GENESYS™

The State of CUSTOMER EXPERIENCE

A new paradigm:
Personalized, empathetic
experiences at scale

The State of CUSTOMER EXPERIENCE

ABOUT THIS RESEARCH

"The State of Customer Experience" is a global benchmarking study based on surveys of consumers and customer experience (CX) decision-makers. This third edition, "A new paradigm: Personalized, empathetic experiences at scale," uncovers how rapidly shifting customer preferences and declining satisfaction with digital channels are creating mounting business risks for organizations worldwide. In surveying CX Leaders, the report discovers profound challenges in digital transformation strategy and execution, and shares a powerful roadmap for delivering empathetic experiences at scale.

Methodology

Genesys conducted this research in collaboration with Actionable Research, an independent research firm. The consumer survey gathered responses from 5,157 consumers, ages 14–80, to gain insights across regions and generations. The executive perspective survey polled 646 CX decision-makers ("CX Leaders") across North America, Europe, Latin America, the Middle East/Africa and Asia-Pacific. The respondents were drawn from multiple industries, including banking, government, healthcare, insurance, retail, technology, telecommunications and utilities. For more information, please refer to the Appendix.

CONTENTS

EXECUTIVE SUMMARY

As the world continues to face an uncertain economic future, consumers seek connection, empathy and shared values when they interact with brands. Organizations need to earn their customers' loyalty every day, proving their value through seamless and effortless engagement that turns transactions into meaningful relationships.

Customer experiences are the defining moments where loyalty is won or lost. And efficiency, effectiveness and empathy in the customer journey, enabled by a comprehensive digital transformation, are the foundations for success. The findings of the report are as follows:

Consumers: Bad experiences kill customer loyalty

Customer experience (CX) is at the very heart of how consumers perceive a brand. Eighty-six percent of consumers say a company is only as good as its service and a third have switched brands in the past year over a negative interaction. CX Leaders cite keeping pace with customer expectations as the greatest challenge they face today.

Digital transformation: A new urgency as channel satisfaction declines

In the past year, more consumers worldwide used a digital channel than used voice to interact with an organization. But satisfaction with all channels except voice declined. The answer to why many experiences remain fragmented and transactional lies in the present state of digital transformation. Just 13% of organizations have a fully connected, omnichannel approach — creating data silos, missed opportunities for personalization and a lack of visibility into business performance.

CX strategies: People take center stage

Human interactions play a critical role in overall customer satisfaction, yet workforce engagement is a long-neglected domain. The survey finds contact center turnover averaging 30–40% and organizations struggling to keep staff continually trained. Looking ahead, CX Leaders are placing employees at the center of their strategy, with improved platforms and technology, leadership development and career pathing, and enhanced remote workforce management.

The tech stack: Powering growth and agility

To build customer loyalty, organizations need to orchestrate holistic, empathetic experiences across all moments of engagement. This can be delivered at scale through a tech stack that enables true customer centricity, resulting in both greater loyalty and business agility. Almost three-quarters of CX Leaders are implementing a CX platform that connects systems and silos to orchestrate seamless end-to-end customer experiences.

Shifts in consumer behavior and preferences create opportunities for organizations to become increasingly customer-centric and grow loyalty. They also present risks to those lacking the agility to keep up. "A new paradigm: Personalized, empathetic experiences at scale" uncovers those opportunities and presents actionable strategies for creating effortless journeys that customers will love.
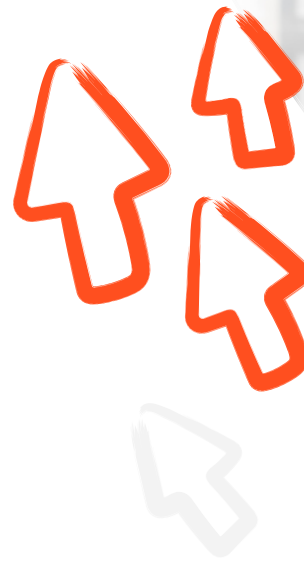
01

Consumers:
Bad experiences kill
CUSTOMER LOYALTY

- Consumers seek speed and efficiency
- Deep frustration with poor journey design
- When loyalty is lost
- Under pressure from all sides
- Fewer organizations deliver exceptional CX
- Rabobank: Pioneering conversational banking

86%

of consumers worldwide say a company is only as good as its service

73%

say they've mostly experienced good service in the past year

65%

say, in general, they feel customer service is getting better

"The State of Customer Experience" finds CX has rapidly shifted even closer to the heart of how consumers perceive a brand. In 2021, 70% of consumers said a company was only as good as its service; that number has leaped to 86% in this latest survey.

The data reveals that, to some extent, customer satisfaction is improving. For example, two-thirds of consumers feel the experiences they receive are generally getting better and almost half say they've enjoyed a CX interaction in the past year. Following a positive service experience, 39% have then made a recommendation to a friend or colleague.

But there's plenty of room for improvement, especially where customer experiences require empathy. Just 43% have felt like a highly valued and appreciated customer at the end of an interaction. A quarter of consumers globally admit to losing their temper and 12% have cried after a negative interaction.

Emotions ran highest with the survey's younger demographics. Although millennials and Gen Z respondents rated themselves as more patient with frustrations such as dropped calls or dead-end menus than Gen X or baby boomers, they were more likely to stop using a company after a negative service interaction. These findings highlight how easily organizations can harm their relationships with younger generations through poorly executed experiences. Long term, it's an existential risk — Gen Z is the largest generation on Earth.

VOICE OF THE CUSTOMER *(% agree)*

43%
"I felt like a **highly valued and appreciated customer** following a service interaction."

48%
"I've **enjoyed** a customer service interaction."

39%
"I have **recommended a company** after a positive customer service interaction."

31%
"I **stopped doing business** with a company after a negative customer service interaction."

12%
"A negative customer experience has **made me cry.**"

26%
"I've **lost my temper** during a customer service interaction."

CONSUMERS SEEK SPEED AND EFFICIENCY

Ideal customer experiences, according to the survey, are fast, professional and completed in the first interaction. The survey data shows that speed is an increasingly important factor for consumers, as they aim to interact quickly and in their own time. This requires organizations to predict customer intent and deploy technology that steers them intelligently across the journey. It also highlights the importance of reducing call queues, equipping employees with the necessary information to assist immediately and eliminating other sources of friction.

While consumers still value a first-interaction resolution and professional approach, the value they place on employees being "trustworthy" has grown by 10% from 2021 to 2022. Consumers value sincerity and empathy in human interactions, and organizations must empower and incentivize employees on the relationship-building aspects of customer engagement.

Consumers: What do you value most in a customer service interaction?

	2022	2021
Fast response	55%	50%
First interaction resolution	51%	54%
Professionalism/friendliness	40%	39%
Trustworthiness of the rep/agent	31%	20%
Knowledgeable rep/agent	27%	39%
Knowledge of my account/history	20%	20%
Reliable follow-through	20%	30%
Trustworthiness of the business	17%	19%

■ 2022   ■ 2021
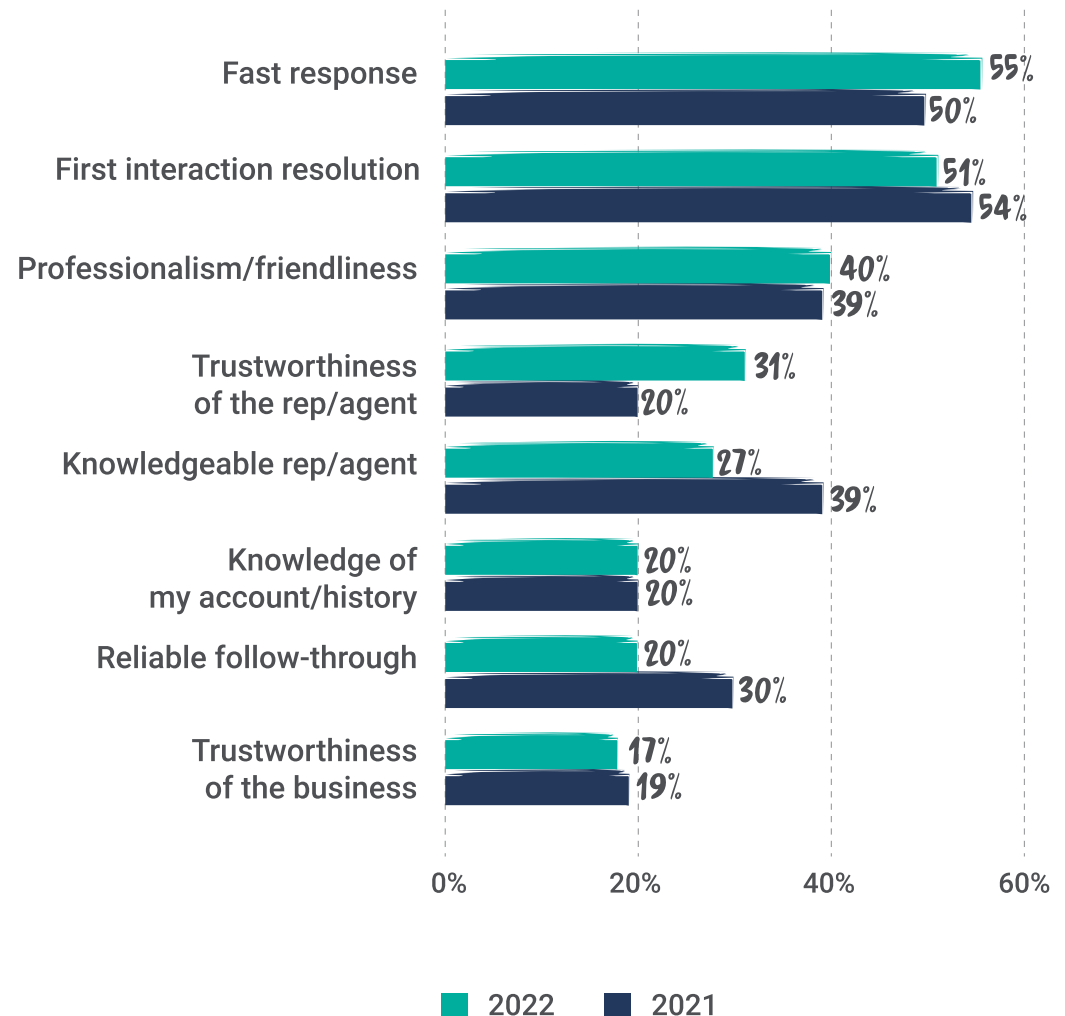
DEEP FRUSTRATION WITH POOR JOURNEY DESIGN

The most frustrating experiences are the result of technology failure or poor journey design. According to the survey, consumers have least tolerance for dropped calls, chatbots that can't escalate to live web chat, dead ends in contact center menus and repetitive interactions with multiple agents. These challenges can be easily avoided with well-designed journeys and connected technologies that deliver seamless experiences.

The highest CX expectations are among North American consumers, with 47% becoming extremely frustrated with a dead-end chatbot, co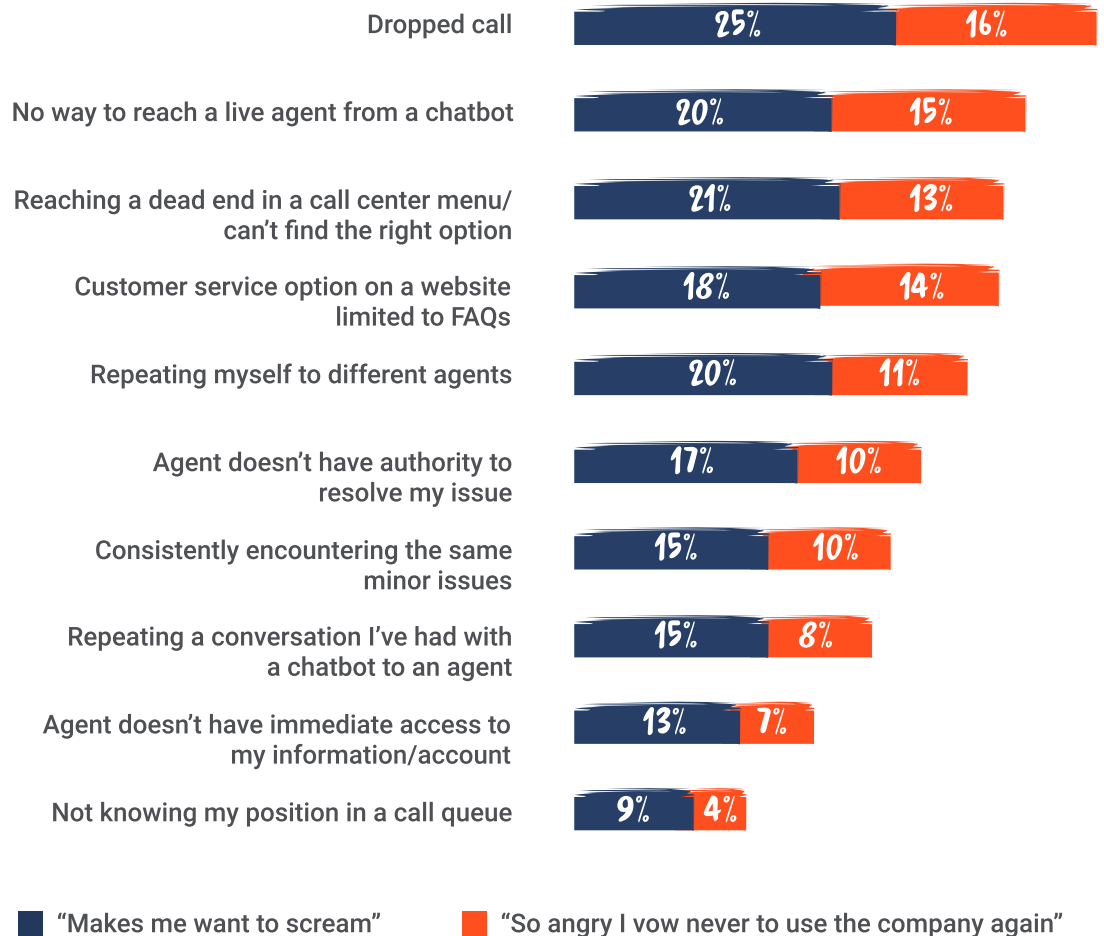mpared to just 24% of respondents in Asia-Pacific, for example. And while younger generations generally appear to have more patience with technological glitches like dropped calls, they were more frustrated with not knowing their place in a call queue than older demographics.

