

# CX Professionals Must Collaborate With Customer Service Leaders

Why Collaboration Is Critical To Achieve A State-Of-The-Art VoC Program And CX Success

by Faith Adams

May 8, 2020

## Why Read This Report

The difference between customer experience and customer service is confusing to many firms. This leads to a lack of clarity over the true ownership of CX and blurred lines between CX professionals and customer service leaders. This can even result in the belief that customer service *is* CX. However, there are clear differences between customer service and CX. Understanding and embracing the distinctions between the two — and why CX professionals and customer service leaders must collaborate with one another — is essential for customer-centric businesses.

## Key Takeaways

### **Customer Experience And Customer Service Should Collaborate More**

The contact center is a crucial source of customer feedback — one that should be integrated into a more holistic voice of the customer (VoC) program.

### **Customer Service Feedback And Insights Are Critical To VoC Programs**

The real voice of the customer that comes from sources like customer service calls, chats, and customer emails provides CX teams with a deep level of insight into the customer experience they deliver.

### **Enterprise VoC Programs Must Include Customer Service**

Enterprises must stop approaching the VoC in silos. A state-of-the-art VoC program achieves full data integration across all channels — including customer service.

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[How To Build Your Voice-Of-The-Customer Program](#)

[How US Companies Improved Their CX Index Scores](#)

[The Three Customer Service Megatrends In 2020: Fuse AI And Agents To Drive Better Experiences](#)

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#### Recommendations

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## Customer Service Is A Critically Important Subset Of CX

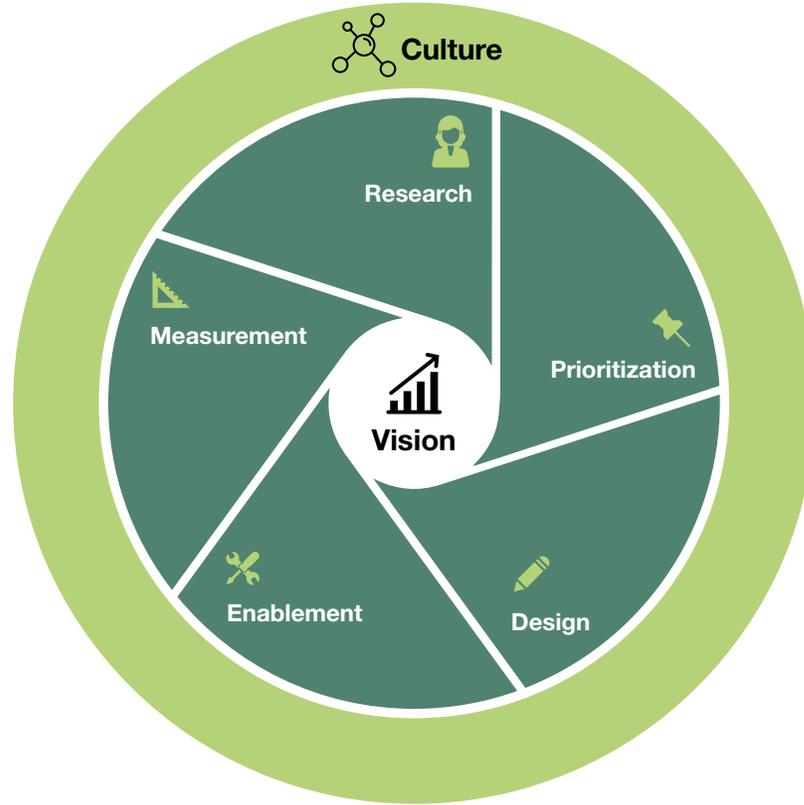
In many organizations, the terms “customer experience” and “customer service” are perceived as synonymous.<sup>1</sup> That’s both untrue and problematic. Failure to understand that customer experience (CX) and customer service are *not* the same — along with a refusal to realize how connected they are — can hinder an organization’s evolution toward CX maturity.

