Creating a seamless customer experience

The Economist Intelligence Unit

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About this report

Creating a seamless customer experience is an Economist Intelligence Unit (EIU) report, sponsored by Panasonic. It uncovers what the future of the customer experience could look like and how organisations can create a seamless, friction-free experience for consumers. The report draws on a global survey of 491 senior executives and 2,403 consumers as well as desk research and in-depth interviews with seven senior executives, consultants and experts.

In August-September 2014 The EIU surveyed 491 senior executives, almost half of whom (44%) are C-level executives or board members, and more than half (53%) work in IT. Of these, 32% are based in Europe, 31% in North America, 28% in Asia-Pacific and the remaining 9% in the rest of the world. Around 60% of the companies surveyed record annual sales of over US$500m. A range of industries are represented in the survey, including 15% of respondents from manufacturing, 14% from healthcare, 13% from retail, 12% from telecommunications and 11% from consumer goods.

The EIU also surveyed 2,403 consumers aged between 18 and 65 from across the world, with 8% each from the following countries: Australia, Brazil, Canada, China, France, Germany, India, Japan, Mexico, Russia, the UK and the US.

Executive summary

Few consumer-facing companies would deny the need for a convincing presence across a whole array of channels these days, from the web, smartphones and social media to bricks-and-mortar stores. People are now using a variety of platforms to research and buy things, for example, to check prices and reviews online before buying over their smartphone or in a shop. For companies, this presents a whole new challenge. Not only must they be up to speed over a whole range of platforms, but they also have to integrate channels, communications and systems so that consumers can switch between them seamlessly.

For the purpose of this report The Economist Intelligence Unit surveyed consumers to ask what they want from companies and how they rate companies for customer service. And we asked company executives about their attitudes to customer service and how well they think they are doing in joining up all of the new technologies in use today.

The main findings include the following.

Consumers look at the whole transaction and want simplicity, speed and accuracy across all channels. Company executives, in contrast, continue to think in terms of individual platforms. Consumers make little distinction between the various platforms they use, seeing things squarely in terms of an overall transaction with a single company. They want things to be easy to buy, questions to be answered quickly, and be able to track orders in real time. By contrast, company executives tend to see things in terms of different channels, such as the website and smartphone apps.

Online companies are seen by consumers as examples of excellent customer service. Four of the top five companies listed most frequently as offering excellent customer service are relatively new online companies. Amazon takes the top spot, followed by eBay and then two regional e-commerce sites: India's Flipkart and MercadoLibre, the biggest e-commerce site in Latin America. Only one traditional retailer makes the list: America's Wal-Mart. Retail is cited as the best sector for customer service, closely followed by consumer goods and banks.

Improving the customer experience is cited as a priority by most firms, but many companies still have some basic work to do. More than three-quarters of the executives surveyed say that improving the customer experience is a priority, but progress on joining things up is limited. Few have created roles such as a chief customer officer to take

charge of the overall customer journey; many have basic work to do on integrating content between different platforms; and less than one-third track customer behaviour across channels.

Company executives accept that the biggest obstacles to better customer service are organisational, rather than technical. More than a third (36%) of executives see silos within their organisation as the biggest issue and around a quarter (24%) cite lack of senior management vision, while close to half of consumers cite a lack of interest in customer satisfaction as the largest hurdle. Analysts interviewed for this report point out that companies such as Amazon show that it is possible to join together the various platforms

seamlessly from a customer perspective. However, many companies have created separate divisions for areas such as web sales, meaning that integration across platforms can require a major company reorganisation and IT spend.

If companies deliver bad customer service, then consumers will walk away. Close to three-quarters of consumers say they will stop doing business with a company following a bad experience, and more than half will complain to families and friends. Slow replies to questions and inaccurate product information are their main complaints—irrespective of the platform.

Introduction

Customer satisfaction has improved in recent years. More than half (51%) of the consumers surveyed for this report say that their overall experience as a customer has improved over the past three years. This may not be surprising, given the wealth of choice opening up to consumers. Rather than trailing to a shop, they can increasingly buy things online or over their smartphones whenever they like, and they enjoy a widening choice and better prices available online.

However, there is no room for complacency. Customers' expectations of their interactions with organisations are changing rapidly. The customer experience is no longer considered a series of separate touchpoints—such as a store visit, a website review or a catalogue perusal. Instead, customers expect a holistic, seamless experience in which their interactions with a company or brand are easy and efficient, as well as sustainable over multiple types of engagements.

Companies have been quite slow to respond to the rise of technologies that are well-established by now. Some products, such as books and music, have largely migrated online, forcing some traditional retailers out of business. In such cases, consumers are well served by a new generation of online companies such as

Amazon and Apple's iTunes. But in reality such a mass migration online remains rare: even in retailing, one of the most affected sectors, people still prefer to go to physical stores to buy everything from shoes to groceries, where online penetration remains low.

However, as our survey confirms, challenges remain even at the basic level of forging a decent presence online or over smartphone apps. But the bigger challenge is that consumers now expect to be offered a wide variety of platforms, and to be able to use them seamlessly. Hence, a hybrid model is developing, with consumers using many different media to buy things. They might go to a shop to compare products before checking for the best deal online. Or they research products online and ask for advice over social media before picking them up from a shop. To consumers, the shift is simply that they now expect a variety of means to contact a firm.

For companies this has long offered a series of challenges. They have had to develop ways to serve customers over the phone, online, via social media and increasingly over smartphones. Many have done so successfully, but progress can be surprisingly slow. Some banks have been slow to offer mobile-phone apps, for example. Some shops are struggling because, even now their online presence is inadequate—as recently

as December 2013 a big UK supermarket chain, Morrisons, saw a dip in its Christmas sales because it lacked an online presence (since rectified),[1] while the DIY chain Homebase recently blamed a big store closure programme on its failure to compete effectively online.[2]

Companies do not just need to have a strong presence via a wide variety of media, but they must also join together activities often developed as separate business units as firms tackle new technologies as they emerge. That can mean a major business reorganisation and major investment in unifying separate IT systems developed for each activity. Judging by the results of our survey, many companies now accept both points, but few have faced up to the scale of change necessary to become truly omnichannel operations. Some of the leading players, typically online specialists such as Amazon and eBay, show that it can be done, while the problems that have hit traditional retailers—from the electronics chain Comet to the video-rental firm Blockbuster—highlight the dangers of not adapting to the new reality.

[1] "Tesco and Morrisons see sales slide", BBC News, January 9th 2014. Available at: http://www.bbc.co.uk/news/business-25664398

[2] "Homebase to close one in four stores as UK falls out of love with DIY", *The Guardian*, October 22nd 2014. Available at: http://www.theguardian.com/business/2014/oct/22/homebase-to-close-quarter-stores-diy

1 The seamless customer journey

According to our survey results, consumers want some pretty simple things: goods should be cheap, ordering simple, delivery reliable and questions and complaints answered promptly. And they prefer companies such as Amazon and eBay that deliver on these things, regardless of whether they shop over a PC, a tablet or a mobile phone.

"Companies have to stop thinking of themselves as business-to-business or business-to-consumer," says Bill Price, the president of Driva Solutions, who was Amazon's first vice-president of global customer service. "Instead, they have to put the consumer first." He dubs this the "Me2B" experience demanded by today's consumers, who are increasingly refusing to deal with companies

Chart 1

Q **Thinking of the ideal customer experience, which of the following elements are most important to you?**

Please select up to three (% respondents, consumer survey)

Fast response to enquiries or complaints	**47%**
Simple purchasing processes	**47%**
Ability to track orders in real time	**34%**
Clarity and simplicity of product information across channels	**25%**
Ability to interact with the company over multiple channels (e.g. in-person, e-mail, online, mobile, phone)	**22%**
Access to more in-depth product information in stores through technology	**18%**
Ability to interact with the company via multiple channels 24/7	**14%**
Consistency of product information across channels	**14%**
A more personalised experience with relevant offers and recommendations based on my interests	**12%**
Ongoing engagement with the company after the purchase has concluded	**10%**
Customised offers based on my preferences revealed on different channels	**7%**
Company representatives recognise me as a regular customer across all channels	**7%**
Consistency of creative imaging across channels	**4%**
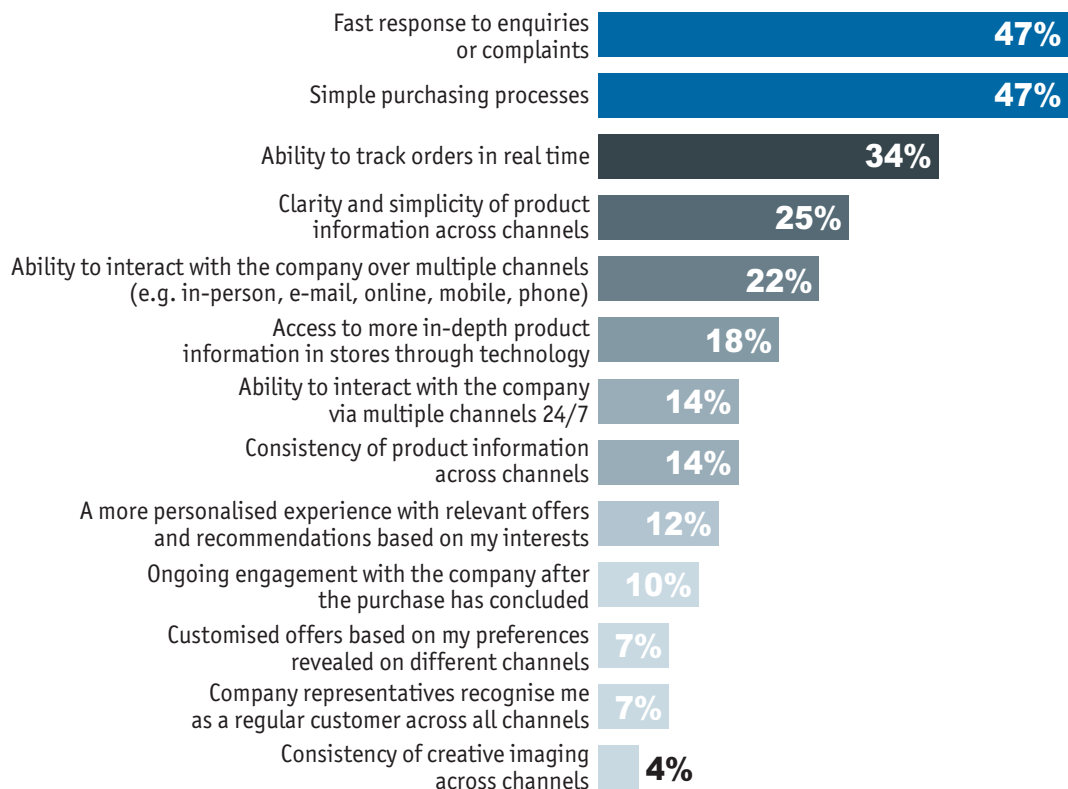
Source: The Economist Intelligence Unit survey, September 2014.

which insist that they come to a physical store, bank branch or airline office at a time that suits the company rather than the customer. Instead, these companies should start with what their customers want and build their business around them.