Whenever a customer wastes time maneuvering a fragmented journey or experiences a technical issue, loyalty is eroded. And it's only a matter of time before they decide to walk away.

Consumers: How do you feel when any of the following occur in a customer service interaction?

	Makes me want to scream	So angry I vow never to use the company again
Dropped call	25%	16%
No way to reach a live agent from a chatbot	20%	15%
Reaching a dead end in a call center menu/ can't find the right option	21%	13%
Customer service option on a website limited to FAQs	18%	14%
Repeating myself to different agents	20%	11%
Agent doesn't have authority to resolve my issue	17%	10%
Consistently encountering the same minor issues	15%	10%
Repeating a conversation I've had with a chatbot to an agent	15%	8%
Agent doesn't have immediate access to my information/account	13%	7%
Not knowing my position in a call queue	9%	4%

■ "Makes me want to scream"   ■ "So angry I vow never to use the company again"

Note: Consumers were given a range of options: "Doesn't bother me," "Mildly irritated," "Frustrated," "Makes me want to scream" and "So angry I vow never to use the company again." This chart shows the top two responses.

WHEN LOYALTY IS LOST

The survey probed how many negative experiences consumers will tolerate before they finally walk away. It finds that one in 10 will switch brands after a single negative interaction. And two-thirds will switch after two to five negative interactions. That means 77% of customers will leave after receiving five negative or frustrating interactions.

Globally, 31% of consumers have stopped using a company after a negative CX interaction in the past year. Of all the regions, the survey finds customer loyalty most fragile in Latin America — with 35% having walked away after a bad interaction. These findings highlight how many customers are at risk when organizations provide even just a few poor experiences.

31% of consumers stopped using a company **after a negative interaction** in the past year

Consumers: After how many negative interactions would you switch to another business?
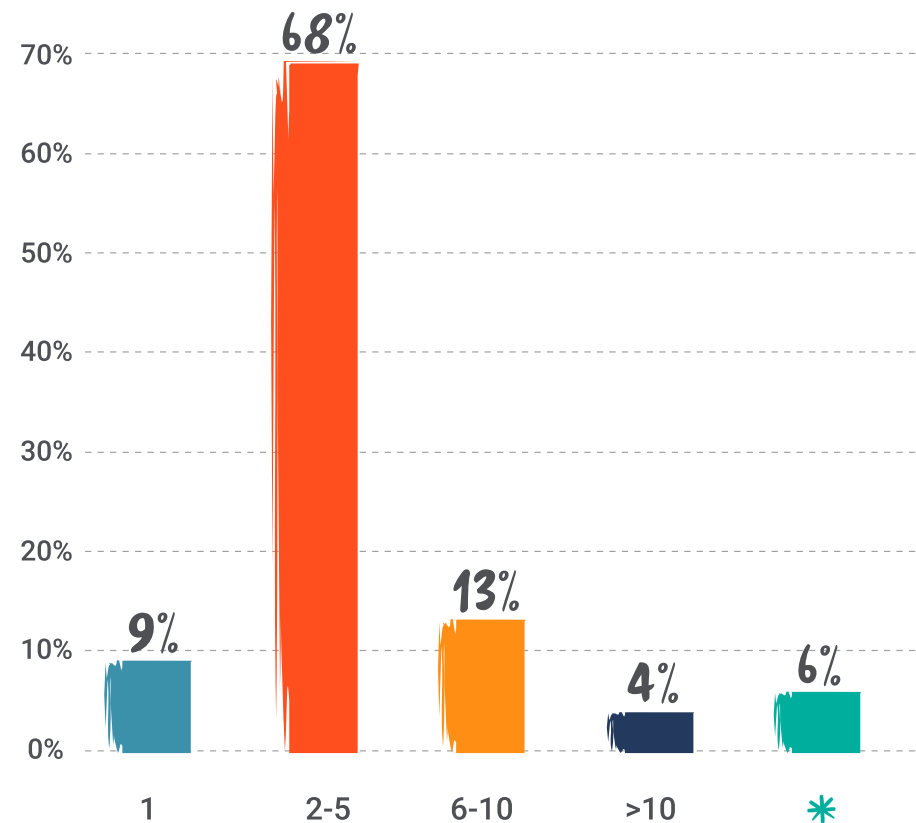
I'm unlikely to switch to a new company regardless of bad customer service interactions.

UNDER PRESSURE FROM ALL SIDES

CX decision-makers are under immense internal and external pressure. External pressure comes from rising customer expectations. As new engagement channels become more widely adopted, customers are less patient with poorly designed journeys and technical problems. CX Leaders say keeping pace with changing customer expectations is the greatest challenge facing their function today.

The internal pressures that CX Leaders are experiencing reflect the reality of fundamental shifts in the post-pandemic landscape. These include managing quality and productivity with a remote and hybrid workforce, as well as keeping staff continually trained with less supervisor face time. A recent MIT Technology Review survey found just 39% of organizations will go back to operating with a full-time onsite model. In the future, using scalable approaches to workforce engagement will be critical for delivering superior customer experiences.

CX Leaders: What is the greatest challenge facing your company's customer experience function today? (Select three)

Challenge	%
Keeping pace with rising customer expectations	43%
Keeping staff continually trained on new tools and protocols	40%
Improving effectiveness of self-service technologies (bots, AI)	40%
Managing quality and productivity with remote/hybrid working	39%
Reducing staff turnover	38%
Maintaining quality of service while operating aging technology	36%
Labor shortages and increasing hiring costs	35%
Managing staff engagement during uncertainty and change	35%
Managing data privacy and compliance	33%
Managing increased interaction volume and channel complexity	31%

FEWER ORGANIZATIONS DELIVER EXCEPTIONAL CX

The rising bar for customer expectations is especially evident when examining how consumers rank each industry for service quality. Although three-quarters of consumers feel they're mostly experiencing "good" service, few organizations provide service they would consider "exceptional."

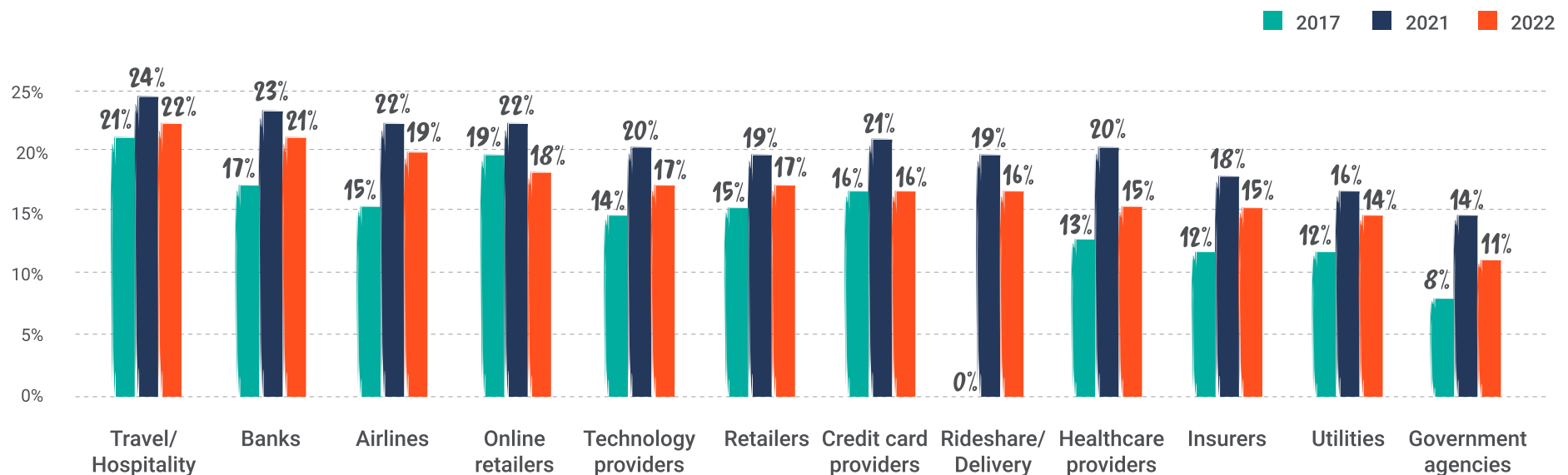Compared to previous years, consumers rated fewer industries as providing "exceptional" CX. Travel and hospitality companies, followed by banks, airlines and online retailers, are considered to provide the best customer experiences today. But even for those leaders, differentiation is difficult. In a recent survey by FT Longitude, 54% of banking leaders say they aim to provide a personalized experience, but it often appears to customers as generic.

In 2017, consumers considered travel and retail companies to provide the best experiences. By 2021, after a wave of innovation triggered by COVID-19, banks, airlines, technology companies and healthcare organizations had virtually closed the gap. But in this latest survey, most industries dropped by several percentage points, notably credit card and healthcare companies — both slipping by 5%. This shows that the previous gains aren't enough for organizations to continue to stand out. Being "exceptional" requires a relentless focus on improving and reimagining what's possible with CX.

Consumers: Which of the following industries do you associate with having exceptional customer experiences?

Legend: 2017 (teal), 2021 (navy), 2022 (orange)

Industry	2017	2021	2022
Travel/Hospitality	21%	24%	22%
Banks	17%	23%	21%
Airlines	15%	22%	19%
Online retailers	19%	22%	18%
Technology providers	14%	20%	17%
Retailers	15%	19%	17%
Credit card providers	16%	21%	16%
Rideshare/Delivery	0%	19%	16%
Healthcare providers	13%	20%	15%
Insurers	12%	18%	15%
Utilities	12%	16%	14%
Government agencies	8%	14%	11%

KEY STRATEGY

Deliver excellence by continually reimagining customer experience

For organizations seeking to grow in the experience economy, keeping pace with customer expectations is the baseline requirement — but it's not enough. To increase loyalty and trust and attract new customers, CX has emerged as the central differentiator.

Delivering the *exceptional* in every interaction requires experience orchestration: coordinating people, channels, interactions, knowledge, data and systems in real time to deliver empathetic end-to-end experiences at scale — while also managing costs. This involves three key priorities:

01

Get *complete* VISIBILITY

Great customer experience begins with having a deep understanding of what your customers are experiencing, with complete visibility across the customer journey — from aggregate data all the way through to individual interactions.

02

INNOVATE for empathy and personalization

Organizations need to power their customer experiences with the flexible, scalable and adaptive technology to outpace consumers' rapidly changing expectations.

03

Use AI and automation for FLAWLESS EXECUTION

Bring speed, scale and personalization to customer and employee experiences with artificial intelligence (AI) and automation. Machine learning and natural language processing capabilities intelligently steer customers across channels, arm agents with the relevant context and knowledge to deliver empathy in the moment, and reduce post-interaction administration by up to 90%.

RABOBANK

Pioneering conversational banking

Rabobank

Industry: Financial services

Location: The Netherlands, with global operations

Contact center: 15,000 advisors

"Conversational banking is about **intelligently steering** customers to the most suitable digital channels like our app, 24/7 virtual assistant, asynchronous messaging tool or instant video calls. Ensuring they move **seamlessly and friction-free** between those channels is equally important."

Thom Kokhuis,
Head of Conversational Banking, Rabobank

- **Over $2.2 million saved** in hardware and IT staff costs
- **25% agent productivity gain** with asynchronous web messaging
- **90%+ customer satisfaction** for digital channels
- **45% of questions answered** by virtual assistants

Rabobank is on a mission to create a positive influence on people and society through financial services. The cooperative bank serves retail and corporate clients in the Netherlands, focusing on the global food and agriculture sectors. Consistently delivering excellent customer experience is integral to its success.

Yet disconnected on-premises products meant contact center teams couldn't transfer information, get a unified view of the customer or capture meaningful real-time data. The company's previously deployed live chat and chatbot solutions operated in silos. Meanwhile, requirements like IP telephony, routing, reporting, voice recording and CRM integration were becoming more complex.

Conversational banking service model

Coupled with a company-wide cloud-first strategy, Rabobank has created a new conversational banking service model that runs on the Genesys Cloud CX™ platform. The bank has three principal customer channels: web messaging with a virtual assistant or live agent; voice, which has become a main channel since the pandemic; and video for customers making big financial decisions. Meanwhile, outbound communications proactively support marketing campaigns and security alerts.

Personalization and reducing customer effort

Shifting from voice to digital-first conversational banking delivers greater convenience and improved customer experience. Virtual assistants never sleep, answering around 45% of all questions — 24/7. Web messaging volumes have risen from 15% to 20% of all interactions. These improvements have delivered customer satisfaction rates of 90% and above for these digital channels.

To facilitate more seamless repeat interactions, the CRM system identifies the caller and routes them to the same person whenever possible. Smart intent-based routing steers the customer to the best channel and advisor. Those rules detect factors like customer sentiment (using voice recognition analysis); current products and value; and cross-sell and up-sell opportunities.