- › **Customer experience is a perception.** Forrester defines customer experience as how customers perceive their interactions with your company. CX professionals help their companies deliver high-quality experiences by leading them to adopt the six competencies of CX management: customer research, prioritization, design, enablement, measurement, and culture (see Figure 1).<sup>2</sup> CX teams act as change agents, transforming the greater culture, sharing the voice of the customer, enabling employees to deliver the right experiences, and identifying opportunities for CX improvements that will lead to superior business outcomes.
- › **Customer service is an intervention.** Customer service teams help customers during all stages of the customer journey (see Figure 2). Their assistance ranges from presale outreach to postsale issue resolution and feedback collection. For many customers, though, customer service is viewed as a necessary evil that they would prefer to avoid. When they can’t avoid it, the interaction with a customer service representative (CSR) is a critical moment of truth. In fact, for most B2C industries that Forrester has studied, customer service is the most impactful driver category for the overall CX, eclipsing categories like products and prices.<sup>3</sup>

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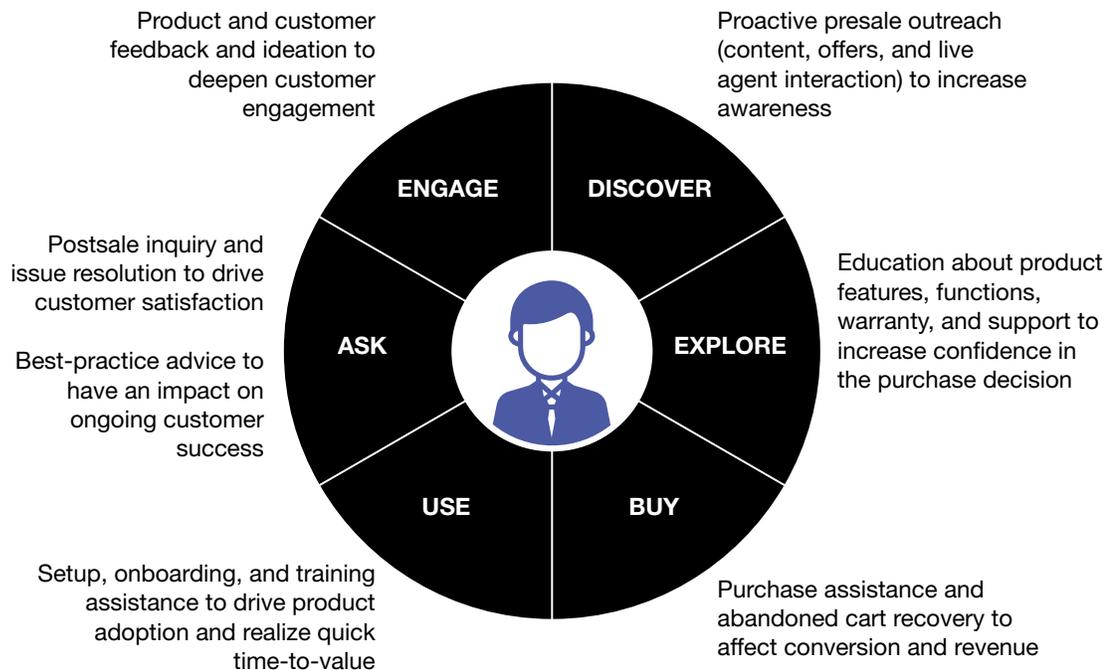
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**FIGURE 1** The Six Competencies That Make Your CX Vision A Reality



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**FIGURE 2** Customer Service Activities Span The Customer's Journey**Customer Service Is A Treasure Trove Of Feedback And Insights**

Customer service is a key driver category for every B2C industry in the Forrester Customer Experience Index (CX Index™). But in many organizations, customer service leaders still don't play a leading role in CX and VoC efforts. To achieve a state-of-the-art VoC program — one that achieves full data integration across the enterprise — CX pros must engage the contact center. This is because the customer service function:

- › **Has massive amounts of data about the customer experience your brand delivers.** Customer service teams hear firsthand how customers perceive their interactions with your brand. Every customer interaction — whether through a call, text, chat, or email — is tracked, recorded, and archived. During these interactions, customers share what drove them to need assistance, whether it was an inability to find answers to questions on a company's website or confusion over a billing statement. By tapping into this data, CX teams can better focus on the “why” behind less-than-optimal experiences — what led to service recovery interactions in the first place. One health insurer expanded its sources of feedback to include contact center calls and chats and agent notes. Now the insurer has a more holistic view of its customers' experience based on these sources plus surveys, website feedback, and social media.<sup>4</sup>

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- › **Can alert CX teams to problems and suggest solutions.** Customer service agents play a crucial role in helping identify problems and highlighting opportunities for improvement. Comcast leveraged one of its customer feedback management (CFM) technology vendors to collect both customer and employee (agent) feedback. The information collected was used to inform team huddles and what it calls “elevations” — a process for empowering employees to speak up about changes that need to be made and contribute ideas for making them. Once the ideas are submitted, the status of actions being taken as a result is communicated back to the teams. Nationally focused improvement activities — like the redesign of its brick-and-mortar store locations to be less like a “pawn shop” and more open and interactive — stemmed from these elevations, showing employees that their feedback really does matter.<sup>5</sup>
- › **Is evolving in ways that can help drive better CX (and revenue).** Contact center leaders are seeking and hiring a different type of CSR. As automation takes over more of the basic and repetitive tasks that CSRs usually perform, these teams can play a different and crucial role that goes beyond typical customer service tasks. For example, Pier 1 Imports began hiring home decorating enthusiasts as agents — many of whom have never worked in a contact center before but wanted to share their passion with Pier 1 customers. Although Pier 1 teaches these brand advocates basic customer service processes, they already come to work every day with an infectious love for the brand’s products and the home decor business that would be impossible to teach.<sup>6</sup> This approach helps to create brand loyalty and increase sales.
- › **Already uses technologies that can support broader CX efforts.** Customer service operations continue to incorporate AI and automation into their technology platforms. Unfortunately, CX teams do not always have a window into these technologies, so they don’t integrate them into a more comprehensive VoC program. This lack of integration was particularly evident during the research for “[The Forrester Wave™: Customer Feedback Management Platforms, Q1 2020](#),” where we found many reference clients who were not maximizing the wealth of insights being collected by their contact center. This situation inhibits the enterprise from realizing the value of its technology investments and results in a fragmented approach to CX — with multiple teams managing their own VoC efforts. Ultimately, this leads to a bad customer experience due to over-surveying and no holistic view of the customer or ability to prioritize improvement projects at the enterprise level.

**CX Teams Can Help Customer Service Deliver A Better Service Experience**

If an organization wants to evolve its customer experience discipline, CX and customer service must collaborate. By embracing a collaborative approach, CX and customer service can:

- › **Enable a customer-centric culture in customer service that translates to better CX.** A lack of a customer-centric culture continues to be one of the most significant obstacles that CX leaders face, with 31% of CX professionals highlighting this challenge.<sup>7</sup> But collaboration between CX and customer service can be a game-changer for many organizations when it comes to improving CX overall. This is because customer service is a key driver category in all B2C industries that Forrester evaluates in its CX Index. Customer service is also the top driver category in four out

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of the five industries of the most-improved brands in 2019. These brands that improved their scores in 2019 made investments in their people — making it easier for employees to be more customer-centric — often by removing procedural obstacles that got in their way (see Figure 3). In addition, CX teams can help tackle the broken back-end processes that create CX issues that drive customers to engage with customer service and are difficult for CSRs to resolve, like system failures or antiquated processes (see Figure 4).