The classic examples of this are Amazon and eBay (see eBay case study), both of which are dedicated online companies built around the "customer first" ideal. "Amazon's philosophy is that you must have good systems [to respond to customer complaints and questions], but that you should work to avoid customers having to use them," says Mr Price. In other words, if the website or mobile app works, people should not have to speak to the company. Look at Amazon's site: the clever use of data analytics means that it is increasingly skilled at flagging purchases to customers based on their buying history and the type of goods they have just bought. But it is also strikingly simple to track orders and deliveries, to return goods and report non-deliveries—and to speak to someone if necessary, whether you order over your PC or hit the "1-Click" button to buy over the smartphone app. User friendliness and customer satisfaction are built into the Amazon site.

Small surprise then that Amazon is the most frequently cited company in our survey for customer satisfaction. Consumers think squarely in terms of the outcome—the ease and speed of a purchase—rather than worrying about whether they are accessing the website (as many would describe it) over their PC or their tablet.

Customers focus on ease and speed, companies on specific platforms

By contrast, our survey suggests that senior executives remain fixated on the specific platform used for the sale or query, and on their own website and marketing material rather than, for example, the external sites that buyers use for objective reviews of purchases (see chart below). Amazon, by contrast, flags buyers' reviews of products and a summary of their ratings and

> " Consumers say that their primary concern is that complaints are answered quickly, that purchasing procedures are kept simple, and that they can track deliveries in real time. "

features price offers from alternative sellers. It is transparent and offers easy access to independent opinion.

According to our survey, consumers say that their primary concern is that complaints are answered quickly, that purchasing procedures are kept simple, and that they can track deliveries in real time (see chart above). They prefer to research products using search engines and independent sites as well as companies' own sites, and they prefer to use their phone or email to speak to companies with queries or complaints (see chart below). Good use of modern technology can help some in these areas, such as tracking deliveries. But well-trained, accessible staff and some old-fashioned technology are equally important.

"Most call centres are failing to keep pace with rising customer expectations and are a frequently overlooked aspect of the multichannel customer experience," says Robert Wollan, global managing director of sales and customer services at Accenture, a management consulting, technology services and outsourcing company. Daniel Ziv, vice-president of customer analytics at Verint, which provides analytic software solutions for the security, surveillance and business intelligence markets, adds that many companies do not have a single team handling queries, whether from the web, via email or social media, or unified systems to ensure that a customer's records are available to all of its internal teams—a point borne out by our survey. Many of the company executives replying to our survey admit that, even now, their firms do not offer consistent information or service over different channels. In other words, companies are still not geared up to the way in which people shop these days.

Online retailers take the lead

Here, the new breed of online retailers seems to enjoy a clear lead in the quality of their customer experience over traditional bricks-and-mortar shops, according to Richard Small, a partner within Deloitte's customer

Chart 2

Q Which of the following channels do you use to learn about and compare products (consumers)? Which of the following channels does your organisation currently use to interact with customers (companies)?

Please select all that apply (% respondents, consumer and executive surveys)

	Executives	Consumers
Search engine tools	25%	69%
Company websites	78%	58%
Ask family/friends		51%
Independent websites	19%	46%
Television/radio	28%	43%
Bricks-and-mortar premises	45%	42%
Newspapers/magazines	40%	41%
E-mail	67%	38%
Printed catalogues	31%	34%
Mobile applications	31%	28%
Branded social media pages	32%	25%
Phone	55%	24%
Live chat	18%	15%
Kiosk	9%	8%

Source: The Economist Intelligence Unit survey, September 2014.

> " Department stores such as Macy's in the US and John Lewis in the UK have introduced technology, including mobile apps and barcode scanners, that customers can use in tandem with a visit to a physical store, along with 'click and collect' services. "

management team. "It was what they were set up to do, after all." Four of the top five companies singled out for good customer service in our survey are online specialists. Amazon and eBay take the top two spots. In third place comes Flipkart, an Indian e-commerce site registered in Singapore to bypass Indian restrictions on multi-brand e-tailing. MercadoLibre ("free market" in Spanish), in fifth place, is the biggest

e-commerce site in Latin America, part-owned by eBay.

Only one traditional retailer makes it into the top five, America's Wal-Mart, which has made a big push into e-commerce to complement its store presence. It is one of a handful of big stores around the world that are starting to introduce mobile-phone apps that can do everything

3 "Apple Pay to launch Monday", *USA Today*, October 16th 2014. Available at: http://www.usatoday.com/story/tech/2014/10/16/apple-ipay/17308389/

4 "Virtual store tour: John Lewis Oxford Street mapped on Google Street View", *Retail Week*, December 16th 2013. Available at: http://www.retail-week.com/stores/virtual-store-tour-john-lewis-oxford-street-mapped-on-google-street-view/5055876.article

5 "Walking back to happiness for Marks & Spencer?", *The Telegraph*, April 6th 2013. Available at: http://www.telegraph.co.uk/finance/newsbysector/retailandconsumer/9975955/Walking-back-to-happiness-for-Marks-and-Spencer.html

> " Almost three-quarters of consumers say they will stop doing business with a company following a bad experience. "

from pinpointing an item's location in the store to pre-ordering goods for collection. It is not only selling over the web, in other words, it is increasingly using mobile technology to complement its physical store presence.

Consumers overwhelmingly point to the retail sector for examples of best practice, but company executives (with a wider commercial remit than simple shopping) also single out sectors such as banks and telecommunications companies for praise. The business response to the omnichannel challenge will be discussed in detail in the next chapter, but some of the following examples can already give a good indication of best practice in the retail, banking and telecoms sectors, explaining why they rate highly for consumer service.

Department stores such as Macy's in the US and John Lewis in the UK have introduced technology, including mobile apps and barcode scanners, that customers can use in tandem with a visit to a physical store, along with "click and collect" services that mean consumers can shop whenever and wherever they like and then pick up the goods from a store in their free time (giving the retailer a useful upselling opportunity, too). Retailers such as Macy's are experimenting with new payment methods such as Apple Pay, allowing customers to avoid the hassle of long queues for in-store tills.[3] John Lewis has used Google Street View to map its flagship Oxford Street store in London, so that customers can pinpoint where things are and pre-plan their visit.[4] Both of these chains recognise that people coming to their stores are also using their digital sites and have designed both to complement each other.

Their example is increasingly being followed by the big supermarket chains in developed countries and by other retailers sometimes playing catch-up with customer behaviour. The UK clothes and food seller Marks & Spencer (M&S) took back control of its site from Amazon at the start of 2014, for example, and now equips

its salespeople with tablet computers.[5] M&S needed to catch up with omnichannel and has launched a thorough overhaul of its website; it has introduced "click and collect" services and uses tablet computers to connect store customers directly to the website.

Such thinking is evident in other consumer-facing industries, too, as they find their customers using a variety of platforms. Banks have evolved their offering steadily, for example. For many years they have been looking towards leanly staffed branch networks, allowing customers to do most of their banking over automated teller machines (ATMs) capable of an increasingly wide variety of tasks rather than face-to-face. Internet banking has also been developed to the point where most banking services can be done online. Major banks such as HSBC have introduced mobile banking apps allowing at least basic functions such as account transfers and some payments to be done from a smartphone. This is partly a response to the rise of e-commerce companies such as PayPal. If banks do not respond, they will lose customers increasingly used to being able to do their banking as and when they want.

Banks and building societies have started to look at the use of innovations such as video links to improve in-store service levels (see Nationwide case study) and to integrate branch, phone and Internet banking. It is a similar story in telecoms. Companies such as BT and EE have developed their websites and launched mobile apps allowing people to check everything from their bill to broadband speeds, integrated to some extent with a store and phone service.

The importance of getting the basics right

As more companies use a wider range of platforms for customer service, so consumers show themselves increasingly intolerant of low standards on any of the sales platforms: our survey shows convincingly that consumers will walk away from a firm that has failed to tackle the

basics competently—almost three-quarters of consumers say they will stop doing business with a company following a bad experience, and more than half will complain to families and friends.

Some of the leading companies are taking a hard look at some of the areas that can make customers walk away, such as the need for reliable delivery. Working people can find it hard to be at home for a delivery, for example, so eBay has teamed up with a UK retailer, Argos, to allow "click and collect" services, meaning that people can go to an Argos store at the weekend to pick up an eBay purchase. Some courier companies and retailers such as Amazon are also experimenting with collection points at railway stations that people can use on their way to or from work.[6]

Consumers are now demanding such things so that they can shop when, where and how they like. At a company level this can mean a major reorganisation to get rid of internal silos that are irrelevant to consumers, such as web-only sales, or making sure that physical stores are able to handle returns from online deals, for example.

Chart 3

Q **You mentioned that you stopped doing business with at least one company in the last year due to a negative experience. What aspect of that experience annoyed you most?**
Please select up to three (% respondents, consumer survey)

Slow response to enquiries or complaints	38%
Inaccurate or misleading information about the product	35%
Delays in delivering the product or providing the service	30%
Inaccuracies in order fulfilment	23%
Lack of accessibility of company representatives	23%
Unsatisfactory returns process	22%
Complicated or unreliable ordering process	17%
Failure to keep track of my information	12%
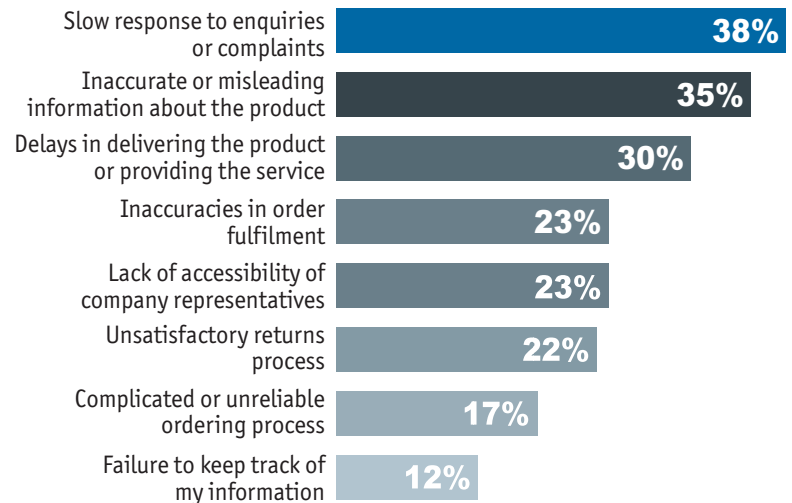
Source: The Economist Intelligence Unit survey, September 2014.

Above all, it can mean a change of mindset, with companies trying to satisfy customers' demands and practices rather than expecting consumers to fit in with their existing business structures.

6 "Amazon to join railway station parcel pick-up service", BBC News, June 22nd 2014. Available at: http://www.bbc.co.uk/news/business-27962642

Case study: eBay's changing business model responds to omnichannel challenge

It is easy to assume that relatively new companies, such as eBay or Amazon, are leading the charge towards online and hybrid shopping, wiping out traditional retailers as shopping habits change in their favour. In fact, these companies are themselves having to change fast to keep up with rapidly evolving consumer habits. In the space of just 15 years eBay's business model has changed fundamentally, for example, and it continues to evolve.

Set up as an online auction site, most of eBay's business is now selling new goods for a fixed price. "More than three-quarters of our listings today are 'buy it now'," says Valerie Nygaard, eBay's senior director of buyer experience. The company's growth has been as fast as the changes to its business model. In 2013 its gross merchandising volume (excluding vehicles) was above US$76bn globally and continuing to grow fast, up 13% on 2012.