Read the full story ⟶ here

02

DIGITAL TRANSFORMATION:
A critical lack of progress

- Digital overtakes voice
- Asynchronous interactions gain ground
- Channel satisfaction declines
- Digital transformation is lagging
- Cathay Pacific: Elevating lifetime relationships

Consumer adoption of digital channels for CX interactions continues to increase, and the survey finds that, for the first time, email has overtaken voice as the most common method for reaching customer service.

While voice is still overall the No. 1 channel preference, this declines sharply with each younger generation. At the same time, consumers — particularly Gen Z and millennials — would increasingly prefer unassisted or asynchronous interactions. But they report that these channels aren't currently reliable in delivering high-quality experiences.

The CX Leaders survey sheds some light into why digital experiences aren't achieving high reviews for customer satisfaction. Just a small fraction of CX Leaders have connected the technology and data to deliver seamless, end-to-end, omnichannel experiences.

40%
of consumers were "extremely satisfied" with voice interactions

Email overtook voice as the
#1
channel for CX interaction

13%
of organizations provide a fully connected omnichannel experience

DIGITAL OVERTAKES VOICE

In the past year, more consumers worldwide used a digital channel to interact with an organization than used the voice channel. Some 72% of consumers used email for a CX interaction, while 68% called a contact center. Chatbots and messaging apps also continue to increase in popularity for CX interactions. This is a landmark moment. Digital is no longer on the periphery as an alternative channel to voice; it's now critical for organizations to have a connected voice and digital strategy that empowers customers across their journey.

Consumers: Which of the following channels have you used for a CX interaction in the past 12 months? (Select all that apply)

Legend: 2017, 2021, 2022

Channel	2017	2021	2022
Email	54%	63%	72%
Live agent via phone	86%	68%	68%
Live webchat	55%	48%	49%
Video chat	7%	24%	19%
Chatbot	14%	34%	38%
Voicebot/IVR	13%	15%	13%
SMS	18%	30%	28%
Messaging app	14%	37%	39%
Self-service	22%	26%	24%
Social media	17%	32%	30%
Virtual home assistant	0%	12%	11%
Community forum	13%	8%	7%
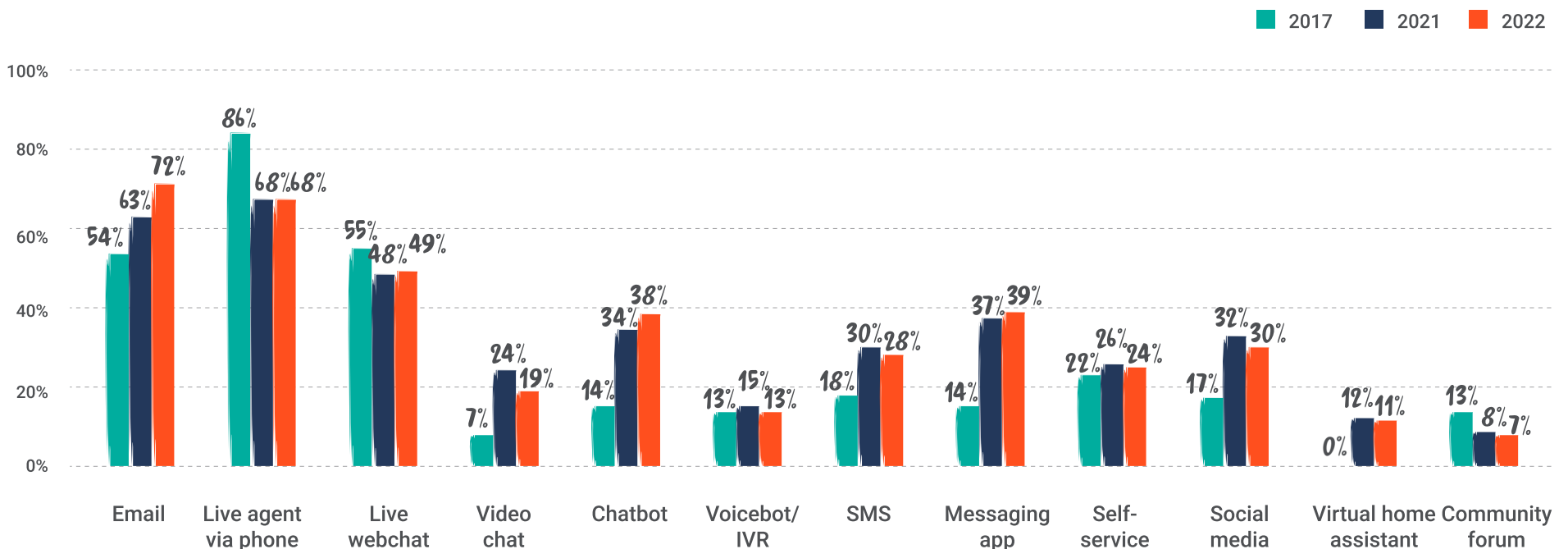
ASYNCHRONOUS INTERACTIONS GAIN GROUND

While email is widely used as a customer interaction channel, the survey data shows it's not the most preferred. Just 14% of respondents overall selected email as their top channel for CX interactions, since it typically doesn't result in a fast response — consumers' most important criteria.

While voice does remain the most preferred channel, that preference declines sharply with each younger generation. Millennials and Gen Z show a stronger preference for digital channels, particularly messaging apps, chatbots and social media. They also show a preference for service in their channels (e.g., WhatsApp or Instagram) rather than your channels (e.g., voice or email).

Ensuring that CX meets the requirements and preferences of millennials and Gen Z is essential for organizations to survive in the long term. This means providing seamless digital experiences as well as immediate, empathetic voice support when they need it.

Consumers: Given the choice, which would be your most-preferred method of CX interaction if it were available to you? (ranked first)

Legend: ■ Gen Z ■ Millennials ■ Gen X ■ Baby boomers

Channel	Gen Z	Millennials	Gen X	Baby boomers
Live agent via phone	19%	29%	35%	52%
Email	10%	16%	13%	13%
Live web chat	15%	14%	15%	12%
App/Web self-service	5%	11%	10%	7%
Chatbot	14%	7%	8%	4%
Video	5%	5%	5%	4%
SMS	6%	3%	4%	4%
Messaging app	14%	9%	8%	3%
Social media	9%	4%	2%	1%
Voicebot/IVR	2%	3%	1%	1%
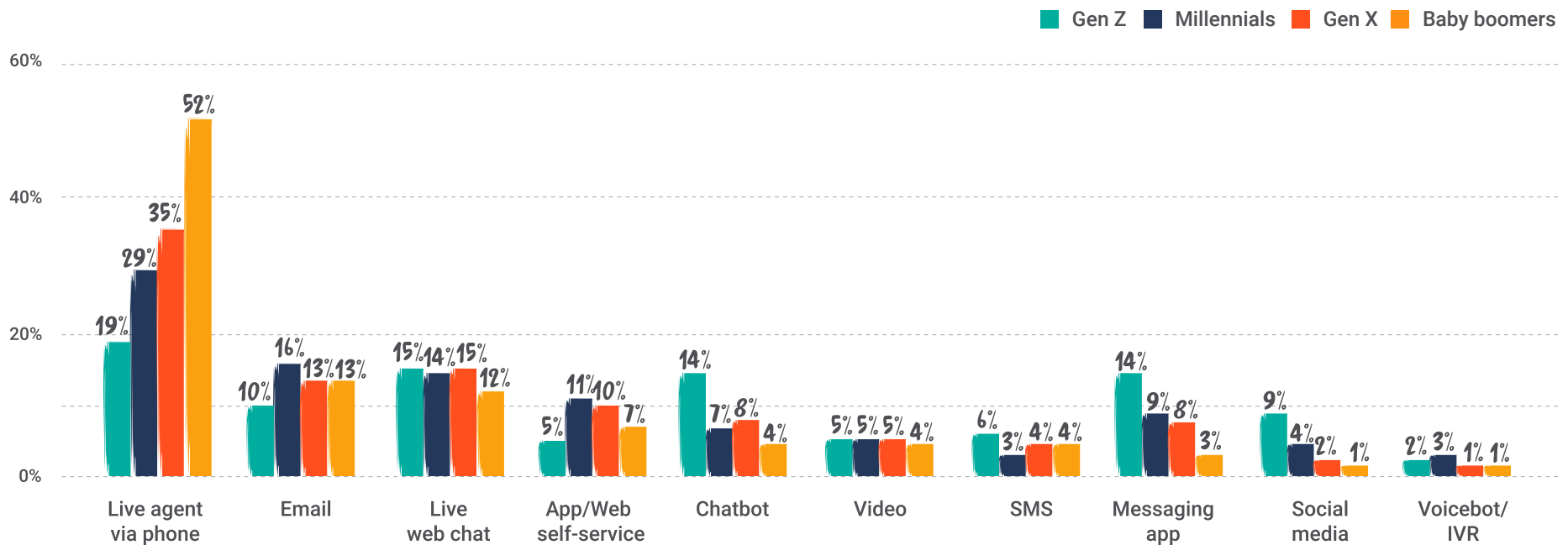
CHANNEL SATISFACTION DECLINES

Other than voice (which continued to grow in satisfaction year-over-year), consumers are generally less satisfied with CX channels than they were in the previous survey. The biggest decreases in satisfaction were with social media, voicebots and virtual home assistants. The quality of experiences in video, messaging apps and chatbots also declined. Across the board there is a gap between expectations and reality for the speed and capabilities of digital channels.

This doesn't mean organizations should focus strategy on driving traffic to voice. Apart from being the most expensive channel to grow, customers have an underlying preference for speed and a first-contact resolution.

Additionally, seamless digital channels are critical to engage younger generations. But this data shows that voice isn't going away, and that mastering voice is non-negotiable for organizations seeking to increase customer satisfaction.

The data provides a clear urgency for improving customer journeys through a connected digital and voice strategy — lowering costs and serving customers more quickly. For example, only 44% of CX executive respondents use bots with AI capabilities to predict intent and prompt next-best actions. Self-service technologies that are part of an integrated digital strategy will drive digital adoption and increase customer satisfaction.

Consumers: Which channels have you been highly satisfied with over the past 12 months? (% "highly satisfied")

Legend: 2017, 2021, 2022

Channel	2017	2021	2022
Video	55%	44%	40%
Live agent via phone	35%	38%	40%
Messaging app	38%	38%	36%
Live Webchat	30%	35%	32%
Virtual home assistant	0%	46%	32%
Social media	30%	37%	31%
Email	25%	33%	30%
Community forum	28%	41%	29%
Voicebot /IVR	27%	35%	28%
SMS	22%	30%	27%
Chatbot	35%	25%	21%
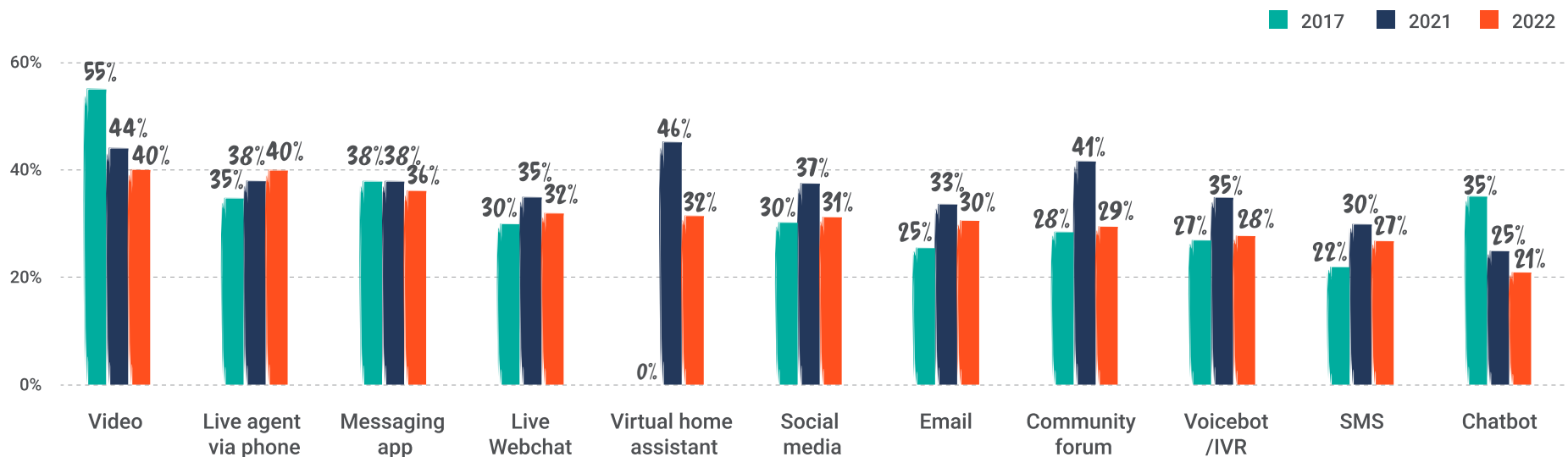
DIGITAL TRANSFORMATION IS LAGGING

Despite organizations prioritizing CX innovation, many digital experiences remain fractured and inconsistent. The problem lies in the maturity of omnichannel strategies — or rather the lack thereof.

Overall, few organizations (13%) have connected the technology and data needed to create end-to-end customer journeys. Half of respondents have a "multichannel" strategy — they offer multiple channels to their customers, but those channels operate independently. So, if a customer has been browsing a website or conversing with a bot and then calls the contact center, context isn't automatically transferred — meaning the customer will frustratingly have to start again.

Of the industries represented in the survey sample, retailers are furthest ahead in the omnichannel journey — yet still only 20% report having connected technologies and data to deliver omnichannel experiences.

CX Leaders: Where are you on your journey to providing an omnichannel experience to your customers?

13%
We offer multiple channels for customer interactions with completely integrated technology and connected data. We are able to gain insights and make adjustments in real time.

