2022

CX
LEADERS

TRENDS & INSIGHTS

CORPORATE EDITION

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PREFACE

Results from this year's CX Leaders Trends & Insights Corporate Edition survey revealed an industry emboldened by optimism, with more customer experience (CX) leaders believing they are meeting the needs and expectations of their customers than at any time since 2018. While there were some indications of slowing growth (particularly in terms of head counts), growth itself was still on the menu for 2022 and, in many cases, it was the main course.

Three years on, the shift to work-from-home (WFH) is generally viewed as a positive shift within the industry. The performance of agents trained remotely continues to improve, and companies continue to find new and inventive ways to engage with, manage, and inspire remote teams with many organizations settling into highly productive hybrid models that offer the best of both worlds.

As for challenges, many remain. Chief among these are hiring and retention, legacy technology systems, and mounting fiscal pressures. CX leaders will need to navigate these and other challenges against a backdrop of rapidly evolving consumer expectations and behaviors. Naturally, the most sensible way to proceed is to always make sure the customer is the organization's North Star.

Like in previous years, this report relies on a particular set of definitions when describing different CX solutions and channels. Those definitions are as follows:

Voice-Based Interactions:
Phone, In-Person, Video Chat, etc.
Text-Based Interactions:
Online or Mobile Chat, Email, SMS, etc.
Self-Help Interactions:
Chatbots, Mobile Apps, FAQs, Kiosks, etc.
Social Media Interactions:
Twitter, Facebook, Forums, etc.

Always make sure the customer is the organization's North Star.

Select, top findings from this report:
- Seventy-four percent of CX leaders indicated their organizations are already taking significant or modest actions to address economic uncertainties (page 15)
- Eighty-six percent of CX leaders felt their organizations were generally meeting the customer care needs and expectations of customers (page 51)
- Only 31% of CX leaders are "Very Satisfied" or "Satisfied" with the CX technology stack (page 68)

A NOTE FROM
THE AUTHOR

Continuous improvement is only possible when armed with the right information. So, it is our great pleasure to twice yearly bring these CX insights to life as a part of the CX Leaders Trends & Insights series. But, our efforts are truly only possible with the help of a thoughful and engaged community. We extend our sincerest thanks to the 111 CX leaders who contributed their time, insights, and experiences to this year's survey, creating one of the most extensive Corporate Edition datasets in our decade-plus of developing CX-related research.

We'd also like to extend a word of deep appreciation to the eight CX leaders who took their participation one step further by contributing a Practitioner's Perspective to this year's report. These insights and reactions provide a window into how numbers become actions, and actions become sustainable change. Please be sure to spend some time with each of these top-notch leaders by reviewing their respective perspectives (see below).

We'd also like to thank ACT, a leading provider of performance-driven contact centers and back-office support services and our research partner for this volume of CX Leaders Trends & Insights. Be sure to check out the insightful commentary on these results by Trace Anderman, ACT's Chief Sales Officer, starting on page six.

Execs In The Know

Thanks again to this edition's practitioners! Their contributions can be found on these pages:

Paul Brandt	Jasmyn Haas	April Obersteller	Mark Killick	Jared Benesh
(p. 24)	*(p. 28)*	*(p. 52)*	*(p. 54)*	*(p. 58)*
goodleap	flume	woom pedal your planet	Shipt	State Employees' Credit Union

Lisa Oswald	Brigitte Bailey	Jim Moloney
(p. 59)	*(p. 63)*	*(p. 68)*
TRAVELZOO	FULTON COUNTY	NAVISTAR

THE 2023 CX LEADERS CONSUMER EDITION IS COMING IN SEPTEMBER
CONSIDER CONTRIBUTING A PERSPECTIVE!

We want to hear your story! Execs In The Know is always looking to share the insights and perspectives of CX leaders like you. What are your best practices, what is or isn't working well, and what are you planning for the future experiences of your customers? Promote your efforts, your brand, and yourself!

For information on how you can participate, please contact Susan McDaniel (Susan@execsintheknow.com) or Jim Von Seggern (Jim@execsintheknow.com).

METHODOLOGY

This report, the CX Leaders Trends & Insights: 2022 Corporate Edition, was developed based on results derived from a custom 85-question survey delivered via the SurveyMonkey online platform.

Surveying occurred from November 2 through December 13, 2022. Private invitations to partake in the survey were delivered by email to the Execs In The Know community and via promotion within Execs In The Know's private online community, Know It All. Invitations targeted individuals responsible for managing the customer experience and customer care programs of large Business-to-Consumer (B2C) and B2C/Business-to-Business (B2B) organizations, primarily in the United States and Canada.

The survey benefited from the participation of 111 CX leaders with individual question sample sizes ranging from 87 to 111 responses. Forty-two percent of survey participants held a title of Vice President or above. See page 13 for a detailed breakdown of this year's survey participants, including details about participation by industry, revenue, and customer type.

RESEARCH PARTNER COMMENTARY

COMMENTARY

Total Experience is the "Big Picture" Formula that CX Leaders Need in 2023

by Trace Anderman, Chief Sales Officer, ACT

Looking back on the past three years post COVID, it's clear that the most successful brands adapted by doubling down on digital platforms and UX investments. Digital transformation is now status quo and we're navigating the complexities and disruption of the widespread convergence and consolidation of platforms. It's becoming increasingly clear that the next trend for 2023 will be about how we can unlock more measurable value from our technology investments by focusing not only on multichannel enablement, but also the undervalued employee experience, and, most importantly, the Total Experience for customers engaging with brands.

The narrative we're seeing in this report corroborates exactly what we've been working on with our Fortune 500 clients in recent months. Their 2020 projects saw rapid advancements in digital and UX efforts focused on CX. But coming into 2023, we're looking at a very different economic climate with 80% of businesses becoming more focused on financials and 55% reducing budgets for new programs (page 15). It feels like the familiar "let's do more with less" scenario, but we've got good news. It's not that at all.

You've been putting everything into position from an infrastructure and technology standpoint. Now you need to connect the dots on all those different launches and deployments, and we have a model that we use to make that possible. We call it the Total Experience formula.
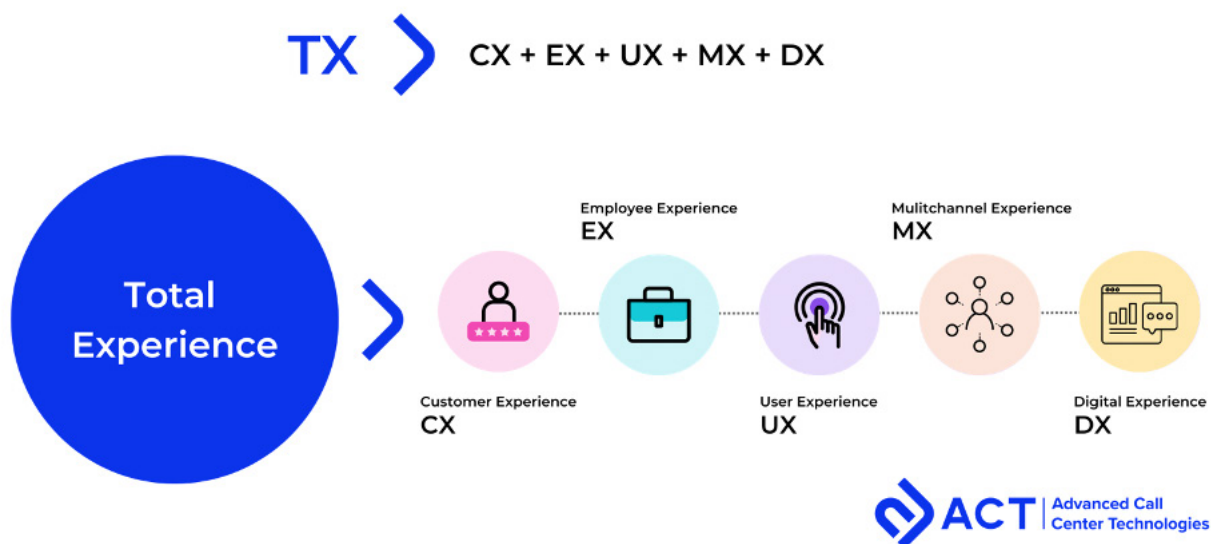
$$TX > CX + EX + UX + MX + DX$$

Total Experience is a unified and transformative end-to-end experience model that takes into account every touchpoint across your brand, and all stakeholders involved — customers, employees, and users across all digital channels and platforms.

Why are multichannel and employee experience so critical in 2023?

The results of this survey tell us that the winners of 2023 will shift their focus to a 10-thousand-foot, panoramic view of their brand to understand how multiple channels are intersecting in the customer journey. They will map and optimize the employee experience, and bring cohesion to the end-to-end CX tech stack.

The challenge of being hyper focused on Digital Experience (DX) and User Experience (UX) ever since the pandemic started is that these individual achievements in digital are great if the customer has a simple issue to resolve and a linear journey to get the help they need. That's a point of strength for brands, with 89% of CX leaders feeling they "excel" in at least one customer touchpoint (page 41). But that's clearly not the whole story when 42% of consumers say the #1 most frustrating aspect of resolving a customer care issue is "difficulty in reaching a live person" (page 84).

The Total Experience formula can help you make sense of that imbalance. Businesses have spent the past three years pulling the DX and UX levers hard. That means two levers have been undermined, Multichannel Experience (MX) and Employee Experience (EX).

There is plenty of evidence in this report where we see these major takeaways:

1. Don't Overlook the Human Factor – Employee Experience Matters

- 89% think their customers would agree that customer care agents need to be "very passionate about the brands they represent" (page 23) and 44% of consumers "prefer to speak to someone" in determining their preferred channel of care (page 83).

2. Multichannel strategy needs to be a priority in 2023

- 39% have no cross-channel initiatives started, which is up from 35% a year ago (page 46)

3. The end-to-end CX Tech Stack needs to be mapped to your Total Experience strategy

- Only 31% are satisfied with their CX tech stack (page 68) and "Legacy systems, processes and tools" were the #1 challenge for CX operations (page 51).

Another way to look at the problem statement is that great DX and UX can result in a myopic focus on perfecting very specific customer journey touchpoints. A Total Experience vision will get you out of the weeds. When you break down your operations in this model it helps to identify which adjacent or interdependent investments and efforts need to be scaled, refined or realigned to positively impact CX.

Start seeing the "Big Picture" for your end-to-end brand experience.

This report shows that CX leaders are more confident than ever in how they're succeeding in individual customer touchpoints and channels. That makes sense, nearly all of them spent the past three years launching and perfecting new digital platforms and enhanced processes.

On the other hand, we find that the "big picture" is where CX leaders are struggling:

1. EX – Employee Experience is an unmapped and untapped opportunity

We see that 24% of CX leaders "don't know" if agents trained in a WFH setting perform better than or equal to in-center trained agents (page 21). It's a safe bet there's much about the experience of their employees they don't know. When our clients first come to us, we consistently find it to be an opportunity to deliver a transformational solution. We have invested significantly in mapping the end-to-end employee experience to ensure our employees are engaged, empowered to be successful, and highly motivated to deliver the best outcomes for our clients.

2. DX and UX – An influx of new platforms requires more holistic visibility

Digital investments are paying off, but the experience across multiple channels and solutions is still struggling. The data shows us that while 89% of CX leaders feel they "excel" in at least one customer touchpoint (page 41), only 28% believe they do a good job providing a seamless, consistent, easy experience when customers transition between different channels and solutions (page 42).

3. MX – Multichannel needs greater visibility to help drive brand consistency

You know customers are "channel hopping" or "channel transitioning" more than ever, but very few CX leaders have clear visibility into how the increasingly multi-channel experience impacts customers. Only 38% of CX leaders are measuring across all channels (page 38). Similarly, 78% are not comparing single-channel journeys to multi-channel journeys, and that number hasn't moved since 2021 (page 39). That's a major blind spot. Thirty-nine percent still don't have any MX initiatives in place, and that number is up significantly from 35% a year ago (page 46).

Differentiating on Employee Experience.

At ACT, we believe that the employee experience is one of the most untapped opportunities to impact customer experience. We are 100% employee owned, which means all employees have a path to owning shares in our company. Employee ownership means our employees' motivation is aligned to our clients' success. We are one of less than 7,000 employee owned companies (ESOPs) in the world – none of our competitors offer this unique differentiator.

We have mapped every touchpoint of the employee experience, set high performance standards and put measurements in place to ensure that we are meeting those expectations. By delivering an outstanding employee experience, we not only achieve extraordinary retention KPIs, we also ensure that our agents are personally motivated to build value for our customers.

Don't Overlook the Human Factor.

Automation and self-help solutions are undeniably powerful tools to help customers and gain cost efficiencies. But in 2023, it's more important than ever to make sure your digital investments don't drive a wedge between your customers and meaningful human experiences that build brand loyalty.

A major point of consensus between CX leaders and consumers in this report is that they both agree a positive and differentiated customer service experience is a path to increased brand loyalty (99% of CX leaders and 73% of consumers, page 80). It can be easy to overlook this point as a "soft metric," but this should be a thread that helps you key in on the untapped potential of a more thoroughly mapped and defined Employee Experience (EX) strategy.

There are three points in this report that show us there is still work to be done for CX leaders to meet their customers' needs:

1) Consumers say the #1 most frustrating aspect of resolving a customer care issue is "Difficulty in reaching a live person," and #2 isn't even close (page 84).

2) In contrast, the majority of CX leaders believe the most frustrating aspect for customers is just that the "process takes too long" (page 63), with reaching a live agent in a distant third.

3) CX leaders and consumers do agree that "A quick and easy process" is one of the most important factors in resolving a customer care issue. But they diverge completely in that while 21% of consumers feel "polite and friendly treatment" is the most important factor, only 1% of CX leaders see it that way (page 79).

COMMENTARY, CONT.

Mapping EX Improves Visibility.

What you should take away from this is that there's still some stark mismatches between what customers expect from a customer service experience versus what your teams believe and, in turn, are focused on delivering to your customers.

Mapping the employee experience brings much needed visibility to these areas of your business, gives you an opportunity to create better experiences for the customer, and ultimately sets your business apart from your competitors who are still living with these blind spots.

Capitalize on your digital investments with the Total Experience formula.

I'm very excited about the data in this report. Because if the past three years have been about doubling down on digital platforms and UX investments, then it's clear that 2023 is about unlocking more measurable value from those investments by focusing on multichannel, employee experience and, most importantly, the Total Experience.

Trace Anderman
Chief Sales Officer

ACT

Trace Anderman is Chief Sales Officer for ACT. With solid experience in the contact center outsourcing industry focusing on new business development, she is a results-oriented problem solver who is highly effective at initiating and leading change. Trace landed her first major account, Barclays Bank, a $100 million dollar contact early in her career at EGS. Leading the North America Sales Team at Concentrix, driving digital adoption and new advancements in contact center technology, her team played an integral role in building brand loyalty and retention. Trace is extremely passionate about promoting diversity and inclusion in the workplace, having created and chaired the Women's Initiative Network for Movate, serving as a regional board member for TP Women and is a current Chief Member. Trace grew up in Seattle, attended Seattle University before relocating to West Chester, PA where she met her husband and has raised two children. Loving the challenge of navigating unpredictable waters, she can be found sailing when she's not out selling or leading her team.

ABOUT THE PARTICIPANTS'
BUSINESSES

VERTICALS AND BUSINESS TYPES

The vertical breakdown of this year's 111 survey participants was indicative of years past, with concentrations in six specific areas, accounting for 81% of the whole. And, like prior years, Consumer Electronics, Technology, and Software and Financial Services and Insurance figure most prominently and draw some of the largest reported revenues.

5%
Food, Beverage, and Packaged Goods

5%
Telecom and Utilities

9%
Restaurants, Travel, Hospitality, and Entertainment

16%
Consumer Electronics, Technology, and Software

11%
Supplier, Business, and Professional Services

16%
Financial Services and Insurance

12%
Retail

12%
Real Estate, Manufacturing, Automotive, and Transportation

14%
Education, Healthcare, and Government Services

Business Type of Survey Participants

57% Both B2B and B2C

25% B2C (Business to Customer)

18% B2B (Business to Business)
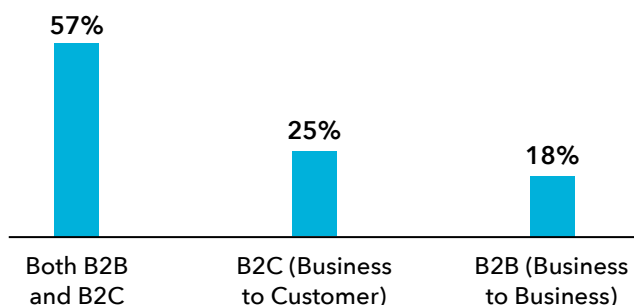
This year's survey cohorts included a slightly higher number of blended business types – those conducting both B2B and B2B business, at 57%, up from 47% in 2021. Companies that conduct business both with consumers and other businesses tend to be larger, and this is reflected on the revenue breakdown on the following page. These types of companies can also have more complex operations and tend to be more sophisticated and global in nature.

REVENUE AND THE STATE OF THE BUSINESS

The average size of companies participating in this most recent survey was notably higher than last year. Correcting out responses of "Don't Know/Decline to Answer," 22% of respondent companies generated revenue of $10 billion or more, compared to only 17% of 2021 survey respondents. In part, this could be attributable to the increase in inflation across major markets.

Revenues of Survey Participants

$1 Billion or Less	$1 Billion to $10 Billion	$10 Billion to $50 Billion	$50 Billion or More	Don't Know/ Decline To Answer
45%	20%	12%	7%	16%
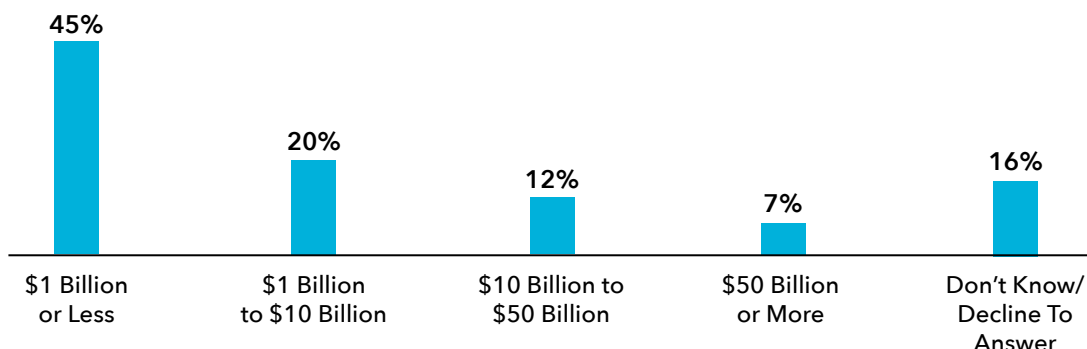
While the growth story was generally positive in 2022, there was a definitive shift in the vitality of growth. There was both a steep drop in the number of respondents describing their business as "Growing Quickly," and an uptick in those describing their business as in decline (from 2% in 2021 to 13% in 2022). Belts are expected to be further tightened in 2023, which should have most CX leaders reconsidering their operational approach, especially in striving to contribute to the financial strategies on the wider organization.

How would you generally describe the state of the business over the past 12 months?

	Growing Quickly	Growing Moderately	Staying About the Same	Shrinking Moderately	Shrinking Quickly
2021	45%	42%	11%	2%	0%
2022	27%	45%	15%	11%	2%

■ 2021   ■ 2022
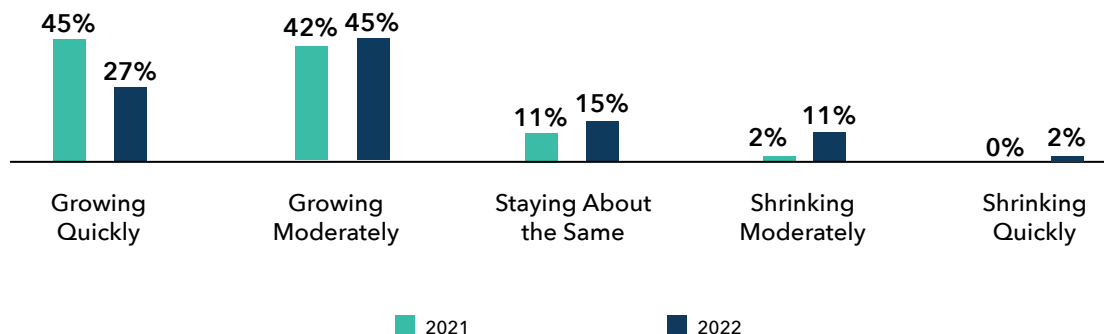
ADDRESSING ECONOMIC UNCERTAINTIES

In a pair of new questions for 2022, survey respondents were asked to describe where their companies were in recognizing and addressing economic uncertainty. Not surprisingly, given the chatter in the industry, as well as the weakening growth highlighted on the previous page, most companies are beyond the discussion phase, and well into taking action. Among survey respondents, 74% of companies are already taking significant or modest action, with only 9% having not had such discussions (or actions).
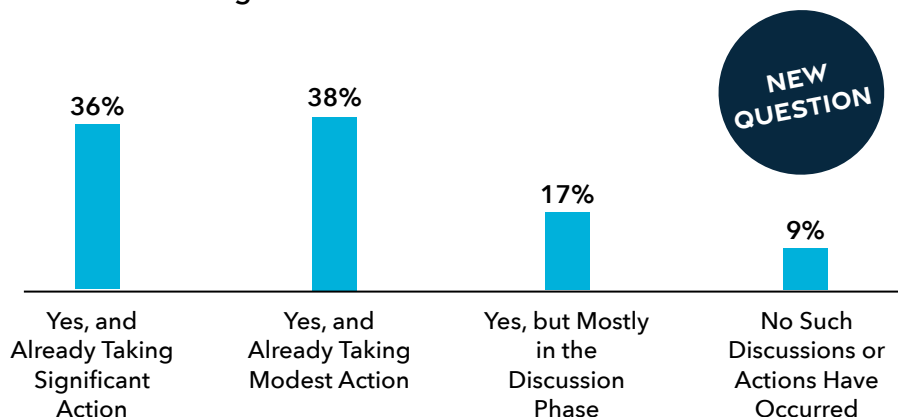
Has your company begun discussing or acting on the uncertain economic conditions?

NEW QUESTION

36%	38%	17%	9%
Yes, and Already Taking Significant Action	Yes, and Already Taking Modest Action	Yes, but Mostly in the Discussion Phase	No Such Discussions or Actions Have Occurred

In a follow-up to the above question, survey respondents were asked to describe the actions taking place to address economic uncertainties. Most organizations had already committed to paying greater attention to the financials, with about half already cutting budgets. Among "Other," respondents discussed things like team realignment, outsourcing, and greater scrutiny for project approvals and non-essential program expenses (like travel).

NEW QUESTION

Which of the following actions has your organization recently taken in response to the uncertain economic conditions? (Select all that apply.)

80%	55%	30%	30%	28%	17%	8%	7%
Increased Focus on ROI/ Financials	Reduced Budget for New Programs	Cancellation of Programs/ Projects	Leadership Changes	Hiring Freeze	Layoffs	Acquisitions/ New Products	Other
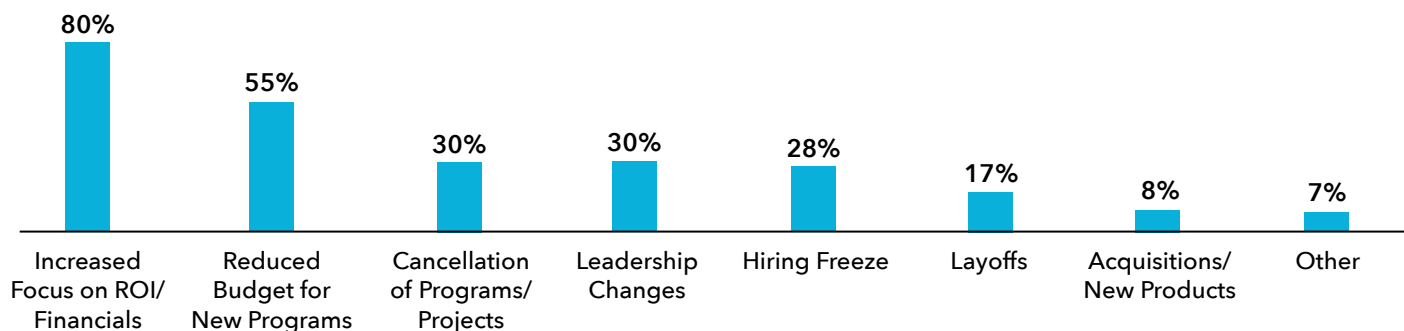
SURVEY
RESULTS

WORKFORCES &
WORKPLACES

WORKFORCES
WORKPLACES

WORKFORCES

TYPE OF WORKFORCE RESOURCES UTILIZED

"Internal Agents" were the most commonly utilized frontline resource among surveyed brands, distantly followed by "External Agents." Diving deeper, it was also discovered that exactly half of all companies deployed both internal and external agents, with 15% of these also deploying "Gig Workers." There wasn't a single organization that deployed gig workers without also having internal agents.

Which types of frontline workforce resources are utilized by your CX operations? (Select all that apply.)

Compare Your Operations

NEW QUESTION

Internal Agents	External Agent (BPO, Third-Party, etc.)	Shared Resources (Cross-Program, etc.)	Seasonal External	Seasonal Internal	Gig Workers
91%	58%	16%	15%	14%	10%
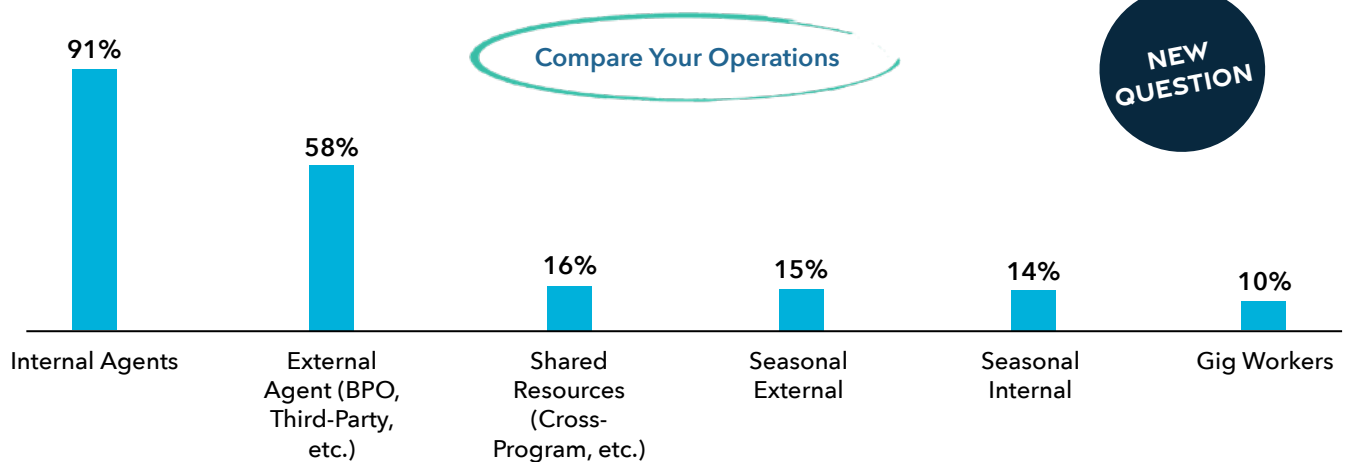
FTE COUNT AND HEADCOUNT CHANGES

The bulk of survey respondents indicated contact center operations of 500 or fewer full-time agents (FTEs). About one-third of programs (32%) reported having no outsourced FTEs, comparable to last year's result of 30%. Of those organizations that did have outsourced operations, FTE counts tended to be larger. This is illustrated by the fact that 54% of companies with outsourced operations had 100 or more FTEs compared to 39% of companies having no outsourced FTEs.

Approximately how many FTEs are a part of your contact center operations?