As expected from an online specialist, eBay is an expert at many of the basics demanded by consumers, from simple ordering and delivery procedures to an effective mobile app. However, as Ms Nygaard points out: "We face the reverse challenge to bricks-and-mortar retailers." She points to the formation of eBay Collections, allowing customers the chance to browse their favourite things on the site as well as in physical stores. "It gives us a shop window," she explains. As well as allowing eBay to highlight offers from the millions of different items available on the site, shoppers can create collections around the areas that interest them, from vintage clothing to computer equipment.

eBay is also working hard on data analytics techniques to identify customers' tastes and offer them the right things in marketing e-mails, recognising the value of the huge amount of information that it holds. "You have to be careful not to overload people with offers," warns Ms Nygaard, acknowledging how annoying endless sales messages can become.

Perhaps most intriguing, however, is that eBay, in many ways symptomatic of the new online competition that troubles traditional retailers, also recognises that it must become a part of the omnichannel revolution. Its own research shows that close to one-third (31%) of customers visit a store before making a purchase online, but also that a greater percentage—34%—research online before buying in-store. Simply put, eBay needs to co-operate with the retail chains that use it as a sales channel.

In the UK alone it now has tie-ups with more than 100 retailers. For eBay, this allows it to get around some practical problems, such as offering options for home delivery. Its customers can now opt to pick up their packages from Argos stores, for example. For retailers already using eBay heavily as a sales channel, it allows the one-time auction site to become a part of their omnichannel strategy, rather than being in opposition to it. See something in-store, buy it over eBay and then have it delivered to the store or to your home. It's a natural fit, and a big shift in the way of doing business for both eBay and traditional retailers.

2 The business response

For many companies, the impact of new technologies is fairly simple: rather than dealing with customers face-to-face, they must be able to handle them remotely as well, whether over the web, social media, a mobile app or all three simultaneously. Few of these technologies are new, although some—notably mobile apps—are becoming more popular. Generally, companies will have developed ways of using at least the three main variations here: physical stores, telephone and websites. Hence, the challenge is not just to launch activities over the multitude of platforms available today; it is to integrate them so that users can switch between them seamlessly, and so that they become complementary to one another rather than battling against each other.

"The term 'omnichannel' has emerged to represent how customers really want to use different channels together, since 'multichannel' has too often been implemented as just a collection of pieces," concludes Accenture's Mr. Wollan. There is, after all, little new in banks or shops allowing people to shift money or shop over the Internet or over the phone, as well as in a branch. Only fairly recently, however, have companies started to face up to the need to join things together, leaving behind the old "multichannel" thinking that they could offer, for example, online services separately from their store presence.

Joining up the dots

This can mean more than simply sorting out IT and accounting systems to join things up, although that is certainly important. In some

markets, notably retail, the shift in consumer shopping habits has major implications for the shape of the industry, and certainly for companies sitting on a big store network. "It changes the function of retail stores," says Ben Perkins, head of consumer business research at Deloitte. With consumers now used to shopping online and increasingly using mobile devices, such as smartphones and tablets, to compare prices even when in-store, physical shops might become a place to browse and test products, but not necessarily to buy them. Apple stores show this in action. The computer and mobile giant realised that people wanted a place to come and try out its products but shied away from launching traditional shops with check-outs. Instead, customers can browse in-store, buy over their smartphones or tablet computers and then pick up their goods in-store.

Such thinking is starting to penetrate mainstream retail. As mentioned in the first chapter, the UK department store chain John Lewis, for example, has thrived by joining up its online, tablet and store sales so that a customer can buy online and then go to a store to return or pick up the item. It was also an early adopter of "click and collect" and is now pushing the use of mobile technology in-store, for example launching an app allowing people to scan a barcode for more product information. Beacon technology is also becoming increasingly popular with retailers.

The UK's House of Fraser announced over the summer that it would introduce beacon-equipped mannequins in its Aberdeen store, for example.

> " The challenge is not just to launch activities over the multitude of platforms available today; it is to integrate them, so that users can switch between them seamlessly. "

When a customer with an enabled smartphone app is within 50 metres of the mannequin, the beacon sends a signal providing them with details about the clothes and accessories on the mannequin, the price, where the items can be found within the store and links to purchase the items directly from the retailer's website. For customers, technology is making it better and easier to shop in-store.

Case study: Nationwide combines tradition and modern technology to raise customer satisfaction

Banks and building societies are often cited as a classic example of technological challenges: their retail customers expect to be able to access their accounts over the web or on their mobile phones, and in practical terms there can be no difference between the online services and going into their local branch. Financial institutions have generally accepted the challenge, with varying degrees of success. However, by and large they have failed to use technology to cut back on the massive costs of running a branch network still preferred by many customers as a source of face-to-face advice.

That is why many are eying with interest the example of Nationwide in the UK. The building society partnered with Cisco in 2013 to introduce Internet-based video conferencing in its branches, giving customers fast access to expert mortgage advice and saving on the need to have expensive specialists in each branch. "Customer satisfaction increased markedly," says Cisco's managing director of global industries, Paul Jameson, "and costs fell sharply."

The building society launched a pilot project in January 2013, offering customers in some rural branches the chance to speak to remote mortgage experts, talking them through the loan process and application over a high-definition Internet video link provided by Cisco. Some branches can be too small to house such experts cost-effectively, so this was a way to speed up access to good-quality advice as well as to save money on employing mortgage experts in each branch. Even in well-staffed urban branches customers would often have to wait to see an expert or schedule an appointment for a later date. Close to one-third of customers would simply go to a competitor bank to save time instead, costing Nationwide business.

Within a few weeks Nationwide found that the branches offering remote access reported higher customer satisfaction ratings and were doing better business than a test group of traditional outlets and started to roll out its remote-access programme to its other branches. By November 2013 it had seen a 66% increase in new mortgage business, double-digit growth in customer net satisfaction, and it had cut the cost of sales in the mortgage division by two-thirds.

Nationwide has worked hard to merge the use of the new technology with the traditional personal atmosphere of a branch visit. Customers wanting mortgage advice are greeted by staff who book them into a meeting through the building society's online schedule and set up the video conference. They can provide any necessary documentation, meaning that the customer regards the online service as part of the branch service, rather than as separate.

The exciting thing, of course, is how far this idea could be stretched, both to other branch services such as investment advice and to offering people direct advice through their home or office PC. "Telling people where and when to go for advice does not fit with modern lifestyles," explains Mr Jameson.

Other industries are starting to realise that they can improve the customer experience by embracing technological change. Paul Jameson, Cisco's managing director of global industries, mentions Nationwide Building Society, a UK financial institution that now offers retail customers the option of meeting with specialists in a branch over a high-definition video conference. This allows people quick access to experts in areas such as mortgage lending, for example, and it allows the building society to better utilise its banking experts, with experts available to any site when needed—a huge advantage when costs are under intense scrutiny while people now demand banking services to be more convenient (see Nationwide case study).

Consumer goods companies face a tricky task managing things over different platforms, with most reliant on retailers for sales. "The challenge is over branding," highlights Driva's Mr Price. He points to Nike as a company that has been able to grow its brand, taking advantage of mobile technology to launch fitness programmes and games to cement customer loyalty. "It's gone from selling sneakers to being a lifestyle brand," he adds.

Such stories remain relatively rare, in fact, although one consultant who wants to remain anonymous does say that he speaks "to all of the top 100 global retailers and banks, and they are all working hard to improve their omnichannel presence". Beneath the rhetoric it is clear that, technologically at least, it seems possible to do a decent job of joining things up, and that many big companies recognise the need to do so. So why has this not happened more widely?

The need for organisational change
More than three-quarters of the senior executives we surveyed say that creating a better customer experience and consistent messaging across different platforms are a priority for their firms and for senior management. And they recognise the need to take basic steps such as improving employee collaboration (so that departments

work with rather than against each other) and for a cross-functional approach.

However, there is little sign of the type of organisational shift necessary to make that happen. Just 12% of executives say their firm has a chief customer officer or equivalent—one of the basic steps that John Lewis took to create some joined-up thinking. And only 11% state that their primary focus was turning customers into brand advocates—the sort of deeper, longer-term relationship achieved by companies such as Nike. Only around half of the companies surveyed have a single, integrated customer response unit. And

> "Technologically at least, it seems possible to do a decent job of joining things up, and (...) many big companies recognise the need to do so."

Chart 4

Q Do you agree with the following statements about your organisation's strategy for improving the customer experience?
Please select up to three (% respondents, executive survey)

83% We believe that it is important that our message to customers remains consistent at every stage of the relationship

82% We believe that new technologies have a vital role to play in improving the customer experience both online and face-to-face

79% Our senior leaders have designated improvement of the customer experience as a key strategic priority

77% We have adopted specific strategies designed to improve the customer experience

70% We have recognised improved collaboration among employees as a key part of an improved customer experience

66% We have recognised improved collaboration with partners and suppliers as a key part of an improved customer experience

64% We have taken action to support customer interactions with cross-functional approaches in all of our customer-facing activities

51% We have created new executive roles and responsibilities designed to make the organisation more customer-centric

38% We have not yet implemented major initiatives to improve the customer experience but we plan to do so within two years

31% Creating a more holistic customer experience is not a priority for our organisation

Source: The Economist Intelligence Unit survey, September 2014.

> **Take a look at the nitty-gritty of creating an omnichannel presence, let alone a seamless one, and it becomes clear that many companies are at a shockingly early stage.**

few have a comprehensive approach to measuring customer experience; only around one-third of respondents (35%) consider customer lifetime sales value or customer influence on others (29%). Rather, they prefer to look at sales volumes (52% of respondents) and repeat purchases (49%).

Take a look at the nitty-gritty of creating an omnichannel presence, let alone a seamless one, and it becomes clear that many companies are still at a shockingly early stage, considering that it is now well over a decade since the Internet and e-commerce became commonplace. Of the companies which deal directly with customers over their websites, around one-third has not customised the site for use over desktop, tablet and mobiles, just 40% offer all of their products and services across all of these platforms, and only one-third can engage with customers in real time, at any time.

As far as consumer-facing companies that use bricks-and-mortar sites to interact with customers are concerned, the likes of John Lewis remain the exception rather than the rule. Relatively few of the companies surveyed that use bricks-and-mortar premises have integrated digital channels, with just 28% having online viewing of in-store inventory, and well under

one-half offering shop-and-ship (41%) or order-and-ship (42%).

Meanwhile, data analytics, already used heavily by the likes of Amazon and eBay to prompt and predict shopper behaviour, hardly exists on a large scale. Less than one-third of companies surveyed (31%) track behaviour across channels, for example.

Difficult changes ahead

The survey results broadly echo the comments of analysts interviewed for this report to explain this tardiness. Many online channels remain separate profit centres from bricks-and-mortar operations, perhaps under the remit of the marketing department, while customer service deals with social media. Changing that means a big reorganisation of the company. Sorting out legacy IT systems can be a big expense and take several years for a big company, although it may be increasingly possible to keep the old systems in place and impose a separate system above them to unify structures from the customers' point of view, thus reducing the cost.