25%
We offer multiple channels for customer interactions with some connectivity of technology and data. Further integration is a priority for us.

26%
We offer several different channels for customer interactions but are yet to connect the underlying technology or data.

28%
We are considering following an omnichannel strategy but have yet to make meaningful plans in this space.

8%
We do not provide an omnichannel experience for our customers and we have no plans to.

Banks currently have the most fragmented landscape for their digital channels and data. According to the FT Longitude report, 64% of CX Leaders in banking cite having strategies focused on products and channels rather than on the overall customer journey as their greatest challenge to improving CX.

This lack of connection means organizations have blind spots that lead to repeated requests for customer information and context. They also lack real-time insights for rapidly uncovering customer needs or monitoring quality across channels and making performance improvements to smooth the customer journey.

ORGANIZATIONAL BARRIERS TO IMPROVING CX *(% agree)*

44%
Lack of carry-over of the customer context from one channel to another

40%
Lack of consolidated data and analytics

33%
Siloed departments with separate customer engagement solutions
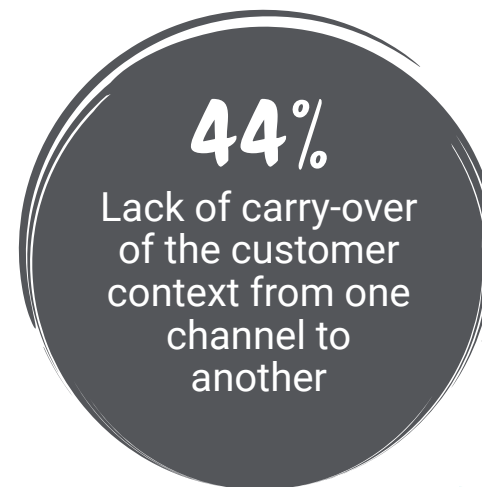
KEY STRATEGY

Eliminate friction across end-to-end customer journeys

The survey finds that while consumers increasingly prefer asynchronous or unassisted interactions, their satisfaction with these channels remains low and is getting worse (see page 21). Time is running out for organizations to close the gap on creating connected omnichannel experiences. Best practice organizations:

01

Focus on *THE JOURNEY*, not the channel

To create seamless customer journeys, organizations should bring all channels and departments onto one platform. This consolidation allows organizations to eliminate frustration by guiding customers to their desired outcome — regardless of their entry point. Having consistent experiences across digital and voice improves customer satisfaction, increases digital adoption and lowers cost.

02

Invest in *EMPLOYEES*

A strong voice channel is critical to customer satisfaction and requires trained, engaged and empowered employees. Using workforce engagement capabilities like intelligent forecasting and scheduling, agent-assist technology, and AI-assisted training and coaching supports CX employees from all angles, increasing efficiency, customer satisfaction and loyalty while decreasing time to resolution.

03

Learn and adapt in *REAL TIME*

Companies can use advanced analytics and dashboards with rich real-time data to not only improve reporting and KPI tracking, but also to adjust in the moment. This includes uncovering and resolving emerging issues, adapting to customer preferences, and monitoring new and emerging trends.

CATHAY PACIFIC

Elevating lifetime relationships

CATHAY PACIFIC

Industry: Travel and aviation

Location: Hong Kong

Company size: Over 20,800 employees

"We see customers reaching out to us through our digital platforms more, leading to **higher adoption rates of digital channels.**"

Selena Yeung,
Customer Contact Specialist, Hong Kong at Cathay Pacific

89% increase
in hourly contacts handled per agent

37% reduction
in cost per contact

16-point increase
in digital contacts

10-plus channels
consolidated to a single platform

Cathay Pacific is one of the world's largest airlines, providing flights to over 200 global destinations. The company aspires to build lifetime relationships by delivering world-class customer care. Cathay Pacific views CX as central to its brand identity and has embarked on a journey to modernize its contact center.

Soaring into the future with an all-in-one CX platform

For Cathay Pacific to achieve its customer experience vision, it was critical to deliver an omnichannel experience. Previously, its channels were siloed. Agents struggled to navigate multiple screens and had limited information about a caller's intent.

In partnership with Accenture, Cathay Pacific transitioned 10 of its global customer care sites to Genesys Cloud CX in three phases over the course of a year. It performed these cutovers site by site to ensure minimal impact on contact center operations. This brought together multiple siloed contact centers into one to maximize resources worldwide and roll out innovative capabilities — including digital and self-service — consistently across locations.

Enhancing the end-to-end customer journey

The Genesys solution provides Cathay Pacific with a 360-degree view of its customers by consolidating more than 10 customer channels (varying by location) including voice, email, web chat and social messaging channels like WhatsApp, Facebook Messenger, WeChat and LINE into a single platform.

Improving productivity with a one-click login, agents have a complete view of the end-to-end customer journey. Customers can initiate conversations in one channel and seamlessly complete them on another channel without repeating information. Agents can use Smart Agent Assist to obtain customer profiles and relevant prompts on the fly, allowing them to personalize interactions and resolve inquiries more efficiently. In fact, Cathay Pacific saw a 16-point increase in the use of digital channels.

Read the full story ⟶ here

03

CX STRATEGIES: People take center stage

- Personalization decoded
- Employee experience tops strategic agenda
- Electrolux: Transforming contact centers into care centers

Leading organizations have people — customers and employees — at the center of their CX strategies. This requires understanding what both consumers and employees really want and adjusting in real time to meet and exceed their needs.

Personalization isn't a "nice to have" add-on; to secure customer loyalty and accelerate business growth, every aspect of the customer journey must be designed to drive outcomes and experiences unique to individual customers.

The links between personalization, loyalty and revenue are clear. More than 80% of consumers say they'd purchase additional items from companies that consistently personalize the experience. But just 35% of CX Leaders say their company offers a highly personalized experience today.

If guaranteed a **personalized experience** every time they buy from a particular company:

81%
of consumers would purchase additional items

79%
would recommend the company to a friend or colleague

56%
would pay a slightly higher price (64% of millennials/Gen Z)

PERSONALIZATION DECODED

Organizations that have disconnected technology and data (see page 23) have limited ability to respond to customer preferences in real time or deliver the types of personalization that customers really want. And according to the survey, the forms of personalization that consumers value most are those that happen during CX interactions.

Almost two-thirds of consumers say the most critical forms of personalization are "Receiving the services I need at any time and in my preferred channel of choice," and "Being connected straightaway with the right person to help me." And the third most important is "Being offered services and products that are customized to my needs."

These preferences require organizations to know who the customer is and what their needs are — identity and intent. And they can achieve this at scale using real-time analytics and natural language processing capabilities to extract patterns and insights and drive positive outcomes. Engaging the customer in their preferred channel with the right offer, web message, bot or agent-assisted service ensures the customer feels known, heard and understood — the foundations for a lasting relationship.

Consumers: What type of personalized experiences would be most valuable to you? (Select three)

Experience	Percentage
Receiving the services I need at any time in my preferred channel of choice	62%
Being connected straightaway with the right person to help me	62%
Being offered services and products that are customized to my needs	42%
Proactive communication about services or assistance I may need	33%
A company knowing/predicting in advance the reason I am contacting them	25%
A company knowing who I am before I've introduced myself	20%
Personalized marketing offers or loyalty programs	16%

EMPLOYEE EXPERIENCE TOPS STRATEGIC AGENDA

Driving personalization requires a focus on people and technology. As in the previous edition of "The State of Customer Experience," such imperatives as "Enhancing analytics for real-time insights, analytics and reporting" and "Using data and AI for customer understanding and personalization" are near the top of the CX strategic agenda for the next two years.

What's new is that contact center *employee* experience is emerging as the number one CX priority for business leaders. CX workforce management is undergoing many changes — from new remote and hybrid working models, to talent shortages and the rise of the gig economy.

According to the survey, average annual staff turnover in the contact center is 32%, which is increasingly unsustainable. Forty-two percent of CX executives surveyed by MIT Technology Review say recruiting for contact center roles is "extremely challenging."

CX Leaders: What are your company's biggest strategic CX priorities for the next 1–2 years? (Select three)

Priority	Percentage
Improving employee experience with new technology (or by connecting existing technology)	47%
Enhancing data capabilities for real-time insights, analytics and reporting	42%
Using data and AI for customer understanding and personalization	40%
Learning and development, career-pathing and leadership development	39%
Improving performance management for remote/hybrid working	39%
Improving hiring strategies and employee value proposition	38%
Driving self-service to improve efficiency	35%
Reducing cost to serve	32%
Developing a strategy for engaging customers in the metaverse	27%

The pivot toward workforce centricity is timely, as until now, employee experience has been largely neglected. Almost half (48%) of respondents say their organization currently does very little or nothing at all to make contact center jobs easier.

The future opportunity is to deploy new technology, or connect existing technology, in ways that link customer and employee experiences — orchestrating the two in parallel. For employees, the improved experience will involve a simplified desktop, instant knowledge and suggestions, analytics that make it easier to course-correct, and gamified KPIs for motivation and teamwork. Organizations will also explore innovations in generative AI and large language models for reducing agents' administrative workload.

A better platform with tools that allow employees to succeed is critical to their engagement; a Genesys survey of 16,000 contact center agents found learning new skills and technologies is what they enjoy most about their job.

Using a customer experience platform that allows you to build in employee skill profiles will also ensure the right resources are available at the right time for customers — driving personalization as interactions are routed to the employee best suited to assist.

HEADCOUNT AND BUDGET FORECAST, 2023 *(global)*

5%
Forecasted increase in contact center headcount in 2023

25%
Forecasted increase in CX budget in 2023 (staff, technology investments, digital channels)

KEY STRATEGY
Put empathy into action for customers and employees

Empathy isn't sympathy; it's stepping into the shoes of your customers and employees to deliver personalized, relevant interactions. To get ahead, organizations must:

01

Orchestrate the customer JOURNEY

Putting empathy into action is where orchestration technology excels. AI can listen to customers; understand and predict what they're looking to achieve; act quickly and precisely; and then learn continuously from the process. Similarly, AI can listen to employees, route interactions to them where they're likely to succeed, and then support them through to resolution.

02

Harness knowledge to EMPOWER humans and bots

Employees know their value and are questioning the way they work. In 2023, organizations will increasingly support human and virtual agents with AI and automation technologies to personalize and resolve interactions. AI and automation can also offload routine tasks to digital and self-service channels, freeing up agents for higher value-add interactions.

03

Scale EFFICIENTLY with automatization

To deliver the personalized approach every customer deserves without having costs spiral, organizations need to develop scalable strategies. Automation capabilities that enable organizations to personalize at scale include predictive engagement, chatbots and voicebots and predictive routing. These allow organizations to develop meaningful customer relationships and increase sales conversion rates while tightly managing cost.

ELECTROLUX

Transforming contact centers into care centers

Electrolux

Industry: Manufacturing and retail
Location: Sweden and global
Contact center: 1,000 agents across Europe

"The system flags excessive webpage dwell times so agents can launch a **timely webchat offering support or a tailored offer.** And we can also set up alerts if shopping basket checkouts appear to stall, again enabling agents to reach out and get the sale back on track."

Mateusz Jazdzewski,
IT Peace of Mind Solutions Manager and Head of CX Product, Electrolux

45-second reduction
in wait time and significantly less customer effort

56-second
reduction in AHT

Improved
FCR, NPS and employee satisfaction

over 75%
bot intent recognition

One of the world's biggest home appliance manufacturers, Electrolux strives to improve everyday life for millions. It competes in a fast-changing market, where customers regularly switch between visiting stores and shopping online. Driven by the rise in eCommerce, Electrolux saw an opportunity to develop business-to-consumer and direct to consumer channels; getting closer to customers and driving sales. Success meant redesigning its contact centers for greater efficiency and faster innovation.

Holistic customer-centric solution

Electrolux implemented Genesys Cloud CX to form a solid omnichannel foundation that ensures efficient multitasking with inbound, outbound, email and chat conversations managed from a single desktop. Agents quickly collaborate with colleagues using the Genesys Cloud CX interface, rather than having to navigate multiple screens and apps. Managers and supervisors have visibility into what's happening, instantly drilling down into reports and monitoring queues and workloads.

Voicebots and chatbots powered by Google Cloud Contact Center AI detect customer intent and suggest

self-serve options, or intelligently route calls to the best specialist with the right skills. Genesys Predictive Engagement connects the dots on website journeys by leveraging AI and analytics to uncover visitors' behaviors and interests — and then personalizes engagements in real time.

Efficiency and productivity

Service efficiency has also improved, with a 56-second reduction in average handle time. During the first three months after implementation, the company's Google Cloud concierge bot recognized over 75% of customer intents. These included requests for appliance repairs, made in English and Italian, for instance.

"Bot intent recognition rose and, in some cases, reached almost 100% as we added use cases and training," said Jazdzewski.

Employee satisfaction has improved, too. "Agents have responded very positively," said Jazdzewski. "Genesys Cloud CX has improved their day-to-day work with neat shortcuts and better search capabilities and wrap-up tools."

Read the full story ⟶ here

04 THE TECH STACK: Powering growth and agility

- Integrated platforms enable CX orchestration
- Benefits of the cloud
- From on-premises to the cloud
- Most valuable CX capabilities
- Data security tops consumer concerns
- Xerox: Achieving ambitious business outcomes faster

To enable a digital transformation around customers and employees, CX Leaders have innovation, technology integration and data connectivity at the top of their tech agenda.

Some 71% of CX Leaders say that implementing a customer experience platform that integrates systems is a top technology priority for 2023. They're looking for better visibility, from enterprise level down to individual interaction data, to drive omnichannel CX and coordinate each step of the customer experience.