Legend: ■ Less Than 100 ■ 101 to 500 ■ 501 to 1,0001 ■ 1,001 to 5,000 ■ More Than 5,000 ■ None

In-House: 59%, 24%, 5%, 7%, 5%, 0%
Outsourced: 31%, 15%, 10%, 7%, 5%, 32%
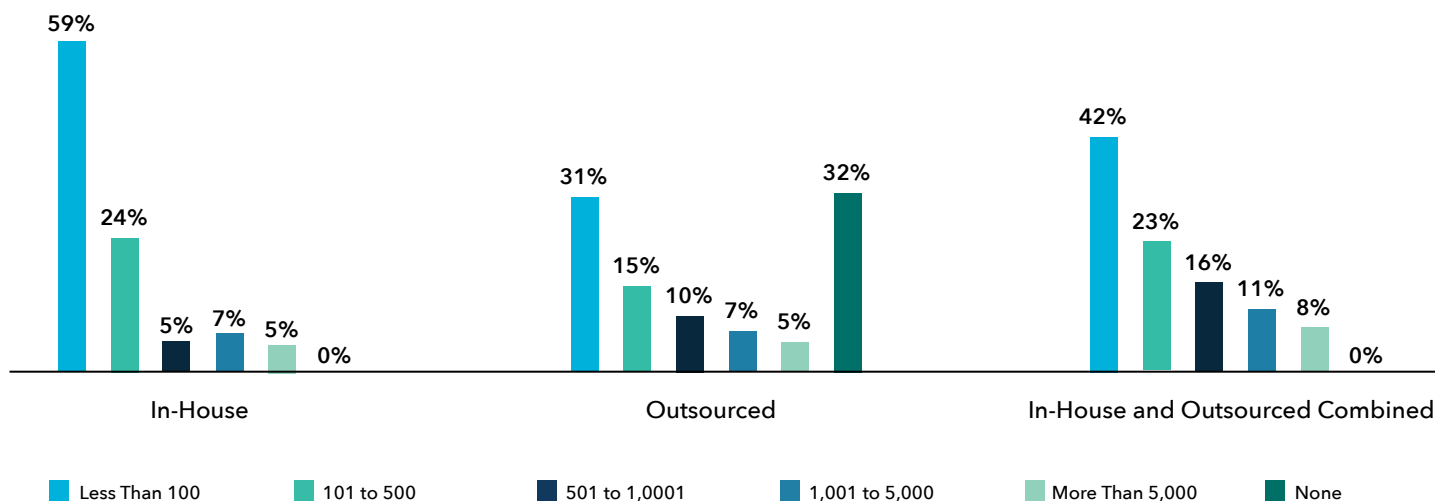In-House and Outsourced Combined: 42%, 23%, 16%, 11%, 8%, 0%

When asked about the changes in head count over the preceding 12 months, results were reminiscent of "State of the Business" results on page 14 – slowing growth, but growth nonetheless. In-House teams saw both a reduction in the percent of respondents indicating head count increases, as well as an increase in the percent indicating head count decreases. The year-over-year comparisons of total program head counts (In-House and Outsourced) further define the head count challenges faced by organizations.

How has your contact center operations head count changed over the past 12 months?

Legend: ■ Increased ■ Stayed the Same ■ Decreased

In-House 2021: 41%, 42%, 17%
In-House 2022: 35%, 37%, 28%
Outsourced 2021: 52%, 32%, 16%
Outsourced 2022: 42%, 47%, 11%
In-House and Outsourced Combined 2021: 58%, 28%, 13%
In-House and Outsourced Combined 2022: 46%, 35%, 19%
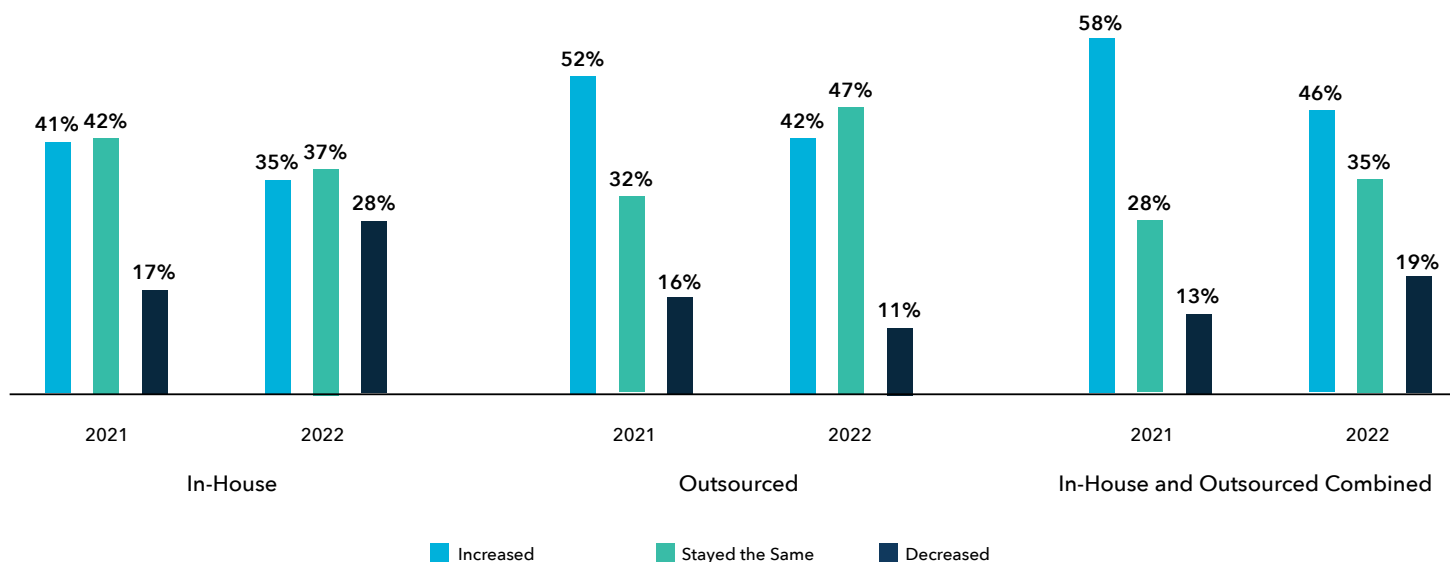
AGENT PERFORMANCE AND PROCESS ADJUSTMENTS

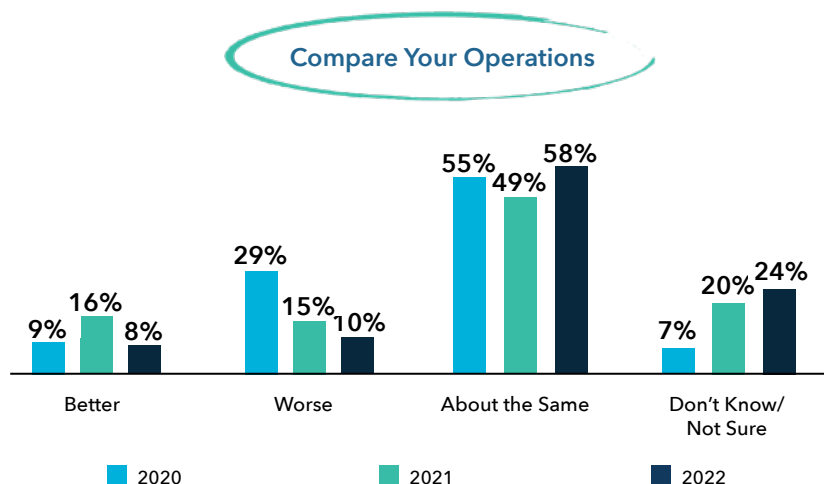The percentage of companies indicating performance deficiencies among home-trained agents fell year-over-year for a second time, indicating continued progress in remote training. To train remotely most effectively, brands need to provide the proper tools, time, and incentives, giving both trainers and trainees the best opportunity to succeed. Critical to the process is statistically measuring the effectiveness of remote training through activities like testing and role-playing, preferably doing so before newly trained agents are able to directly interact with customers.

Companies were rather consistent year-over-year in the areas where change took place to better accommodate the shift to WFH, with 2022 results indicating increased emphasis on "Coaching Practices." Below are a selection of verbatim that typify the responses received regarding the most significant ways in which some organizations have adjusted their agent-related processes. Among responses received, three common themes emerged: geo-free recruitment, greater use of virtual environments, and implementation of more robust technology.

How do agents trained in a work-from-home environment perform against agents trained in-center?

Compare Your Operations

	Better	Worse	About the Same	Don't Know/ Not Sure
2020	9%	29%	55%	7%
2021	16%	15%	49%	20%
2022	8%	10%	58%	24%

Percentage of companies that have adjusted their recruiting, hiring/onboarding, training, and/or coaching practices as a result of the shift to work-from-home.

	Recruiting	Hiring/ Onboarding	Training Practices	Coaching Practices
2021	72%	82%	80%	80%
2022	76%	86%	81%	87%

"
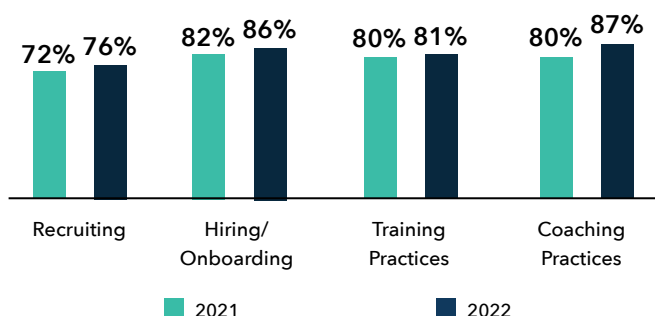
WHAT ARE SOME OF THE MOST SIGNIFICANT AND IMPACTFUL WAYS YOU HAVE CHANGED YOUR RECRUITING, HIRING/ONBOARDING, TRAINING, AND COACHING PRACTICES IN RESPONSE TO THE SHIFT TO WORK-FROM-HOME?

"Our biggest change is recruiting nationwide rather than only close to the office while no longer requiring relocation."

"All of our training/onboarding was completely performed via Zoom, and now our coaching has become more statistically driven."

"We implemented a robust prescreening tool and worked to standardize our coaching and training."

"Creating a 360 view of the agent life cycle in a hybrid work environment has allowed us to improve hiring and, subsequently, the rest of our processes."

"We use weekly touch points, situational leadership, and interaction analytics — all to support employee engagement."

"The need for mentors is supremely more important to us now because it helps team members feel connected from the beginning."

"

WORKFORCE MOTIVATION

A motivated workforce is a massive boon for CX leaders, regardless of whether employees are in-office or WFH. When asked about the most effective motivators, pay and flexibility were a given for many who contributed their insights. But relationships, connections, and engagement also figured prominently. Below are the specific questions asked about workforce motivation, and a variety of verbatim from the responses received.

NEW QUESTION

IN YOUR OPINION, WHAT IS THE MOST EFFECTIVE MOTIVATOR FOR YOUR WORKFORCE, AND IS THIS DIFFERENT FOR WFH/HYBRID VERSUS IN-OFFICE STAFF?

"Pay and flexibility. Same whether at the office or work-from-home."

"People don't care how much you know until they know how much you care. We are laser-focused on leadership development."

"Creating a meaningful connection with the brand and the team leader. Creating a connection to the brand takes more intention with WFH agents."

"A fair salary and the appropriate recognition for achievements. Remote staff seem to need more structured recognition, as it's easier for peers and supervisors to show ad hoc appreciation in the office."

"Leadership engagement. From the head of operations to mid-managers and supervisors, if engagement from leadership is not happening, nothing falls in place."

"Continuous coaching and feedback, as well as a gamification program with public recognition and reward opportunities."

"Ensure a good work environment, good incentives, a united 'purpose,' and provide a clear career path for those who choose to pursue it."

"... we believe that the employee experience is one of the most untapped opportunities to impact customer experience."

**Trace Anderman
Chief Sales Officer**

ACT

See Trace's commentary on page six for more insights.

ENCOURAGING ENGAGEMENT AND PASSIONATE AGENTS

Among the responses received to the open-ended question below, one type of response rose above all others: We try to bring people together as often as is feasible. Furthermore, in-person gatherings were as often described as socializing (i.e., "fun") as they were business-focused. Below are a selection of verbatim that typify some of the most common types of responses received.

> **IN YOUR OPINION, WHAT IS THE MOST EFFECTIVE MOTIVATOR FOR YOUR WORKFORCE, AND IS THIS DIFFERENT FOR WFH/HYBRID VERSUS IN-OFFICE STAFF?**
>
> "We still bring people together for meetings, planning sessions, employee-focused recognition events, etc. Just because we are 100% virtual for day-to-day work doesn't mean we can't come together."
>
> "Create live connections like monthly all-hands, regular team meetings, weekly social events (like trivia, team games, etc.). We're also embracing Slack and Notion to keep everyone in sync."
>
> "We have an annual homecoming week when everyone is expected to be in the office for various team-building activities."
>
> "We've increased rewards and recognition, but with a focus on empathetic awards, not just metrics."
>
> "We require webcams for all U.S.-based agents, and we hold frequent on-camera meetings. We can't make this a requirement for offshore agents, so we've upped our 1:1 interactions to help engagement."
>
> "We're constantly up-skilling our management/leadership team on remote engagement skills."
>
> "We enhanced our Voice of the Employee surveys, introduced multiple channels of communication, developed employee action-planning teams, require on-camera meetings, and hold bi-annual recognition meetings."

CX leaders demonstrated a moderate understanding of how customers feel about passionate agents. Eighty-nine percent of CX leaders felt that their customers would either "Strongly Agree" or "Somewhat Agree" that agents being very passionate about the brands they represent is important. In fact, this question had been posed to consumers as a part of the 2022 CX Leaders Consumer Edition report, in which 58% of respondents indicated some level of agreement. For more analysis on such comparisons, please see page 87.

In your opinion, how do you think YOUR CUSTOMERS feel about the following statement: It is important for customer care agents to be very passionate about the brands they represent.

Strongly Agree	Somewhat Agree	Neutral	Somewhat Disagree	Strongly Disagree
47%	42%	11%	0%	0%
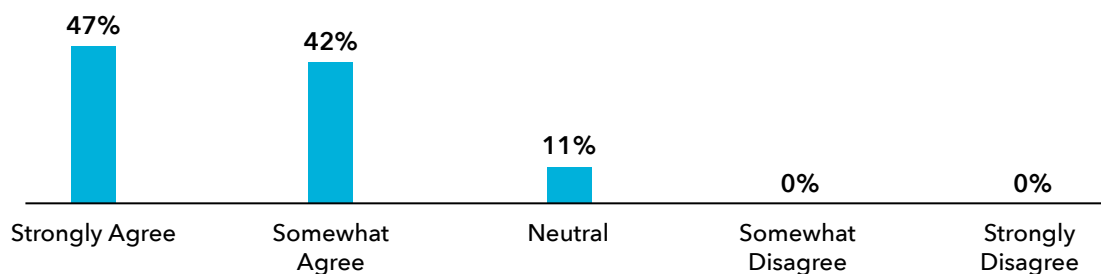
IMPROVING AGENT PERFORMANCE

Over the past few years, many companies have come to rely more heavily on automated CX solutions like chatbots, virtual agents, and smarter mobile apps. These solutions are now capable of handling the bulk of transactional engagements, leaving much more complicated engagements to live agents. As a result, strong skills in key areas (like problem-solving, proficiency, and communication) have risen in desirability. To fulfill on these needs, compa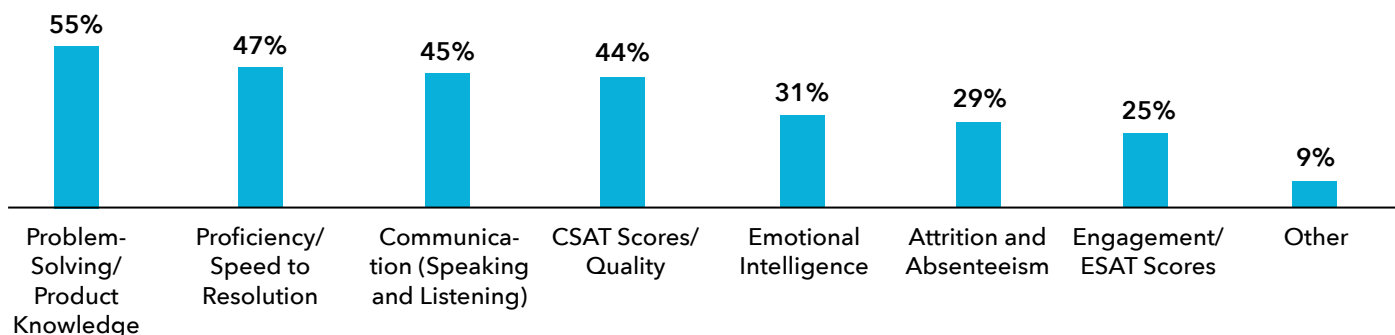nies need to rethink their screening routines for recruitment, while also reassessing training and coaching practices. See page 21 for some specific ways in which companies are changing their processes in these key areas.

In which area are you most interested in improving agent performance over the next 12 months? (Please select no more than three.)

Problem-Solving/ Product Knowledge	Proficiency/ Speed to Resolution	Communica- tion (Speaking and Listening)	CSAT Scores/ Quality	Emotional Intelligence	Attrition and Absenteeism	Engagement/ ESAT Scores	Other
55%	47%	45%	44%	31%	29%	25%	9%

Given ongoing hiring challenges, how is your organization pursuing performance gains among your current team?

"Speed and accuracy are two of the main variables we're always looking to optimize. We know the faster we can help a homeowner (or a sales rep) answer a question about their loan application, then the faster they're able to start their sustainable home improvement project. It's critical that we always have the right information available for our team members so they can answer any question accurately. In the past, I've been with companies that have optimized one over the other. Fortunately, at GoodLeap, we recognize these don't have to be mutually exclusive – you can be fast and accurate. There is not an end destination at GoodLeap; we use a continuous improvement mindset to constantly look for ways to optimize these variables."

**goodleap**™ | **Paul Brandt**
Chief Experience Officer

WORKPLACES

WFH AND SITE VISITS

Expectations and the desire for WFH environments picked up year-over-year, with the largest gains being seen in one- to three-year expectations for internal workers, moving from 60% in 2021 to 71% in 2022. At the same time, the percentage of staff reported as currently working from home fell year-over-year, particularly among outsourced workforces, falling from 72% WFH in 2021 to 60% in 2022. This indicates that CX leaders are finding some success in shaping their programs to their desires and expectations, further suggesting the largest reductions in WFH have already occurred.

What percentage of your internal workforce is currently WFH, and what percentage do you want/expect to have WFH in 1–3 years?

78% 76%   62% 69%   60% 71%

Currently WFH   WFH Wanted in 1–3 Years   WFH Expected in 1–3 Years

■ 2021   ■ 2022
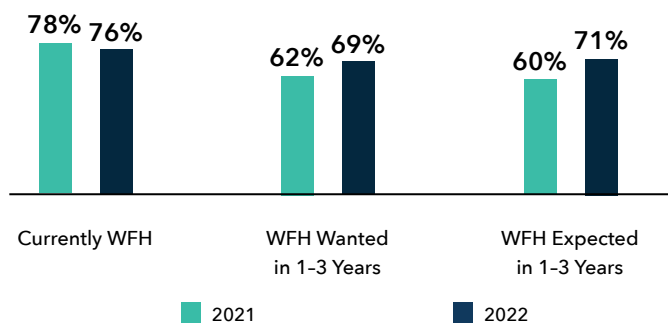
What percentage of your outsourced workforce is currently WFH, and what percentage do you want/expect to have WFH in 1–3 years?

72% 60%   53% 56%   55% 58%

Currently WFH   WFH Wanted in 1–3 Years   WFH Expected in 1–3 Years

■ 2021   ■ 2022
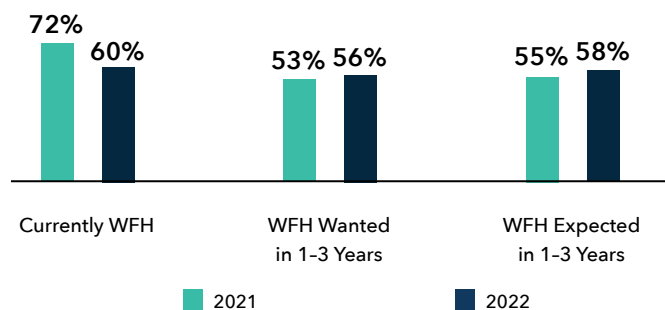
Site visits experienced a strong rebound in 2022, with almost half (47%) of survey respondents indicating that they have physically visited a partner site within the last 6-12 months. This number increases further to 52%, when considering this answer is only among those who deploy outsourced agents. This is a massive leap from 16% in 2021, indicating that, at least from a travel perspective, the CX industry is fast getting back (somewhat) to business as usual.

Have you physically visited any of your Outsourcing partner(s) or prospective Outsourcing partner sites in the last 6-12 months?

84%   53%   16%   47%

Yes   No

■ 2021   ■ 2022
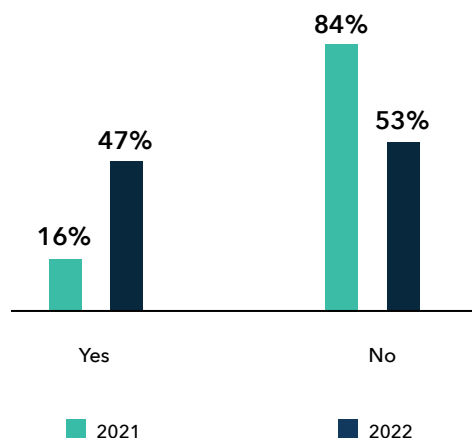
LONG-TERM IMPACT OF WFH

Undoubtedly, the initial crush to move entire CX programs off-site came with plenty of aches and pains. But as the industry has sailed further away from the disruptions of such seismic change, positive impressions of that change have been on the rise. This is especially true over the past year where there has been a dramatic increase in the percent (from 27% to 42%) of CX leaders describing the change as "Very Positive" as it applies to meeting customer needs and expectations.

Generally speaking, what long-term impact has your organization's shift to work-from-home (WFH) had on your ability to meet the needs and expectations of your customers?

	A Very Positive Impact	A Somewhat Positive Impact	No Impact Either Way	A Somewhat Negative Impact	A Very Negative Impact	Has Not Shifted to WFH
2021	27%	39%	23%	8%	0%	3%
2022	42%	35%	16%	5%	1%	1%

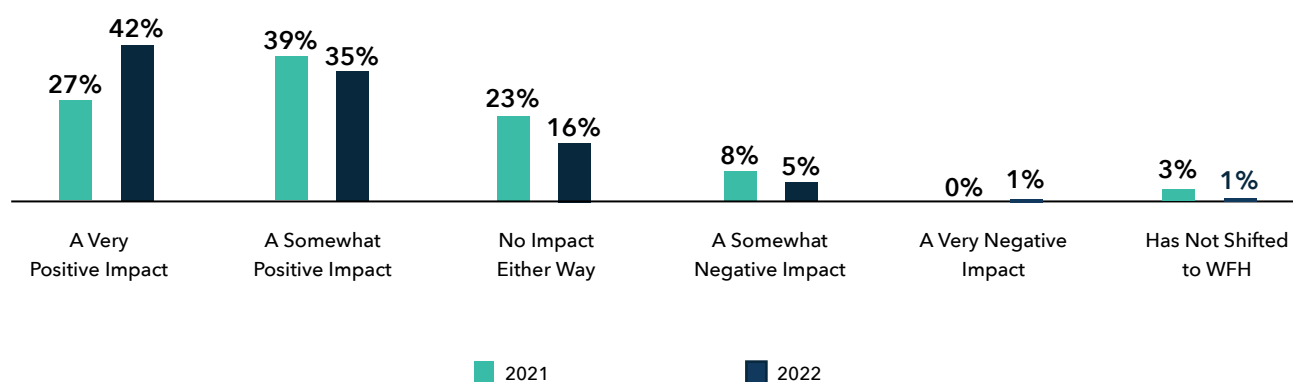Below are a selection of verbatim received in a follow-up, open-ended question asking CX leaders to briefly describe the impact WFH has had on their operations, both positive and negative. Flexibility, work/life balance, and improved performance/efficiency were the most common positive responses, while the negative responses centered mostly on disconnection and lack of oversight.

BRIEFLY DESCRIBE WHY THE WORK-FROM-HOME IMPACT HAS BEEN EITHER POSITIVE OR NEGATIVE, AS INDICATED IN THE PREVIOUS QUESTION.

VERBATIM — POSITIVE

"Allows us to tap talent globally and provide more flexibility for our workforce, though some connectivity challenges remain."

"Teams overall are more efficient on most days, and more available. We have adopted a hybrid model recently though that has helped to bridge the one major gap we had with full remote work, which was collaboration."

"Happier staff, no impact on overall productivity; and when someone is sick, they can WFH instead of just not working at all."

"We've seen a greater appreciation of time management and more time dedicated to learning."

VERBATIM — NEGATIVE

"Less in-person brainstorming and creative thinking and/or exchange of ideas. Zoom forces us to take a more formal approach."

"Lack of real time remote workforce monitoring. Led to problems of keeping people in seats and focused on processing customer inquiries."

"We have struggled to retain talent for job groups required to return to the office."

"It has stymied the development of relationships amongst colleagues, especially for new hires who have joined since 2020 and have not had the opportunity to develop bonds with teammates."

A few years in and the shift to WFH has been positive for many. What have been some of the most notable benefits for your organization and people in the shift to WFH?

"Even pre-pandemic, I have been a big proponent of WFH. So it is exciting to see that, for a majority of CX leaders, the shift to WFH over the last few years has been positive. Some of the most notable benefits I have seen on our team are the ability to keep talented, knowledgeable employees, allowing for a much healthier work/life/school balance, as well as no labor issues during high vacation times like the holidays. In the past, I have seen companies lose good talent because of changes in employees' lives and needing to relocate. Now, in the new WFH world, that talent gets retained, which is beneficial for the employee and company because it reduces onboarding costs. I think the benefit almost everyone has seen is the work/life/school balance, not negating the fact we still need to pay close attention to mental health and the challenges that come with being separated from the in-person interactions. I throw school in the mix because with a healthier balance and less time commuting, employees (including myself) can have the flexibility to complete school or expand their education. Lastly, as some businesses see more callouts and vacation requests during the holiday seasons, we can accommodate for employees to work a few hours here and there wherever they are in the world!"
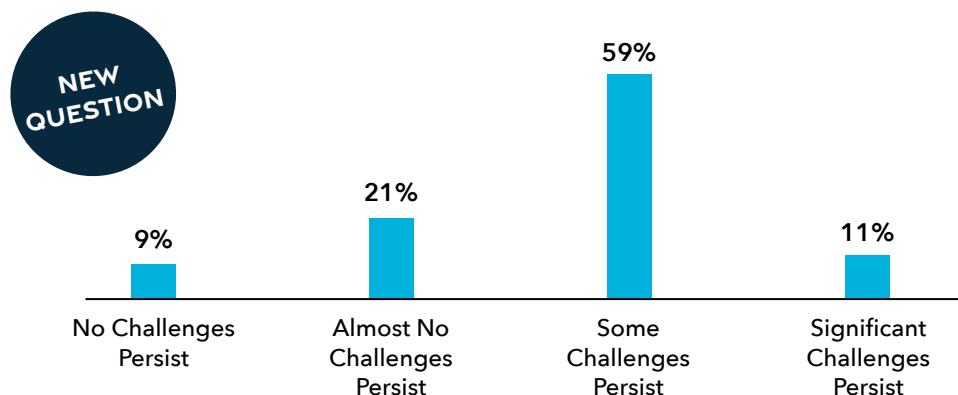
flume™

Jasmyn Haas
Vice President, Experience

ONGOING IMPACT OF THE PAST FEW YEARS

How would you describe the ongoing impact of the operational, workforce, and workplace disruptions that have occurred over the past few years?

NEW QUESTION

No Challenges Persist	Almost No Challenges Persist	Some Challenges Persist	Significant Challenges Persist
9%	21%	59%	11%

Although the above question has been reframed for 2022, a similar question was asked last year regarding both internal and external operations. Interestingly, 2022 results were remarkably similar to those of 2021, across both internal and outsourced operations, with response deltas of less than 4% across the entire answer set. In other words, not a lot has changed in terms of ongoing challenges. These continue to include things like hiring challenges, employee engagement, and employee oversight. Fiscal pressures have also entered the fray in 2022. Below are a few specific verbatim that typify the responses received.

BRIEFLY DESCRIBE SOME OF THE PERSISTING CHALLENGES YOUR INTERNAL CX OPERATIONS HAVE BEEN EXPERIENCING OVER THE PAST 12–18 MONTHS, AND HOW YOU PLAN ON ADDRESSING THEM.

"Driving 'connectivity' and relationships in a virtual environment. We are social creatures and so we must, as leaders, focus on still creating those moments."

"Finding employees willing to return to the office in numbers large enough to justify keeping an office open."

"Higher staff turnover coupled with recruitment challenges (longer lead times to hire), product inventory/supply pressures and, on the service side, continued high levels of service escalations because of legacy COVID issues."

"'Quiet quitting' is definitely a thing. We are still looking for the perfect 360 quality/auditing system that bridges the gap left by not being able to 'manage by walking around'."

"Ability to properly screen applicants in a virtual environment has made it tough to find the right people."

"There has been less appetite to invest in technology to support changes to the customer experience with many projects canceled or placed on hold."

SECTION HIGHLIGHTS

The growth of combined operational head counts (both In-House and Outsourced FTEs) appeared to have slowed in 2022, with fewer brands indicating increasing head counts (46% in 2022 versus 58% in 2021), and more brands indicating decreasing head counts (19% in 2022 versus 13% in 2021) (page 20)

Seventy-seven percent of survey respondents describe the shift to WFH as having a "Very Positive" or "Somewhat Positive" impact on meeting customer needs and expectations, up from 66% in 2021 (page 27)

The top areas where CX leaders are most interested in improving agent performance include Problem-Solving/Product Knowledge, Proficiency/Speed to Resolution, Communication (Speaking and Listening), and CSAT Scores/Quality (page 24)

Forty-seven percent of CX leaders visited a partner site in 2022, up from 16% in 2021 (page 26)

Although results from this research indicate a slowing of operational head count growth in 2022, this is perhaps less a reflection of demand (or the general health of contact centers as a whole), and more likely an indication of other factors like ongoing hiring challenges, a continued move toward automation, and the beginnings of slowed spending. Significant contact center investments were made in response to the COVID-19 pandemic. It may be the case that many of these investments (and/or operational adjustments) are finally hitting their optimized stride.