Moreover, there is the problem of dealing with long-term property leases in the face of a changing market that can make physical stores redundant. The shift in shopping behaviour

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Chart 5

Q **What obstacles stand in the way of improving your organisation's customer experience?**

Please select up to two (% respondents, executive survey)

Silos within the organisation	**36%**
Lack of integrated information systems	**27%**
Lack of consolidated 360 degree view of the customer across touchpoints	**24%**
Lack of senior management vision and leadership	**24%**
Lack of employee incentives for collaboration	**17%**
Inflexible technology and application infrastructure	**17%**
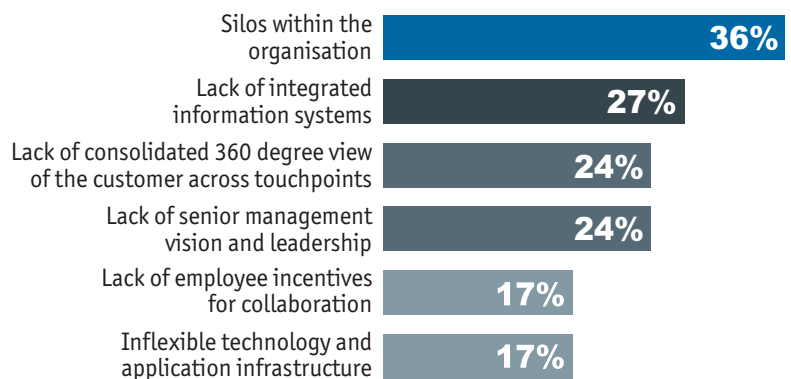
Source: The Economist Intelligence Unit survey, September 2014.

is leading to big out-of-town supermarkets becoming less popular, for example, as people prefer to browse at smaller local shops. Winding down a large portfolio of stores cannot be done easily—socially or commercially—but flagging results can force change. For example, Homebase recently announced that it would be closing a quarter of its stores over the next three years in response to online competition,[7] and Staples in the US has also launched a major store rationalisation programme as its business shifts to the web.[8]

In other words, if the need is perceived as urgent, then even big structural adjustments can be made in response to changing customer behaviour. However, internal resistance can be fierce. Our survey finds that the biggest obstacles to better customer service are organisational, rather than technical. More than a third (36%) see silos within their organisation as the biggest issue, while around a quarter (24%) cite lack of senior management vision. By contrast, relatively few blame technology gaps.

In fact, there is broad agreement between consumers and company executives here: consumers think that the biggest problem is a lack of interest in customer satisfaction, a lack of rigorous training in customer service and a failure to perceive customer needs. In reality, our survey suggests that the problem is not one of corporate ignorance, but of corporate will and capacity for change.

> " Some 60% of senior executives in our survey believe that the biggest obstacles to better customer service are internal organisational problems. "

Chart 6

Q In your opinion what obstacles prevent companies from providing the ideal customer experience?

Please select up to three (% respondents, consumer survey)

A lack of interest in customer satisfaction	**45%**
Lack of rigorous training in customer service	**34%**
Failure to perceive customer needs	**31%**
Inadequate staffing levels	**30%**
Cost pressures	**24%**
Difficulty in recruiting/retaining competent staff	**23%**
Incentive structures that emphasise sales numbers over positive interaction	**20%**
An outdated or inadequate web presence	**17%**
Outdated or inadequate communications technology	**14%**

Source: The Economist Intelligence Unit survey, September 2014.

[7] "Homebase to close one in four stores as UK falls out of love with DIY", *The Guardian*, October 22nd 2014. Available at: http://www.theguardian.com/business/2014/oct/22/homebase-to-close-quarter-stores-diy

[8] "Staples Closing 225 Stores As Fourth Quarter Profit And Revenue Drop", Forbes, March 6th 2014. Available at: http://www.forbes.com/sites/maggiemcgrath/2014/03/06/staples-closing-225-stores-as-fourth-quarter-profit-and-revenue-drop/
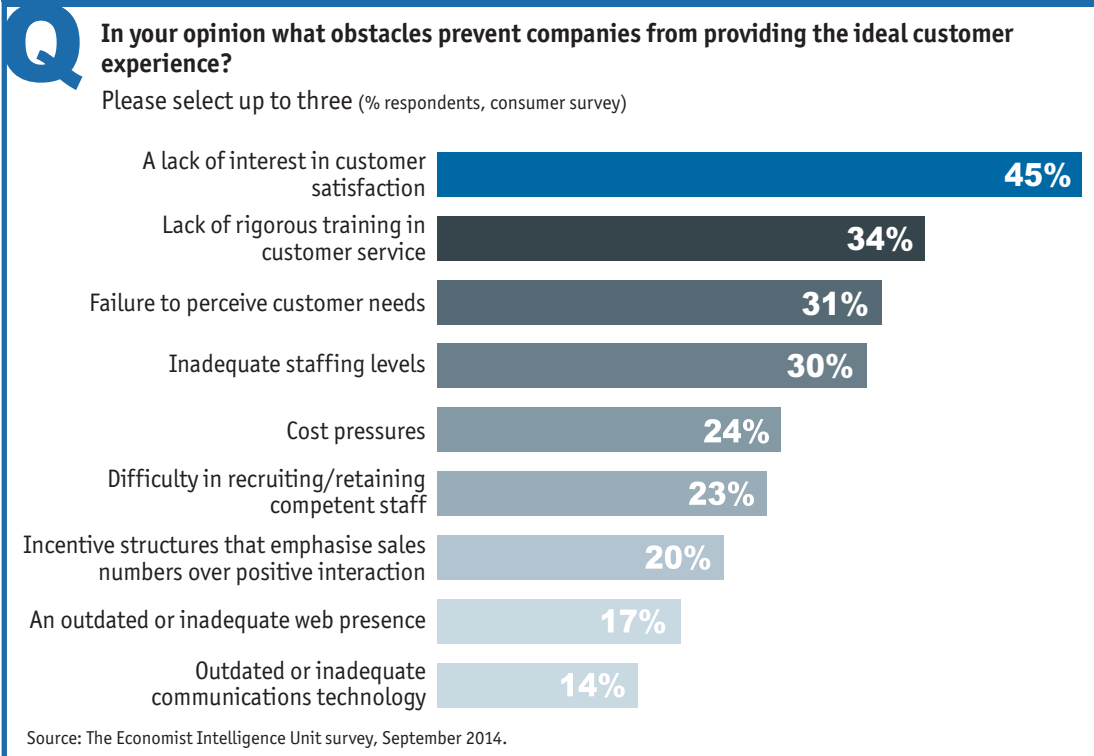
Conclusion

Consumers might make little conscious distinction between buying things online, over their mobile phones or in-store, but our survey shows that it does matter if they hit problems over any of these areas. Such an increase in choice helps to explain our survey's finding that consumers feel their customer experience has improved after all. And our poll also finds that their response to companies which are not up to speed when it comes to joining up these channels is harsh. Nearly three-quarters of consumers say that they will stop using a company after a bad experience, and more than half will complain to family and friends about it. Get this wrong and the results will suffer.

Companies realise that, but they remain tardy in their response to demands that, for a consumer, seem like common sense. Our survey suggests that they are slow to get up to speed on basics such as dealing with customers over their website, let alone with relatively new trends such as mobile apps. Most worryingly, far from offering a seamless experience to people contacting them through a plethora of different media, they do not yet give consistent information and service levels across different platforms. John Lewis is making a big push in this area because it found that close to two-thirds of its customers shopped online and over their mobile devices, as well as in-store. Consumers have already changed their habits, and companies need to react to that convincingly.

Technologically, this is clearly possible, although some jobs (such as setting up a single database spanning all platforms) can be expensive and time-consuming. Equally, the reorganisation required can be complex, but it does not have to be painful or expensive: staff need to be redeployed to unified departments, someone needs to take control of the customer journey (rather than of specific areas such as sales and marketing), and incentive schemes need to be rethought to take account of the changed roles of some departments, with shops perhaps supporting sales eventually signed online and vice versa. John Lewis, again, provides an example of how this can be done, with incentives now allocated on the basis of regional rather than store results. This may not be complicated, but it requires a big shift in accounting—and mentality.

Ultimately, as our survey shows very strongly, this is a question of company culture and company leadership. If a company gets this right, the organisation can be tweaked to allow departments to work seamlessly together. And if our survey sounds a warning bell for firms that fail to do this, then the relatively high levels of customer satisfaction recorded also hint at the rewards on offer. As companies from Nike to Apple have shown, developing a seamless customer journey can take a brand in new directions, foster long-term customer loyalty and allow a company to be on top of a shifting market. It is not an issue that companies can shy away from.

Appendix: Survey results

Percentages may not add to 100% owing to rounding or the ability of respondents to choose multiple responses.

Consumer survey

Which of the following devices do you own or have access to? Please select all that apply
(% respondents)

Laptop
80

Smartphone (voice and internet)
79

Landline phone
74

Desktop computer
65

Tablet
51

Mobile phone (voice and text)
49

None of the above
0
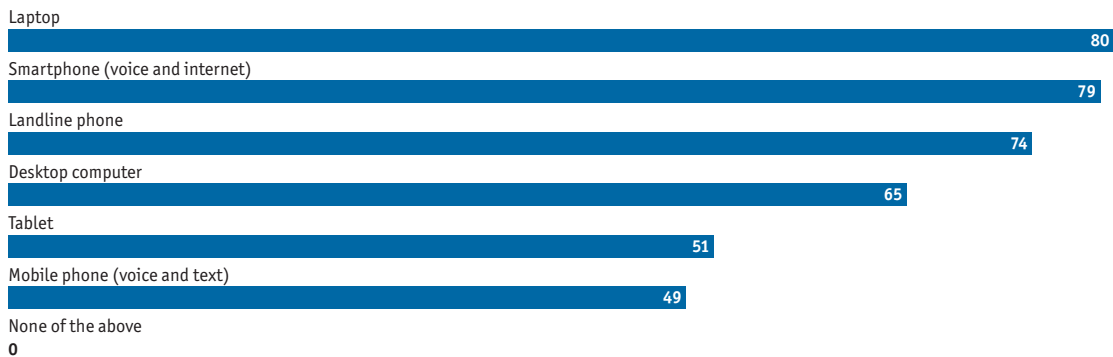
Which of the following channels do you use to learn about and compare products? Please select all that apply
(% respondents)

Search engine tools
69

Company websites
58

Ask family/friends
51

Independent websites
46

Television/radio
43

Bricks-and-mortar premises
42

Newspapers/magazines
41

E-mail
38

Printed catalogues
34
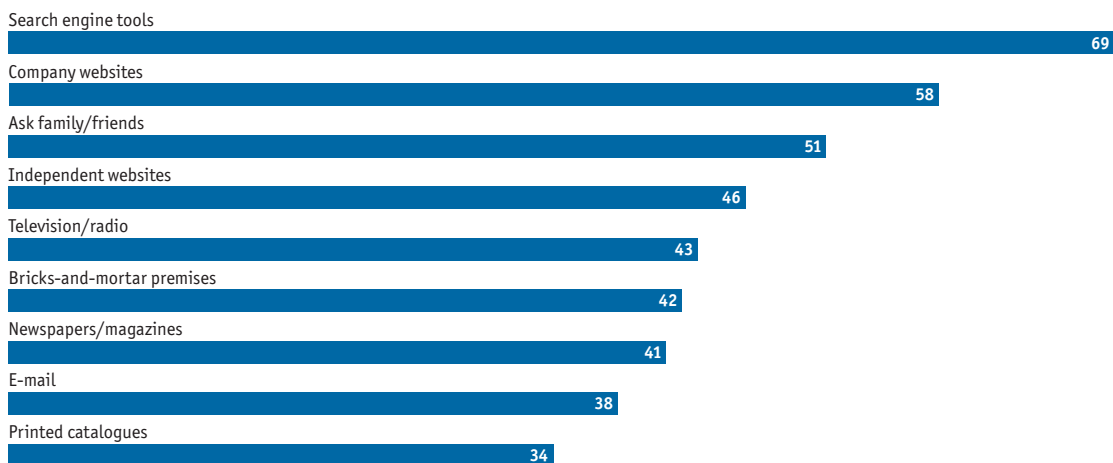
Approximately how much time in a typical week do you spend online for personal purposes?
(% respondents)