71%
of CX Leaders prioritize a customer experience platform that integrates systems

#1
The top benefit of the cloud is better access to data across channels

57%
of CX Leaders think data and analytics tools have the greatest value for CX

INTEGRATED PLATFORMS ENABLE CX ORCHESTRATION

The number one technology priority for CX Leaders worldwide is implementing a customer experience platform that integrates systems such as unified communications, CRM systems, enterprise resource management (ERP), AI tools and workforce planning. The second greatest priority is connecting technology and data to deliver a better omnichannel experience. CX Leaders are seeking to improve customer satisfaction and drive business process efficiency through digital transformation.

Supporting their strategic imperative to improve employee experience, almost half of respondents are focusing on simplifying and improving the agent desktop experience. Expect to see single screens, unified communications,

gamification, bite-size learning and development programs, dashboards, and performance monitoring tools like AI-assisted coaching and training.

To give employees better information in the moment and make self-service more effective, 43% of respondents will improve knowledge management in the next 1–2 years. Technology leaders need to decide between generic knowledge bases, or ones dedicated to specific types of information. They'll also need processes for making sure knowledge is up-to-date and quickly corrected, when necessary, and delivered in an actionable way. Connecting technology, data and knowledge are key priorities for improving customer and employee experiences.

CX Leaders: Which of the following technology initiatives will you use to support your strategic priorities over the next 1–2 years?

Initiative	Percentage
Implementing a customer experience platform that integrates systems	71%
Connecting technology and data to deliver an omnichannel experience	50%
Improving and simplifying the contact center employee desktop experience	48%
Improving knowledge management systems	43%
Automating contact center operational processes (scheduling, reporting)	43%
Developing/refining bot strategy to improve self-service or engagement	37%
Using natural language understanding in voice and digital channels	35%
Rearchitecting the technology environment to mitigate regulatory risk	33%

NEED FOR AGILITY DRIVES CLOUD MOMENTUM

The survey reveals about half of customer experience management technologies are currently being delivered via all-cloud platforms and solutions, or in hybrid cloud/on-premises models.

The top benefits of using cloud-based CX technologies include better access to data across channels, the ability to design processes with new features and capabilities faster, and increased cybersecurity. Four in 10 CX Leaders say a leading benefit of the cloud is enabling hybrid and remote working models. And one-third cite reduced cost to serve as a top benefit of the cloud, as they're able to scale more efficiently.

CX Leaders: What have been the greatest benefits of moving to a cloud-based infrastructure?

Benefit	Percentage
Better access to data across channels	50%
Ability to add new capabilities/features/channels faster	49%
Increased cybersecurity	45%
Enabling remote or hybrid working	41%
Enhanced reporting and analytics	40%
Improved disaster recovery/business continuity	37%
Simplification through a single interface	37%
Reduced cost to serve	35%
Scale resources on demand	33%
Better address changing geographical support needs	19%

Of the respondents using on-premises solutions, the greatest cloud momentum is currently around digital engagement and communications platforms. In two years, 80% of the respondents plan to be using cloud solutions for communications, 78% for digital engagement and 75% for the agent desktop. There's also momentum around workforce engagement management: 52% of respondents currently use cloud technology; this will increase to 73% in two years' time.

CX Leaders: How are you delivering your customer experience infrastructure today and in two years' time?

Digital Engagement
- 2022: 40% / 18%
- 2024: 51% / 27%

Analytics/Reporting
- 2022: 32% / 21%
- 2024: 44% / 30%

Customer Relationship Management (CRM)
- 2022: 33% / 20%
- 2024: 46% / 29%

Agent Desktop
- 2022: 29% / 23%
- 2024: 42% / 33%

Workforce Engagement Management (WEM)
- 2022: 30% / 22%
- 2024: 42% / 31%

Communications Platform
- 2022: 36% / 24%
- 2024: 48% / 32%

Contact Center Telephony
- 2022: 29% / 20%
- 2024: 46% / 29%

Legend:
- All Cloud
- Hybrid Cloud

REAL-TIME ANALYTICS ARE TRANSFORMATIONAL CAPABILITIES

The capabilities CX Leaders consider most critical for improving customer experience are real-time and historical analytics and reporting, customer data platforms that provide a single unified view of the customer, and workforce engagement management solutions. Having deeper insights allows CX Leaders to gain a better understanding of their customers and employees, and then develop targeted strategies for engagement across digital and voice channels.

Workforce engagement management capabilities will also enable CX Leaders to build a culture their employees will love. These include performance management, quality management and intelligent forecasting to avoid staff burnout during interaction volume spikes.

CX Leaders: How valuable are each of the following features for managing your customer service/support needs? (% responding "extremely valuable")

Feature	%
Real-time and historical analytics and reporting	57%
Customer data platform	54%
Workforce engagement management	48%
Unified agent desktop application	47%
Predictive/journey analytics	46%
Integrated Unified Communications and Contact Center solution	45%
Agent-assist technology	44%
Single point of system administration	43%
Prebuilt integrations to HR, CRM and Customer Engagement solutions	42%
Omnichannel digital engagement solution for web and mobile	41%
Outbound notifications	41%
Speech and text analytics, real-time sentiment analysis	41%
AI-driven process automation	40%
Predictive web engagement	40%
Video capabilities for service or support	40%
Predictive/AI-driven customer interaction routing	39%

PRIVACY AND SECURITY: THE CORNERSTONE OF LOYALTY

Consumers expect the organizations they buy from to share their concerns about ethical issues and reflect their values around issues of social responsibility.

Data privacy/protection is consumers' No. 1 concern globally, selected by almost 60% of respondents. Building and maintaining customer loyalty rests on having secure, reliable processes that safeguard sensitive information. CX Leaders consider cybersecurity to be a leading benefit of cloud technology – providing the privacy protections their brands rely on. To grow loyalty and trust, organizations need to make data privacy a leading pillar of their brand.

The other issue that has grown in importance between 2021 and 2022 is the environment. Some 42% of consumers selected carbon reduction as a top priority in 2022, compared with 34% in 2021. Other than data privacy and the environment, all other issues declined in importance for consumers worldwide.

Consumers: Which of the following social, ethical or environmental issues do you care about and expect the companies you buy from to stand for and advocate around?

Issue	2022	2021
Data privacy/protection	59%	55%
Carbon reduction	42%	34%
Animal welfare/cruelty-free treatment	38%	41%
Human rights	37%	39%
Health and wellness	36%	39%
Sustainable products/packaging	30%	36%
Worker/employee rights	29%	33%
Poverty reduction	25%	27%
Gender equality/advocacy	24%	29%
Diversity/race relations	24%	25%
Ethical use of AI	18%	21%
Sustainable supply chain	16%	21%
Political issues	10%	13%
LGBTQ+ rights	9%	11%

■ 2022   ■ 2021

Getting strategic and brand alignment around the issues consumers care about can increase loyalty. Overall, 57% of consumers state they'll pay more to buy from companies aligned to their values. Millennials; Gen Z; and consumers in Asia-Pacific, the Middle East/Africa and Latin America feel even more strongly about this.

57% of consumers will pay more to buy from companies that support their social, ethical and environmental concerns

Consumers: I only buy/prefer to buy from companies that are aligned to my social, ethical or environmental concerns, and am willing to pay more. (% agree)

65%	63%	62%	52%	41%	57%
Middle East /Africa	Asia-Pacific	Latin America	Europe	North America	Total
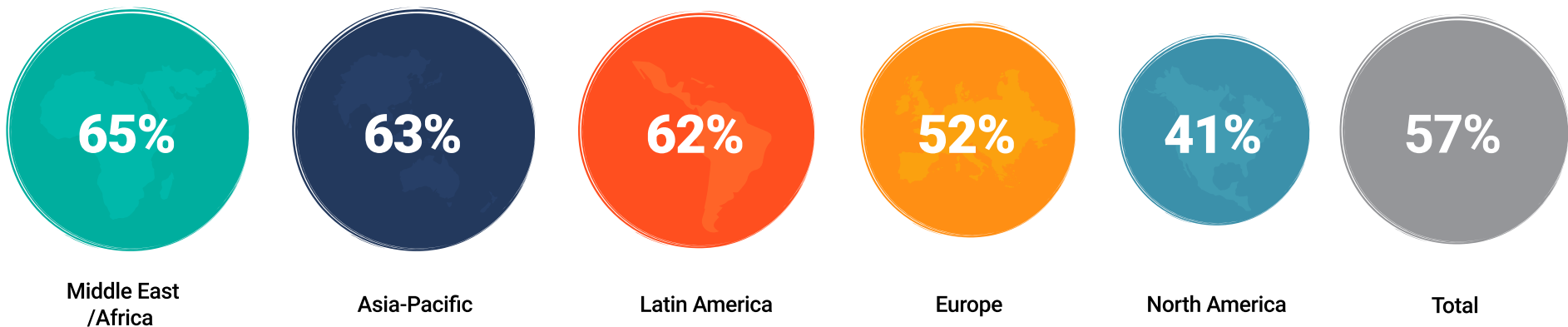
KEY STRATEGY

Develop a tech stack that ignites growth and reduces cost

Leading organizations use their technology infrastructure to drive customer loyalty through personalization at scale and increase employee engagement — all while managing costs. Best practice organizations should:

01

UNIFY TECHNOLOGIES for customer and employee experiences

Enterprise innovation cycles have shortened dramatically. Throwing resources at short-term problems can causes issues like technical debt, difficulty sustaining differentiation, and fragmented experiences for customers and employees. Moving forward, CX Leaders should streamline and seamlessly integrate CX and EX technologies for a unified approach to digital transformation.

02

Embrace open, CLOUD-BASED architectures

Flexible, composable and scalable technology architectures focused around microservices, open APIs and cloud-native platforms will pave the way for innovation at lower cost and with less risk. They will provide access to a best-in-class ecosystem, unify data and communications, and support global consolidation and data virtualization.

03

Make RESPONSIBLE TECHNOLOGY part of the brand

With great data comes great responsibility. Data privacy and protection is consumers' greatest ethical concern — and one they expect organizations to similarly prioritize. World-class cybersecurity, data governance and privacy compliance are table stakes, and must apply to all partners and suppliers in the technology ecosystem.

XEROX

Achieving ambitious business outcomes faster

xerox™

Industry: Workplace technology
Location: US
Company size: More than 24,000 employees worldwide
Contact center: 3,600 agents

"The best thing about native cloud architectures is that you don't have to worry about data centers, compute, storage and networks — all complicated stacks with long lead times."

Naresh Shanker,
CTO, Xerox

3,600 agents
working in 14 languages migrated

100% remote
implementation

Unified
customer journey

Retired seven
legacy platforms

Xerox is a workplace technology leader with software, services and other new technologies to redefine the work experience for its customers. Its scientists and engineers are building on a rich heritage of innovation to introduce technologies, such as augmented reality, robotic process automation, additive manufacturing, cleantech and the internet of things.

Until this year, Xerox used non-standardized global contact centers. "We interacted differently depending on what country the customer's from, what products they've bought and how they've purchased them," said Jason Ferguson, VP Digital Experience at Xerox. "So, we had lots of different systems, processes and teams trying to support the customer in an unintegrated way."

An easy move to an all-in-one composable platform

Xerox embarked on a global implementation project using Genesys Cloud CX as the foundation to migrate more than 3,600 agents worldwide. The Xerox and Genesys teams delivered a global contact center platform that orchestrates experiences in 14 languages for customers across 67 countries — complete with speech recognition for interactive voice response call routing, full interaction and screen recording, and quality management.

Genesys Cloud CX is connected to the company's SAP CRM system and Survey Dynamix, capturing real-time actionable insights through customizable surveys across channels. An embedded workforce management tool has made a big difference, too. Xerox now uses Genesys Workforce Engagement Management worldwide for a better employee experience.

"The highest cost is your workforce, so you want to make them as productive and efficient as possible," said Naresh Shanker, CTO at Xerox. "We have a powerful tool that does this dynamically. With the data and analytics available, we can design more proactive engagement models to improve productivity, wait time, call handling, workload balancing and more."

Laying the foundations for omnichannel CX, Xerox was able to retire seven legacy solutions — reducing technology debt and unifying customer journeys. Other benefits include simplified call designs, enhanced routing and processes for adding new business groups.

Read the full story ⟶ here

THE PATH FORWARD:
Experience orchestration delivers empathy at scale

This report finds organizations are falling behind on their ability to meet customer expectations. While 86% of consumers say a company is only as good as its service, they also say that service quality has declined across every industry.

With digital channels achieving broad penetration and the future trend skewing even further toward asynchronous and unassisted interactions, a connected voice and digital strategy is now more critical than ever for reimagining the customer experience.

Moving to a customer journey approach — through connected technology, measurement and management — means creating a future where experiences will be orchestrated in real time. This will use cloud-based technologies, automation and AI to coordinate people, channels, interactions, knowledge, data and systems into empathetic end-to-end experiences.

The strategies shared in this report will position organizations for success:

Deliver excellence by continually reimagining the customer experience

Delivering the *exceptional* in every interaction requires experience orchestration: coordinating people, channels, interactions, knowledge, data and systems in real time to deliver empathetic end-to-end experiences at scale — while also managing costs. It requires complete visibility across the customer journey; flexible, scalable and adaptive technology to exceed customer expectations; and AI and automation for flawless, cost-effective execution.

Eliminate friction across end-to-end customer journeys

To create seamless customer journeys, organizations should bring all channels and departments onto one platform. This consolidation allows organizations to eliminate frustration by guiding customers to their desired outcome, regardless of the entry point. Having consistent experiences across digital and voice improves customer satisfaction, increases digital adoption and lowers cost.

Put empathy into action for customers *and* employees

Putting empathy into action is where orchestration technology excels. AI can listen to customers; understand and predict what they're looking to achieve; act quickly and precisely; and then learn continuously from the process. Similarly, AI can listen to employees, route interactions to them where they're likely to succeed and then support them through to resolution.