Beyond changes in head count, a strong, positive sentiment seemed to permeate among survey respondents in 2022. By and large, CX leaders see many positives coming out of nearly three years of tumult for the industry (and society at large). It appears WFH has been a net positive, though some challenges remain. Most notably, staffing (finding the right people) remains a rocky road, as well as maintaining healthy employee engagement upon hire. Competition for talent remains high, but economic headwinds (now evident in accelerating layoffs), may soon lead to a loosening of the labor market. Regardless, CX leaders should be prepared to go to bat for the resources they need. And when they do, results that speak to customer loyalty and business success are likely to be the surest way to persuade those holding the purse strings.

TOUCHPOINTS
CHANNELS
MEASUREMENTS & PERFORMANCE
PREFERENCES & INITIATIVES

CHANNELS

UNDERSTANDING PREFERENCES AND SOLUTIONS OFFERED

CX Leaders became slightly less sure of their channel strategy prowess in 2022, with a seven-point drop (down 13%) in the percentage of CX leaders who believe their companies have a good understanding of which channels their customers prefer to use. Furthermore, there was a more than doubling of the percentage of CX leaders who indicated their companies did not have a good understanding of which channels their customers preferred to use, from seven percent in 2021 to 17% in 2022. Of course, understanding the preferences of customers starts with asking them.

Do you believe your company has a good understanding of which channels your customers prefer to use?

	Yes	Somewhat	No
2021	55%	38%	7%
2022	48%	35%	17%
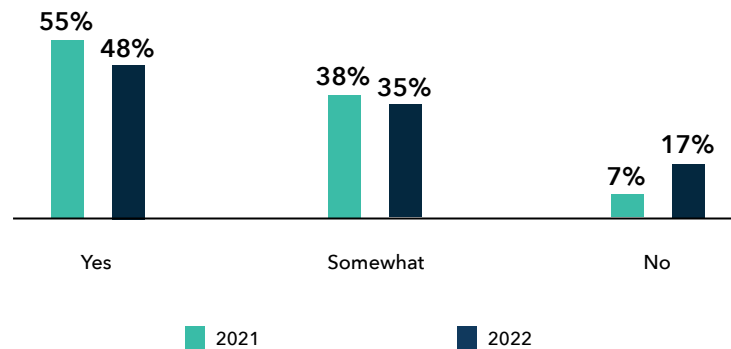
Phone remains the most commonly offered customer care solution among respondents to this year's survey, with Email not far behind. Online Chat and Social Media/Direct Messaging also established stair-step growth across three years' worth of data, and Mobile Apps also saw a resurgence in 2022. In deciding which channels to offer, brands need to be sure to understand both the needs and adoptability (likelihood to adopt) of solutions among their customers. Channel strategy is an area where Voice of the Customer can play an especially valuable role.

Which of the following customer care solutions do you offer for your customers? (Please select all that apply.)

	2022	2021	2020
Phone	92%	90%	82%
Email	89%	90%	77%
Online Chat	65%	59%	53%
Social Media/Direct Messaging	59%	45%	31%
Online FAQ/Community/Knowledge Base	48%	48%	78%
Chatbot/Virtual Assistant	38%	39%	37%
Mobile App	40%	28%	55%
In-Person	33%	30%	36%
SMS/Text (2-Way/Asynchronous)	30%	28%	N/A
Video Chat	8%	12%	10%
Kiosks	5%	6%	13%
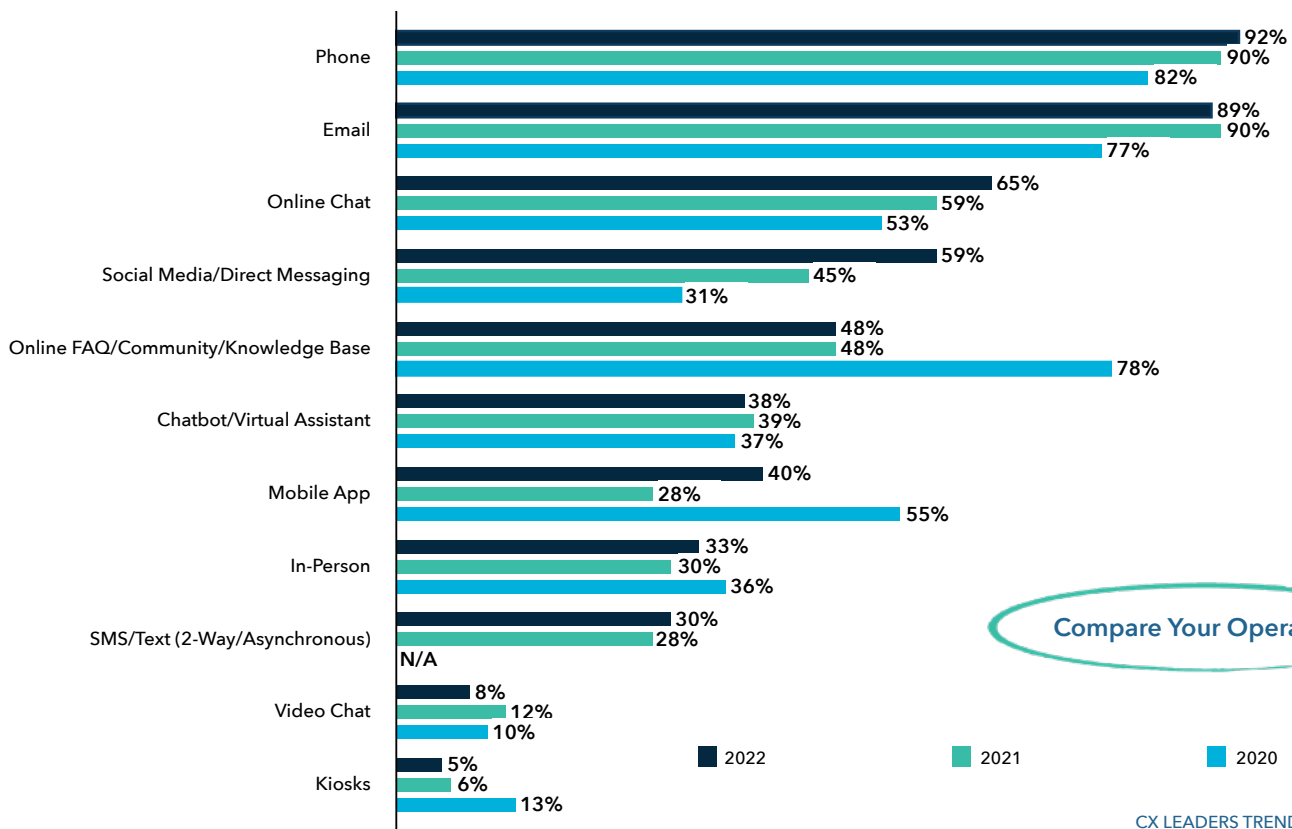
Compare Your Operations

PROGRAM VOLUMES

From a macro viewpoint, there was effectively no change year-over-year in terms of contact volume weighting across the survey cohort with only a marginal dip of three points for Phone. Like last year, Phone, Email, and Online Chat continue to account for most program contacts, averaging 83% of all engagement volumes among 2022 survey respondents, down from 85% in 2021.

Please indicate what percentage each of the following solutions contributes to your program's Overall Contact Volume.

Compare Your Operations

	Phone	Email	Online Chat	SMS/Text (2-Way/ Asynchronous)	In-Person	Chatbot/Virtual Assistant	Social Media/ Direct Messaging	Other
2021	50%	24%	11%	4%	4%	3%	3%	1%
2022	47%	25%	11%	4%	3%	3%	4%	3%
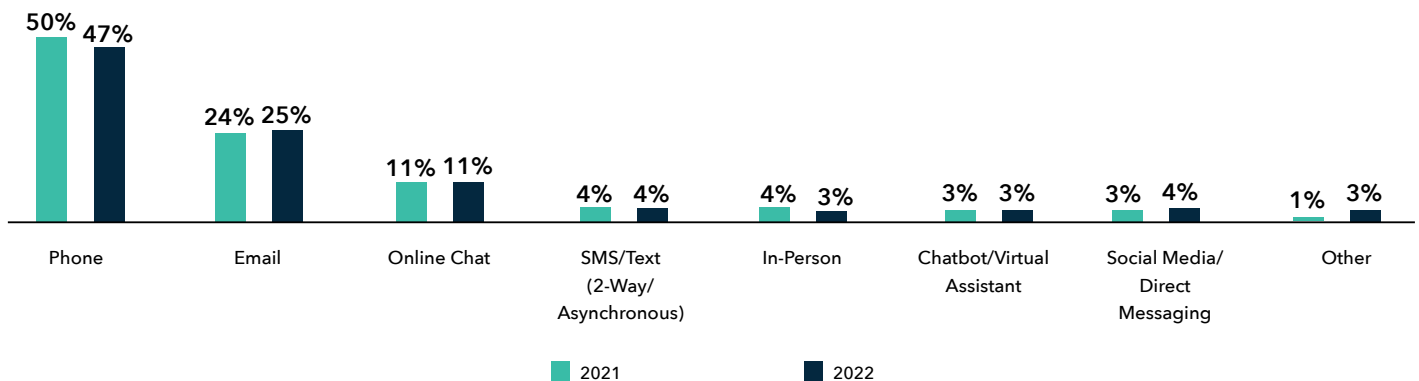
VOLUME INCREASES AND DECLINES

When viewing volume shifts on a channel-by-channel basis, Online Chat experienced a significant boost in growth in 2022, with twice as many CX leaders indicating it as their channel of most growth compared to 2021. At the same time, Chatbots/Virtual Assistants growth slowed considerably, moving from the fastest-growing solution among 16% in 2021 to 2% in 2022. This indicates a shift among consumers back toward assisted-solutions after a couple of years of phenomenal growth among unassisted solutions.

Which of the following customer care solutions has seen the biggest increase in volume in the past 12 months?

Channel	2022	2021
Phone	33%	33%
Online Chat	32%	16%
Email	11%	14%
SMS/Text (2-Way/Asynchronous)	11%	10%
Social Media/Direct Messaging	5%	5%
Mobile App	4%	5%
Chatbot/Virtual Assistant	2%	16%
Video Chat	1%	0%
In-Person	1%	0%
Online FAQ/Community/Knowledge Base	0%	2%
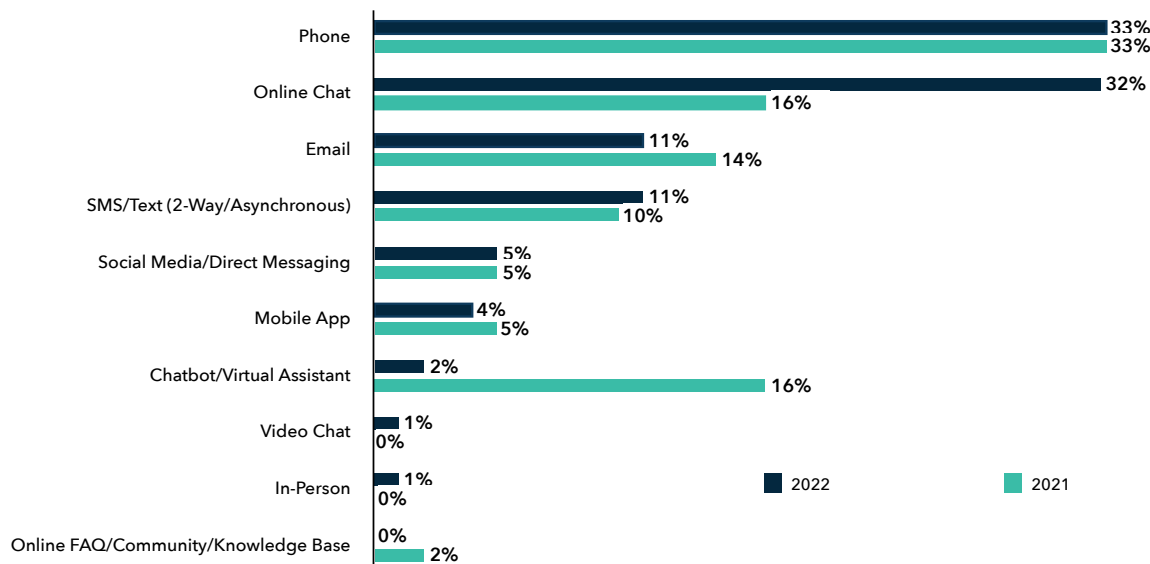
When asked about solutions with the highest levels of decline, shrinkage of In-Person engagements slowed dramatically, with only 12% of respondents naming In-Person as the solution with the biggest decrease in volume compared to 25% the year prior. Declines in both Phone and Email also picked up in 2022 with the two combining to account for two-thirds of responses, naming either one or the other as the solution experiencing the biggest decreases in volume.

Which of the following customer care solutions has seen the biggest decrease in volume in the past 12 months?

Channel	2022	2021
Phone	35%	27%
Email	31%	25%
In-Person	12%	25%
Online Chat	9%	9%
Social Media/Direct Messaging	5%	4%
Online FAQ/Community/Knowledge Base	1%	5%
Video Chat	1%	2%
SMS/Text (2-Way/Asynchronous)	1%	0%
Kiosks	1%	0%
Chatbot/Virtual Assistant	0%	2%
Everything is Increasing	0%	4%
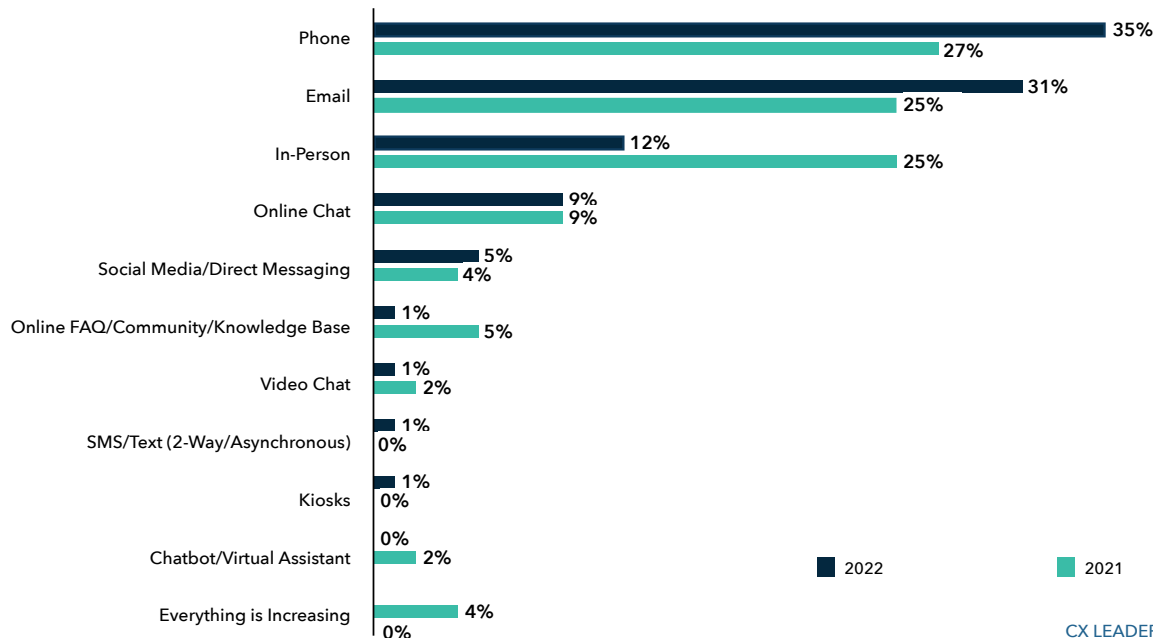
FUTURE CHANNELS

For two consecutive years, SM/Text has been a clear leader of solutions planned for the short- to near-term, though giving up five points year-over-year. That said, the data below can be perceived in two different ways. A year-over-year could represent less interest in a solution or it could indicate industry-wide progress in implementing said solution. Understanding this, it's worth noting that several year-over-year declines occurred for all but a handful of solutions, including Kiosks, Chatbots, and In-Person. Furthermore, results on page 33 hint at a broadening of solutions, particularly in the solutions that are showing reduced year-over-year intent in the chart below.

Which of the following solutions are not currently offered by your organization, but are a part of your short- to near-term plans? (Please select all that apply.)

Solution	2022	2021
SMS/Text (2-Way/Asynchronous)	52%	57%
Chatbot/Virtual Assistant	48%	44%
Video Chat	41%	43%
Kiosks	39%	33%
Mobile App	25%	28%
Online Chat	22%	30%
Online FAQ/Community/Knowledge Base	22%	26%
In-Person	22%	18%
Social Media/Direct Messaging	16%	25%
Phone	5%	5%
Email	2%	5%

Compare Your Operations
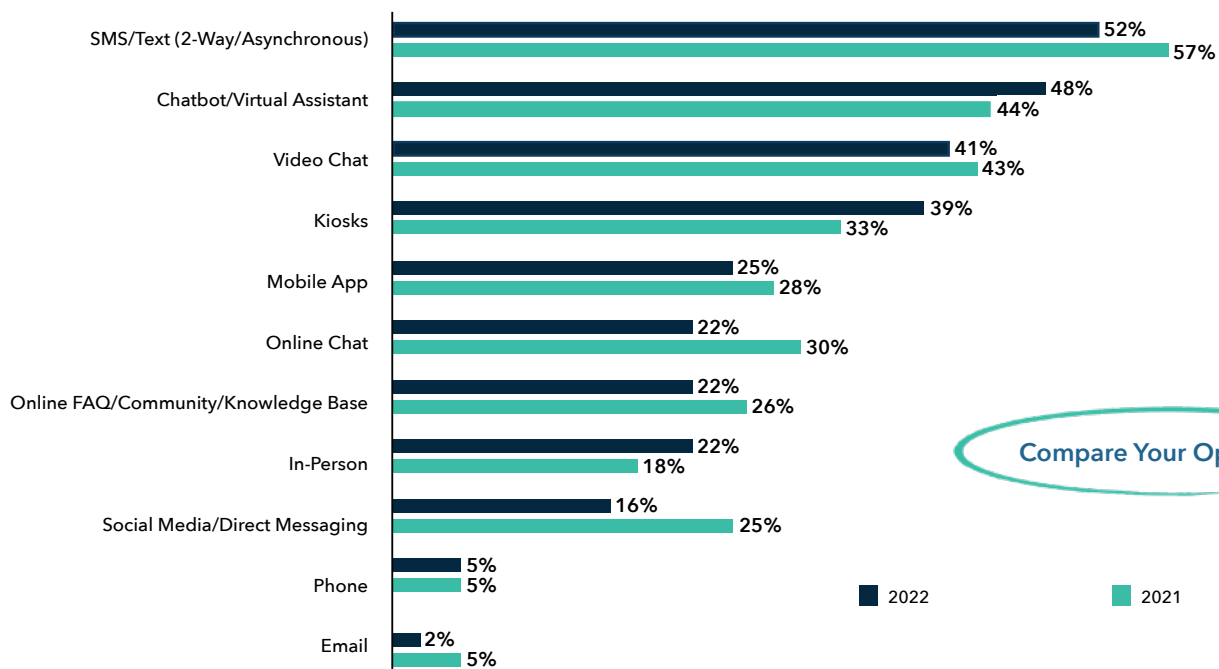
MEASUREMENTS & PERFORMANCE

METHODS OF MEASUREMENT AND METRICS BY SOLUTION

Meaningful measurement is in managing successful CX operations. Year-over-year, a much larger percent of organizations are measuring the customer experience using the Gold Standard method — measuring the entire experience across all channels. This is good news, as it provides more leaders with a holistic, truer view of the end-to-end customer journey, something essential for engineering a better experience.
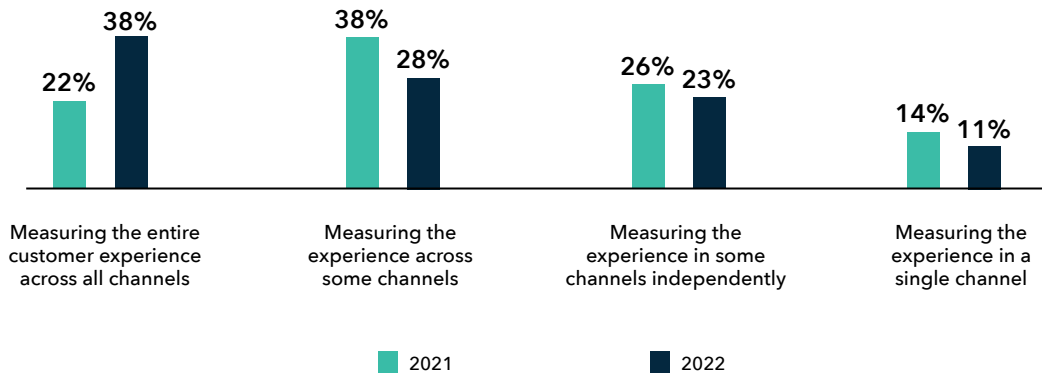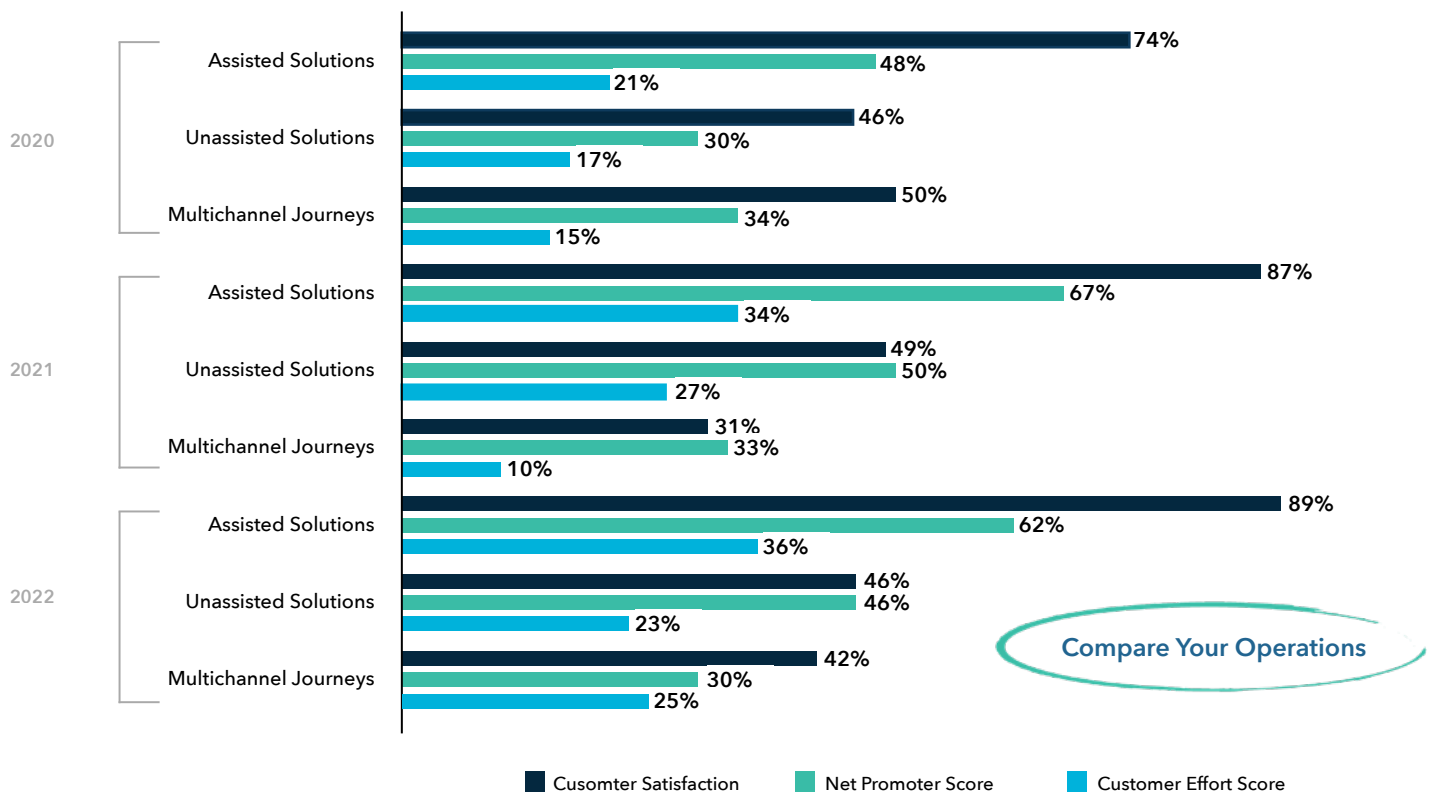
How would you describe how you are measuring the customer experience?

	Measuring the entire customer experience across all channels	Measuring the experience across some channels	Measuring the experience in some channels independently	Measuring the experience in a single channel
2021	22%	38%	26%	14%
2022	38%	28%	23%	11%

2021 ■ *2022* ■

The percentage of organizations using CSAT and Customer Effort Score to measure assisted solutions continued to grow in 2022, with the use of Net Promoter Score decreasing across solution types. Perhaps more significant, Multichannel Journeys experienced heightened monitoring compared to 2021, with a higher percentage of organizations leaning on both CSAT and Customer Effort Score.

Which metric(s) do you use to measure the customer experience by solution type? (Check all that apply.)

Year	Solution Type	Customer Satisfaction	Net Promoter Score	Customer Effort Score
2020	Assisted Solutions	74%	48%	21%
2020	Unassisted Solutions	46%	30%	17%
2020	Multichannel Journeys	50%	34%	15%
2021	Assisted Solutions	87%	67%	34%
2021	Unassisted Solutions	49%	50%	27%
2021	Multichannel Journeys	31%	33%	10%
2022	Assisted Solutions	89%	62%	36%
2022	Unassisted Solutions	46%	46%	23%
2022	Multichannel Journeys	42%	30%	25%

Compare Your Operations

■ Cusomter Satisfaction   ■ Net Promoter Score   ■ Customer Effort Score

MULTICHANNEL JOURNEY MEASUREMENT AND ABANDONMENT

There has been consistently little movement in the percentage of companies measuring multichannel journeys against the experiences provided by a single-channel journey. And though this can be a difficult exercise, it's an effective way of exposing channel-specific pain points, as well as gaps in channel transitions. As channel hopping becomes more common, brands will want to strive toward multichannel experiences that match or exceed the experiences had in any single channel of care.

Does your organization measure the performance of a multichannel journey against the performance of a single-channel journey (e.g., resolution or satisfaction rates)?

|	2019	2020	2021	2022
Yes	18%	22%	22%	22%
No	82%	78%	78%	78%
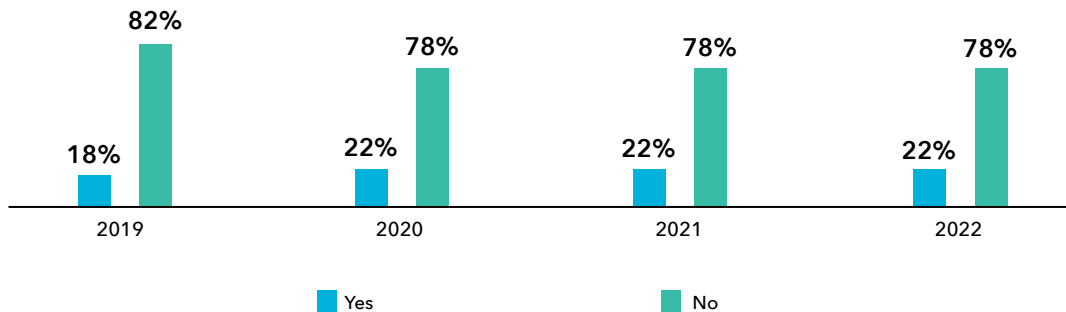
In 2022, only slightly fewer brands indicated they were measuring abandonment rates for self-help or unassisted solutions. Although resolution rates for such solutions improved greatly year-over-year (page 40), measuring abandonment rates is the first step in understanding and addressing inefficiencies like logic loops, user experience issues, and solution capability shortfalls.

Do you measure how many customers attempt to use self-help or unassisted solutions but abandon the interaction before completing the task?

	2021	2022
Yes	45%	43%
No	55%	57%
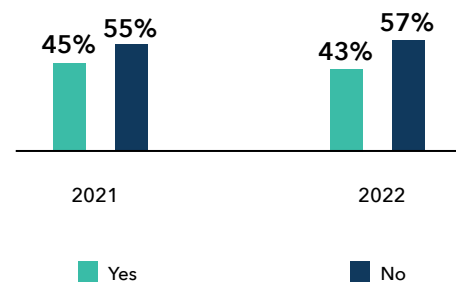
RESOLUTION RATES BY SOLUTION

Resolution rates were highly consistent year-over-year save two channels … Social Media/Direct Messaging and Chatbot/Virtual Assistant. While the improvement in Chatbot effectiveness is sensible, the reduced resolution rate for Social Media/Direct Messaging is likely due to the diminutive sample size from last year, which included only eight samples. Regardless, the strives made for Chatbots is welcomed news, as ineffectiveness of automated solutions remains a top complaint among consumers.