More than 50 hours
9

21 to 50 hours
16

16 to 20 hours
14

11 to 15 hours
14

6 to 10 hours
22

2 to 5 hours
20

One hour
4

None
0
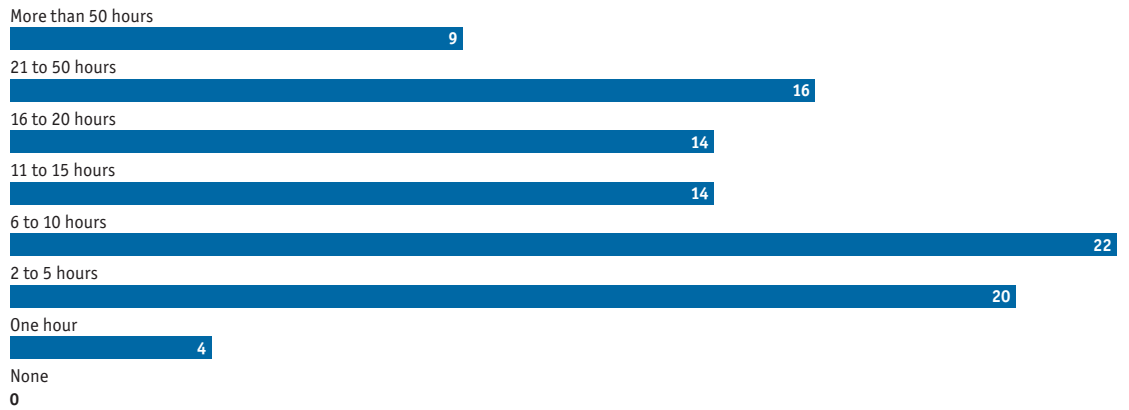
Approximately how many purchases have you completed using online channels in the past year?
(% respondents)

More than 20
27

11 to 20
16

6 to 10
23

2 to 5
24

One
4

None
6

Do you agree or disagree with the following statements about your purchasing practices? Please select one from each row
(% respondents)

■ Agree ■ Disagree ■ Don't know/not applicable

I use online channels to research my selections of some products/services even when I plan to purchase in person at a store
89 | 7 | 4

I use social media, blogs and other online channels to learn about experiences of other consumers with products/services or companies
64 | 27 | 8

I use social media, blogs and other online channels to share my experiences with products/services or companies
46 | 43 | 12

When researching a potential purchase I look for expert reviews on the internet
73 | 18 | 9

When researching a potential purchase I look for consumer reviews on the internet
84 | 10 | 6

I use a mobile device to look for products/services or suppliers near my location
56 | 34 | 10

I go to a store to see a product I have researched online prior to purchasing
75 | 18 | 7

While in a store, I comparison shop / check for the best price on my smartphone
52 | 37 | 12

On average, how frequently do you use the following channels to interact with a business concerning an actual or potential purchase? Please select one from each row
(% respondents)

Very frequently ■ Frequently ■ Occasionally ■ Rarely ■ Never ■ Don't know/not applicable

Landline phone

| 9 | 12 | 23 | 26 | 25 | 5 |

Mobile phone (voice and text)

| 11 | 16 | 17 | 16 | 30 | 11 |

Smartphone (voice and internet)

| 22 | 24 | 20 | 11 | 17 | 6 |

Desktop computer

| 22 | 24 | 18 | 11 | 16 | 8 |

Laptop

| 27 | 28 | 20 | 9 | 10 | 6 |

Tablet

| 16 | 18 | 13 | 10 | 27 | 16 |

How has the quality of your overall experience as a customer changed over the past three years?
(% respondents)

My experiences have become worse
7

My experiences have become better
51

My experiences have not changed
37

Not sure
5

Thinking of the ideal customer experience, which of the following elements are most important to you?
Please select up to three
(% respondents)

Fast response to enquiries or complaints
47

Simple purchasing processes
47

Ability to track orders in real time
34

Clarity and simplicity of product information across channels
25

Ability to interact with the company over multiple channels (eg, in-person, e-mail, online, mobile, phone)
22

Access to more in-depth product information in stores through technology
18

Ability to interact with the company via multiple channels 24/7
14

Consistency of product information across channels
14

A more personalised experience with relevant offers and recommendations based on my interests
12

Ongoing engagement with the company after the purchase has concluded
10

Customised offers based on my preferences revealed on different channels
7

Company representatives recognise me as a regular customer across all channels
7

Consistency of creative imaging across channels
4

Other (please specify)
1

Not sure
3

What proportion of the companies you deal with currently provide you with a great customer experience?
(% respondents)

51% to 100%
25

31% to 50%
26

21% to 30%
15

11% to 20%
11

10% or less
10

Not sure
10

None
3
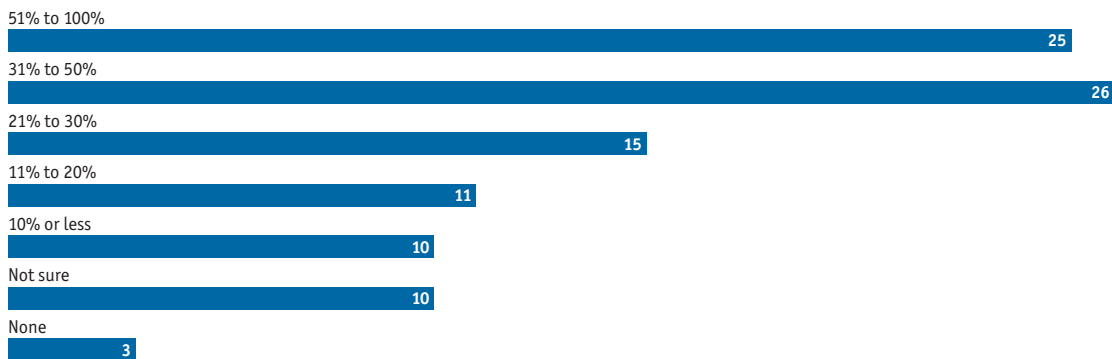
Which industries do you think provide the best overall customer experience? Please select up to two
(% respondents)

Retail
34

Consumer goods
31

Banking
30

Airlines
20

Telecommunications
12

Other (please specify)
2

Not sure
15
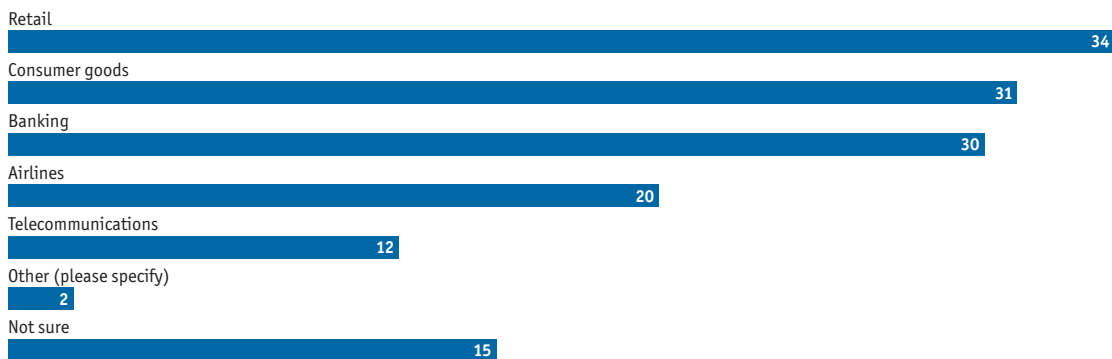
Thinking of the industries that provide the best customer experience, which aspects impress you most? Please select up to four
(% respondents)

Easy online-ordering process
54

Accurate and relevant product information
53

Fast delivery of ordered products
49

Hassle-free returns process
32

Prompt response to complaints
28

Simple in-store purchase process
24

Regular information about the status of my order/shipment
21

Expert advice from company representatives
20

Helpful information about product use
20

When you have an outstanding experience with a company, what is your typical response? Please select all that apply
(% respondents)

Make a mental note to buy from that company again
69

Tell friends and family in person or by email
51

Take an interest in the company's activities
23

Post a comment on a social media site
23

Thank the company in person, by phone or by email
21

Post a comment on the company's website
19

Follow the company on a social media site
16

Post a review on an independent website
13

Do nothing
5
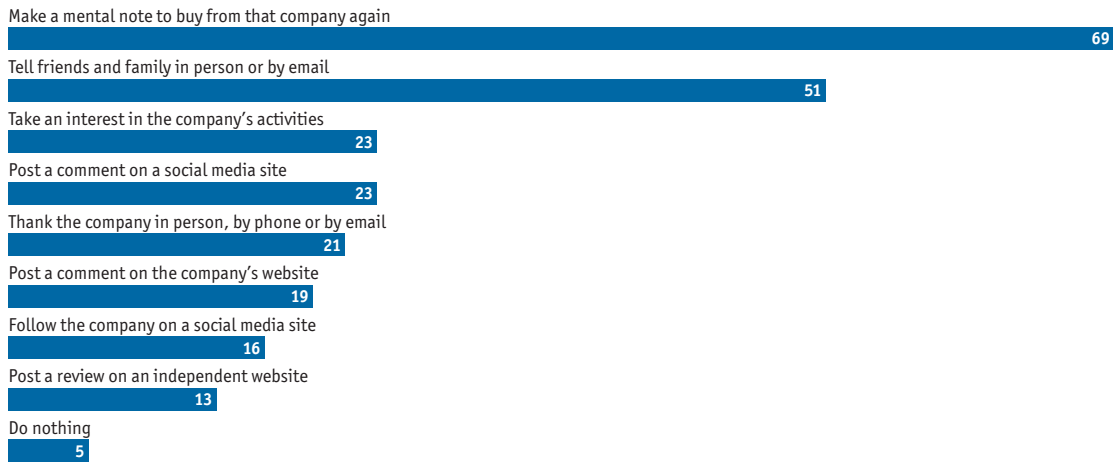
When you have a bad experience with a company, what is your typical response? Please select all that apply.
(% respondents)

Stop doing business with the company
71

Tell friends and family in person or by email
55

Complain to the company in person, by phone or by email
42

Post a comment on a social media site
26

Post a comment on the company's website
21

Post a review on an independent website
15

Do nothing
4

Not sure
3
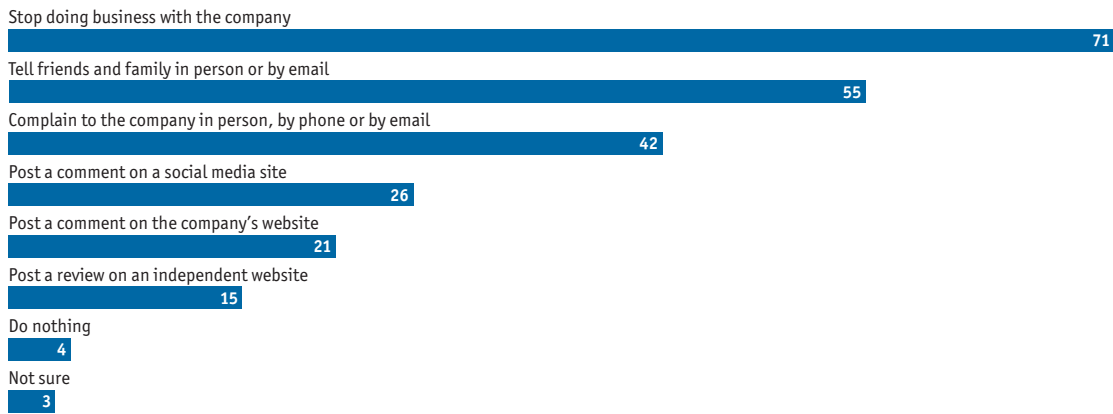
In the past year, how many companies have you stopped doing business with due to a negative experience?
(% respondents)