- › **Bridge silos and build toward a more holistic VoC program.** An effective VoC program is a systematic approach for collecting customer feedback, mining the feedback for insights and then incorporating the insights into business decisions. However, most enterprises don't approach VoC programs this way. By establishing a holistic approach that draws insights from the contact center, one insurer was able to better focus on finding leading indicators of experience problems and then drive change, which quickly resulted in a double-digit improvement in both its Net Promoter Score (NPS) and agent customer satisfaction (CSAT) metrics.<sup>8</sup>
- › **Deliver business outcomes.** Contrary to what some believe, delivering good CX doesn't just improve the experiences of your customers. When CX teams approach it strategically, they also improve business outcomes. Improvements to the contact center experience can be especially effective in this regard: When a brand solves customer problems quickly, its customers are seven times more likely to stay and eight times more likely to spend more with the brand.<sup>9</sup> In one year, Westar Energy drove more than 20 operational changes that mostly focused on the contact center and field agents, which improved customer satisfaction and reduced costs.<sup>10</sup>
- › **Minimize risk while avoiding costs.** One financial services firm had three key areas of focus — one of which was compliance. Through its CX efforts — primarily its VoC program — the firm was able to identify thousands of customer service calls that were out of compliance. Given that each of these instances could potentially cost the company between \$1,000 and \$2,500, the firm was able to quantify the value of listening to the voice of the customer and motivate itself to remedy the situation to avoid exposure to additional risk.<sup>11</sup>

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**FIGURE 3** Policies Changed That Enabled Employee Productivity

Company	Goal	Actions taken
Bank of the West	Foster customer empathy among employees and shift mindsets so that call center employees feel they “own” customer resolutions	<ul style="list-style-type: none"> <li>• Created a central platform for information (instead of relying on personal notes or emails)</li> <li>• Provided empathy coaching</li> <li>• Pulled managers off their desks and onto the floor, where they could interact and coach in real time</li> <li>• Included call center reps in product development so that they became aware of and familiar with new products (previously, they found out about a new product when a customer called with an issue)</li> </ul>
Highmark BCBS	Get out of being a transaction-based business and become a value-based business	<ul style="list-style-type: none"> <li>• Focused on first-call resolution</li> <li>• Created a dashboard so that employees can help callers with all their tasks — not just the ones they called about</li> <li>• Allowed reps to waive minor charges or fees for members struggling to pay a bill</li> </ul>
TD Ameritrade	Ensure call center employees spend enough time on each customer and are able to resolve their issue	<ul style="list-style-type: none"> <li>• Began using a blend of CX performance and call handle time metrics</li> <li>• Allotted 2 hours per week for call center employees to “skill up” in areas where they and their manager thought they could improve</li> <li>• Removed the obligation for call center reps to “own” the resolution, enabling them to hand off the call to other employees with more expertise</li> <li>• Allowed call center reps to get off the phone to find better resolutions</li> </ul>
TD Bank	Embed advice as a key component of all service interactions	<ul style="list-style-type: none"> <li>• Invested in training employees to better understand customers’ needs and elevate the advice they provide</li> <li>• Focused training on behaviors like asking open-ended questions to drive better CX and better business results</li> <li>• Democratized customer data to help employees offer proactive, personalized advice</li> </ul>
TSA	Enable employees to be more personable and efficient	<ul style="list-style-type: none"> <li>• Provided training to all employees (old and new) on how to provide customer care and how to work with customers in stressful situations</li> <li>• Restructured their back end so that social channels fed into a single platform, allowing employees to answer questions in one place</li> </ul>

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**FIGURE 4** Process Repairs That Helped Customers Accomplish Their Goals

Company	Goal	Actions taken
Highmark BCBS	Increase the number of customers who would pay their bill online	<ul style="list-style-type: none"> <li>Discovered that approximately half of the customers who tried to pay online would have completed most of the process and be ready to submit, only to have the system fail</li> <li>Fixed the computer problem, which resulted in over a 93% completion rate for online payments</li> </ul>
Vanguard	Make it easier for members to transfer assets	<ul style="list-style-type: none"> <li>Conducted root-cause analysis to uncover why some transfers failed to go through digitally and were “kicked to paper” (required paperwork)</li> <li>Uncovered a policy created over a decade ago and coded into back-end processes</li> <li>Removed the policy, which enabled customers to move money to Vanguard online without having to do paperwork or talk to a customer service representative</li> </ul>