What is the approximate Resolution Rate of the following solutions?

Compare Your Operations

Solution	2021	2022
Phone	82%	81%
In-Person	78%	78%
SMS/Text (2-Way/Asynchronous)	70%	70%
Email	70%	69%
Online Chat	67%	68%
Social Media/Direct Messaging	84%	62%
Chatbot/Virtual Assistant	37%	56%
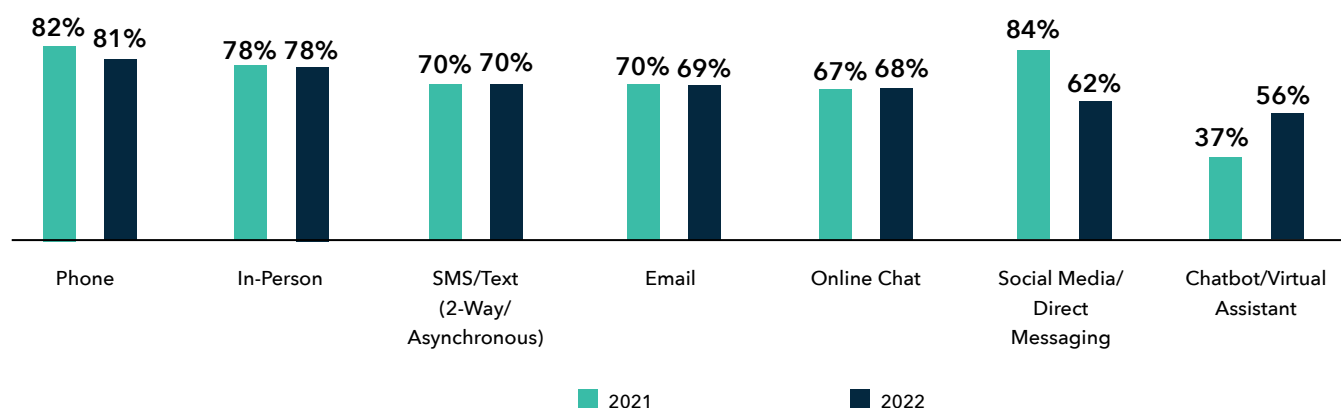
TOUCHPOINT PROWESS

Compared to 2021, significantly more respondents indicated higher levels of prowess across channels, and fewer respondents indicated "Not There Yet on 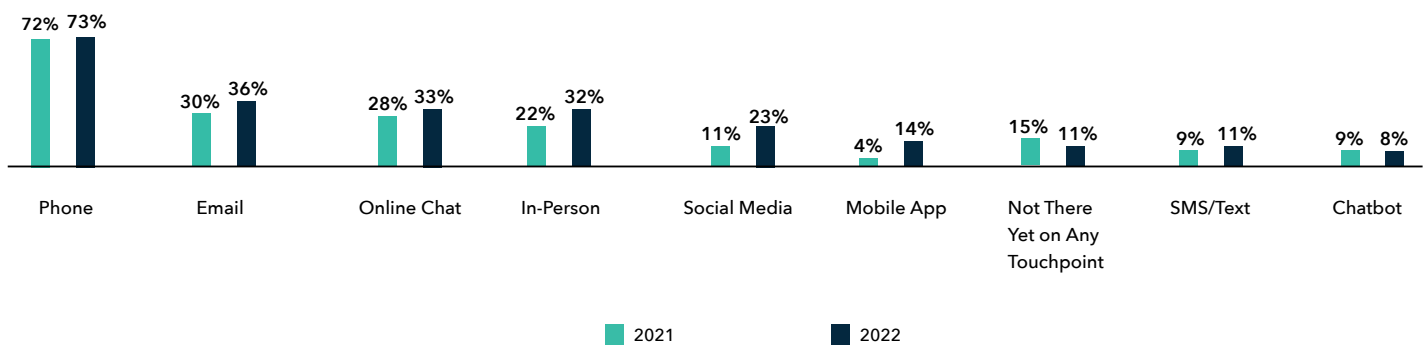Any Touchpoint." This positive sentiment was expressed in a variety of results throughout the survey results, signaling a high level of optimism within the industry. This optimism is also indicative of what was perceived to be a very challenging 2021 which, for many organizations, likely brought about additional investments in technology and greater focus on agents and processes.

Which customer touchpoint(s) do you feel your organization excels at?
(Select all that apply.)

Touchpoint	2021	2022
Phone	72%	73%
Email	30%	36%
Online Chat	28%	33%
In-Person	22%	32%
Social Media	11%	23%
Mobile App	4%	14%
Not There Yet on Any Touchpoint	15%	11%
SMS/Text	9%	11%
Chatbot	9%	8%

■ 2021   ■ 2022

Among CX leaders who excel at one or more touchpoints, several themes emerged when asked why they felt they were successful, but there was one overarching idea: success was purposeful. In other words, companies strove for success either in their planning, resourcing, or both. Below are a selection of verbatim in which respondents explain why and in what ways they are successful when it comes to specific touchpoints.

> ❝
>
> **BRIEFLY DESCRIBE WHY YOU FEEL YOUR ORGANIZATION EXCELS AT THE TOUCHPOINT(S) DENOTED IN THE PREVIOUS QUESTION.**
>
> "From implementing lessons learned and having a process of continuous improvement approaches on our most used channels."
>
> "We have great culture with a clearly articulated roadmap for improving the customer experience."
>
> "We empower our agents to meet the needs of the customer."
>
> "We have a very empathetic team that really wants to help customers, and it really shows."
>
> "We have dedicated teams and resources, and we've made the touchpoint an organizational priority."
>
> "Our legacy training is excellent."
>
> ❞

PROVIDING AN EXCEPTIONAL CROSS-CHANNEL EXPERIENCE

Like the sentiment expressed on the previous page, there was a year-over-year increase in the percentage of CX leaders feeling that their organizations were doing a good job in creating seamless, consistent, and easy experiences as customers navigate across channels. This is good news for consumers who are increasingly growing accustomed to solving a single issue while navigating across one or more solutions. Creating a seamless and exceptional cross-experience is also the single most effective way to encourage repeat use and adoption of the types of channels CX leader prefer their customers use, like online chat and chatbots.

Does your organization do a good job of providing a seamless, consistent, and easy experience as your customers transition between different channels and solutions?
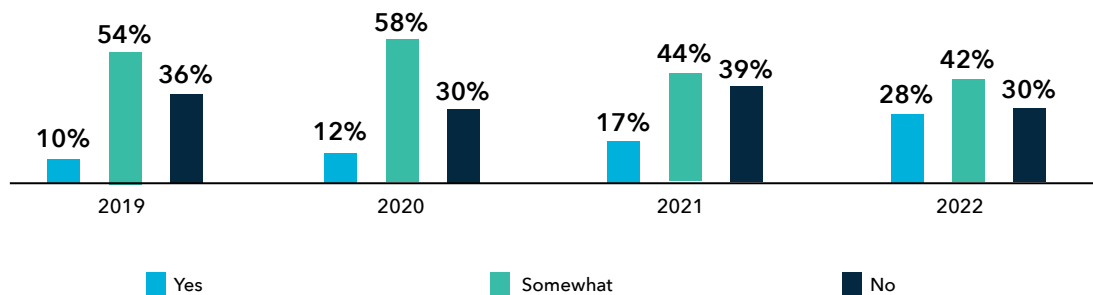
	2019	2020	2021	2022
Yes	10%	12%	17%	28%
Somewhat	54%	58%	44%	42%
No	36%	30%	39%	30%

"… the winners of 2023 will shift their focus to a 10-thousand-foot, panoramic view of their brand to understand how multiple channels are intersecting in the customer journey."

Trace Anderman
Chief Sales Officer

ACT

**See Trace's commentary on page
six for more insights.**
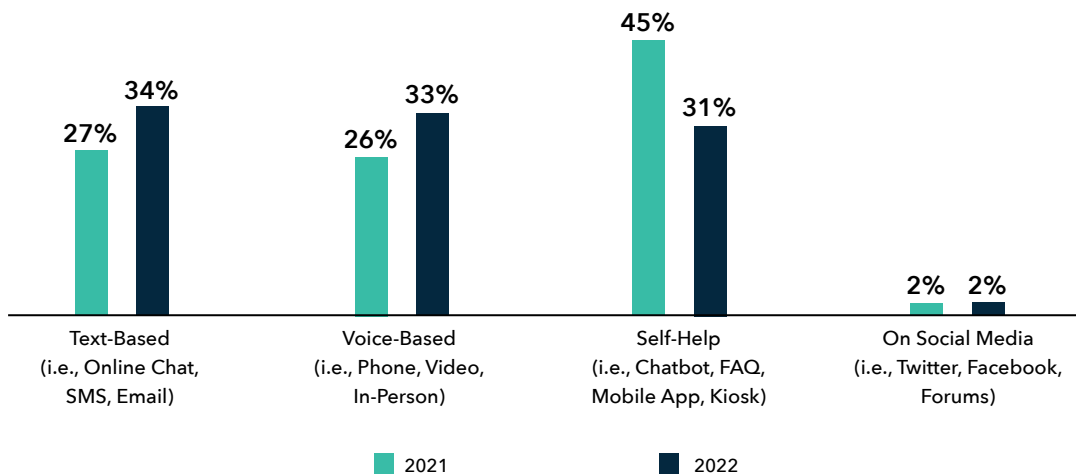
PREFERENCES
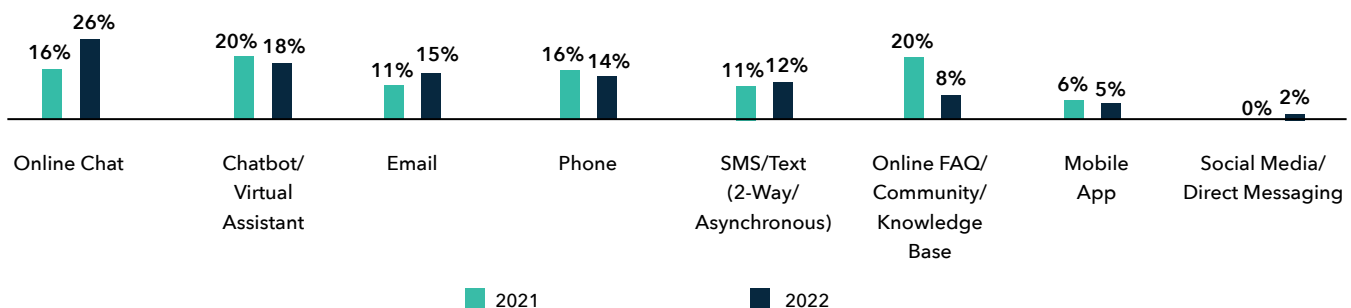& INITIATIVES

CONTACT PREFERENCES

Although CX leaders reset their perception of contact preferences among consumers in 2022, a disconnect remains when it comes to Self-Help solutions. In consumer surveying conducted in mid-2022, only 15% of consumers expressed that Self-Help would be their preferred contact method, while 31% of CX leaders suspect Self-Help as the channel of choice among consumers. Regardless, companies should seek to understand the preferences of their specific customers because adoption of such solutions is not the same across demographics and customer bases. For more details on how these results matched up against the rest of those consumer survey results, see the Consumer Comparisons section (page 78).

Assuming the customer care issue would be resolved, which contact method do you think consumers would prefer to use?

	Text-Based (i.e., Online Chat, SMS, Email)	Voice-Based (i.e., Phone, Video, In-Person)	Self-Help (i.e., Chatbot, FAQ, Mobile App, Kiosk)	On Social Media (i.e., Twitter, Facebook, Forums)
2021	27%	26%	45%	2%
2022	34%	33%	31%	2%

Among CX leaders' preferences, the desire for customers to use Online Chat grew substantially in 2022, up ten points (an increase of 63%) – potentially the result of organizations launching Online Chat solutions, as suggested by future channel results on page 36. At the same time, preference for Online FAQs and other online destinations fell by 12 points (a 60% decline). This, too, could be the result of operational changes such as stronger staffing levels, the desire to see investments pay off, or an understanding that any engagement with a live agent is an opportunity to create a unique brand experience.

Assuming all solutions are equally capable of resolving a customer's issue, which channel would you prefer your customers use?

	Online Chat	Chatbot/ Virtual Assistant	Email	Phone	SMS/Text (2-Way/ Asynchronous)	Online FAQ/ Community/ Knowledge Base	Mobile App	Social Media/ Direct Messaging
2021	16%	20%	11%	16%	11%	20%	6%	0%
2022	26%	18%	15%	14%	12%	8%	5%	2%

FACTORS DETERMINING CONTACT PREFERENCES

As seen on the previous page, CX leaders have, year-over-year, radically adjusted their perceptions of which contact methods consumers prefer. So, too, have they adjusted their perceptions of which factors determine consumer preferences. Again, this is a question also asked of consumers. And, while 52% of consumers did name "Convenience/Ease of Use" as one of the biggest factors determining their preference, 44% also selected "Prefer to Speak to Someone." For more details on how these CX leaders results compared to the consumer survey, see the "Consumer Comparison" section on page 83.

What do you think is the biggest factor in determining the contact method preferences of consumers?

	2021	2022
Convenience/Ease of Use	62%	39%
Getting a Quick Answer	21%	30%
Being Comfortable with the Channel	9%	15%
Preference for Speaking to Someone	8%	16%
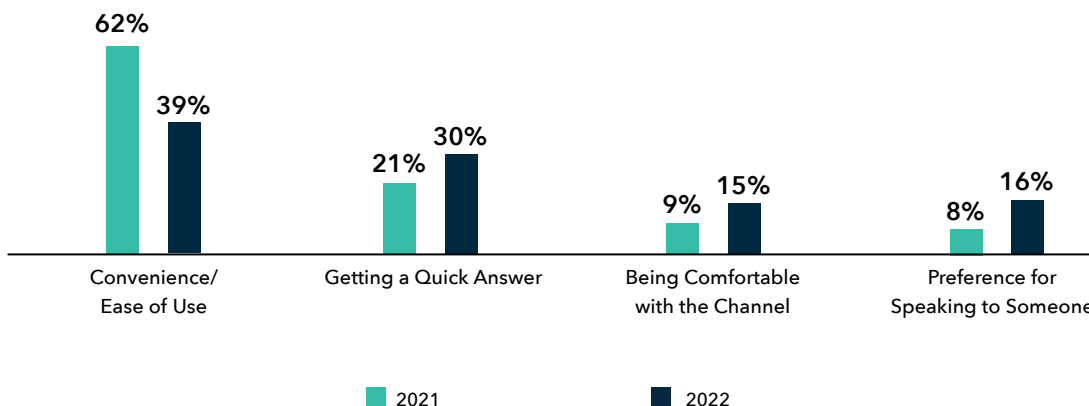
INITIATIVES FOR GREATER CROSS-CHANNEL EASE

Does your organization have any specific initiatives to create greater ease for customers as they navigate across channels?

2019	2020	2021	2022
28% / 65% / 7%	41% / 46% / 13%	53% / 35% / 12%	49% / 39% / 12%

■ Yes   ■ No   ■ Don't Know
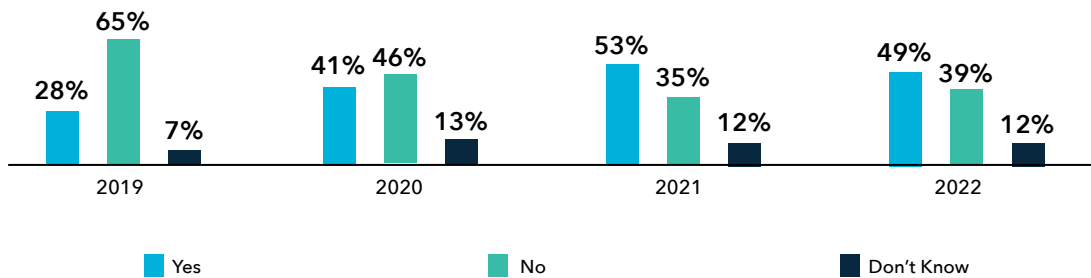
Consistent with last year's results, about half of the organizations (49%) in this year's survey have initiatives to create greater ease for customers as they navigate across channels. Below is a selection of verbatim describing some of these specific initiatives. Among all responses, a few common threads emerged, including technology playing a central role, centralization of information, creating consistent messaging across channels, and regular monitoring/assessment of the current experience.

"

BRIEFLY DESCRIBE YOUR ORGANIZATION'S SPECIFIC INITIATIVE(S) TO CREATE GREATER EASE FOR CUSTOMERS AS THEY NAVIGATE ACROSS CHANNELS.

"Improving guest journeys via process and technology, plus things like our transfer reduction initiative."

"We're constantly evaluating the ease of use of our customer-facing systems, especially online accounts."

"Creation of universal applications and providing consistent resources everywhere, be it in-person, online, etc."

"We conduct regular usability testing on all our channels."

"Attempting to align technologies for a seamless, consistent experience."

"We are working toward having a record of all customer interactions in one."

"Creating many of the baseline capabilities and use cases and building upon those."

"Our data science team is looking at the triggers for those changes from one channel to another. Once we understand that piece, we'll build an easier workflow so customer progress is passed from one channel to the next."

"

INITIATIVES TO CREATE GREATER CROSS-CHANNEL CONSISTENCY

Does your organization have any specific initiatives to create greater consistency across channels?

	2019	2020	2021	2022
Yes	48%	47%	64%	56%
No	43%	40%	25%	30%
Don't Know	9%	13%	11%	14%
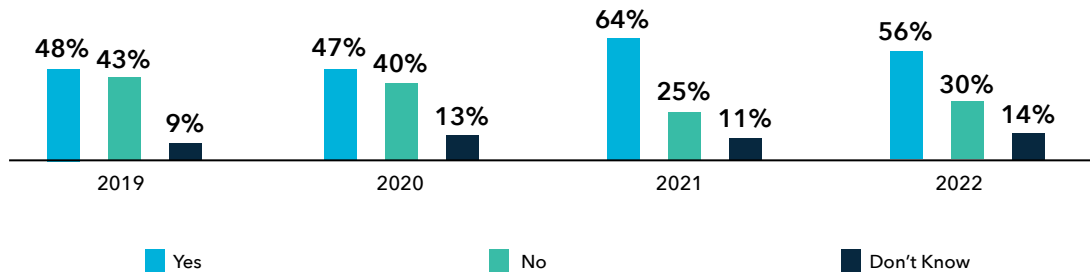
The percentage of companies with initiatives to create greater cross-channel consistency slipped year-over-year, though remaining north of 50%. Based on two years' worth of data from CX Leaders Trends & Insights Consumer Edition reporting, consistency is most important to roughly 13-14% of consumers, which is a significant number, so cross-channel consistency is an investment worth making. Below are some of the specific ways in which this year's survey participants are enacting greater consistency for customers. Again, most of the initiatives described involve technology solutions, but there were also several nods to improved training and reworked processes.

BRIEFLY DESCRIBE YOUR ORGANIZATION'S SPECIFIC INITIATIVE(S) TO CREATE GREATER CONSISTENCY ACROSS CHANNELS.

"Implementation of an omni channel-like application."

"Standardized process flows and KPIs."

"Cross-train agents and teams and use a customer data platform to ensure cohesiveness across all platforms."

"Baseline service training for all customer-facing staff."

"Feed all channels to the same tool and the same agent pool."

"We put in place a single platform to support email, phone, and chat. This way, we get a 360-degree view of customer contacts in a single platform."

"Heavy investment in RPA and automation, especially with respect to working out of multiple systems / CRMs."

SECTION HIGHLIGHTS

Across organizations, roughly three-fourths of all contact volume occurs across just two solutions: Phone and Email; but consumers are migrating, slowly (page 34)

SMS/Text remains the most highly planned for solution in the short-to near-term, followed closely by Chatbot/Virtual Assistant, Video Chat, and Kiosks (page 36)

Thirty-eight percent of companies measuring the entire customer experience across all channels (page 38)

The average reported Resolution Rate of "Chatbot/Virtual Assistant" improved 19 points year-over-year, from 37% to 56% (page 40)

Many trends matured in 2022, especially as they applied to channel use and preferences. Although consumers continue to value Voice-Based solutions (namely, Phone), the slow, steady move toward Text-Based solutions continues, with 2022 seeing a near-50/50 split in preferences among consumers.

This shift noted above is occurring not only from the perspective of consumer preferences and use, but also in terms of corporate investment. Among the solutions most slated for future investment, SMS/Text and Chatbots continue to rise to the top. It is imperative, prior to developing such channels, that brands take pains to understand if such solutions align with the expectations and desires of their specific customer base. In other words, in asking what success might look like, brands have to recalibrate on what's most important to their customers. Yes, every solution needs to start with access, ease, and effectiveness. This requires the right types of initiatives, but also an equal measure of proper monitoring to prove out the value of such efforts.

But, beyond these essential elements, consumers are more likely to reward brands that have passionate, friendly, and engaged agents, as demonstrated in the coming pages of this report.

STRATEGIES, PROGRAM DATA, AND LOYALTY

STRATEGIES

PROGRAM DATA

LOYALTY

CX STRATEGIES

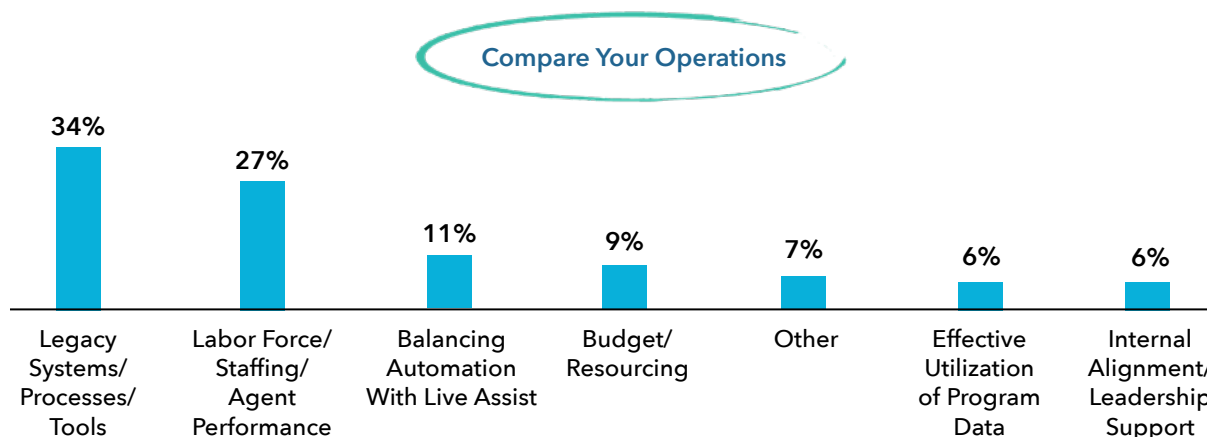# MEETING NEEDS AND EXPECTATIONS AND BIGGEST CHALLENGES

The opinions CX leaders have for their organizations' ability to meet customer needs and expectations continued their steady rise in 2022, up two points year-over-year and up ten points since 2019. This is especially encouraging given the challenges of the past few years. Overcoming these challenges naturally leads to a strong sense of accomplishment and is, in this case, much deserved.

Do you feel your customer care organization is generally meeting the needs and expectations of your customers?

Year	Yes	No
2019	76%	24%
2020	82%	18%
2021	84%	16%
2022	86%	14%

■ Yes ■ No
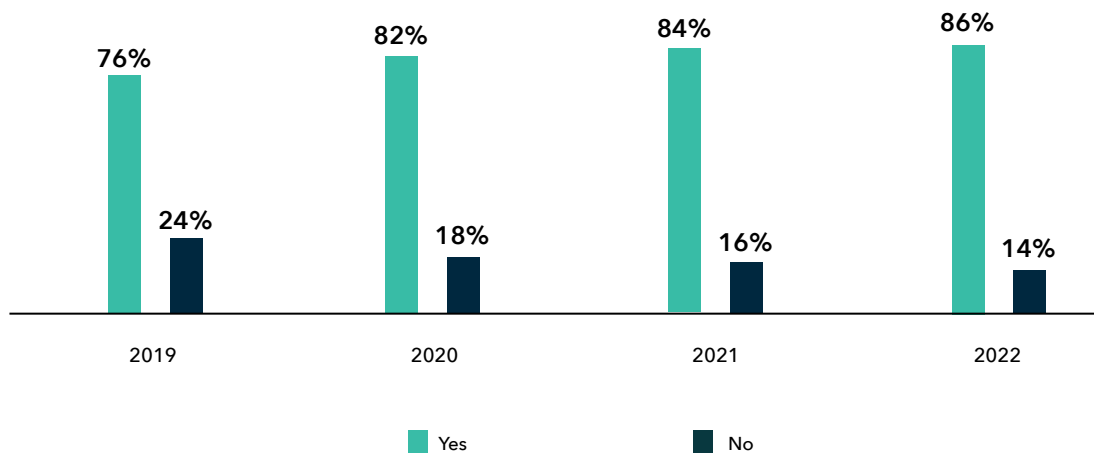
In a question about the biggest challenges currently facing CX operations, attention once again turns toward technology – specifically, Legacy Systems, Processes, and Tools, all challenges calling for large investments. Given the fiscal uncertainties, these challenges will undoubtedly be amplified in the future. And, not far behind, are the challenges of ongoing staffing issues, as companies still struggle to fill openings with qualified, high-performing agents.

What is the single biggest challenge currently facing your CX operations?

Compare Your Operations

Challenge	Percentage
Legacy Systems/ Processes/ Tools	34%
Labor Force/ Staffing/ Agent Performance	27%
Balancing Automation With Live Assist	11%
Budget/ Resourcing	9%
Other	7%
Effective Utilization of Program Data	6%
Internal Alignment/ Leadership Support	6%

COMMITTING TO A CUSTOMER-FIRST STRATEGY

This year's report brings a revision to the below question, converting from a three-point to a five-point scale. In 2021, 92% of respondents indicated "Yes" or "Somewhat" to a similar question, which equates to about 88% in 2022. That this number remains elevated is good news for consumers (and companies) as a firm commitment to a "customer first" strategy is step one in tapping into improved loyalty, increased revenue, and a heightened brand impression, as demonstrated across industries time and again.

How committed is your company to a "customer first" strategy?

51%	37%	4%	5%	3%
Very Committed – Customer Is Always at the Center	Somewhat Committed – Customer Is Usually at the Center	As Committed as Others in Our Industry	Somewhat Uncommitted – Customer Is Rarely at the Center	Very Uncommitted – Customer Is Never at the Center
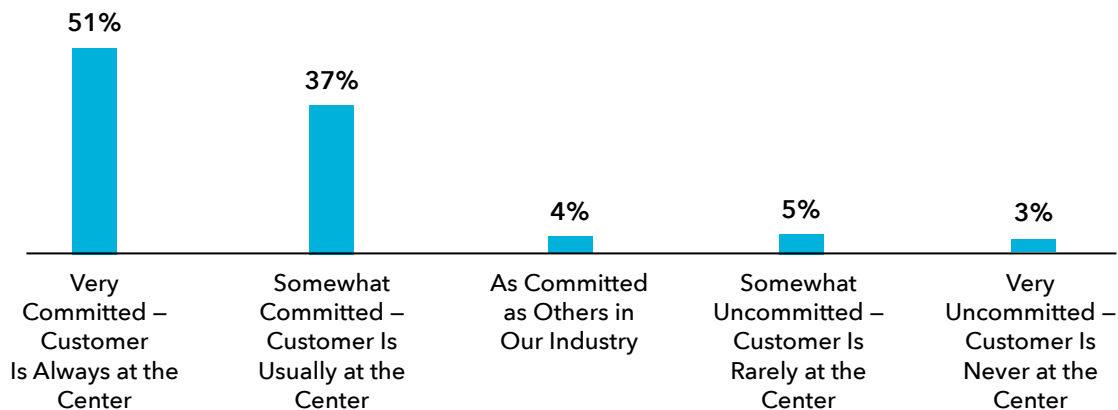
What does "customer first" look like at your organization, and what's it mean for your customers?