10 or more
1

5 to 10
3

2 to 5
24

One
26

None
37

Not sure
9

You mentioned that you stopped doing business with at least one company in the last year due to a negative experience. What aspect of that experience annoyed you most? Please select up to three
(% respondents)

Slow response to enquiries or complaints
38

Inaccurate or misleading information about the product
35

Delays in delivering the product or providing the service
30

Inaccuracies in order fulfilment
23

Lack of accessibility of company representatives
23

Unsatisfactory returns process
22

Complicated or unreliable ordering process
17

Failure to keep track of my information
12

Other (please specify)
10

Not sure
1
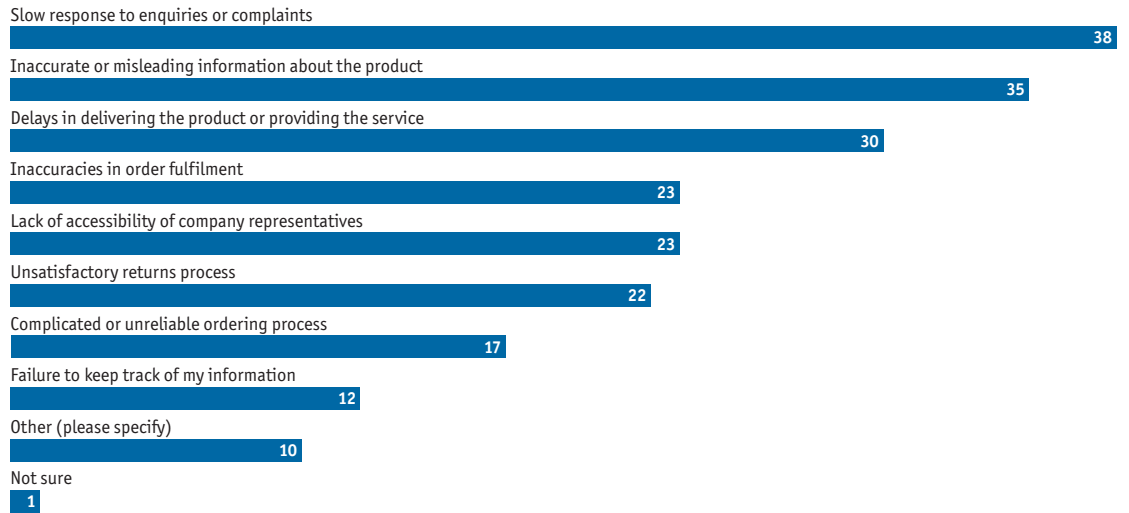
Have you ever posted negative comments about a company or brand on a social media site or customer reveiw site?
(% respondents)

Yes
39

No
61

You mentioned posting negative comments about a company or brand on a social media site or customer review site. Which of the folowing statements best describes the response you received?
(% respondents)

There was no response to my post
42

A company representative posted a solution that resolved my issue
11

A company representative posted a solution that did not resolve my issue
13

A company representative offered an apology and/or a request for broader feedback
10

A company representative contacted me directly to offer a solution and/or request that I revise my post
7

Other customers responded to my post with their own complaints about the company or brand
14

Other customers responded to my post with positive comments about the company or brand
1

Other (please specify)
2

Which of the following communication channels do you prefer to use when interacting with companies at each stage of an actual or potential purchase? Please select one from each row
(% respondents)

■ Desktop/Laptop Internet ■ Tablet/mobile Internet ■ Mobile application ■ Face-to-face ■ Phone ■ E-mail ■ Social media

Stage	Desktop/Laptop Internet	Tablet/mobile Internet	Mobile application	Face-to-face	Phone	E-mail	Social media
Identifying a need	57	13	4	13	6	5	2
Understanding product options/prices	58	16	5	12	5	4	1
Selecting a product	57	13	6	19	2	3	1
Purchasing a product	52	11	4	28	2	2	
Tracking delivery/order fulfilment	54	18	9	8	5	6	1
Obtaining information about product use	58	15	6	10	4	5	2
Returns or warranty issues	41	10	4	21	14	9	1
Conveying compliments or complaints	42	11	4	14	11	14	3

In your opinion what obstacles prevent companies from providing the ideal customer experience? Please select up to three
(% respondents)

A lack of interest in customer satisfaction	45
Lack of rigorous training in customer service	34
Failure to perceive customer needs	31
Inadequate staffing levels	30
Cost pressures	24
Difficulty in recruiting/retaining competent staff	23
Incentive structures that emphasise sales numbers over positive interaction	20
An outdated or inadequate web presence	17
Outdated or inadequate communications technology	14

What are the most important improvements that the companies you buy from regularly could make to improve the overall quality of the customer experience?
(% respondents)

Provide better links between their in-store and online services (eg, order-in-store, store pickup of online purchases, online viewing of store inventory)	32
Provide better coordination across different parts of the business (eg, marketing, sales, shipping, customer service)	31
Provide customer support 24/7	30
Be more consistent in the way they deal with me as a customer (eg, remembering my past purchases and service problems)	30
Be more consistent in the products and promotions they offer in-store, online and on different internet sites	29
Other (please specify)	3
None of the above	3
Not sure	7

Executive survey

In your opinion, how does your organisation rate on each of the following performance indicators compared with its peers?
Please select one from each row
(% respondents)

■ Well above average ■ Somewhat above average ■ Average/on par with peers ■ Somewhat below average ■ Well below average

Profitability

| 17 | 38 | 32 | 11 | 2 |

Revenue growth

| 14 | 37 | 34 | 12 | 3 |

Market share

| 18 | 31 | 34 | 12 | 5 |

Customer satisfaction

| 24 | 45 | 24 | 5 | 2 |

Customer loyalty

| 24 | 42 | 26 | 6 | 3 |

Do you agree or disagree with the following statements about your organisation's strategy for improving the customer experience? Please select one from each row
(% respondents)

■ Agree ■ Disagree ■ Don't know/not applicable

Our senior leaders have designated improvement of the customer experience as a key strategic priority

| 79 | 13 | 8 |

We have adopted specific strategies designed to improve the customer experience

| 77 | 14 | 9 |

We have created new executive roles and responsibilities designed to make the organisation more customer-centric

| 51 | 34 | 15 |

We have taken action to support customer interactions with cross-functional approaches in all of our customer-facing activities

| 64 | 23 | 13 |

We believe that it is important that our message to customers remains consistent at every stage of the relationship

| 83 | 10 | 7 |

We believe that new technologies have a vital role to play in improving the customer experience both online and face-to-face

| 82 | 10 | 8 |

We have recognised improved collaboration among employees as a key part of an improved customer experience

| 70 | 20 | 10 |

We have recognised improved collaboration with partners and suppliers as a key part of an improved customer experience

| 66 | 22 | 12 |

We have not yet implemented major initiatives to improve the customer experience but we plan to do so within two years

| 38 | 49 | 14 |

Creating a more holistic customer experience is not a priority for our organisation

| 31 | 59 | 10 |

Which position within your organisation (other than the CEO) has primary accountability for executing strategies to improve the quality of the customer experience?
(% respondents)

Chief Customer Officer, Chief Experience Officer or equivalent
12

Chief Marketing Officer
17

Chief Information Officer
6

Chief Operations Officer
16

Chief Technology Officer
7

Chief Sales Officer
7

Chief Procurement Officer
1

Our CEO retains this responsibility personally
14

Other C-level executive (please specify)
3

More than one C-level executive share this responsibility equally (please specify)
7

Don't know/not applicable
11

What level of maturity has your organisation achieved in customer experience management?
(% respondents)

Our primary focus is on building relationships with customers to increase satisfaction
40

Our primary focus is on acquiring customers to drive sales
25

Our primary focus is on building customer loyalty and preventing churn
17

Our primary focus is on converting customers into brand advocates/ambassadors
11

Other (please specify)
1

Don't know/not applicable
5
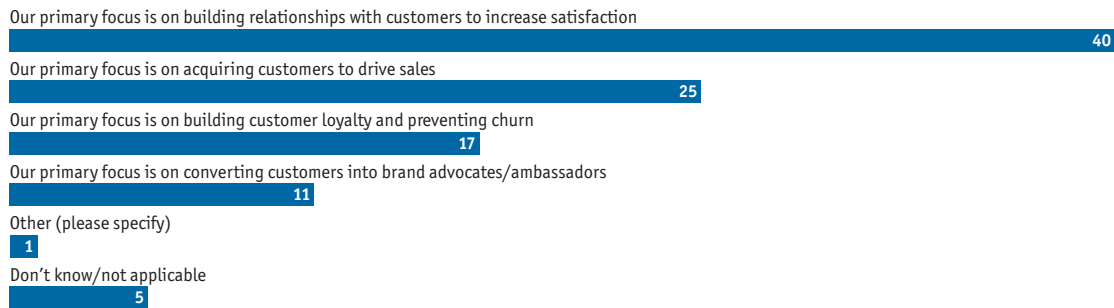
Which of the following statements best describes your organisation's current approach to aligning the customer experience across channels and functions?
(% respondents)

We are developing a holistic approach to shaping the customer experience and have unified some complementary channels and/or functions, but have not yet achieved a seamless experience
31

We promote collaboration among customer-facing functions to ensure consistency across channels but we have not yet attempted systematic linkage among channels or functions
24

We have established a seamless omnichannel experience across the entire customer journey supported by structured communications among all customer-facing functions
14

Our customer-facing functions are each responsible for improving the customer experience within their own domains
10

We are starting internal discussions on how to align the customer experience across channels and functions
10

We do not recognise improving the customer experience as an important goal
3

Other (please specify)
0

Don't know/not applicable
7

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How strongly does your organisation engage customers at the following stages of the customer journey?
Please select one from each row
(% respondents)

■ Very strong engagement ■ Strong engagement ■ Significant engagement ■ Low engagement ■ No engagement ■ Don't know/not applicable

Perceiving need for product/service

| 19 | 34 | 29 | 11 | 2 | 4 |

Researching product/service options

| 16 | 31 | 30 | 16 | 2 | 4 |

Selecting the product/service

| 18 | 33 | 29 | 14 | 2 | 4 |

Conducting the purchase transaction

| 18 | 30 | 30 | 14 | 2 | 6 |

Delivery of product/service

| 21 | 38 | 26 | 9 | 2 | 3 |

Use of product/service

| 19 | 34 | 29 | 12 | 2 | 4 |

Maintenance, repairs, returns

| 16 | 27 | 27 | 14 | 3 | 13 |

Becoming an influencer

| 15 | 26 | 30 | 16 | 6 | 8 |

Which of the following methods does your organisation currently use to map key customer journeys and identify pain points?
Please select all that apply
(% respondents)