Develop a tech stack that ignites growth and reduces costs

A tech stack that powers growth is one that unifies the customer and employee experiences to drive efficiency and personalization across the end-to-end journey. Flexible, scalable and secure technology architectures focused around microservices, open APIs and cloud-native platforms will

pave the way for innovation at a lower cost and with less risk. They will also provide access to a best-in-class ecosystem, offering even greater opportunities to reimagine the customer experience.

Success in the experience economy today requires a people-centric, unified approach to deliver the power of empathy to every experience. Make this your top goal. Start now. Never stop. It's the path to increased customer loyalty, profitability and business resiliency.

In future, **exceptional experiences** will be intelligently orchestrated to deliver empathy from end to end.

AI and automation will coordinate people, channels, interactions, knowledge, data and systems for hyper-personalization at scale.

APPENDIX

METHODOLOGY

In November 2022, Genesys worked with Actionable Research, an independent research firm, to survey 5,157 consumers and 646 CX decision-makers in 18 countries worldwide. Among the business respondents, the industries represented were banking, government, healthcare, insurance, manufacturing, professional services, retail, technology and telecommunications.

Survey respondents by age group

- Baby boomers (57-77): 12%
- Gen Z (up to 26): 20%
- Gen X (43-57): 24%
- Millennials (27-42): 44%
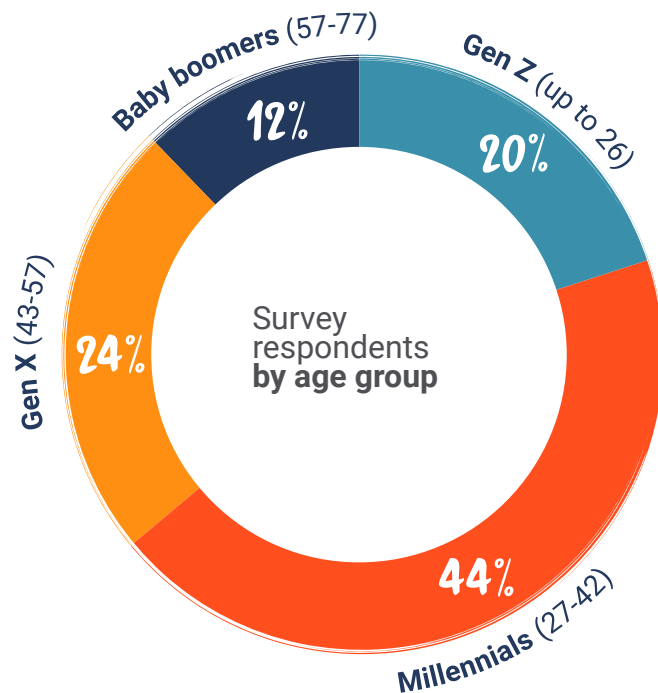
Consumer survey

1,063 EUROPE (UK/Ireland, Germany, other EU)

1,037 NORTH AMERICA (Canada, United States)

1,017 ASIA-PACIFIC (Australia, New Zealand, China, India, Japan, Singapore, South Korea)

1,028 LATAM (Brazil, Mexico, other markets)

1,012 AFRICA/MIDDLE EAST (Saudi Arabia, South Africa, Turkey, United Arab Emirates)

CX LEADERS survey

646 respondents

CX Leaders **by region**

26%	**24%**	**19%**	**16%**	**15%**
Asia-Pacific	North America	Europe	Middle East /Africa	Latin America
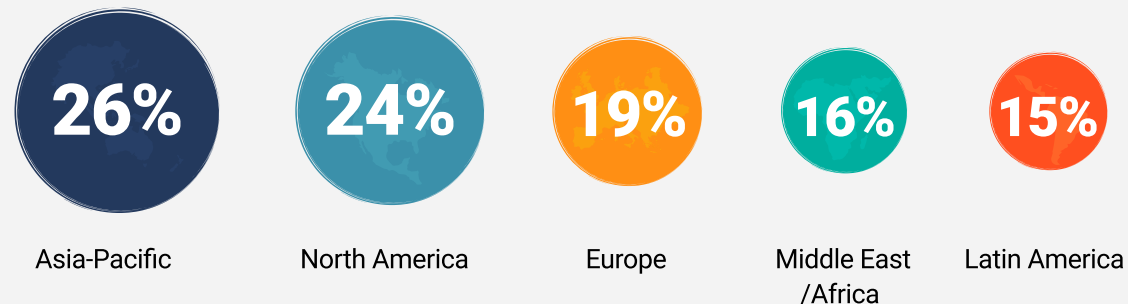
Respondents **by job title**

Job Title	Percentage
Customer Service Head/VP/Director	22%
Chief Technical/Information Officer	15%
Customer Experience Head/VP/Director	15%
Contact Center Head/VP/Director	13%
Other C-Suite/Senior Management	12%
Chief Customer Officer	10%
Customer Support Head/VP/Director	9%
Chief Experience Officer	4%

0%   5%   10%   15%   20%   25%
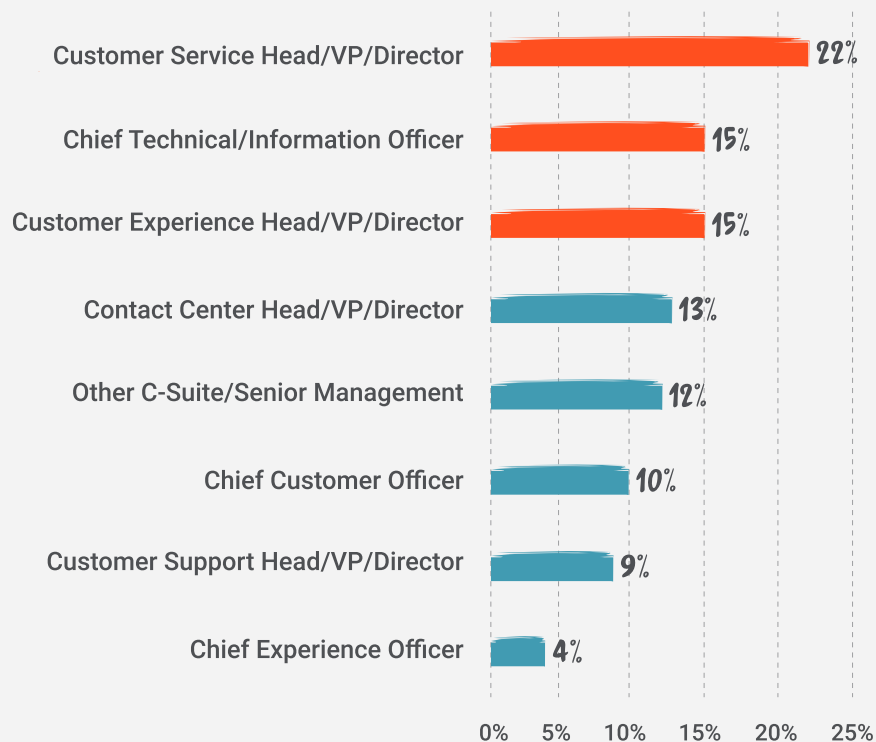
Respondents **by industry**

Industry	Percentage
Retail/eCommerce	18%
Healthcare	16%
Technology	13%
Government	13%
Banking	11%
Insurance	6%
Professional services	5%
Manufacturing	5%
Telecommunications	4%
Utilities	4%
Other	5%

0%   5%   10%   15%   20%
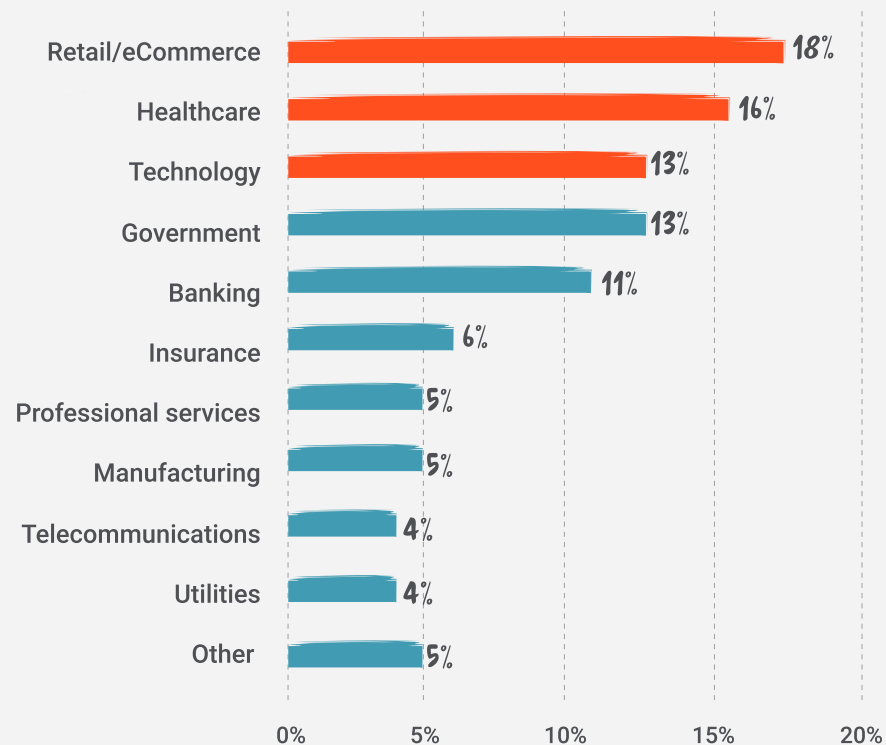
INDUSTRY DATA

What are your company's biggest strategic customer experience priorities for the next 1–2 years? (Select three)

Financial services

Priority	%
Improving employee experience with new technology (or by connecting existing technology)	48%
Learning and development, career-pathing, and leadership development)	44%
Driving self-service adoption to improve efficiency	43%
Using data and AI for customer understanding and personalization	42%
Improving performance management for remote/hybrid working	40%
Enhancing data capabilities for real-time insights, analytics, and reporting	36%
Navigating the impact of new regulations	28%
Shifting from a channel-focus to customer journey-focus	28%
Reducing costs to serve	28%
Improving hiring strategies and employee value proposition	26%
Developing a strategy for engaging customers in the metaverse	21%

What are your company's biggest strategic customer experience priorities for the next 1–2 years? (Select three)

Healthcare

Priority	Percentage
Improving employee experience with new technology (or by connecting existing technology)	48%
Improving hiring strategies and employee value proposition	42%
Enhancing data capabilities for real-time insights, analytics, and reporting	41%
Learning and development, career-pathing, and leadership development	40%
Reducing cost to serve	39%
Improving performance management for remote/hybrid working	38%
Using data and AI for customer understanding and personalization	38%
Driving self-service adoption to improve efficiency	35%
Shifting from a channel-focus to customer journey-focus	28%
Developing a strategy for engaging customers in the metaverse	26%
Navigating the impact of new regulations	22%

What are your company's biggest strategic customer experience priorities for the next 1–2 years? (Select three)

Retail

Priority	%
Enhancing data capabilities for real-time insights, analytics, and reporting	47%
Improving employee experience with new technology (or by connecting existing technology)	47%
Using data and AI for customer understanding and personalization	45%
Improving performance management for remote/hybrid working	43%
Driving self-service adoption to improve efficiency	42%
Developing a strategy for engaging customers in the metaverse	33%
Improving hiring strategies and employee value proposition	33%
Learning and development, career-pathing, and leadership development	33%
Reducing cost to serve	28%
Shifting from a channel-focus to customer journey-focus	27%
Navigating the impact of new regulations	9%

What are your company's biggest strategic customer experience priorities for the next 1–2 years? (Select three)

Government

Priority	Percentage
Improving employee experience with new technology (or by connecting existing technology)	49%
Learning and development, career-pathing, and leadership development	48%
Enhancing data capabilities for real-time insights, analytics, and reporting	44%
Improving performance management for remote/hybrid working	42%
Reducing cost to serve	38%
Using data and AI for customer understanding and personalization	38%
Improving hiring strategies and employee value proposition	36%
Driving self-service adoption to improve efficiency	31%
Developing a strategy for engaging customers in the metaverse	30%
Navigating the impact of new regulations	24%
Shifting from a channel-focus to customer journey-focus	24%

Which of the following technology initiatives will you use to support your strategic priorities over the next 1–2 years? (Select three)

Financial services

Initiative	%
Implementing a customer experience platform that integrates systems	59%
Using natural language understanding in voice and digital channels	51%
Developing/refining bot strategy to improve self-service and engagement	49%
Improving and simplifying the contact center employee desktop experience	39%
Connecting technology and data to deliver an omnichannel experience	37%
Re-architecting the technology environment to mitigate regulatory risk	35%
Improving knowledge management systems	33%
Automating contact center operational processes (scheduling, reporting)	26%

Which of the following technology initiatives will you use to support your strategic priorities over the next 1–2 years? (Select three)

Healthcare

Initiative	Percentage
Implementing a customer experience platform that integrates systems	69%
Re-architecting the technology environment to mitigate regulatory risk	51%
Developing/refining bot strategy to improve self-service and engagement	47%
Automating contact center operational processes (scheduling, reporting)	43%
Migrating customer experience technology to the cloud	43%
Using natural language understanding in voice and digital channels	41%
Connecting technology and data to deliver an omnichannel experience	33%
Improving knowledge management systems	29%
Improving and simplifying the contact center employee desktop experience	18%

0% 10% 20% 30% 40% 50% 60% 70%

Which of the following technology initiatives will you use to support your strategic priorities over the next 1–2 years? (Select three)