" It is encouraging to see the increasing number of companies that are proactively choosing to place the customers at the center of their business. I think most people in the CX industry can relate when I say it is one thing to state it and it takes a mountain of actions to bring this statement to life. For woom, this looks like considering the customer experience in every one of our strategic initiatives, processes, and decision matrixes. It is also reflected in how our organizational structure is set up, which has CX as an even pillar to sales, marketing, operations, and IT instead of underneath one of these functions. Lastly, we have shifted the language from "prioritize CX" to "placement of CX," which holds each of us accountable to start and end our conversations with the question, "How will this impact our customers?" In this regard, our founders led by example and, by extension, this same expectation and responsibility applies to every woom employee. At the end of the day, our customers should feel this in how we show up for them at each step of their journey with woom bikes – from the products we make to the stories we share to the service we strive to provide. "
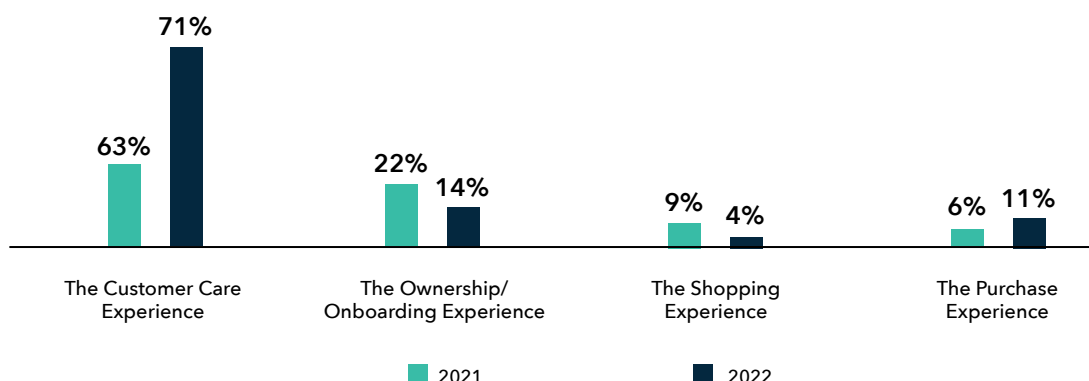
woom
pedal your planet

April Obersteller
Director of Global Experience: EX + CX

WHERE TO FOCUS AND PROACTIVE FOLLOW-UPS

When asked to speculate on where consumers might think brands should be focused, CX leaders correctly pointed to "The Customer Care Experience." In 2022, surveying of consumers as part of the CX Leaders Trends & Insights series, 50% of consumers pointed to "The Customer Care Experience," followed by what amounted to a three-way tie among the three other areas of potential focus.

Where do you think consumers feel brands should focus their improvement efforts?

	The Customer Care Experience	The Ownership/ Onboarding Experience	The Shopping Experience	The Purchase Experience
2021	63%	22%	9%	6%
2022	71%	14%	4%	11%

Proactive follow-ups are a powerful way to directly reduce customer churn while affording CX programs a second chance at making things right for the customer. That said, brands need to ensure they are following up in a consistent and constructive way, anticipating snags and pitfalls ahead of reaching out. This is where a single source of truth and complete, contextualized customer records can make or break not only finding a fix but, in many cases, retaining a customer.

Following a negative customer care experience, does your organization proactively follow up with customers to help remedy or apologize for the situation?

	Yes	In Some, But Not All Cases	No
2021	42%	52%	6%
2022	41%	53%	6%
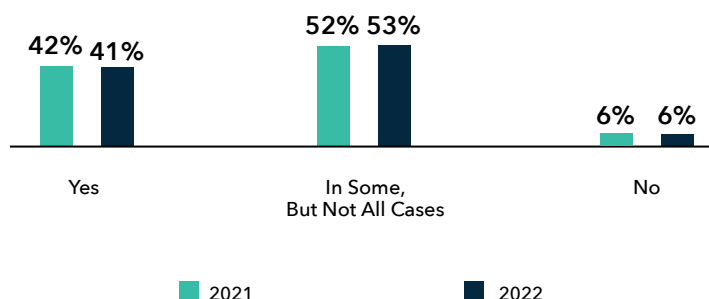
CULTURAL ALIGNMENT TO "CUSTOMER FIRST"

The percentage of CX leaders who felt the culture of their companies was aligned to a "customer first" strategy remained range-bound in 2022, with 94% of respondents indicating "Yes" or "Somewhat." Although the combined number is encouraging, over the past three years of data, there has been little to no movement in converting companies from "Somewhat" to "Yes." Like most mission-based organizations, success comes most easily when the mission is embedded in the cultural identity of an organization. This should always be top of mind for CX leaders as they help assess and guide the cultural identities of their organizations in the coming months and years.

Do you believe the culture of your company is aligned with a "customer first" strategy?

	2019	2020	2021	2022
Yes	30%	52%	53%	51%
Somewhat	63%	45%	43%	43%
No	7%	3%	4%	6%
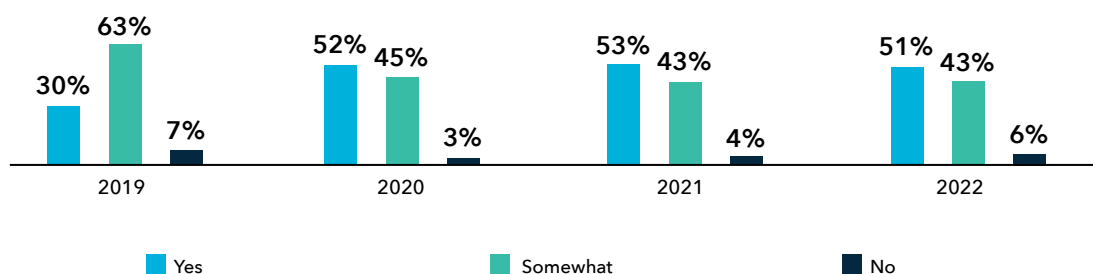
Company culture is a critical component in serving the needs of customers. What are some of the essentials in creating a customer-centric corporate culture?

"At Shipt, our customers are either members, shoppers or retailers, and the need to "walk in their shoes" is more important than ever. On top of answering contacts quickly and politely, today's best-in-class teams are hyper-focused on continually improving the experience for our stakeholders and agents alike. An always-improving culture is set by leaders' curiosity and engaged listening. Do leaders at your company prioritize customer centricity and hold regular routines to review sentiment? Do they shadow contact center agents to keep a pulse on the experience and most common contact topics? Do leaders invest in solutions that improve experience? At Shipt, growth is something that involves everyone. Recently, based on customer, shopper, and agent feedback, Shipt rolled out the ability for shoppers to drop orders if something came up before they started shopping the order. With the click of a button, shoppers no longer need to call or chat us for this action, and it gives us the flexibility to ensure orders are claimed by another available shopper. When you empower voices at all levels, growth becomes part of your culture, and your service center experience is better for it."

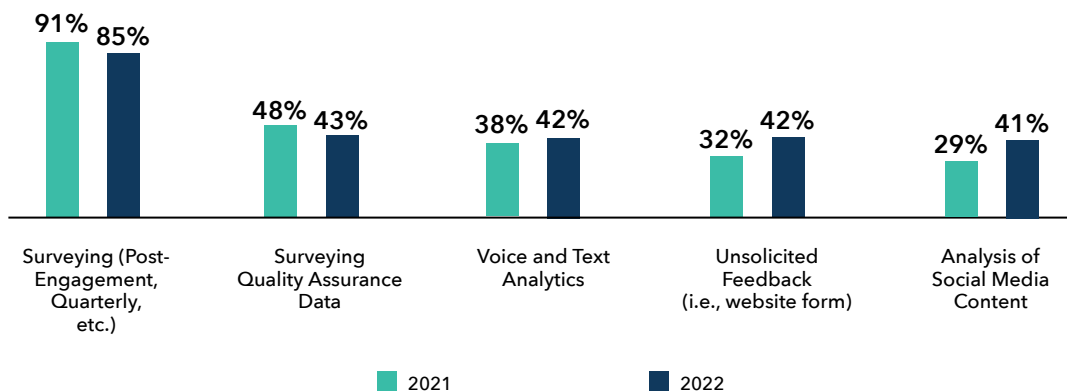**Mark Killick**
SVP, Experiential Operations

Shipt

PROGRAM DATA

CAPTURING SENTIMENT, SURVEYING, AND USE OF DEMOGRAPHICS

Surveying remains the most popular method for capturing customer sentiment and satisfaction information among this year's survey participants, though slightly falling in prevalence year-over-year, from 91% down to 85%. At the same time, companies turned greater attention to sources such as social media content, unsolicited feedback, and analytics (both voice and text). More than ever before, Voice of the Customer data is indispensable in devising a better customer experience through new initiatives and adjustments to existing processes.

In which ways is your organization capturing customer sentiment and satisfaction information? (Please select all that apply.)

|	Surveying (Post-Engagement, Quarterly, etc.)	Surveying Quality Assurance Data	Voice and Text Analytics	Unsolicited Feedback (i.e., website form)	Analysis of Social Media Content
2021	91%	48%	38%	32%	29%
2022	85%	43%	42%	42%	41%

In a new question for 2022, survey respondents were asked about their post-survey randomization practices. Performance metrics can often be thrown off by selective surveying, a practice in which surveys are only offered when engagements result in positive outcomes for customers. To generate more meaningful survey results, participation should be randomized.

The 2022 CX Leaders Trends & Insights Consumer Edition report, as well as previous consumer reports, indicates that age plays a significant role in solution adoption and how customers experience various journeys. By understanding how different age groups approach customer care, brands can tailor experiences to their customer base, providing the solutions their customers are most comfortable with and most likely to gravitate toward.

NEW QUESTION

When surveying customers post-engagement, does your organization take steps to ensure survey collection is truly randomized?

Yes	Not Yet, But Plan to Soon	No	We Don't Survey Post-Engagement
68%	12%	14%	6%
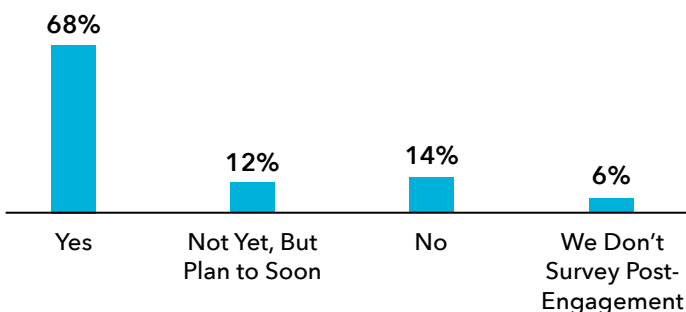
NEW QUESTION

Are you using the demographics (age) of your customers to strategize solutions and processes within your CX organization?

Yes	Not Yet, But Plan to Soon	No
33%	14%	53%
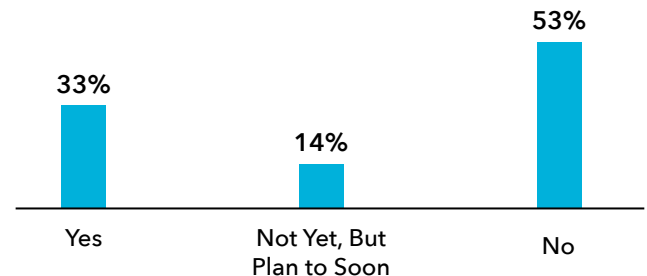
UTILIZING PROGRAM DATA

As highlighted on the previous page, Voice of the Customer data has never been more useful, nor abundant. But capturing, storing, and utilizing this data can be a challenge. It requires the right tools, technology, and people to both manage systems and extract value from the data. But, when done effectively, program data systems can help organizations identify actionable insights on products, services, and customer journeys.

Do you feel your organization is using program data (things like Voice of the Customer and Quality Assurance data) in an appropriate and productive way?

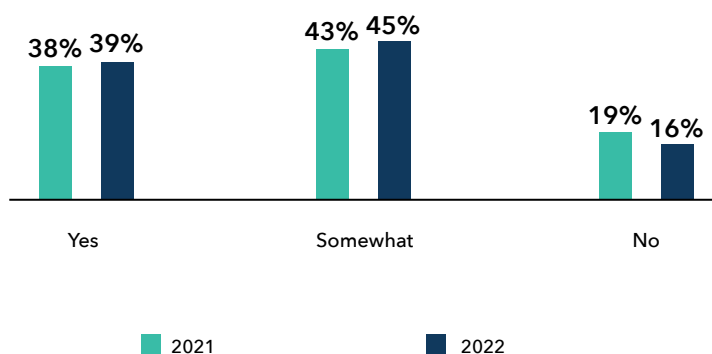|	Yes	Somewhat	No
2021	38%	43%	19%
2022	39%	45%	16%

Among the responses received to the question below, the way in which data is disseminated throughout the organization proved to be prominent. Data centralization, organizational access, establishing repeatable processes for deriving value from the data — are all topics covered in the responses received. Below is a selection of those responses, curated to touch upon common themes.

"

WHAT COULD OR SHOULD YOUR ORGANIZATION BE DOING DIFFERENTLY TO MAXIMIZE THE VALUE OF YOUR PROGRAM'S DATA, AND WHAT IS WORKING BEST CURRENTLY?

"Feed the data back to the business owner driving the root cause of the contact."

"We're working toward AI-driven analysis of all surveys rather than human analysis of a portion of our surveys."

"We need to leverage data from our FAQ usage more effectively and also complete our cloud integrations to offer better Voice of the Customer data to other areas of the business."

"Centralizing data within our CRM has worked well, but we also need to improve how we're analyzing for trends."

"We need to solve for our bad customer data due to non-uniform entry points."

"We need to make it easier for product and benefit owners to access pertinent customer data for the area they manage."
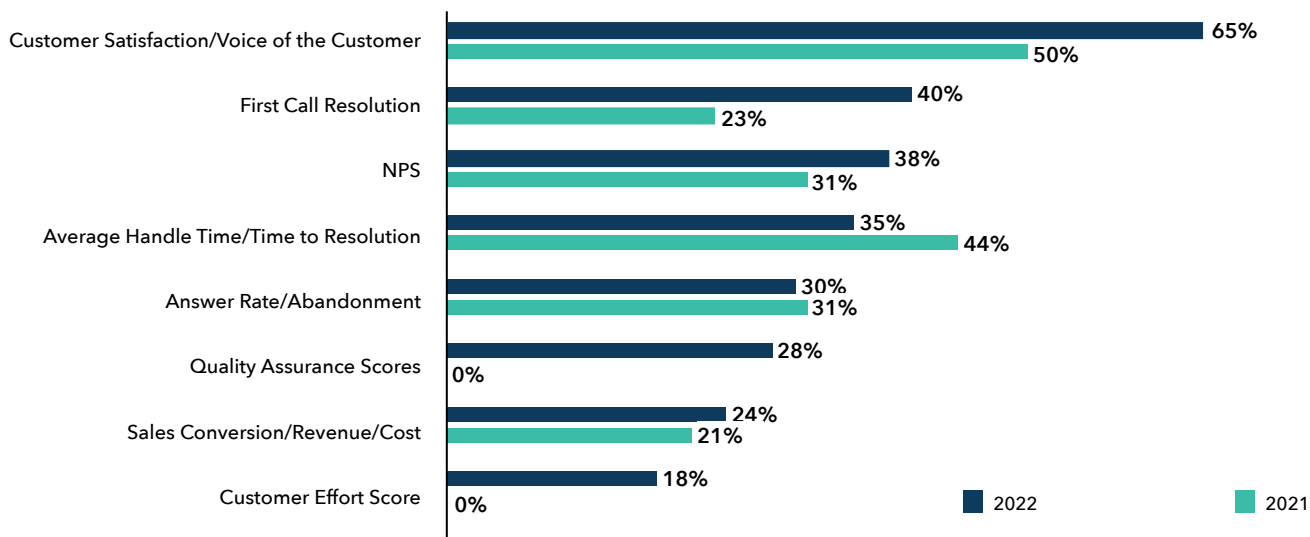
"

KEY PERFORMANCE INDICATORS

For the second year in a row, we asked CX leaders which key performance indicators (KPIs) were most critical to their organizations. CSAT/Voice of the Customer continued to lead the way, strengthening its position over First Call Resolution, which saw hefty year-over-year gains. Notable on the downside was the decline for AHT/Time to Resolution, dropping off nine points, from 44% to 35% year-over-year.

Which three key performance indicators (KPIs) are most critical and garner the most attention in the management of your CX operations?

Compare Your Operations

KPI	2022	2021
Customer Satisfaction/Voice of the Customer	65%	50%
First Call Resolution	40%	23%
NPS	38%	31%
Average Handle Time/Time to Resolution	35%	44%
Answer Rate/Abandonment	30%	31%
Quality Assurance Scores	28%	0%
Sales Conversion/Revenue/Cost	24%	21%
Customer Effort Score	18%	0%

Which three key performance indicators (KPIs) are most critical and garner the most attention in the management of your CX operations?

"A strong digital delivery system is the next evolution of SECU's service offerings. The digital-first strategy respects the desire of our membership to choose the channel in which they want to be served. From a KPI perspective, this context is important, as our strategic plan is helping to shape the measures we will be moving the organization toward — more experiential-focused. With a clearer focus on experience, this also shapes how operational metric targets are set and how we're leading our teams. We place more focus on quality, employee service-skill development, and behavioral coaching. How we deliver service and how that service impacts our membership is paramount."
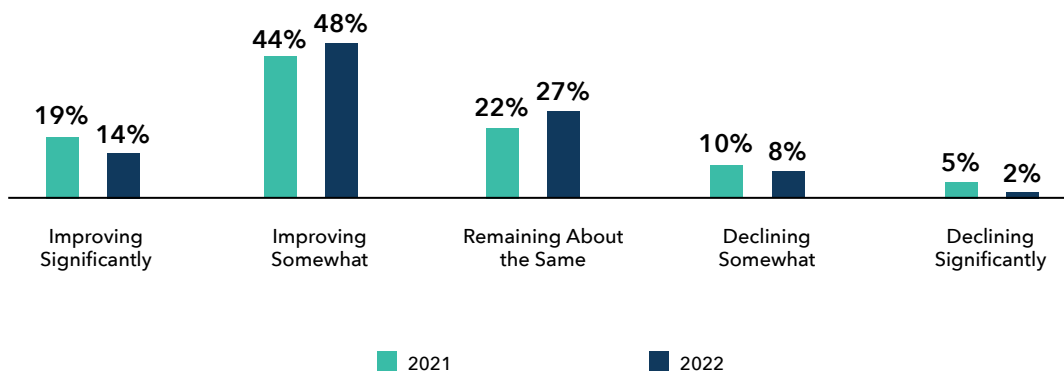
State Employees' Credit Union

Jared Benesh
Executive Vice President, Member Experience Transformation

DIRECTION OF KEY PERFORMANCE INDICATORS

While the percentage of companies indicating improving KPIs remained relatively flat year-over-year, there was a moderate decline in the percentage of companies indicating KPIs declines – from 15% in 2021 to 10% in 2022. Tracking KPIs is most effective when done across the end-to-end journey, making sure to measure with as much care and detail in emerging channels (such as self-help or messaging) as in mainstay channels like voice or email.

Generally speaking, over the past 12 months, have your critical program KPIs been improving, declining, or remaining the same?

	Improving Significantly	Improving Somewhat	Remaining About the Same	Declining Somewhat	Declining Significantly
2021	19%	44%	22%	10%	5%
2022	14%	48%	27%	8%	2%

Improving KPIs has been hard fought in recent years. What changes or initiatives have been most helpful in moving the needle at your organization?

"Moving the needle is generally considered a positive. However, it's positive only if you're moving the needle on the right things. The world has changed since 2020, and the way we do business and consumer behavior has changed along with it. That means if you have not recalibrated your key performance indicators to account for these changes, you're probably not measuring the right things. For starters, contact center leaders need to reexamine the KPIs they track to include what matters most to customers and the enterprise brand. By default, that includes a new focus on employees. Are you emphasizing productivity over people? Satisfaction over sentiment? First contact resolution over customer churn? It's likely, since measuring agent engagement has been long ignored, and now has jumped the line as a leading indicator of attrition. Moving the needle on lowering escalation rates, increasing tool utilization or boosting positive agent emotion might tell you more about how well your team is representing your brand rather than by how fast they are answering the phone."

Lisa Oswald
Senior Vice President & Global Head of Customer Service

TRAVELZOO®

LOYALTY

LOYALTY AND BRAND REPUTATION

In 2022, a larger percentage of CX leaders agree with the notion that good customer care equates to loyal customers, with a combined 99% agreeing or strongly agreeing with the idea, compared to 92% in 2021. Comparatively, 73% of consumers agree or strongly agree to the same notion. Regardless of opinion, the facts bear out that positive customer experiences do lead to loyalty, to one degree or another. For more details on how consumers and CX leaders compare on this topic, check out the Consumer Comparison section, page 80.

**How much do you agree or disagree with the following statement:
Receiving good customer care makes consumers very loyal customers.**

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
2021	54%	38%	8%	0%	0%
2022	68%	31%	1%	0%	0%
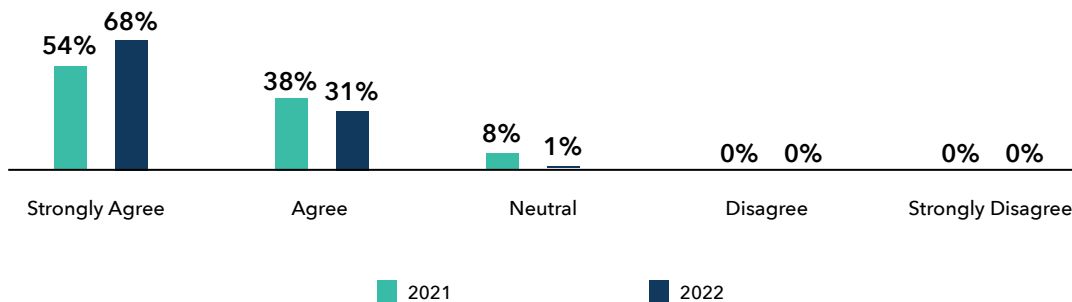
Like the above, CX leaders also strongly agree that brand reputation for good service strongly influences consumer intent to do business, with 96% agreeing or strongly agreeing. Of course, business success largely depends on products and/or services that impact value to the customer. But, aside from this, no other area of the business has such a direct impact on reputation as a company's service organization. And, according to results in the 2022 CX Leaders Trends & Insights Consumer Edition report, most consumers agree, with 63% indicating they agree or strongly agree with the sentiment below.
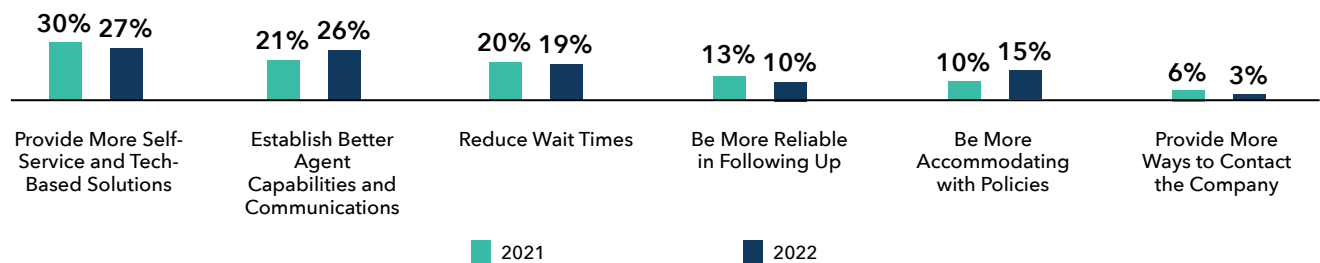
**How much do you agree or disagree with the following statement:
A brand's reputation for good customer service greatly influences
consumers' decisions to do business with said brand.**

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
2021	58%	41%	1%	0%	0%
2022	66%	30%	4%	0%	0%
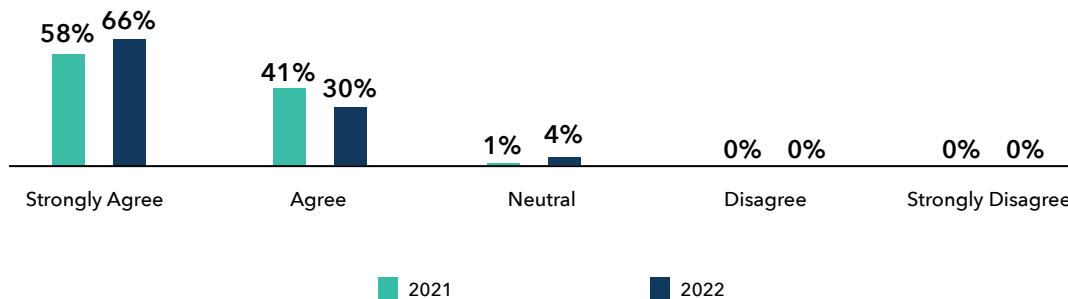
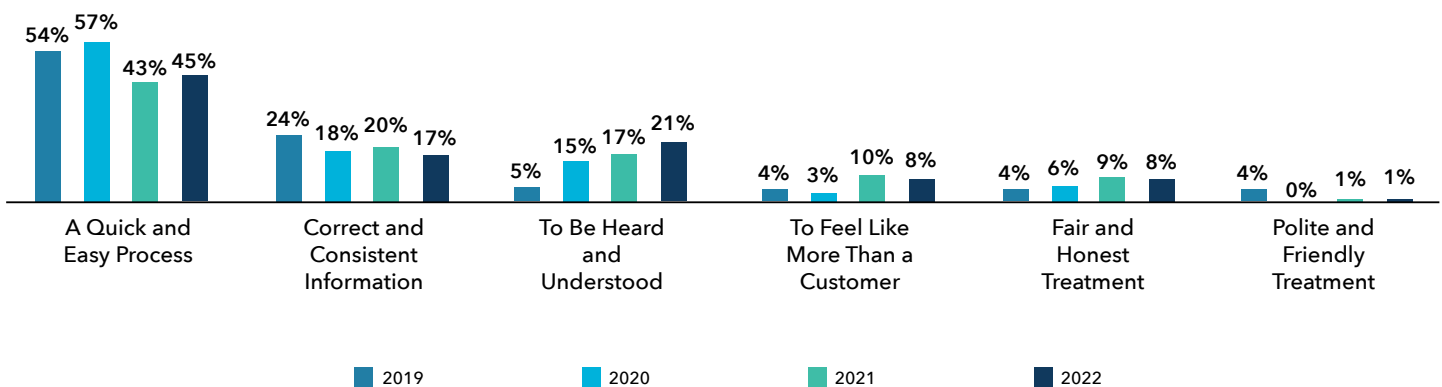# MAKING RESOLUTION EASY AND WHAT'S MOST IMPORTANT

CX leaders continue to cling to the idea that consumers want more self-service and tech-based solutions in order to make the resolution process as easy as possible. But, the reality is that consumers mostly want reduced wait times, better agents, and more ways to contact companies. For a more detailed look at how the below results align and differ from consumer opinion, check out the Consumer Comparison section on page 85.

What do you think consumers want brands to do to make the resolution process as easy as possible?

	2021	2022
Provide More Self-Service and Tech-Based Solutions	30%	27%
Establish Better Agent Capabilities and Communications	21%	26%
Reduce Wait Times	20%	19%
Be More Reliable in Following Up	13%	10%
Be More Accommodating with Policies	10%	15%
Provide More Ways to Contact the Company	6%	3%

Although a significant portion of consumers (21%) want "A Quick and Easy Process" when trying to resolve a customer care issue, even more (25%) want "Fair and Honest Treatment." While CX leaders are on the right track with what consumers want, they continue to underestimate the importance to the consumer of things like fairness, politeness, and friendliness. Check out the Consumer Comparison section on page 79 for a complete breakdown.

Aside from getting their issues resolved satisfactorily, what do you think is most important to your customers when trying to resolve a customer care issue?

	2019	2020	2021	2022
A Quick and Easy Process	54%	57%	43%	45%
Correct and Consistent Information	24%	18%	20%	17%
To Be Heard and Understood	5%	15%	17%	21%
To Feel Like More Than a Customer	4%	3%	10%	8%
Fair and Honest Treatment	4%	6%	9%	8%
Polite and Friendly Treatment	4%	0%	1%	1%

CONSUMER FRUSTRATIONS

While 53% of CX leaders think consumers are most frustrated with the customer care process being too long or cumbersome, the fact is, the largest percentage of consumers (42%) point to the difficulty of reaching a live person as the most frustrating. CX leaders are tasked with improving quality while providing greater access. This often translates into unassisted solutions. While this is unlikely to change, brands need to ensure easy off-ramps for reaching a live person, especially when resolution capabilities of unassisted channels are far from optimized. To see more of how these results compare with those of the consumer, see the Consumer Comparison section on page 84.

What do you think is the most frustrating aspect of resolving a customer care issue for consumers?

NEW QUESTION

53%	16%	14%	14%	4%
Process Takes Too Long or is Cumbersome	Unhelpful Company Policies	Difficulty in Reaching a Live Person	Poor Agent Quality (Communication, Attitude)	Lack of Accountability by Company
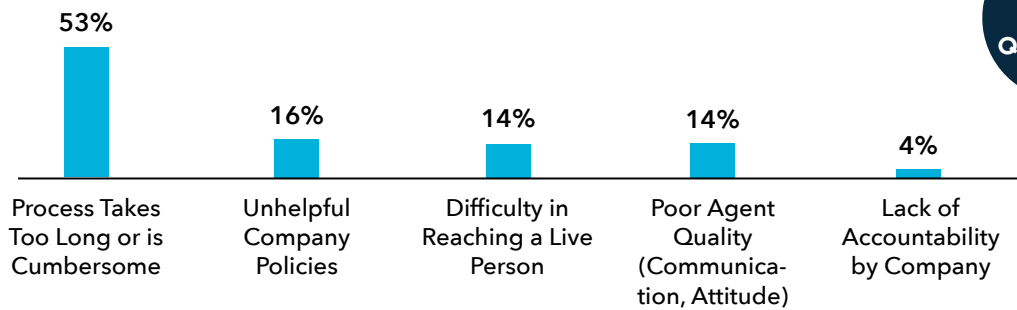
How is your organization identifying and tackling common pain points for customers?

