.pdf))

## Appendix C: Endnotes

<sup>1</sup> In this report, we leveraged artificial intelligence and advanced cluster analysis to model the behaviors and characteristics of the digital customer experience high performers in our global survey to analyze what drives their success.

<sup>2</sup> Source: "Insight Platforms Accelerate Digital Transformation," Forrester Research, Inc., April 27, 2016.

<sup>3</sup> Source: "The Revenue Impact Of Customer Experience, 2015," Forrester Research, Inc., August 11, 2015.

<sup>4</sup> Source: "Does Customer Experience Really Drive Business Success?" Forrester Research, Inc., July 15, 2015.

<sup>5</sup> Source: "Winning In The Age Of The Customer," Forrester Research, Inc., April 6, 2015.

<sup>6</sup> Source: "Winning In The Age Of The Customer," Forrester Research, Inc., April 6, 2015.

<sup>7</sup> Source: "Seven Steps To Successful Customer Experience Measurement Programs," Forrester Research, Inc., February 4, 2016

<sup>8</sup> "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.