Retail

Initiative	Value
Implementing a customer experience platform that integrates systems	76%
Re-architecting the technology environment to mitigate regulatory risk	62%
Developing/refining bot strategy to improve self-service and engagement	60%
Using natural language understanding in voice and digital channels	58%
Automating contact center operational processes (scheduling, reporting)	53%
Migrating customer experience technology to the cloud	47%
Improving and simplifying the contact center employee desktop experience	36%
Improving knowledge management systems	33%
Connecting technology and data to deliver an omnichannel experience	33%

Which of the following technology initiatives will you use to support your strategic priorities over the next 1–2 years? (Select three)

Government

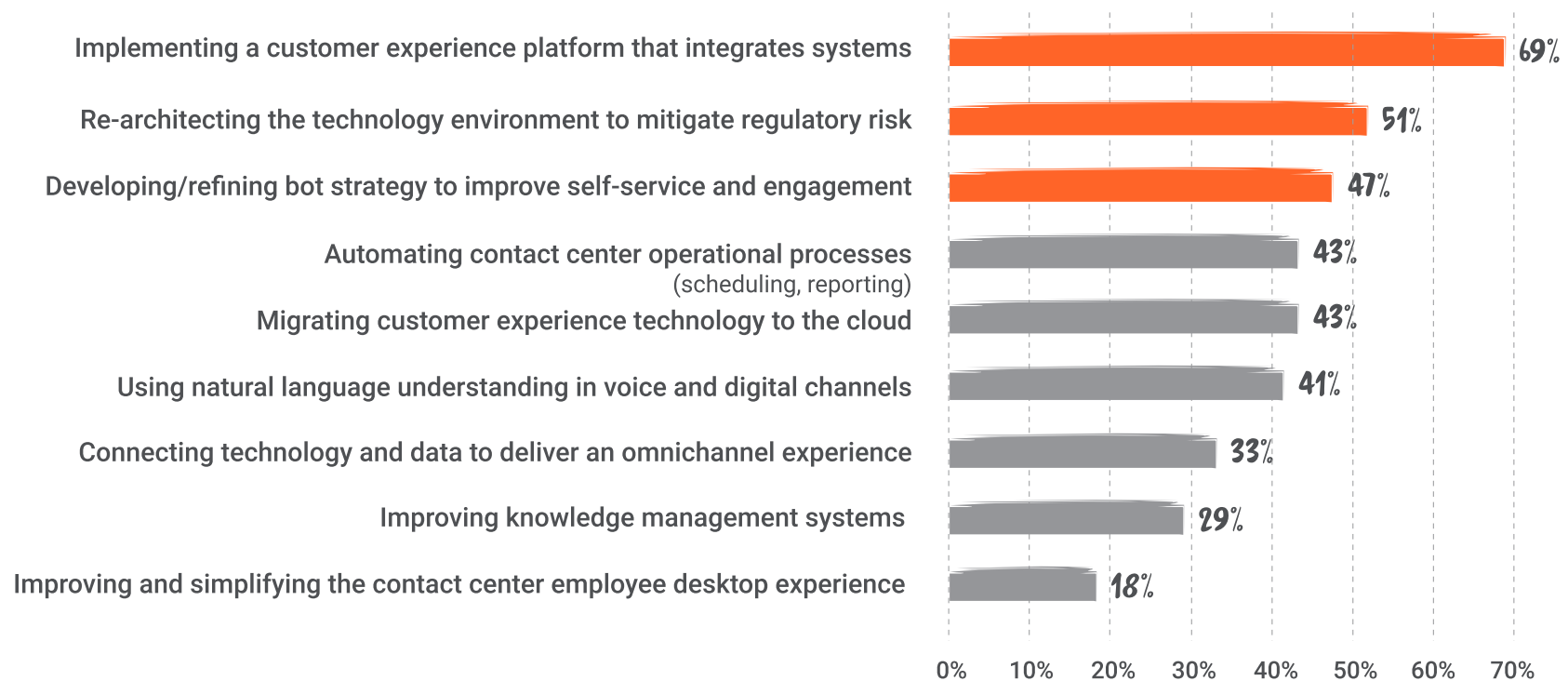| Initiative	Percentage
Implementing a customer experience platform that integrates systems	69%
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Migrating customer experience technology to the cloud	48%
Using natural language understanding in voice and digital channels	46%
Re-architecting the technology environment to mitigate regulatory risk	44%
Developing/refining bot strategy to improve self-service and engagement	42%
Improving and simplifying the contact center employee desktop experience	33%
Improving knowledge management systems	27%
Connecting technology and data to deliver an omnichannel experience	27%

0%   10%   20%   30%   40%   50%   60%   70%

Where are you on your journey to providing an omnichannel experience to your customers?

	Financial services	Healthcare	Retail	Government
We offer multiple channels for customer interactions with completely integrated technology and connected data. We are able to gain insights and make adjustments in real time.	8%	11%	20%	11%
We offer multiple channels for customer interactions with some connectivity of technology and data. Further integration is a priority for us.	18%	28%	32%	31%
We offer several different channels for customer interactions but are yet to connect the underlying technology or data.	29%	28%	19%	26%
We are considering following an omnichannel strategy but have yet to make meaningful plans in this space.	40%	25%	21%	24%
We do not provide an omnichannel experience for our customers and we have no plans to.	6%	8%	9%	7%

Legend: ■ Financial services ■ Healthcare ■ Retail ■ Government

To what degree is your organization currently delivering personalized customer experience?

	Highly personalized	Mostly personalized	Somewhat personalized	Hardly personalized	Not at all personalized
Financial services	34%	37%	27%	2%	
Healthcare	32%	35%	28%	3%	2%
Retail	39%	38%	21%	2%	
Government	36%	26%	36%	1%	

Legend:
- Highly personalized (orange)
- Somewhat personalized (blue)
- Not at all personalized (gray)
- Mostly personalized (yellow)
- Hardly personalized (teal)
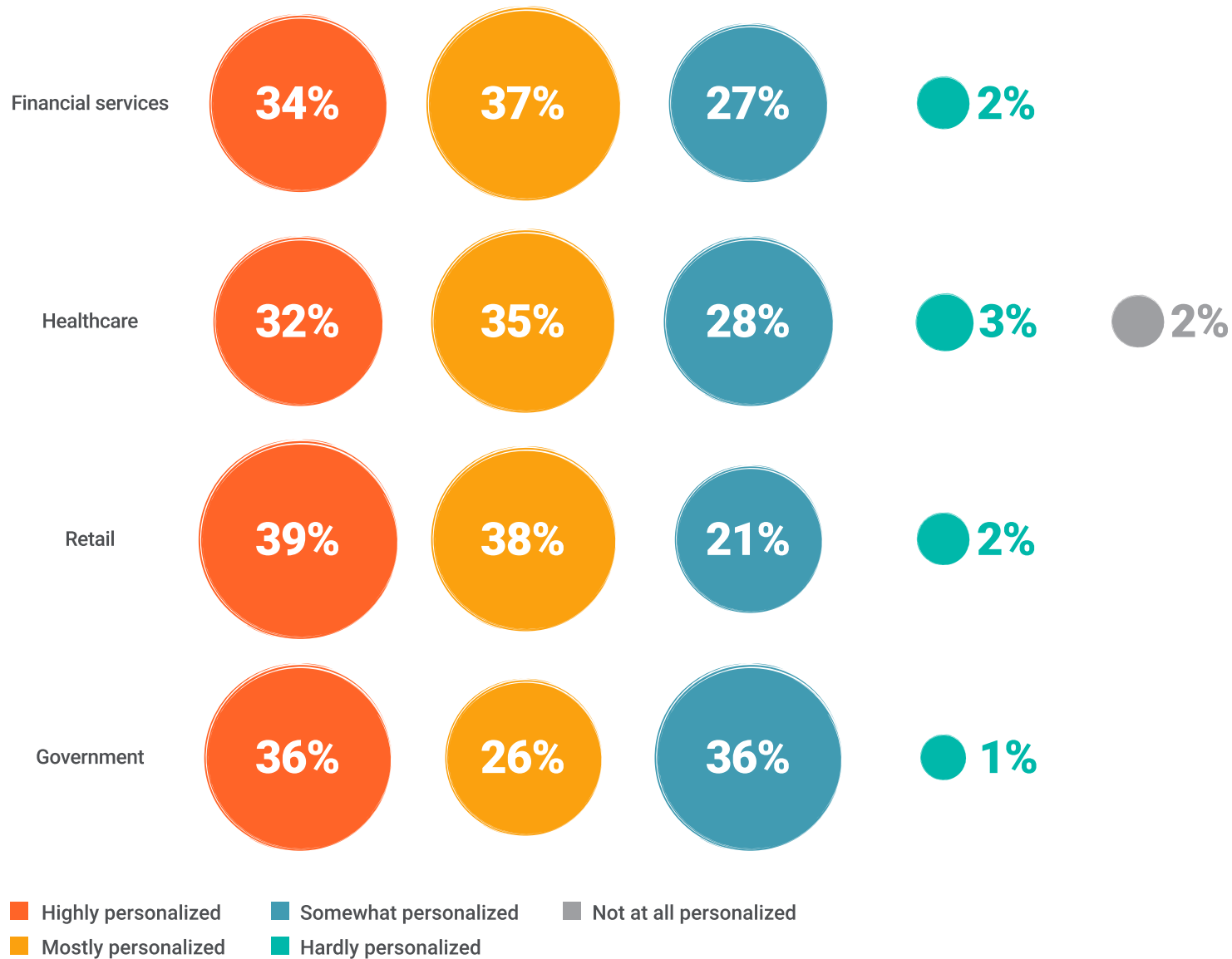
To what extent is your organization minimizing customer effort in the customer journey?

	Highly personalized	Mostly personalized	Somewhat personalized	Hardly personalized	Not at all personalized
Financial services	32%	33%	28%	5%	2%
Healthcare	20%	38%	29%	8%	5%
Retail	28%	32%	29%	6%	5%
Government	23%	35%	31%	4%	6%

🟧 Highly personalized   🟦 Somewhat personalized   ⬜ Not at all personalized
🟨 Mostly personalized   🟩 Hardly personalized
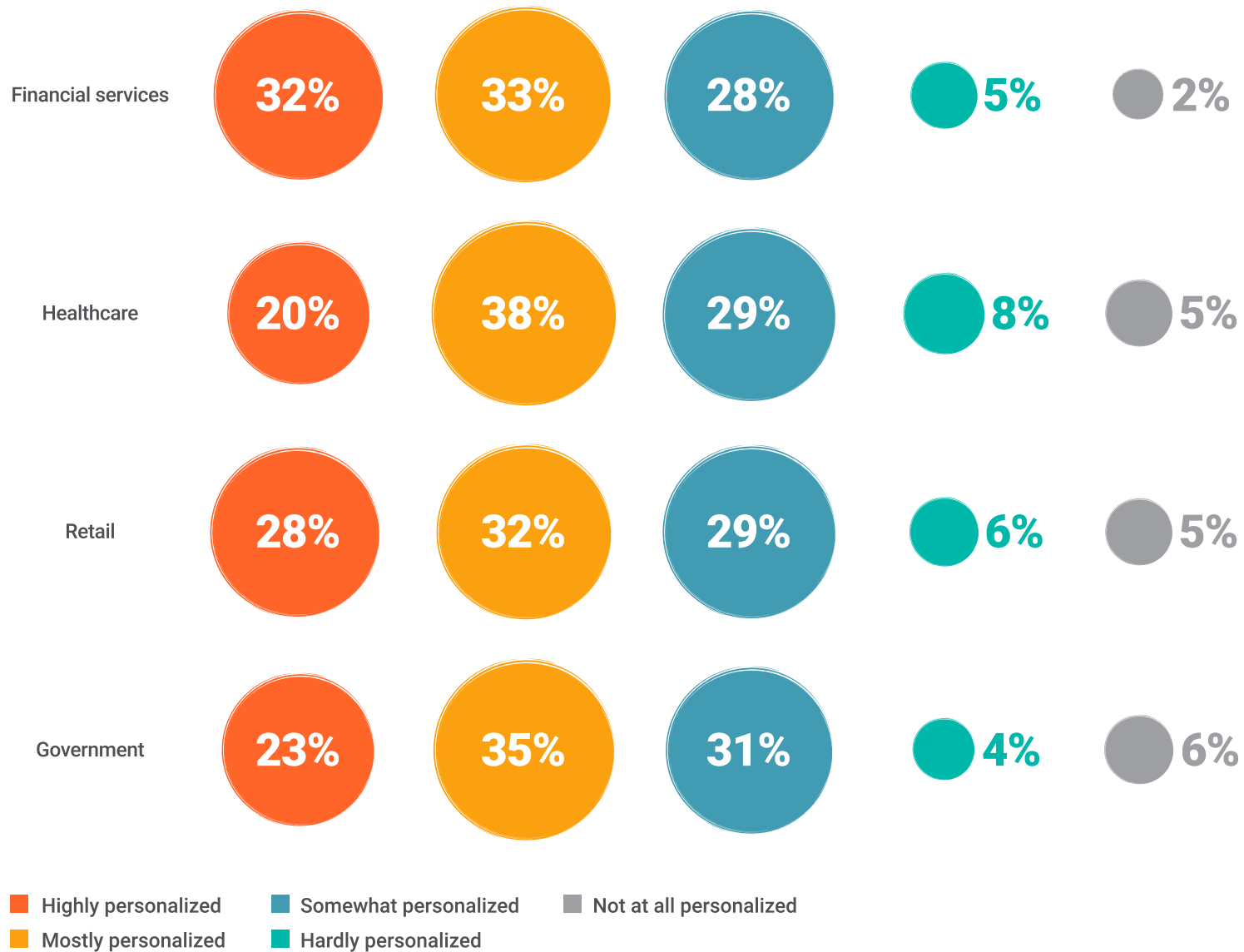
What is (or would you expect to be) the annual employee turnover rate in your contact center?