"Fulton County Government has made a commitment to provide service accurately and efficiently to its customers across multiple touchpoints with minimal deficiencies by eliminating cross-functional disconnects. To do so, we consistently measure the emotional dimensions of our customers through customer journeys and by measuring performance and customer satisfaction. We routinely conduct satisfaction surveys on a monthly, quarterly, bi-annual, and annual basis that help us to identify pain points and service deficiencies. More recently, we have added Customer Satisfaction Kiosks in some of our more forward-facing departments that now measure satisfaction and the customer experience at the transactional moment. This survey method helps us to isolate fluctuations in service levels, track performance with actionable data, uncover potential causes for poor performance, address negative customer experiences immediately, and provide validity needed to make immediate adjustments where pain points exist. The addition of this new evaluation initiative into our customer service framework has had a direct impact on the overall customer experience and further aligned the needs of our customers with services provided by our agencies."

Brigitte Bailey
Director, Customer Experience and Solutions

FULTON COUNTY

USING CX TO BUILD LOYALTY AND COMPANIES DOING CX WELL

In 2022, slightly fewer survey respondents felt their organizations were doing a good job of using CX to drive customer loyalty. If done correctly, CX operations can bring added value not only to customers, but also to the wider organization. This can best be accomplished by feeding insights back into the organization, leading to better products and services, as well as better internal processes. The result is happier, more loyal customers.

Do you feel your organization does a good job of using its customer experience operations to drive customer loyalty?

	Yes	Somewhat	No
2021	42%	50%	8%
2022	38%	49%	13%
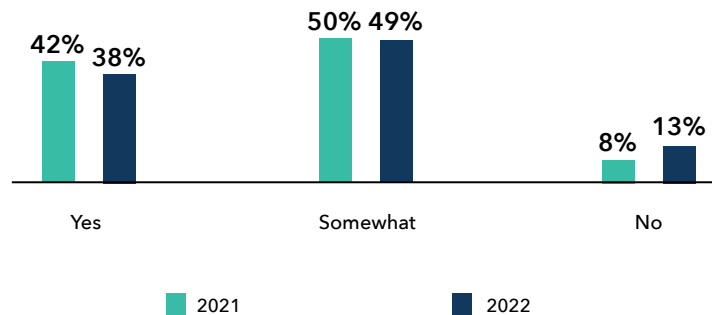
In a question that asks CX leaders to lean on their own customer experiences, survey participants were asked to name which brands they thought were doing CX well. In the minds of respondents, keys to success revolved around seamless experiences, reliability, empowerment among agents and, above all else, a strong sense of customer centricity, both in word and deed. Below are two lists of the companies mentioned by the 57 CX leaders who responded to the question, broken down by multiple mentions (with the number of mentions in parenthesis), as well as a selection of some of the most well-known brands that were singularly named.

" WHICH COMPANIES DO YOU THINK ARE DOING CX WELL AND WHAT, SPECIFICALLY, DO YOU THINK IT IS THAT MAKES THEM SUCCESSFUL? (BOTH BIG AND SMALL COMPANIES.)

Multiple Mentions

Amazon (20)
Apple (7)
Chewy (4)
Zappos (4)
USAA (3)
Nordstrom (3)
Disney (2)
American Express (2)
Delta (2)
Chick-fil-A (2)

Single Mentions

Best Buy
Blue Cross Blue Shield
eBay
Google
Hilton
Hootsuite
Hulu
Jet Blue
LinkedIn

Meta
Panera Bread
PayPal
Rogers
Sunbasket
United Healthcare
United Airlines
Warby Parker
Williams-Sonoma

SECTION HIGHLIGHTS

Eighty-six percent of survey respondents feel their organization is generally meeting customer needs and expectations – the highest result since 2018, and the second highest ever (page 51)

Legacy Systems/Processes/Tools is the single biggest challenge (34%) facing CX leaders, followed by Labor Force/Staffing/Agent Performance (27%) (page 51)

The three KPIs that garner the most attention at the majority of institutions include CSAT/VoC, FCR, and NPS (page 58)

Fifty-three percent of CX leaders think consumers are most frustrated with the customer care process being too long or cumbersome, yet the largest percentage of consumers (42%) point to the difficulty in reaching a live person (page 63)

As highlighted in the Workforce and Workplaces section Conclusions (page 30), optimism within the industry ran high in 2022, and this is further demonstrated by several results within this section, as well. Notably, more CX leaders feel their organizations are generally meeting the needs and expectations of customers than at any time since 2018. Yes, challenges remain. Legacy systems (as well as outdated processes and tools) are still a drag on many organizations, as well as oft mentioned labor force challenges.

Another challenge, one that often flies under the radar, is alignment. In this case, the alignment being referred to is not that between organization departments, but alignment between company and customer. The CX Leaders Trends & Insights report is designed around comparing corporate and consumer perspectives. In many cases, CX leaders and consumers agree on the importance of good customer care, including its impact on loyalty. But they don't always agree on what makes for an exceptional experience. Specifically, brands need to understand that consumers value great experiences, and they are willing to say exactly what that experience needs to look like. It needs to be accessible (especially in terms of accessing people), it needs to be easy, and it needs to be fair. It's upon CX organizations to understand this, deliver it, and measure to ensure the actual experience aligns with the experience companies are trying to achieve.

CX
TECHNOLOGY
INVESTMENTS & COMPETITIVENESS
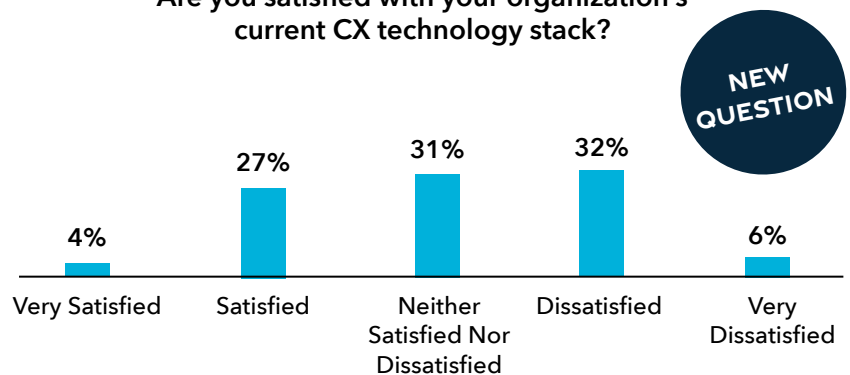## ARTIFICIAL INTELLIGENCE

INVESTMENTS AND COMPETITIVENESS

TECH STACK SATISFACTION

In a new question meant to illustrate the general sentiment toward technology in the CX space, a significant number of survey respondents (38%) expressed some level of dissatisfaction for their current CX Tech stack. Interestingly, this is seven points higher than those expressing some level of satisfaction. To remedy this, CX leaders should seek to build better relationships with their IT organizations, but also reach outside of their own organizations (and even their own industries) to connect with peers and learn what other companies are planning, doing, and investing in. For every CX leader out there struggling with a specific CX tech challenge, there is another leader who has already overcome such a challenge. Luckily, CX is a space where leaders embrace the idea that a rising tide lifts all boats, and most are willing to share their experiences, solutions, and insights.

JOIN EXECS IN THE KNOW'S ONLINE CX COMMUNITY

The Know It All "KIA" online community is a free-to-join, private, online space that gives you instant access to hundreds of other like-minded CX professionals. It's the perfect place to network, learn, and share with your peers in a sales-free space, and on your own time.

Are you satisfied with your organization's current CX technology stack?

NEW QUESTION

Very Satisfied	Satisfied	Neither Satisfied Nor Dissatisfied	Dissatisfied	Very Dissatisfied
4%	27%	31%	32%	6%

Dissatisfaction runs high for the tech stack among CX leaders. What about your tech stack is or isn't working, and what is your go-forward plan on improving the situation?

"

To say I was in the 32% of the dissatisfied respondents would be accurate, but somehow that doesn't portray the optimism I have going forward. Sure, we've been a company with financial challenges that limited our investment in contemporary omnichannel solutions and other tech stack enablers. That's a convenient excuse that's no longer applicable, as we've secured record IT investment this year, and we will be deploying a new case management tool with embedded analytics, while also making upgrades to our telephony stack. However, when considering only 31% of my peers are either very or satisfied with their current CX technology stack, it's time we all step back and ask ourselves, 'Why?' Is it a lack of investment? Or perhaps an unsuccessful implementation that didn't yield the desired results? According to numerous studies, nearly 70% of change initiatives fail. As such, with so many excellent tools in the marketplace, I'd suggest technology isn't the problem – it's the people and processes that need to get on board. That's why we're focusing our efforts on three key areas:

1. Front-line involvement in business requirements development and user acceptance testing
2. Joint project ownership and collaboration with our IT colleagues
3. Establishing a formal change management program

Candidly, using change management tools and training has already yielded significant benefits and improved our odds for a successful deployment. If you'd like a copy of the *Leader's Checklist for Change* tool we're using, please email me: jim.moloney@navistar.com.

In closing, we're on a path of CX maturity with investment and executive buy-in as critical foundational pillars, and we're constantly challenging ourselves to execute with excellence against the vision/strategy we have set for ourselves.

"

NAVISTAR

Jim Moloney
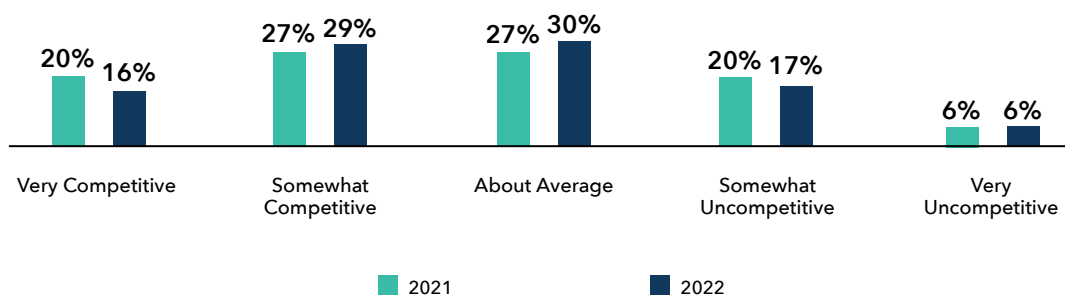Vice President, Aftersales Business Center
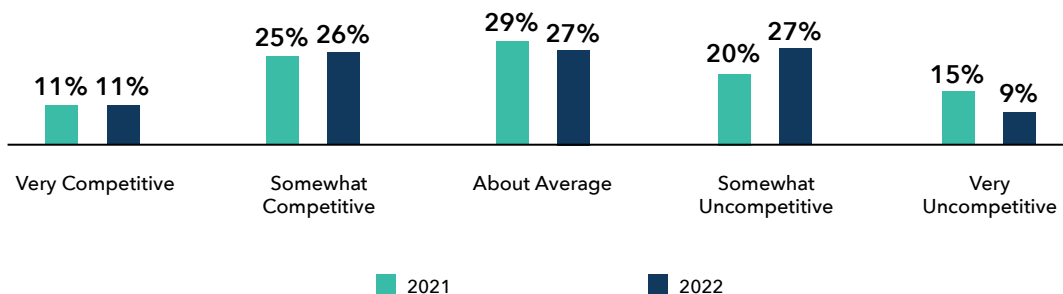
CX TECH COMPETITIVENESS

For the second year in a row, roughly half of survey respondents (47%) feel their organizations are "Very" or "Somewhat" competitive against the competition when it comes to investing in CX-related technologies. Although the availability of such funds might be a challenge in the quarters to come, organizations mustn't lose sight of the impact such investments can have not only on customers, but also on business outcomes.

Compared to your competition, how would you describe your organization's level of competitiveness when it comes to investment in emerging CX-related technologies?

	Very Competitive	Somewhat Competitive	About Average	Somewhat Uncompetitive	Very Uncompetitive
2021	20%	27%	27%	20%	6%
2022	16%	29%	30%	17%	6%

When compared to all industries, rather than just competitors as listed above, survey respondents generally view themselves as less competitive. Rather than 47% of respondents feeling competitive against their direct competition, 37% of respondents felt competitive against companies in all industries. Naturally, this outcome is heavily influenced by the types (and proportions) of companies participating in this year's survey (page 13). If nothing else, these results speak to the importance of having a high level of awareness for the CX frameworks, strategies, technologies, and best practices used outside of one's own industry.

Compared to all companies in all industries, how would you describe your organization's level of competitiveness when it comes to investment in emerging CX-related technologies?
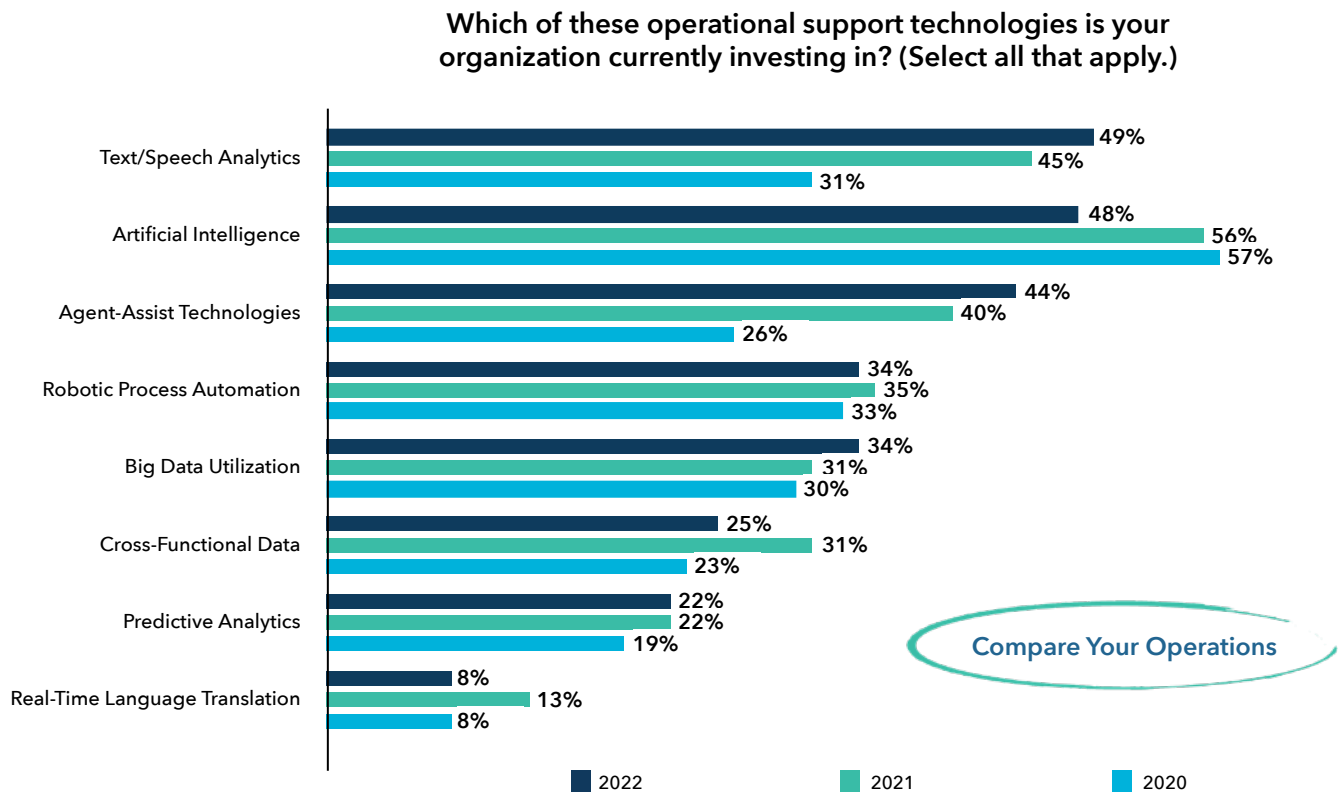
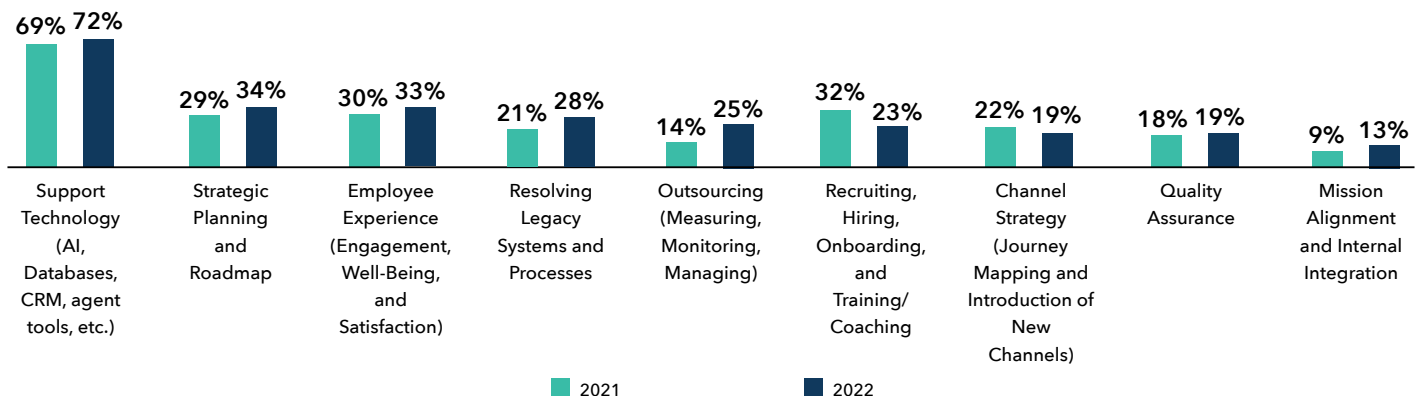|	Very Competitive	Somewhat Competitive	About Average	Somewhat Uncompetitive	Very Uncompetitive
2021	11%	25%	29%	20%	15%
2022	11%	26%	27%	27%	9%

CURRENT AND FUTURE CX TECH INVESTMENT

In 2022, CX technology investments in AI occurred among 48% of survey respondents, giving way to a new leader, with 49% of respondents investing in Text/Speech Analytics. While AI remains a top investment, over three years of data, investment in Text/Speech Analytics and Agent-Assist Technologies have grown the most rapidly.

Which of these operational support technologies is your organization currently investing in? (Select all that apply.)

Technology	2022	2021	2020
Text/Speech Analytics	49%	45%	31%
Artificial Intelligence	48%	56%	57%
Agent-Assist Technologies	44%	40%	26%
Robotic Process Automation	34%	35%	33%
Big Data Utilization	34%	31%	30%
Cross-Functional Data	25%	31%	23%
Predictive Analytics	22%	22%	19%
Real-Time Language Translation	8%	13%	8%

Compare Your Operations

Support Technology (things like AI, databases, CRM systems, etc.) continues to be the destination for the largest pot of money over the next 12 months, with Strategic Planning/Roadmap and Employee Experience also targeted for strong investment. Interestingly, Outsourcing investment looks to take a step forward in the coming year, while outsourced head counts seemingly fell from 2021 to 2022 (page 20). At the same time, investment planned for Recruiting, Hiring, etc. took a step back compared to the forecast of the prior year.

Which area(s) of your CX program do you expect to receive the most investment and attention from your company in the next 12 months? (Select no more than three answers.)

Area	2021	2022
Support Technology (AI, Databases, CRM, agent tools, etc.)	69%	72%
Strategic Planning and Roadmap	29%	34%
Employee Experience (Engagement, Well-Being, and Satisfaction)	30%	33%
Resolving Legacy Systems and Processes	21%	28%
Outsourcing (Measuring, Monitoring, Managing)	14%	25%
Recruiting, Hiring, Onboarding, and Training/Coaching	32%	23%
Channel Strategy (Journey Mapping and Introduction of New Channels)	22%	19%
Quality Assurance	18%	19%
Mission Alignment and Internal Integration	9%	13%

WHERE TO INVEST AND AWARENESS OF THE METAVERSE

In yet another question that asks CX leaders to speculate on the opinions of consumers, 41% thought consumers would want brands to invest in "Creating Better Products and Services," followed distantly by "Gathering and Utilizing Customer Feedback" (at 21%). In this case, CX leaders are spot-on (see the Consumer Comparison section on page 86 for the particulars). Satisfied customers start with quality products and services, and the CX organization can play a vital role in feeding customer insights back into the organization to promote and nurture the improvement of said products and services.
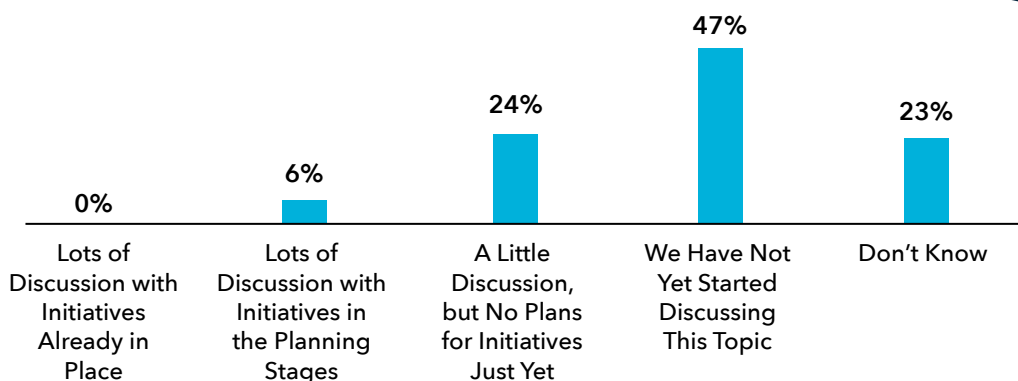
Where do you think consumers feel brands should be investing in order to most effectively improve the customer experience?

	Creating Better Products and Service	Gathering and Utilizing Customer Feedback	Tools and Technology For Customers	Smart, Automated Solutions	Training For Agents and Support Staff
2021	27%	30%	18%	15%	10%
2022	41%	21%	14%	14%	10%
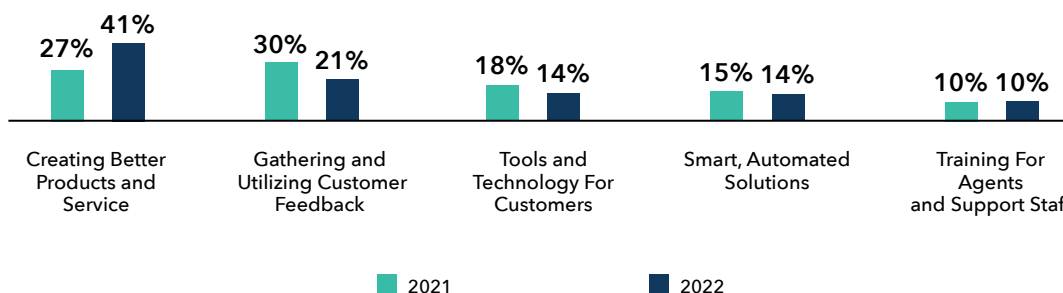
It may be early yet, but that hasn't stopped many leading technology and gaming brands like GameStop, Nvidia, Meta, Microsoft, and Epic from moving full-speed-ahead on metaverse and other technology-forward products and services. It is still unclear what the metaverse might mean and look like for CX operations. Is it just another channel for customer care or something more? What is clear is there will be some sort of presence, especially as the populace becomes more familiar and embracing of the space and its immense potential to reshape ownership, commerce, and human experiences.

Where is your company at in discussing the implications of the metaverse, Web 3.0, NFT, and digital ownership?

NEW QUESTION

| Lots of Discussion with Initiatives Already in Place	Lots of Discussion with Initiatives in the Planning Stages	A Little Discussion, but No Plans for Initiatives Just Yet	We Have Not Yet Started Discussing This Topic	Don't Know
0%	6%	24%	47%	23%

ARTIFICIAL INTELLIGENCE

ARTIFICIAL INTELLIGENCE FOR CONTACT CENTERS

In 2022, 61% of organizations have either applied the use of AI to their contact center organizations or expect to soon. Although this number is up from 57% in 2021, it is still down substantially from 2020 when 71% of organizations had deployed (or planned to deploy) AI. AI continues to be a top destination for investment (page 70), but brands are also investing in technologies that enable AI, like Text/Voice Analytics, Big Data Utilization, and Predictive Analytics.

**Has your company applied the use of artificial intelligence (AI)
within your contact center organization?**
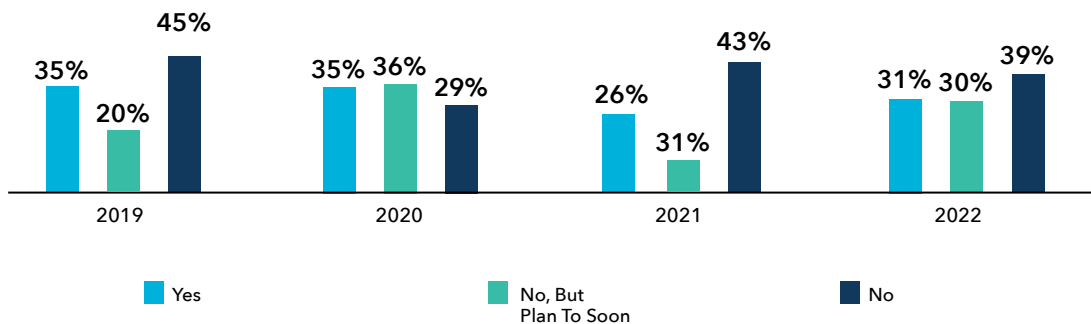
Year	Yes	No, But Plan To Soon	No
2019	35%	20%	45%
2020	35%	36%	29%
2021	26%	31%	43%
2022	31%	30%	39%

"Total Experience is a unified and transformative end-to-end experience model that takes into account every touchpoint across your brand, and all stakeholders involved – customers, employees, and users across all digital channels and platforms."
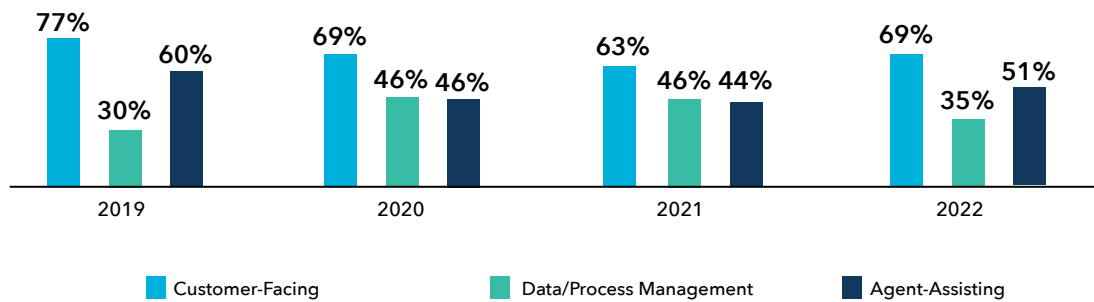
**Trace Anderman
Chief Sales Officer**

ACT

**See Trace's commentary on page
six for more insights.**
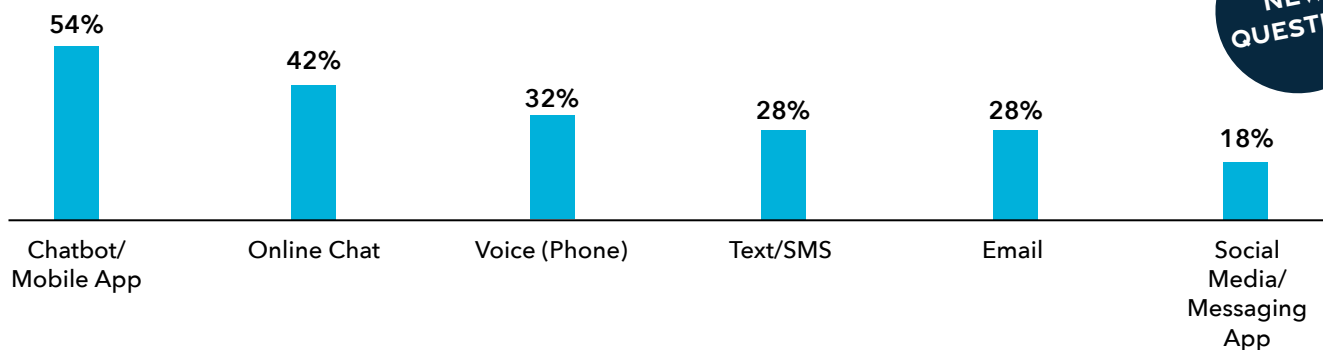
AI APPLICATION AND CHANNEL DEPLOYMENT

Customer-facing solutions remain the most popular use of AI, occurring among 69% of those organizations currently deploying AI. This is followed by Agent-Assisting AI solutions, which occurs in an area (Agent-Assist Technologies) that saw a modest bump in investment year-over-year, as indicated on page 70. It remains to be seen how budgetary pressures might affect investments in AI in the near-term, yet it is certain investment will continue to flow toward AI in the future, especially as the possible applications of AI continue to broaden.