Customer and employee surveys
| 56 |

Analysis of transactions and complaints data
| 54 |

Consultations with front-line employees
| 44 |

Feedback from social media
| 34 |

Gap analysis comparing marketing promises with services delivered
| 27 |

Advanced analytics to identify the impact of various journeys on business outcomes
| 24 |

Customer experience council
| 22 |

Other (please specify)
| 2 |

None of the above
| 4 |

Don't know/not applicable
| 5 |

Which of the following technologies does your organisation currently use to deliver a seamless customer journey?
Please select all that apply
(% respondents)

Employees equipped with mobile or fixed devices such as tablets or displays
44

Web-based interfaces to provide customers with a single window into the business relationship
41

Integrated databases of customer information visible to all customer-facing functions
40

Websites and online content customised for different devices (desktop, tablet, mobile, etc)
34

Predictive analytics to identify pain points and anticipate consumer needs
31

Big Data tools to monitor customer interactions in real time
27

Other (please specify)
3

Don't know/not applicable
14

What is your organisation's top priority for investments in new technology to support a seamless customer journey?
Please select up to two
(% respondents)

Database technologies to integrate customer information
42

Advanced analytics to achieve customer insights
26

Big Data tools to integrate different types of information
24

Database technologies to provide single inventory and offers across channels
24

Mobile or fixed devices such as tablets or displays
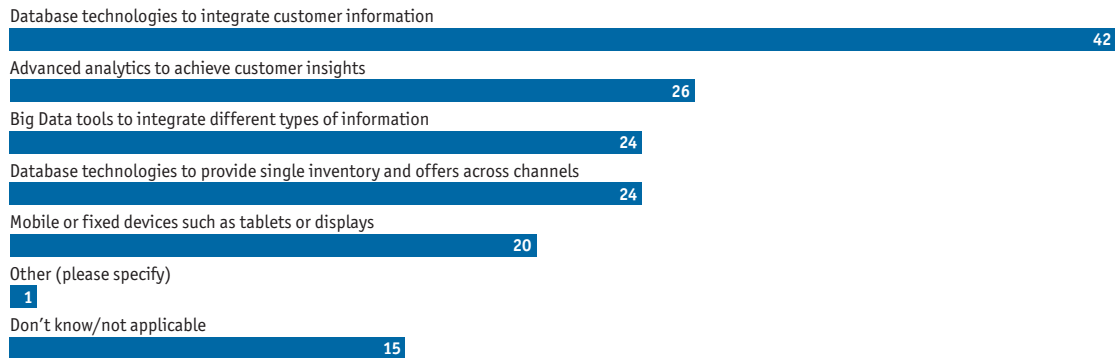20

Other (please specify)
1

Don't know/not applicable
15

Which of the following channels does your organisation currently use to convey messages to customers?
Please select all that apply
(% respondents)

Company websites
78

E-mail
67

Phone
55

Bricks-and-mortar premises
45

Newspapers/magazines
40

Branded social media pages
32

Mobile applications
31

Printed catalogues
31

Social media broadcasting
30

Television/radio
28

Search engine tools
25

Independent websites
19

Live chat
18

Kiosk
9

Don't know/not applicable
2

Which of the following channels does your organisation currently use to interact with customers? Please select all that apply
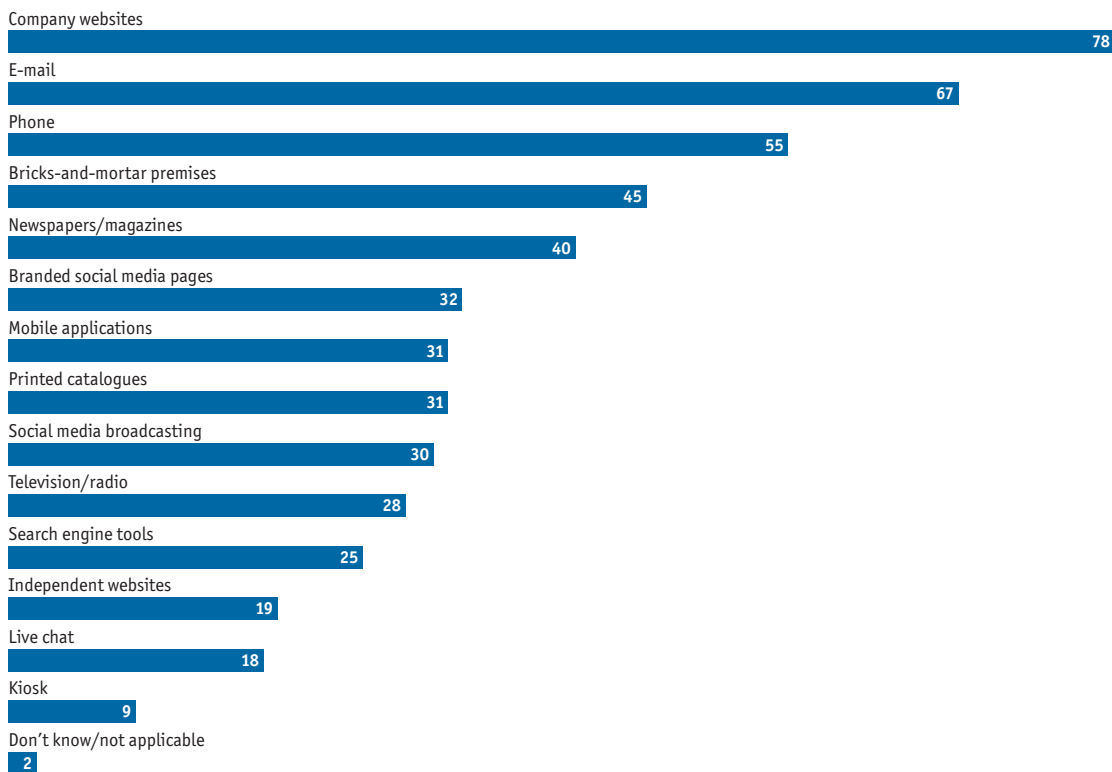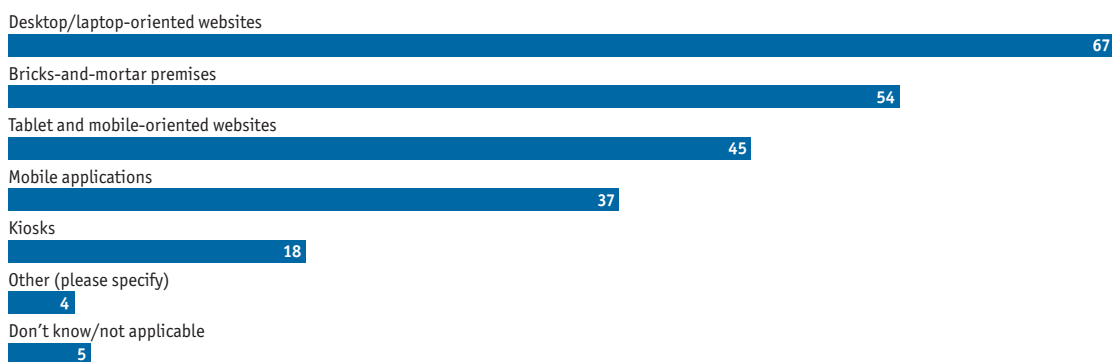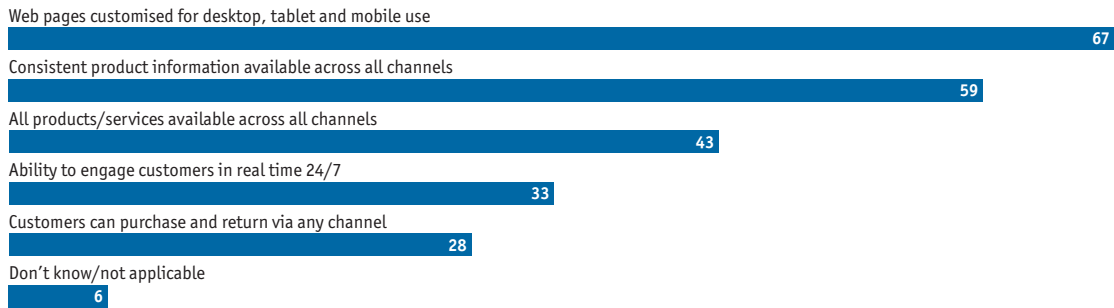(% respondents)

Desktop/laptop-oriented websites
67

Bricks-and-mortar premises
54

Tablet and mobile-oriented websites
45

Mobile applications
37

Kiosks
18

Other (please specify)
4

Don't know/not applicable
5

The Economist | Intelligence Unit

Which of the following features does your organisation currently provide? Please select all that apply
(% of companies that use desktop/laptop-oriented websites or tablet and mobile-oriented websites as channels to interact with customers)

Web pages customised for desktop, tablet and mobile use
67

Consistent product information available across all channels
59

All products/services available across all channels
43

Ability to engage customers in real time 24/7
33

Customers can purchase and return via any channel
28

Don't know/not applicable
6

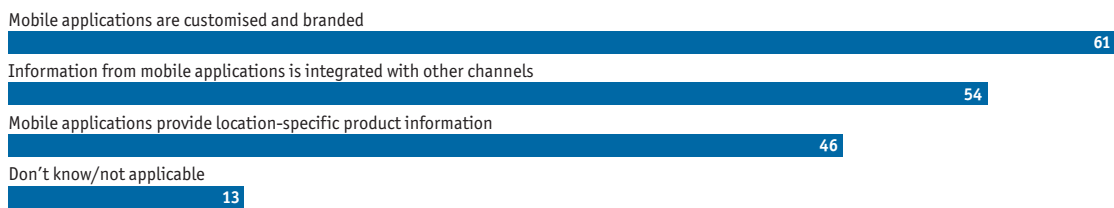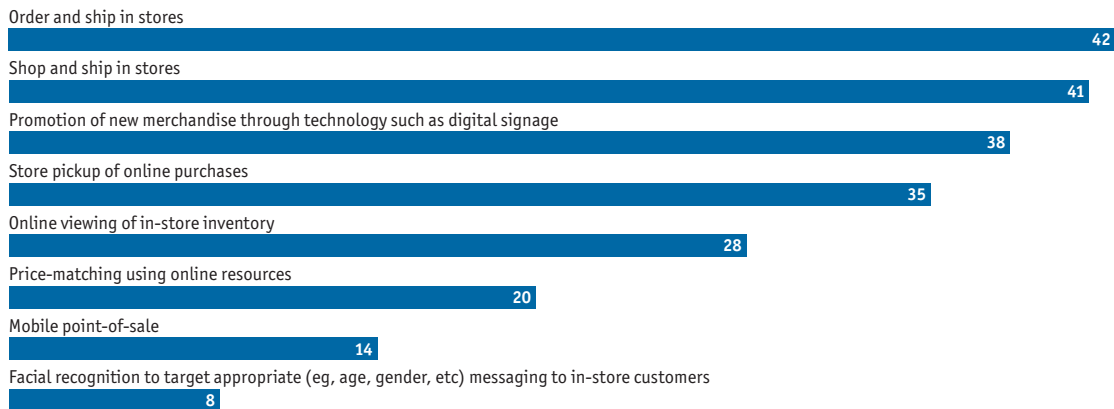**Which of the following features does your organisation currently provide?** Please select all that apply
(% of companies that use mobile applications as channel to interact with customers)