**Recommendations****Take Steps Now Toward A State-Of-The-Art VoC Program**

In order to successfully transform customer experience, CX leaders must aim for a state-of-the-art-level VoC program that includes the contact center and achieves full data integration across the enterprise. To do this:

- › **Assess your VoC maturity — and aim for state of the art.** State-of-the-art-level VoC programs achieve full data integration, incorporate prioritization frameworks, leverage sophisticated business value calculations, have a culture that demands the VoC, and use the VoC to inform the design process. To get to this level, CX pros must integrate with other systems — like CRM and POS — so they don’t ask questions that they already have the answers to. In addition to integrating with these systems, CX pros must be able to connect the data dots across the enterprise — looking across different channels and lines of business, too. To do this, document the current feedback sources that play a role in your VoC program. Identify feedback gaps and document opportunities to bring in other data sources — like customer service calls and chats. Build your plan to incorporate these sources into a holistic program. Focus on parts of the business where you have relationships and buy-in first — this will help reduce the amount of time it takes to start to show value.

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- › **Prove the need to enable a bigger-picture view.** Successful VoC programs provide an end-to-end view of the experience as customers cross diverse business silos. Help stakeholders see the benefits of creating this view by showing them how the different parts of the organization are connected — for example, how feedback coming into the contact center relates to a problem that was encountered on the website. One retailer was using disconnected tools in multiple channels — contact center, retail stores, and digital. The resulting disconnected insights led to jumbled experiences that did not resonate with customers, who expected the retailer to act like a single, consistent brand. Upon realizing this, the retailer took action to integrate its data into a unified view and created a more consistent approach to CX using Topbox, a unified data analytics tool.
- › **Make change management a focus.** One insurer knew that just telling stakeholders they need to change was not going to be enough — so it focused on change management practices to help support its CX transformation efforts. It considered several foundational elements before getting started — like how to organize internally, what to measure and where, how to incent employees on behaviors at all levels, how to engage stakeholders and make them care, and who needs to consume the insights and data it collects. This helped the CX team hit the ground running, stay focused, and demonstrate an impact in the first year of its efforts.

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## Endnotes

- <sup>1</sup> This is often reflected in CX job descriptions. Job descriptions for CX roles at various levels and across various industries (including financial services, healthcare, insurance, legal, and more) are focused heavily on customer service and support.
- <sup>2</sup> See the Forrester report "[Gauge Your CX Management Maturity.](#)"
- <sup>3</sup> See the Forrester report "[The Three Customer Service Megatrends In 2020: Fuse AI And Agents To Drive Better Experiences.](#)"
- <sup>4</sup> See the Forrester report "[The Top 10 Trends Among VoC Leaders, 2019.](#)"
- <sup>5</sup> Source: "The New Comcast: Empowering Employees to Drive a Customer Experience Revolution," Medallia, April 12, 2017 ([https://experience.medallia.com/wp-content/uploads/Comcast\\_CaseStudy\\_041217.pdf](https://experience.medallia.com/wp-content/uploads/Comcast_CaseStudy_041217.pdf)).
- <sup>6</sup> See the Forrester report "[The Future Of Work: You Must Change How You Hire Customer Service Agents.](#)"
- <sup>7</sup> Source: Forrester's Q2 2019 Global State Of Customer Experience Programs Online Survey.

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<sup>8</sup> See the Forrester report [“The Top 10 Trends Among VoC Leaders, 2019.”](#)

Net Promoter and NPS are registered service marks, and Net Promoter Score is a service mark, of Bain & Company, Inc., Satmetrix Systems, Inc., and Fred Reichheld.

<sup>9</sup> See the Forrester report [“CX NYC 2019 Day One Highlights: Your Guide To Radical CX Innovation.”](#)

<sup>10</sup> See the Forrester report [“How To Build Your Voice-Of-The-Customer Program.”](#)

<sup>11</sup> See the Forrester report [“The Top 10 Trends Among VoC Leaders, 2019.”](#)

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