How would you describe the specific application(s) of your AI-powered solutions? (Select all that apply.)

	Customer-Facing	Data/Process Management	Agent-Assisting
2019	77%	30%	60%
2020	69%	46%	46%
2021	63%	46%	44%
2022	69%	35%	51%

In 2022, AI was deployed broadly across a number of customer-facing and/or customer-supporting solutions, though Chatbot/Mobile Apps and Online Chat are hot spots for the technology. Although many think of AI as purely a Chatbot-centric technology, rapid advancement in the application of AI is introducing the technology to many areas of the contact center, well beyond the customer, into things like agent-assisting solutions, agent training, and the optimization of back office tasks.

In which specific channels are you deploying customer-facing or customer-supporting AI-powered solutions? (Select all that apply.)
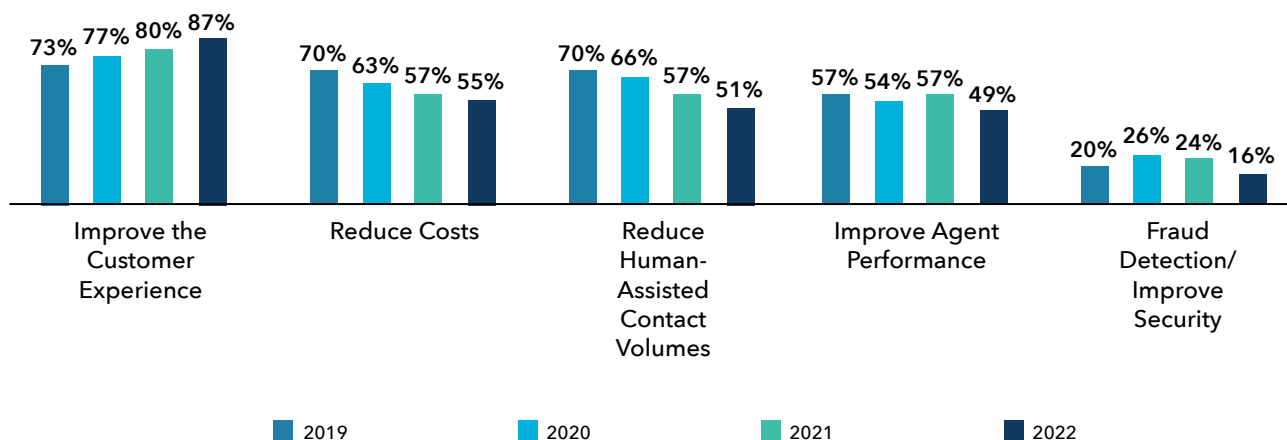
NEW QUESTION

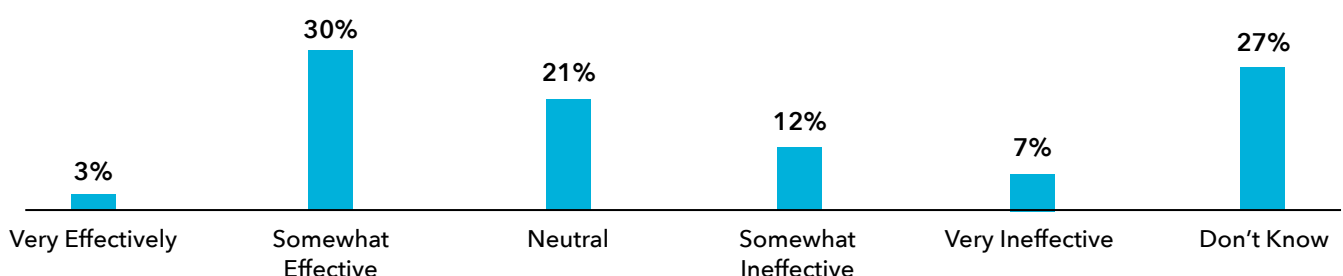| Chatbot/Mobile App	Online Chat	Voice (Phone)	Text/SMS	Email	Social Media/Messaging App
54%	42%	32%	28%	28%	18%

OBJECTIVES FOR AI

Several trends continue to offer promise when CX leaders were asked to identify which objectives they are primarily trying to accomplish with their use of AI. First, "Improve the Customer Experience" has further stretched its lead against other objectives, while use of AI to reduce costs and divert contacts continues to fall. AI best serves customers when it is used to simplify, expedite, or in some other way enhance the customer care experience, particularly in its application toward things like unassisted solutions. On the flip side, reducing cost and reducing human-assisted contacts are not customer-centric objectives and shouldn't be the primary drivers of AI's use.

Which objectives are you primarily trying to accomplish with your use or future use of AI-powered solutions? (Select all that apply.)

	2019	2020	2021	2022
Improve the Customer Experience	73%	77%	80%	87%
Reduce Costs	70%	63%	57%	55%
Reduce Human-Assisted Contact Volumes	70%	66%	57%	51%
Improve Agent Performance	57%	54%	57%	49%
Fraud Detection/Improve Security	20%	26%	24%	16%

The most interesting aspect (below) is not how many CX leaders feel their companies are effective or ineffective at meeting their objectives with AI-powered solutions, but how many don't know (27%). Investments in AI-powered solutions can be costly, and it takes time to measure and understand the impact of deploying such solutions. Still, the results below indicate that a significant percentage of brands need to put greater emphasis on not only understanding if AI-powered solutions are working, but also understanding the experience from their customer's point of view. Are the solutions adding an equal measure of value to customers in relation to the cost of implementing said solution? This is a question CX leaders should seek to answer.

**How effective are you in meeting your objectives with your use of AI-powered solutions?**

NEW QUESTION

Very Effectively	Somewhat Effective	Neutral	Somewhat Ineffective	Very Ineffective	Don't Know
3%	30%	21%	12%	7%	27%

# IMPROVING UNASSISTED RESOLUTION RATES AND IDENTIFYING NON-HUMAN SOLUTIONS

The ability for unassisted solutions to effectively solve for a wide range of issues has been an ongoing challenge since the technology's inception. Although gains have been made in the resolution capabilities of unassisted solutions (page 40), there is yet more work to be done. Brands should start (or continue) that work using three specific tracks. First, gather feedback from the customers who use such technologies. Second, journey map not only the experience with the unassisted, but also the end-to-end journey, including times where customers might shift from or to an unassisted solution. And, finally, measure carefully the unassisted solution experience, from abandonment to user input tracking, understanding which functions go smoothly, and which might have hiccups.

Does your organization have any specific initiatives to increase the resolution capabilities of your unassisted solution(s)?

	Yes	No	No Unassisted Solutions Offered
2020	76%	12%	12%
2021	68%	24%	8%
2022	60%	27%	13%
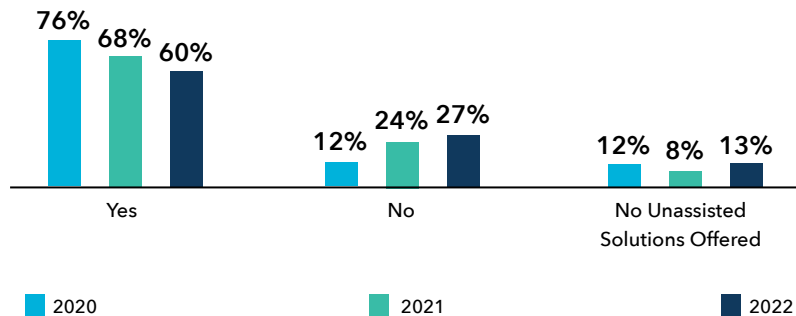
In a new question for 2022, 46% of survey respondents indicated they clearly identify solutions as non-human in some or all cases. In consumer surveying from mid-2022, 47% of survey respondents felt non-human solutions should be clearly labeled as such, while only 28% disagreed that such transparency was necessary. For a more detailed breakdown of the above, and an understanding of how demographics play a role, see the Consumer Comparison section on page 88.

In utilizing customer-facing AI-powered solutions, do you clearly identify the solution as non-human at the start of an interaction?

Yes	In Some Solutions, But Not All	No	Don't Know
34%	12%	21%	33%

CX TECHNOLOGY
CONCLUSIONS
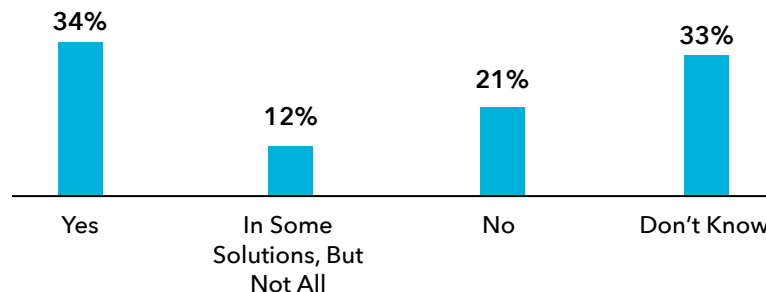
SECTION HIGHLIGHTS

Only 31% of CX leaders are "Very Satisfied" or "Satisfied" with their organization's current CX technology stack, while 38% are "Very Dissatisfied or dissatisfied" (page 68)

Text/Speech Analytics, AI, and Agent-Assist Technology were the top three areas of support technology investment in 2022 (page 70)

Only 60% of organizations have specific plans for increasing the resolution capabilities of unassisted solutions (page 76)

The percentage of organizations using an AI-powered solutions for the purpose of "improve the customer experience"grew for the third straight year (page 75)

CX Technology is always a top area of investment within the CX organization, so it's daunting that CX leaders indicate such a high level of dissatisfaction with their current CX Tech stacks.

A lot of things need to come together to create CX tech success. First and foremost, an organization's leadership has to buy in – not only to the fact that a specific challenge has a technology solution, but also to the idea that such a solution might necessitate abandoning one or more legacy system or process. Next, and perhaps more important, internal relationships need to be beyond solid. Implementation is a complex exercise and it requires shared objectives and realistic expectations. Finally, there needs to be development of meaningful measurements of success, especially in terms of the customer impact, and a reliable mechanism for keeping score against those measurements of success.

As time goes on, CX leaders are becoming more familiar with the strengths and limitations of technologies like AI, automation, and advanced analytics. These technologies are reshaping priorities. The hope is that as these priorities shift, CX leaders don't lose sight of the customer. Solutions that only serve to lower costs or automate contacts are likely to fall short, especially if the competition is investing in CX tech to address customer needs. Those companies that view CX tech as an "experience-enhancer" rather than a "money saver" will set the pace and be the true innovators in what looks to be a new and emerging digital economy.

CONSUMER COMPARISONS

The following section contains comparisons between results contained in this report and those from the 2022 CX Leaders Trends & Insights Consumer Edition report released in October of 2022 and based on data collected August, July, and September of 2022.

To download the 2022 CX Leaders Trends & Insights Consumer Edition report, please visit the CX Research section of the Execs In The Know website, found here:

https://execsintheknow.com/knowledge-center/cx-research/
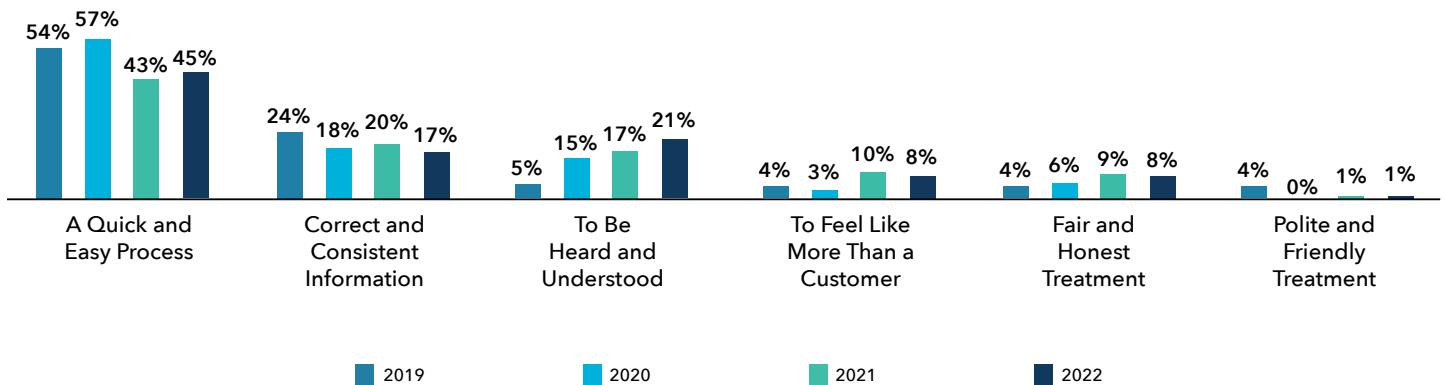cx-leaders-trends-insights/

WHAT'S MOST IMPORTANT TO CONSUMERS

No doubt, consumer expectations have changed significantly over the past few years. And they will continue to evolve, just as they always have. This is why gathering consumer insights takes work. But, understanding what's important to consumers is the first step in designing a better experience for customers.

In comparing the results below, CX leaders are singing off-key when it comes to two buckets that are very important to consumers – "Fair and Honest Treatment" and "Polite and Friendly Treatment." Combined, 46% of consumers noted these categories as most important, whereas on the corporate side, only nine percent of CX leaders indicated that they thought these were important to their customers. The next challenge for CX leaders is to now better understand what fairness and politeness means to their customers.
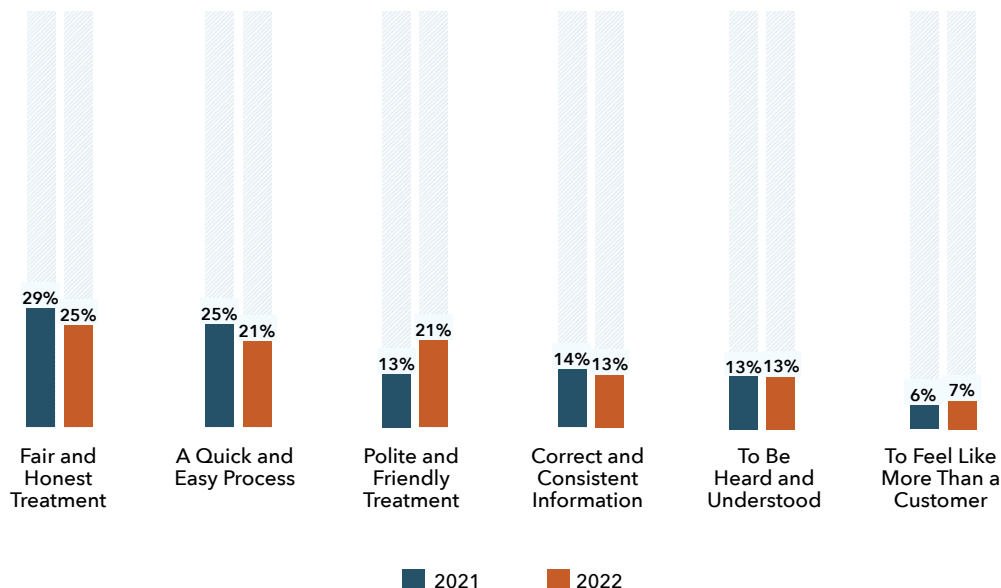
CORPORATE EDITION RESULTS

Aside from getting their issues resolved satisfactorily, what do you think is most important to your customers when trying to resolve a customer care issue?

	A Quick and Easy Process	Correct and Consistent Information	To Be Heard and Understood	To Feel Like More Than a Customer	Fair and Honest Treatment	Polite and Friendly Treatment
2019	54%	24%	5%	4%	4%	4%
2020	57%	18%	15%	3%	6%	0%
2021	43%	20%	17%	10%	9%	1%
2022	45%	17%	21%	8%	8%	1%

CONSUMER EDITION RESULTS

Aside from getting your issue resolved satisfactorily, what is most important when dealing with a large brand to resolve a customer care issue?

|	Fair and Honest Treatment	A Quick and Easy Process	Polite and Friendly Treatment	Correct and Consistent Information	To Be Heard and Understood	To Feel Like More Than a Customer
2021	29%	25%	13%	14%	13%	6%
2022	25%	21%	21%	13%	13%	7%

GOOD CARE LEADS TO LOYALTY

Ninety-nine percent of CX leaders agree/strongly agree that good customer care leads to loyalty. Furthermore, a significant number of consumers (a combined 73%) also agree/strongly agree. Customer care, when done right, can be one of the most reassuring and defining experiences a consumer can have with a brand. As budgets come under pressure and organizations are once again reassessing the role CX plays within the wider business, CX leaders must be prepared to make the case that loyalty is a primary driver of business success, and any investment in CX is a direct investment in creating more loyal customers.
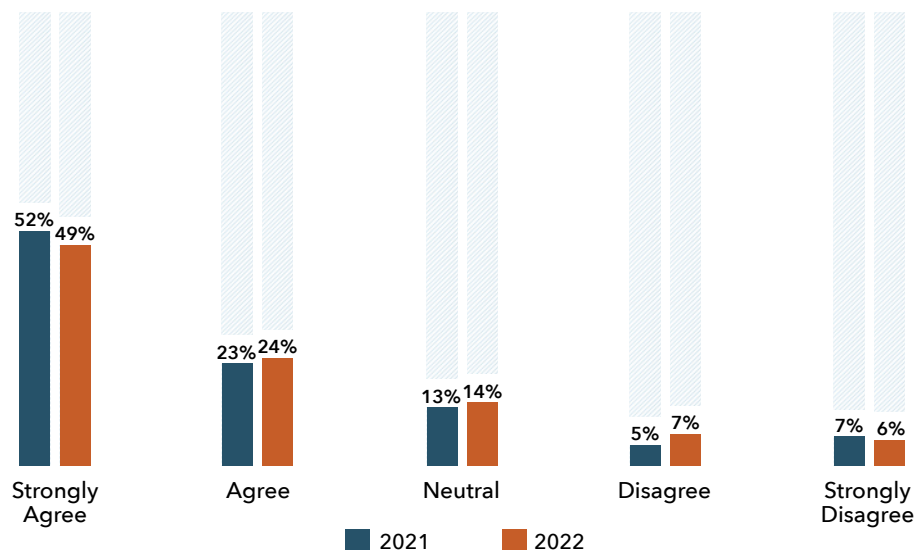
CORPORATE EDITION RESULTS

**How much do you agree or disagree with the following statement:
Receiving good customer care makes consumers very loyal customers.**

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
2021	54%	38%	8%	0%	0%
2022	68%	31%	1%	0%	0%

Legend: 2021, 2022
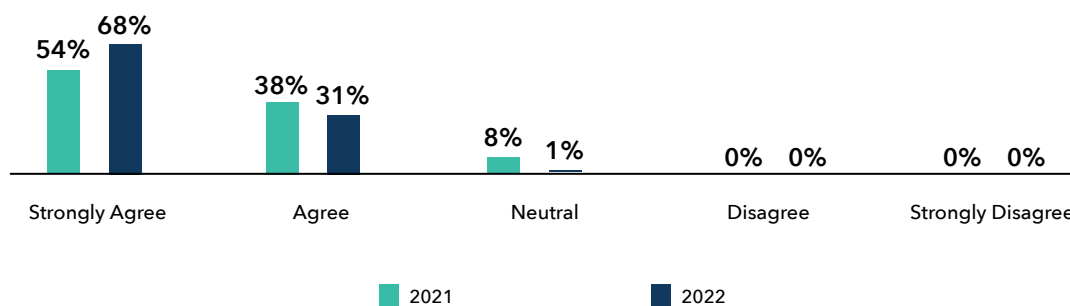
CONSUMER EDITION RESULTS

**How much do you agree or disagree with the following statement:
Receiving good customer care makes me a very loyal customer.**

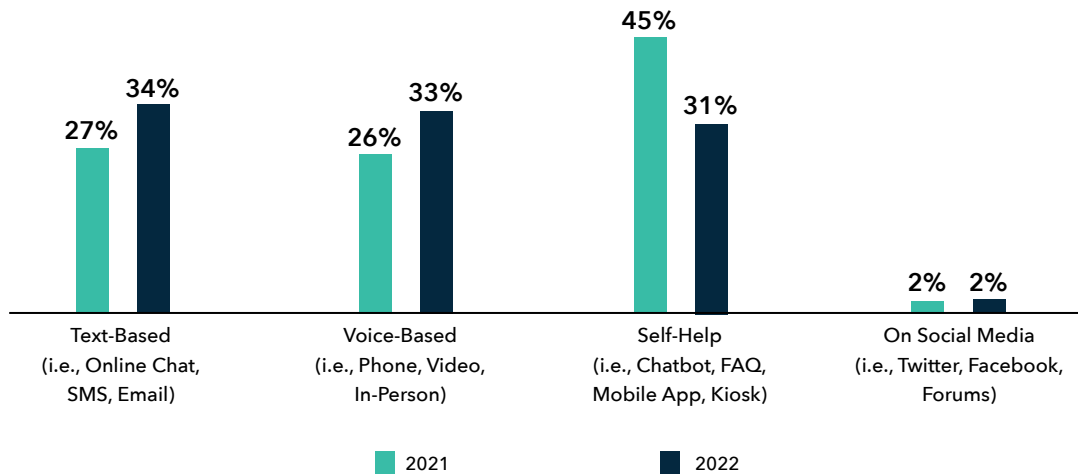|	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
2021	52%	23%	13%	5%	7%
2022	49%	24%	14%	7%	6%

Legend: 2021, 2022

PREFERRED CONTACT METHOD

Slowly, consumers' preferences have been leaning toward text-based solutions and away from voice-based solutions. This shift has accelerated in the past 12 to 24 months. This is likely due to consumers gaining increased exposure to such solutions during the pandemic, especially online chat and SMS/Text.

Where CX leaders need to adjust perceptions is regarding self-help solutions, which only 15% of consumers prefer – even if assuming their issues are resolved. The comparison is even more meaningful given the fact that self-help solutions continue to struggle with certain types of issues. While self-help solutions are now a mainstay in the CX toolbox, consumer surveying seems to suggest there is much opportunity for winning them over by improving the self-help experience.
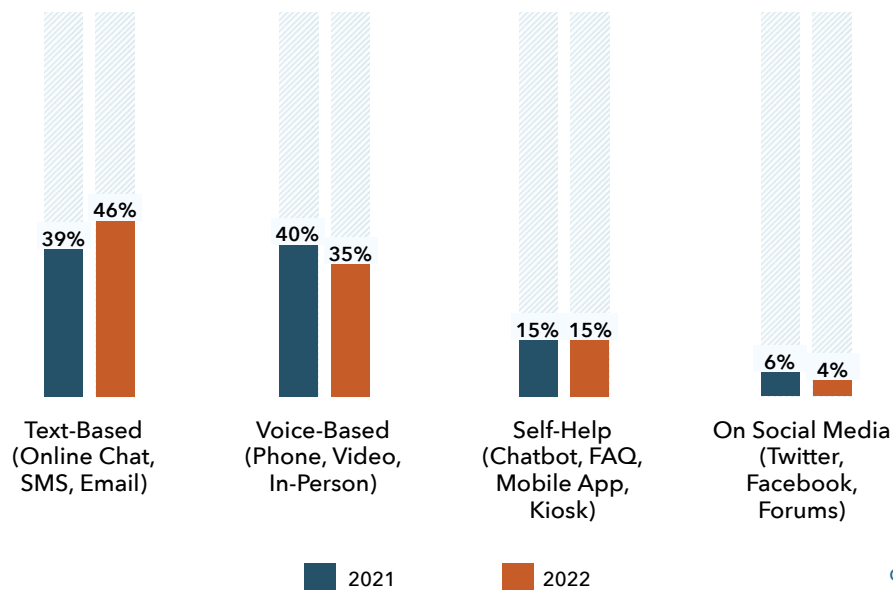
CORPORATE EDITION RESULTS

Assuming the customer care issue would be resolved, which contact method do you think consumers would prefer to use?

	Text-Based (i.e., Online Chat, SMS, Email)	Voice-Based (i.e., Phone, Video, In-Person)	Self-Help (i.e., Chatbot, FAQ, Mobile App, Kiosk)	On Social Media (i.e., Twitter, Facebook, Forums)
2021	27%	26%	45%	2%
2022	34%	33%	31%	2%

CONSUMER EDITION RESULTS

If you knew your customer care issue would be resolved regardless of contact channel, which would be your preferred contact method?

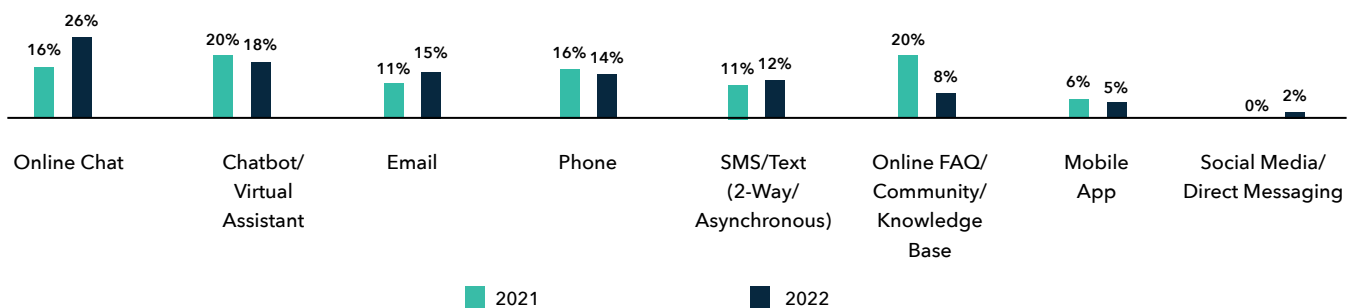|	Text-Based (Online Chat, SMS, Email)	Voice-Based (Phone, Video, In-Person)	Self-Help (Chatbot, FAQ, Mobile App, Kiosk)	On Social Media (Twitter, Facebook, Forums)
2021	39%	40%	15%	6%
2022	46%	35%	15%	4%

SOLUTION PREFERENCES

On a solution-by-solutions basis, consumers still roundly prefer Phone over all other solutions, especially when issues are defined as complex. While more CX leaders prefer their customers use Online Chat than any other channel, only about ten percent of consumers prefer Online Chat, regardless of whether an issue is complex or simple. As mentioned on the previous page, this speaks to the opportunity to create better experiences. In order to drive adoption, consumers need to be educated about solutions like Online Chat and Chatbots, and how they offer greater simplicity and speed. Then, the experiences had in using these solutions needs to bridge with the education received.

CORPORATE EDITION RESULTS

Assuming all solutions are equally capable of resolving a customer's issue, which channel would you prefer your customers use?

| Channel	2021	2022
Online Chat	16%	26%
Chatbot/Virtual Assistant	20%	18%
Email	11%	15%
Phone	16%	14%
SMS/Text (2-Way/Asynchronous)	11%	12%
Online FAQ/Community/Knowledge Base	20%	8%
Mobile App	6%	5%
Social Media/Direct Messaging	0%	2%

CONSUMER EDITION RESULTS

If you had a simple, transactional customer care issue to resolve with a brand, which is your preferred channel of care?

Channel	%
Phone	49%
Email	21%
SMS/Text	12%
Online Chat	10%
Social Media	5%
Chatbot/FAQ/Self-Help	3%
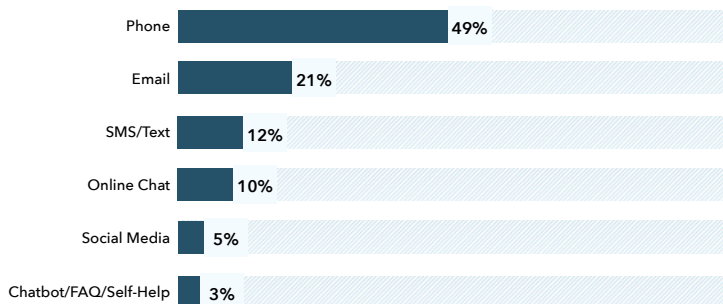
If you had a complex customer care issue to resolve with a brand, which is your preferred channel of care?