Mobile applications are customised and branded
61

Information from mobile applications is integrated with other channels
54

Mobile applications provide location-specific product information
46

Don't know/not applicable
13

Which of the following capabilities does your organisation currently provide? Please select all that apply
(% of companies that use bricks-and-mortar premises or kiosks as channels to interact with customers)

Order and ship in stores
42

Shop and ship in stores
41

Promotion of new merchandise through technology such as digital signage
38

Store pickup of online purchases
35

Online viewing of in-store inventory
28

Price-matching using online resources
20

Mobile point-of-sale
14

Facial recognition to target appropriate (eg, age, gender, etc) messaging to in-store customers
8

Which of the following methods does your organisation use to support a consistent omnichannel experience for customers?
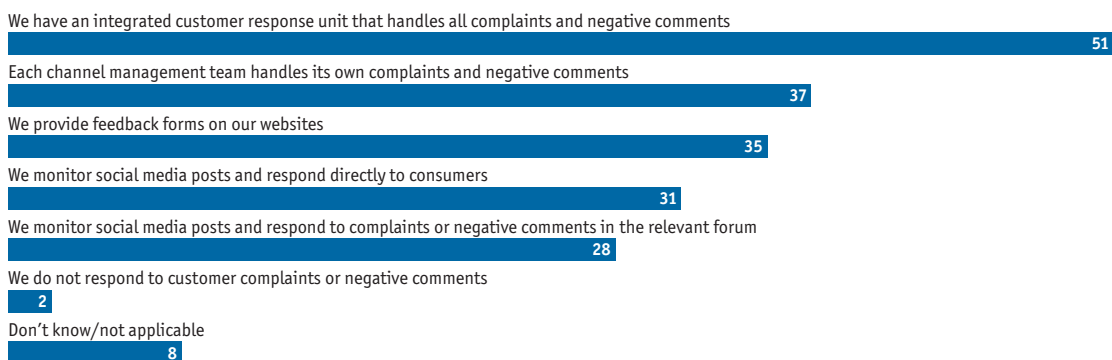Please select all that apply
(% respondents)

Training for staff to offer consistent messaging
41

E-commerce platforms
32

Tracking customer behaviour and preferences across channels
31

Integration of creative elements across channels
28

Loyalty programmes
27

Search engine optimisation
26

Use of offline messages to drive digital activity
23

Mobile payment platforms
21

In-store analytics
19

Site retargeting
11

QR codes to provide product information in-store via smartphone
9

Geo-aware applications
8

Use of in-store technology such as digital signage to reinforce offers promoted through other channels
8

Other (please specify)
2

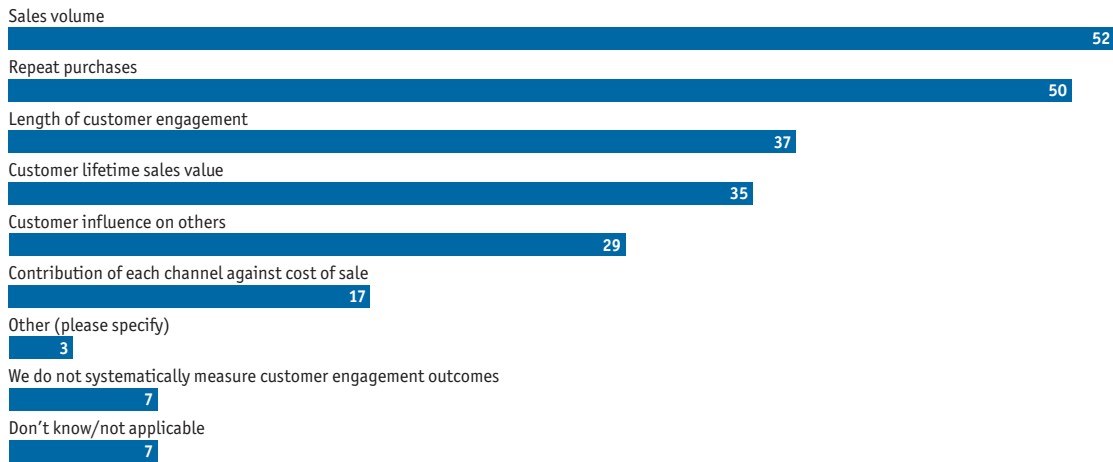Don't know/not applicable
17

Which of the following methods does your organisation use to respond to customer complaints or negative comments?
Please select all that apply
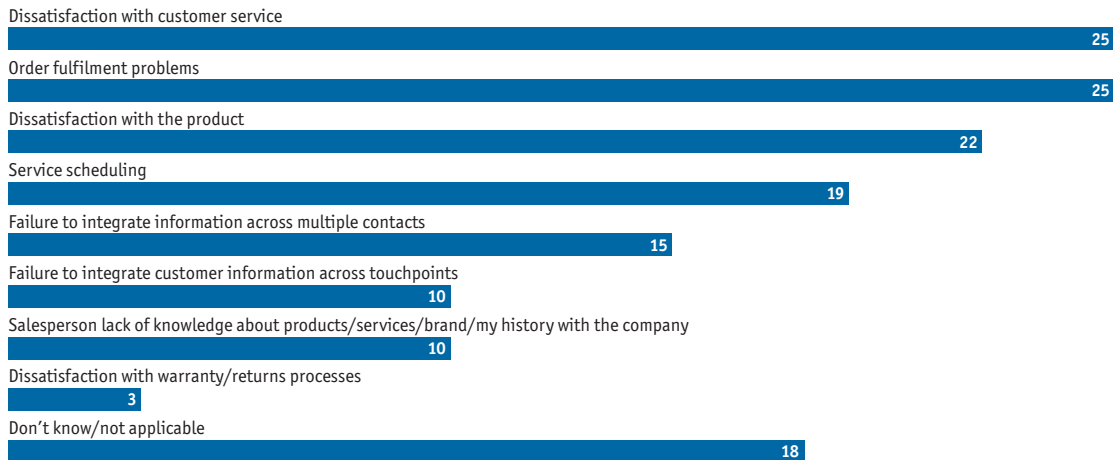(% respondents)

We have an integrated customer response unit that handles all complaints and negative comments
51

Each channel management team handles its own complaints and negative comments
37

We provide feedback forms on our websites
35

We monitor social media posts and respond directly to consumers
31

We monitor social media posts and respond to complaints or negative comments in the relevant forum
28

We do not respond to customer complaints or negative comments
2

Don't know/not applicable
8

How does your organisation measure the outcomes of its consumer experience strategy? Please select all that apply
(% respondents)

Sales volume
52

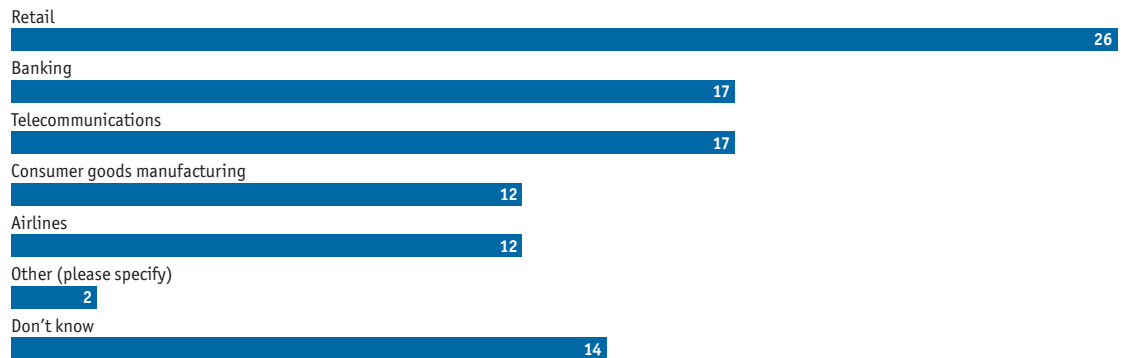Repeat purchases
50

Length of customer engagement
37

Customer lifetime sales value
35

Customer influence on others
29

Contribution of each channel against cost of sale
17

Other (please specify)
3

We do not systematically measure customer engagement outcomes
7

Don't know/not applicable
7

What are your customers' most frequent complaints? Please select up to two
(% respondents)

Dissatisfaction with customer service
25

Order fulfilment problems
25

Dissatisfaction with the product
22

Service scheduling
19

Failure to integrate information across multiple contacts
15

Failure to integrate customer information across touchpoints
10

Salesperson lack of knowledge about products/services/brand/my history with the company
10

Dissatisfaction with warranty/returns processes
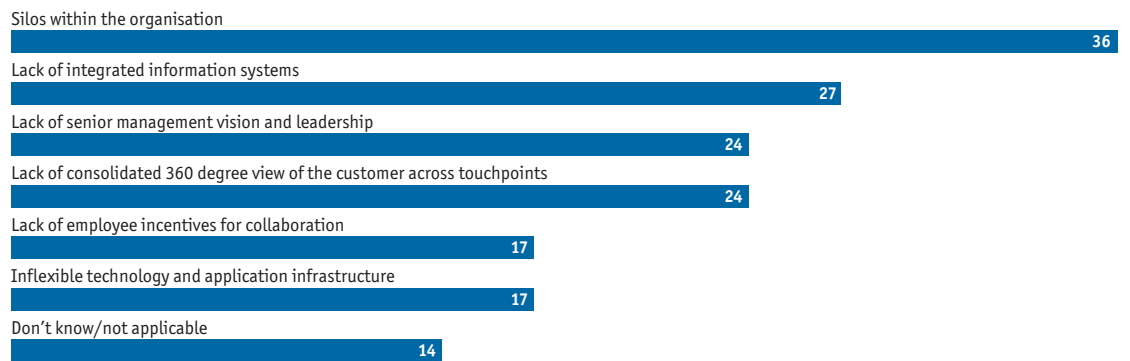3

Don't know/not applicable
18

In your opinion, which of the following industries has achieved the greatest success in providing an excellent customer experience?
(% respondents)

Retail
26

Banking
17

Telecommunications
17

Consumer goods manufacturing
12

Airlines
12

Other (please specify)
2

Don't know
14

What obstacles stand in the way of improving your organisation's customer experience? Please select up to two
(% respondents)

Silos within the organisation
36

Lack of integrated information systems
27

Lack of senior management vision and leadership
24

Lack of consolidated 360 degree view of the customer across touchpoints
24

Lack of employee incentives for collaboration
17

Inflexible technology and application infrastructure
17

Don't know/not applicable
14

The Economist | Intelligence Unit

LONDON
20 Cabot Square
London
E14 4QW
United Kingdom
Tel: (44.20) 7576 8000
Fax: (44.20) 7576 8500
E-mail: london@eiu.com

NEW YORK
750 Third Avenue
5th Floor
New York, NY 10017
United States
Tel: (1.212) 554 0600
Fax: (1.212) 586 1181/2
E-mail: newyork@eiu.com

HONG KONG
6001, Central Plaza
18 Harbour Road
Wanchai
Hong Kong
Tel: (852) 2585 3888
Fax: (852) 2802 7638
E-mail: hongkong@eiu.com

GENEVA
Rue de l'Athénée 32
1206 Geneva
Switzerland
Tel: (41) 22 566 2470
Fax: (41) 22 346 93 47
E-mail: geneva@eiu.com