29% Financial services
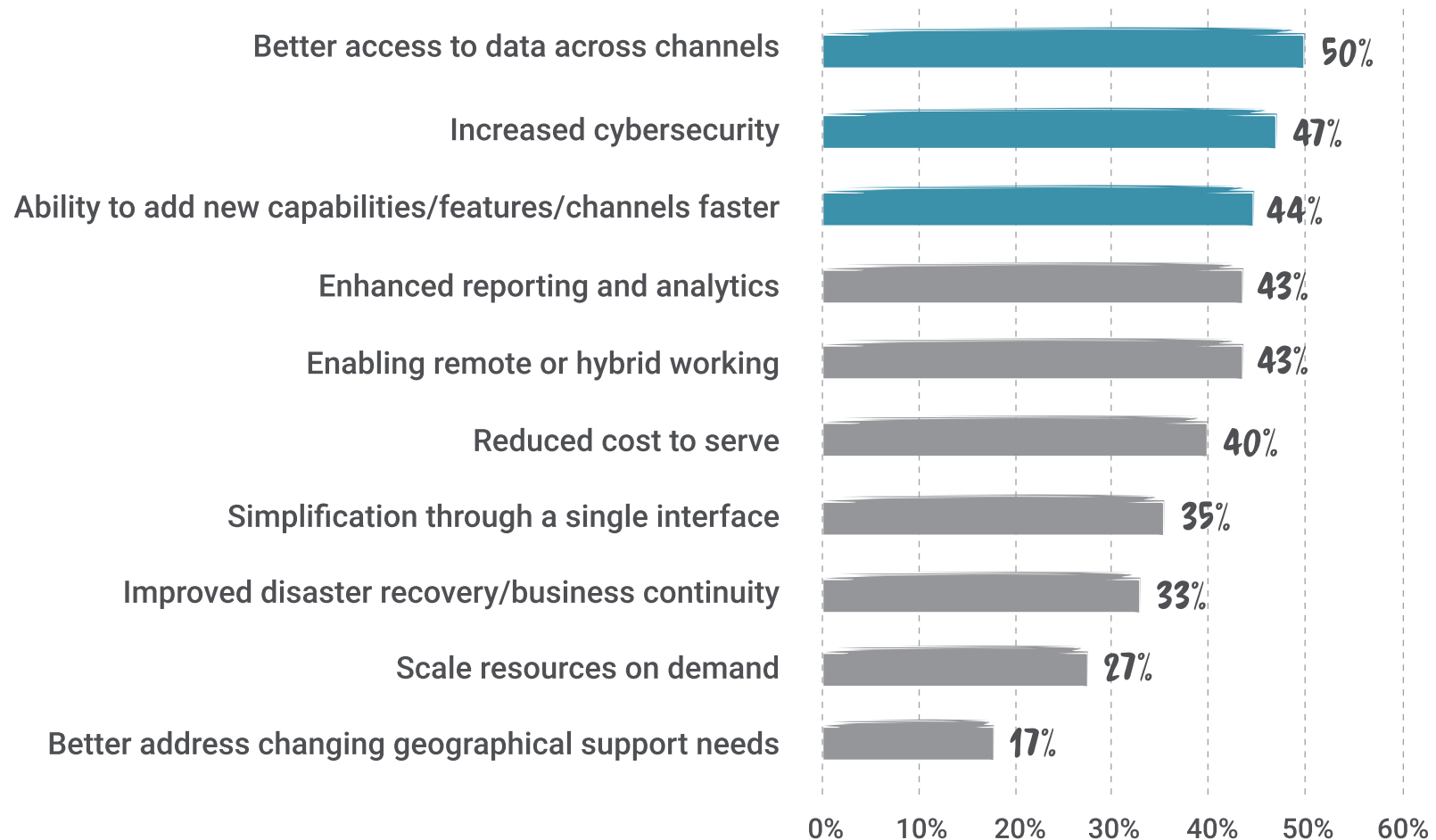
24% Healthcare

40% Retail

23% Government

32% Average

Which of the following technology initiatives will you use to support your strategic priorities over the next 1–2 years? (Select three)

Financial services

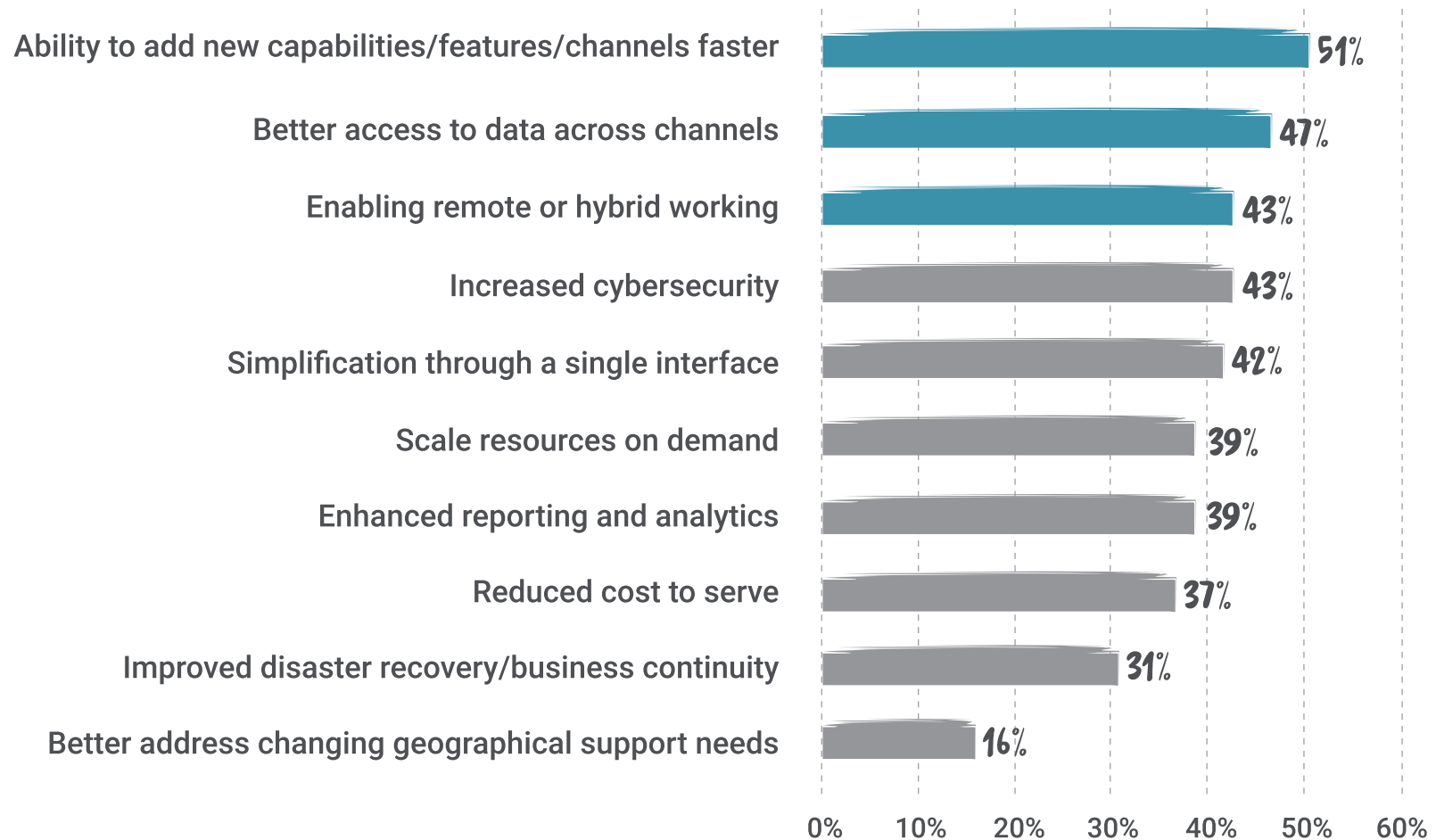|	
Increased cybersecurity	46%
Ability to add new capabilities/features/channels faster	43%
Better access to data across channels	43%
Enhanced reporting and analytics	37%
Improved disaster recovery/business continuity	35%
Scale resources on demand	33%
Simplification through a single interface	33%
Enabling remote or hybrid working	31%
Reduced cost to serve	21%
Better address changing geographical support needs	12%

0%   10%   20%   30%   40%   50%   60%

Which of the following technology initiatives will you use to support your strategic priorities over the next 1–2 years? (Select three)
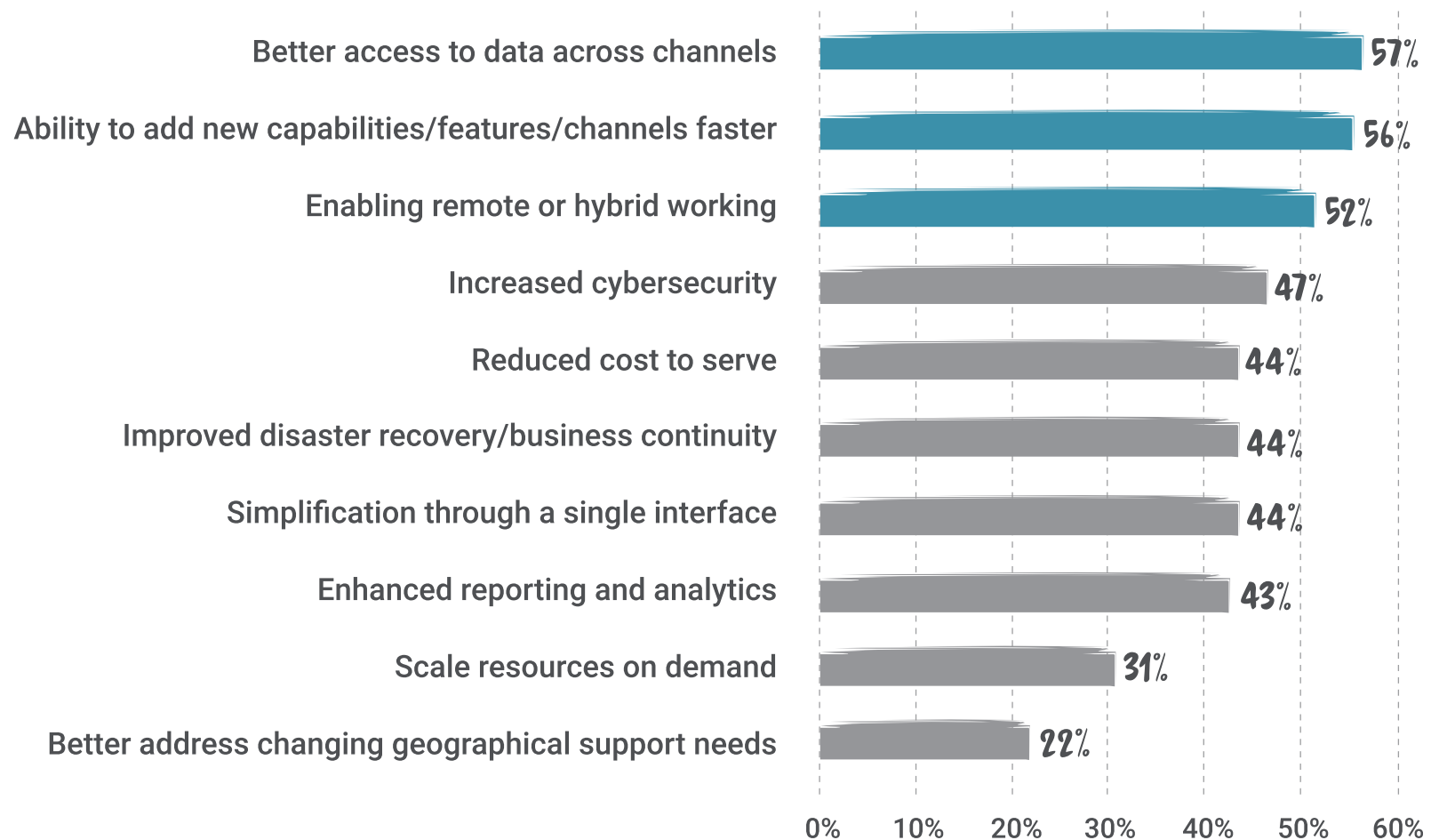
Healthcare

Better access to data across channels	50%
Increased cybersecurity	47%
Ability to add new capabilities/features/channels faster	44%
Enhanced reporting and analytics	43%
Enabling remote or hybrid working	43%
Reduced cost to serve	40%
Simplification through a single interface	35%
Improved disaster recovery/business continuity	33%
Scale resources on demand	27%
Better address changing geographical support needs	17%

0%   10%   20%   30%   40%   50%   60%

Which of the following technology initiatives will you use to support your strategic priorities over the next 1–2 years? (Select three)

Retail

Initiative	%
Ability to add new capabilities/features/channels faster	51%
Better access to data across channels	47%
Enabling remote or hybrid working	43%
Increased cybersecurity	43%
Simplification through a single interface	42%
Scale resources on demand	39%
Enhanced reporting and analytics	39%
Reduced cost to serve	37%
Improved disaster recovery/business continuity	31%
Better address changing geographical support needs	16%

Which of the following technology initiatives will you use to support your strategic priorities over the next 1–2 years? (Select three)

Government

Initiative	Percentage
Better access to data across channels	57%
Ability to add new capabilities/features/channels faster	56%
Enabling remote or hybrid working	52%
Increased cybersecurity	47%
Reduced cost to serve	44%
Improved disaster recovery/business continuity	44%
Simplification through a single interface	44%
Enhanced reporting and analytics	43%
Scale resources on demand	31%
Better address changing geographical support needs	22%

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