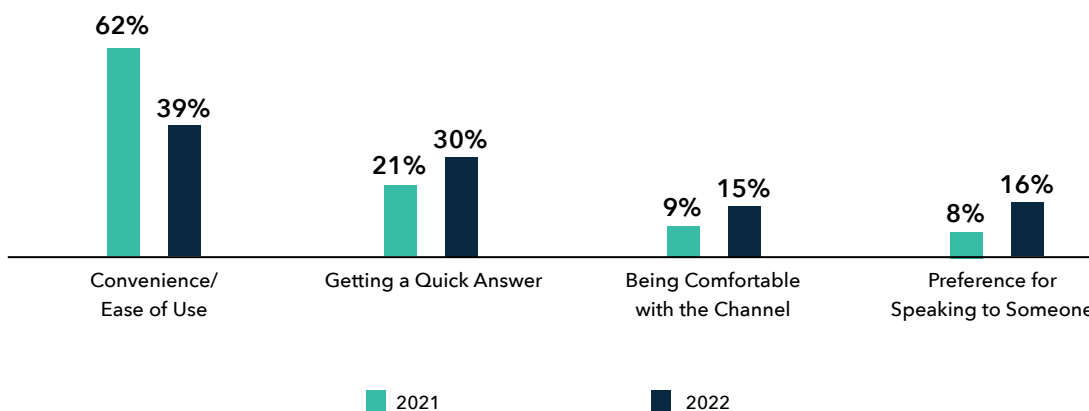| Channel	%
Phone	53%
Email	22%
Online Chat	9%
Social Media	7%
SMS/Text	6%
Chatbot/FAQ/Self-Help	3%
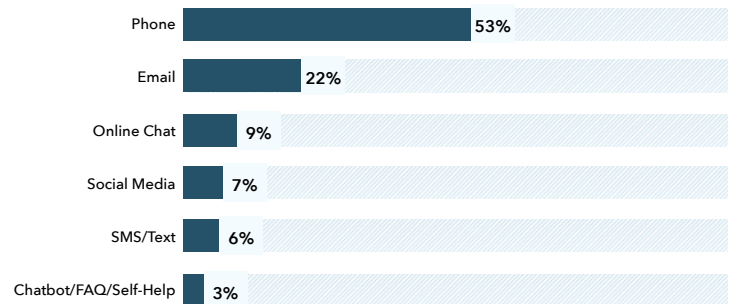
FACTOR DETERMINING PREFERENCE

CX leaders correctly surmise that "Convenience/Ease of Use" is a leading factor driving consumer contact method preferences. But what is grossly underestimated is the consumer's preference for speaking with someone, indicated by 44% of consumers in a question that allowed consumers to select more than one response. Although consumers have shifted more of their preferences from voice to text in recent years, the desire to interface with a human agent remains very strong, especially among older consumers who are often hesitant about unassisted, AI-powered solutions.
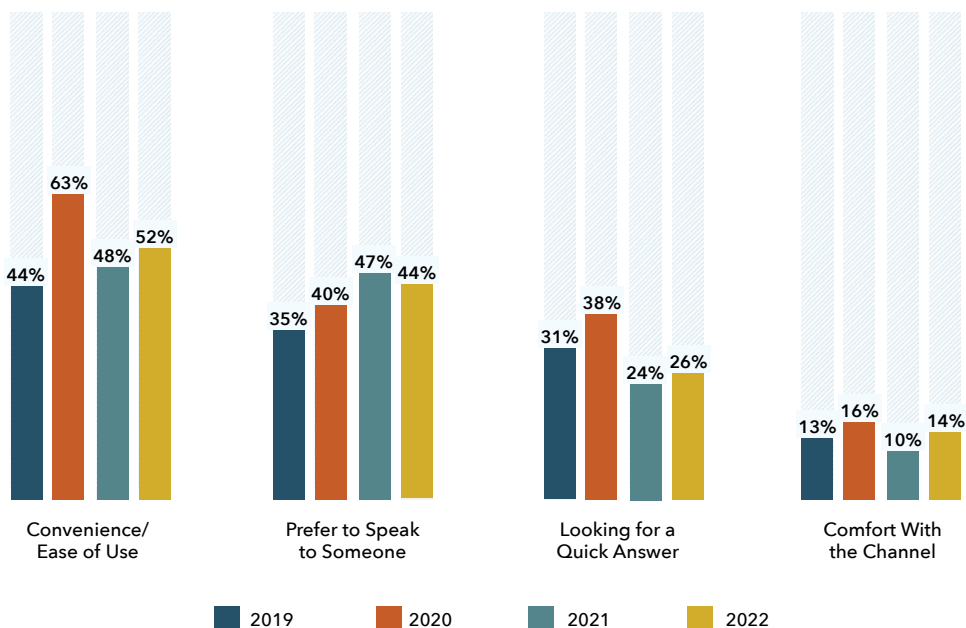
CORPORATE EDITION RESULTS

What do you think is the biggest factor in determining the contact method preferences of consumers?

Factor	2021	2022
Convenience/Ease of Use	62%	39%
Getting a Quick Answer	21%	30%
Being Comfortable with the Channel	9%	15%
Preference for Speaking to Someone	8%	16%

CONSUMER EDITION RESULTS

What are the biggest factors in determining your preferred channel of care?
(Select all that apply.)

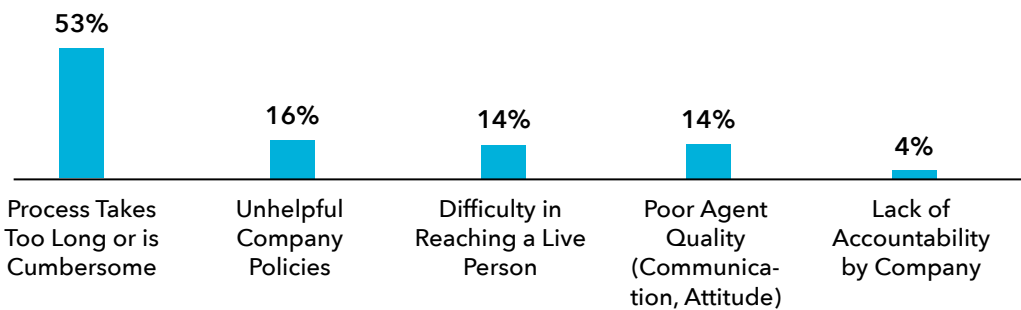| Factor	2019	2020	2021	2022
Convenience/Ease of Use	44%	63%	48%	52%
Prefer to Speak to Someone	35%	40%	47%	44%
Looking for a Quick Answer	31%	38%	24%	26%
Comfort With the Channel	13%	16%	10%	14%

MOST FRUSTRATING

As reflected on the previous page and in the results below, CX leaders take a pragmatic approach to what consumers want, focusing on process, policy, and speed to resolution. Yet, once again, access to a live agent is what is top of mind for consumers, that and the quality of the agent they might reach. This is perhaps good news for CX leaders because it suggests brands are doing a better job with process and policy than previously thought. The counterpunch to this conclusion is the idea that consumers expect to be able to reach a live person when they want, and when they do reach that live agent, the expectation is to be met with a positive attitude and superb communication skills.
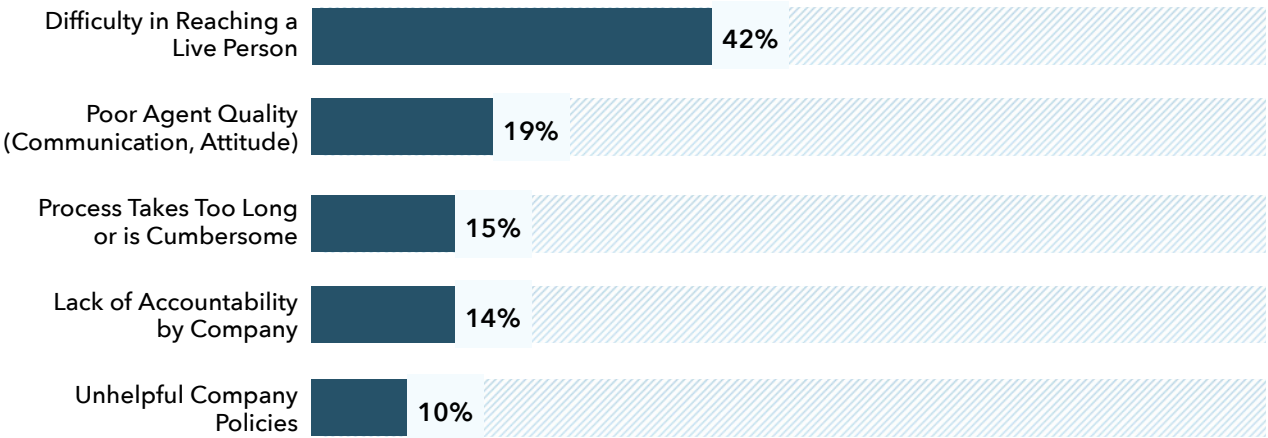
CORPORATE EDITION RESULTS

What do you think is the most frustrating aspect of resolving a customer care issue for consumers?

Category	Percentage
Process Takes Too Long or is Cumbersome	53%
Unhelpful Company Policies	16%
Difficulty in Reaching a Live Person	14%
Poor Agent Quality (Communication, Attitude)	14%
Lack of Accountability by Company	4%

CONSUMER EDITION RESULTS

What do you find to be the most frustrating aspect of resolving a customer care issue with a brand?

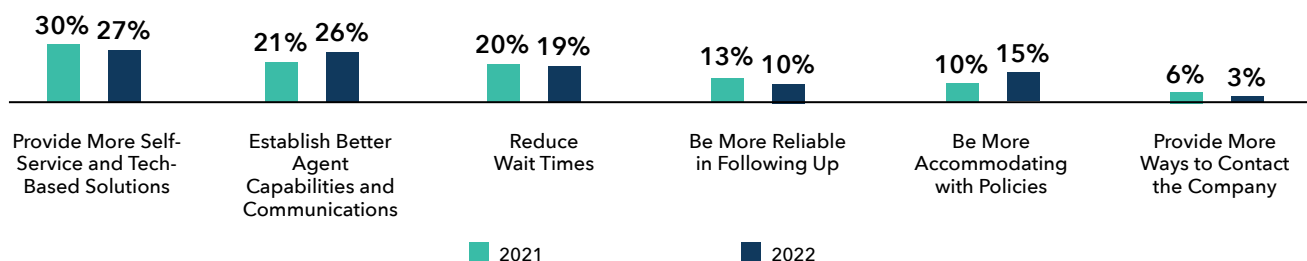| Category	Percentage
Difficulty in Reaching a Live Person	42%
Poor Agent Quality (Communication, Attitude)	19%
Process Takes Too Long or is Cumbersome	15%
Lack of Accountability by Company	14%
Unhelpful Company Policies	10%

MAKING THE PROCESS EASY

Yes, consumers are looking for reduced wait times, but they are also looking for better agents and more ways to contact companies (and not just through automated solutions). Perhaps the most striking aspect of the consumer response to the below question is the lack of concentration in any single response. Consumers truly want it all, but the thing they want least is more self-service and tech-based solutions, something CX leaders thought they might want most. Carefully measuring and mapping the self-service journey might help companies better understand this disconnect.
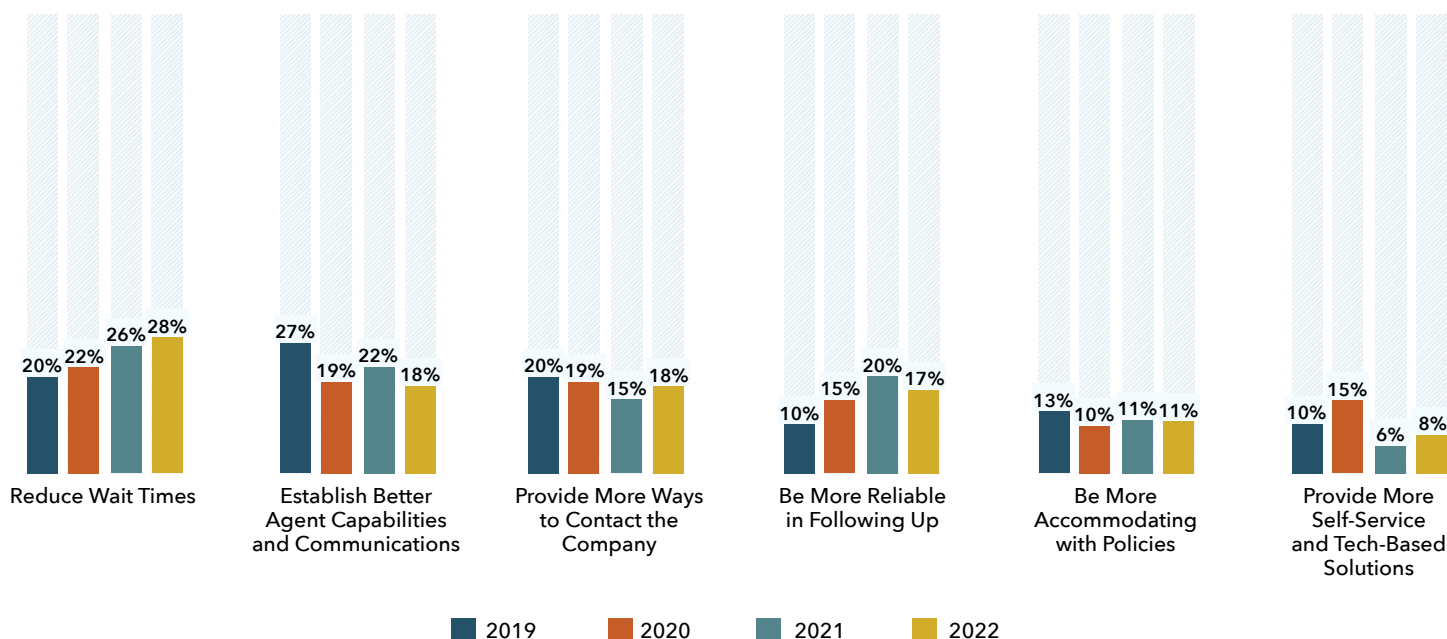
CORPORATE EDITION RESULTS

What do you think consumers want brands to do to make the resolution process as easy as possible?

	Provide More Self-Service and Tech-Based Solutions	Establish Better Agent Capabilities and Communications	Reduce Wait Times	Be More Reliable in Following Up	Be More Accommodating with Policies	Provide More Ways to Contact the Company
2021	30%	21%	20%	13%	10%	6%
2022	27%	26%	19%	10%	15%	3%

CONSUMER EDITION RESULTS

What can brands do differently to make the resolution process as easy as possible?

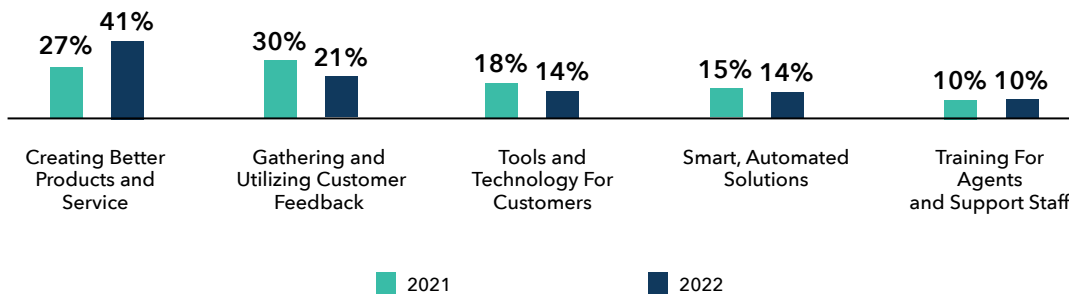|	Reduce Wait Times	Establish Better Agent Capabilities and Communications	Provide More Ways to Contact the Company	Be More Reliable in Following Up	Be More Accommodating with Policies	Provide More Self-Service and Tech-Based Solutions
2019	20%	27%	20%	10%	13%	10%
2020	22%	19%	19%	15%	10%	15%
2021	26%	22%	15%	20%	11%	6%
2022	28%	18%	18%	17%	11%	8%

WHERE TO INVEST

Consumers and CX leaders generally agree on where brands should be investing to best improve the customer experience, save training for agents. Twice as many consumers as CX Leaders (20% versus 10%, respectively) thought brands should be investing in "Training For Agents and Support Staff." This opinion will likely strengthen as brands continue to struggle to find the right people to fill open roles, though innovations in AI-powered agent training and agent-assist tools are posed to lift the quality of agents, even in the face of ongoing workforce challenges.
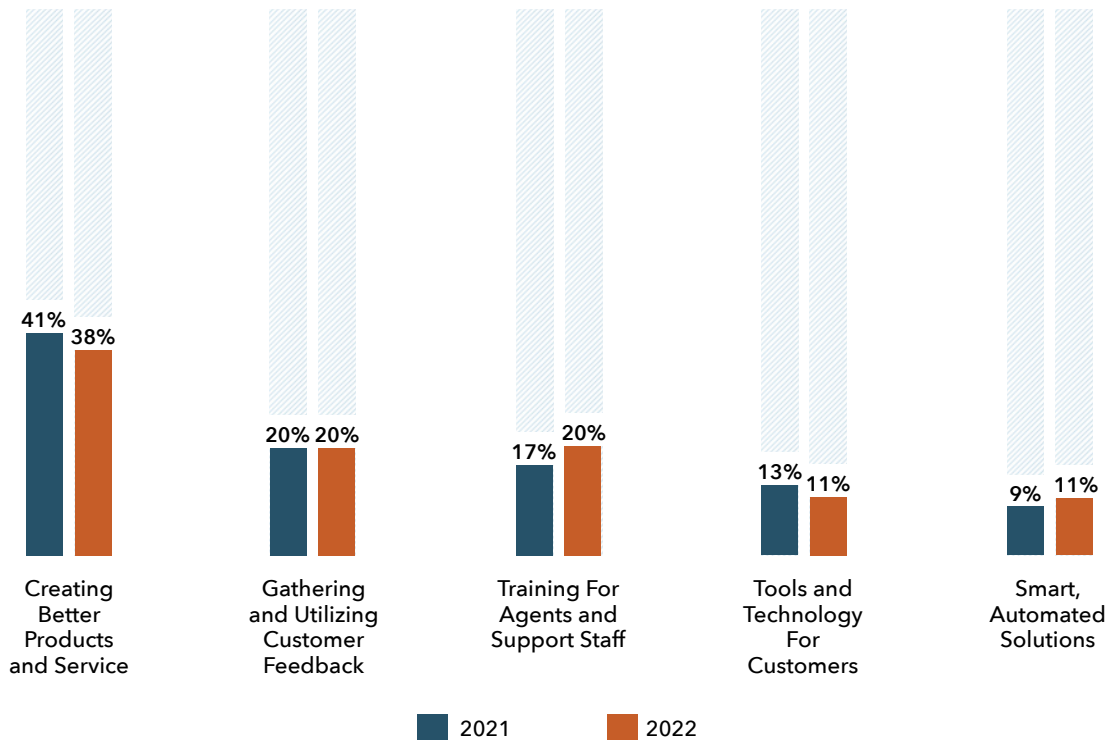
CORPORATE EDITION RESULTS

Where do you think consumers feel brands should be investing in order to most effectively improve the customer experience?

	2021	2022
Creating Better Products and Service	27%	41%
Gathering and Utilizing Customer Feedback	30%	21%
Tools and Technology For Customers	18%	14%
Smart, Automated Solutions	15%	14%
Training For Agents and Support Staff	10%	10%

CONSUMER EDITION RESULTS

In your opinion, where should brands be investing in order to most effectively improve the customer experience?

|	2021	2022
Creating Better Products and Service	41%	38%
Gathering and Utilizing Customer Feedback	20%	20%
Training For Agents and Support Staff	17%	20%
Tools and Technology For Customers	13%	11%
Smart, Automated Solutions	9%	11%

PASSIONATE AGENTS

CX leaders are on the right track when it comes to understanding their customers' position on the importance of passionate agents. In fact, 89% of CX leaders either strongly or somewhat agree on the importance of brand passion among customer care agents compared with 58% of consumers. How to instill that passion is another matter, with a variety of options from more selective hiring, cultural shifts, and more brand immersion for new hires and veteran agents alike.

CORPORATE EDITION RESULTS

In your opinion, how do you think YOUR CUSTOMERS feel about the following statement: It is important for customer care agents to be very passionate about the brands they represent.

47%	42%	11%	0%	0%
Strongly Agree	Somewhat Agree	Neutral	Somewhat Disagree	Strongly Disagree
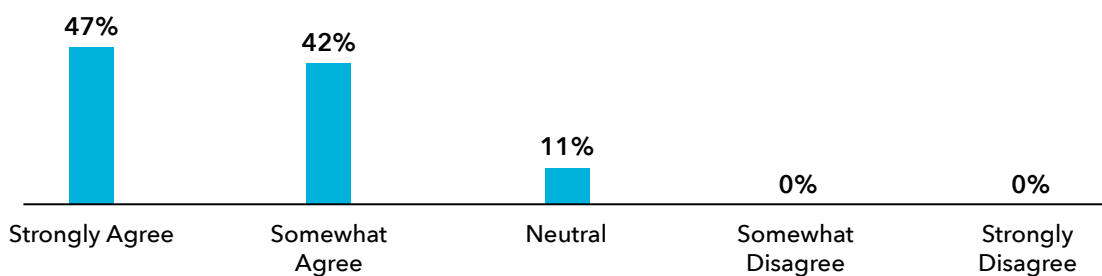
CONSUMER EDITION RESULTS

How do you feel about the following statement: It is important for customer care agents to be very passionate about the brands they represent.

|	
Strongly Agree	31%
Somewhat Agree	27%
Neutral	28%
Somewhat Disagree	9%
Strongly Disagree	5%
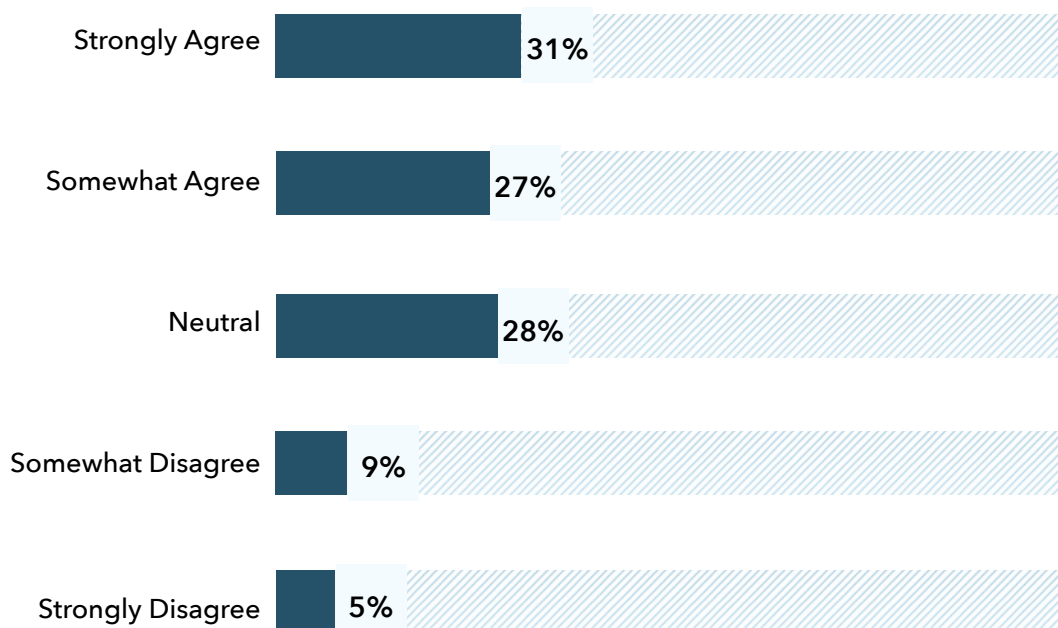
IDENTIFYING NON-HUMANS

While only 47% of consumers strongly or somewhat agreed that AI-powered solutions should be clearly identified as non-human (in line with CX leader responses), results took on a significantly different texture depending on the demographic being asked. Among the youngest cohort asked (those ages 18 to 24 years), the most popular response was, "Neutral," at 41%, followed by "Strongly Disagree," at 23%. Conversely, among those ages 55 to 64 years, 52% either agreed non-human solutions should be clearly identified as such. This speaks to the importance of CX leaders having insight into their own customers, particularly in terms of demographic and willingness to adapt to new technologies and solutions.

CORPORATE EDITION RESULTS

In utilizing customer-facing AI-powered solutions, do you clearly identify the solution as non-human at the start of an interaction?

Yes	In Some Solutions, But Not All	No	Don't Know
34%	12%	21%	33%
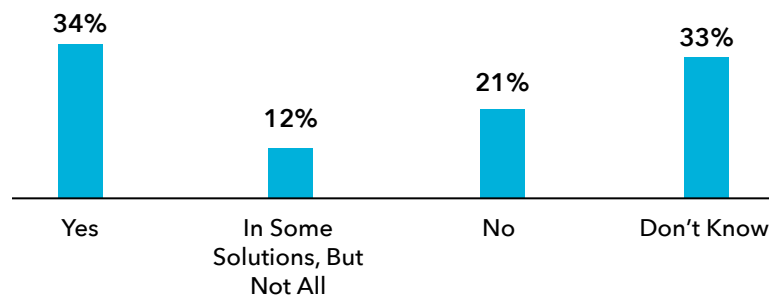
CONSUMER EDITION RESULTS

How much do you agree with the following: If a company guides me to an AI-powered virtual agent for customer service, the solution should be clearly identified as non-human.

Strongly Agree	38%
Somewhat Agree	9%
Neutral	25%
Somewhat Disagree	11%
Strongly Disagree	17%
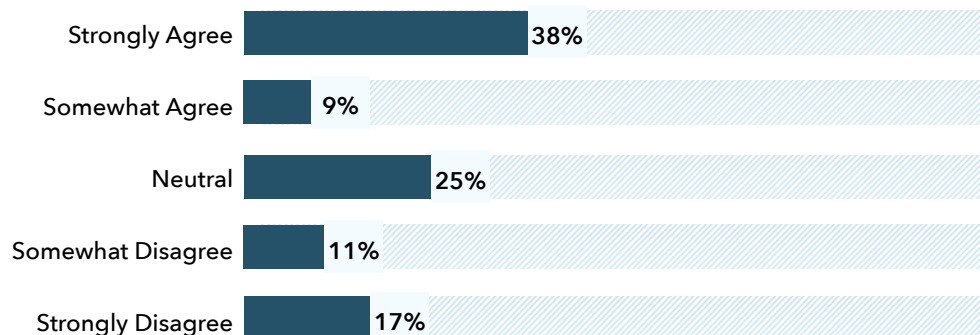
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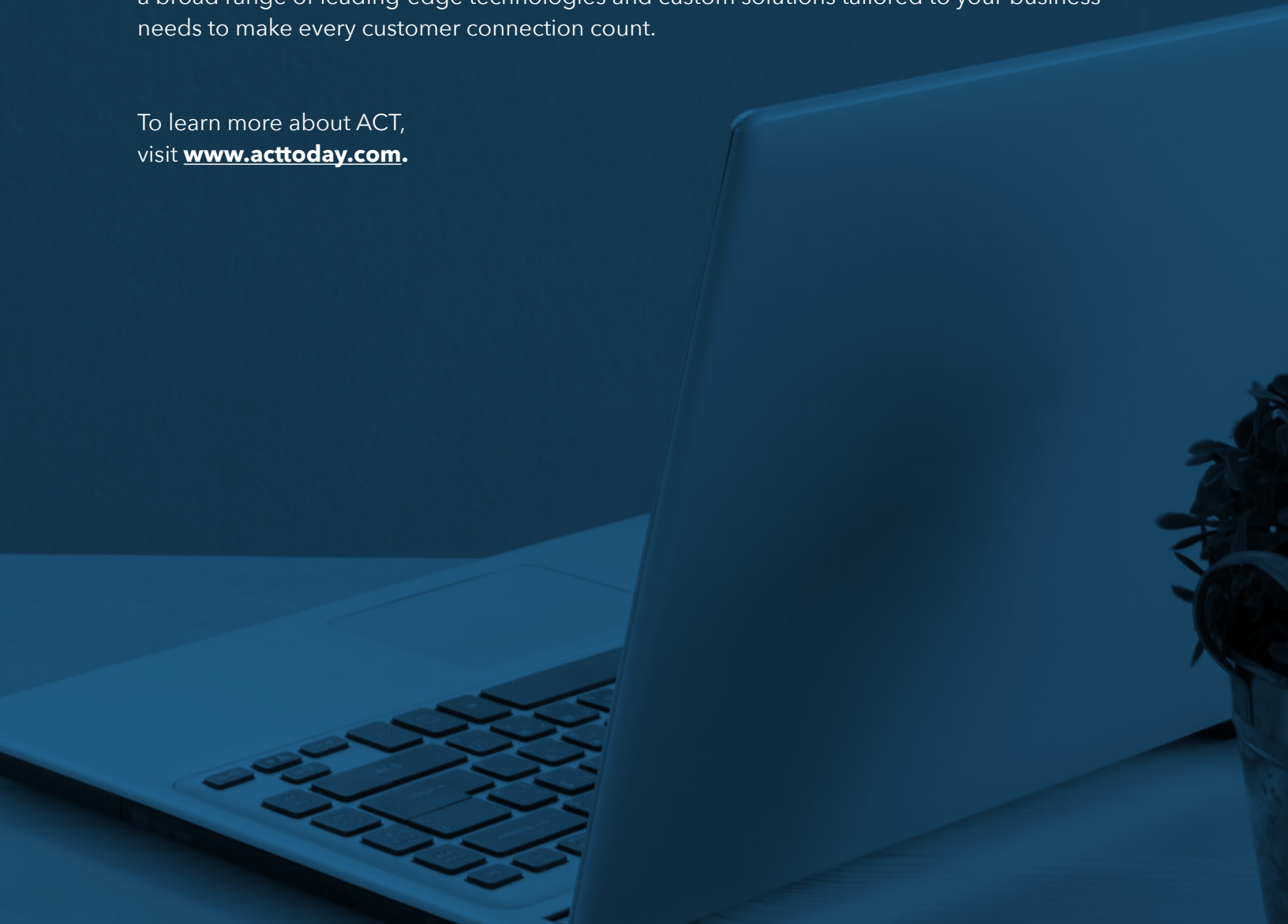visit **www.execsintheknow.com.**

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