How to Choose Really Great Service Providers for Customer Experience

Digital Clarity Group Launches a "Voice of the Customer" Service for Evaluating Service Providers

By Connie Moore and Alan Pelz-Sharpe

Highlights

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Executive Summary

Customer experience management (CEM) initiatives can be extremely complex or relatively straightforward – ranging from transforming the customer experience (CX) and reinventing the strategic business processes that support business initiatives to implementing technologies such as a content management system (CMS) or digital asset management (DAM) that delivers content essential to customers.[1] But whether the focus is writ large across the enterprise or constrained to a more tightly scoped technology implementation, the specter of failure always looms. Why? Because organizations often lack experience with CEM discipline and methodologies; responsibility for the initiative may be unclear or project teams may have overlapping reporting lines;[2] teams may have little or no experience in organizational change management; and technical staff may lack crucial skills for architecting and implementing key technologies. The list of potential problems and deficiencies goes on and on.[3]

Companies usually realize they have limitations or issues that could negatively impact the success of the strategic initiative or technology implementation. To offset these issues and lower their overall risk, they routinely turn to service providers.[4] For example, depending on the scope and focus of the initiative, organizations regularly involve service providers that could include one or a combination of management consultancies, advertising agencies, marketing communications and public relations firms, digital agencies, and systems integrators, as well as other types.

But here's the problem: how do they know if the service provider they select will actually improve the outcome of their initiative? Not all service providers are created equal. Some are great at developing business transformation strategies and implementation plans but can't deploy technical solutions. Some have impressive track records in one technology – say, e-commerce – but are expanding their practice into new areas and are still learning the adjacent technologies they are chasing. Some are, frankly, in over their heads; for example, digital agencies can tackle some of the most mind-blowing, boundary-expanding projects but then flounder with integration, development, and basic systems deployment.

Where do organizations find their service providers and how do they know these future partners are really qualified? Good question. Here are typical scenarios they turn to:

■ **Companies they already do business with.** Most companies already use one or more service firms, whether it's for business strategy or outsourcing or something else business technology related. Unless there's a questionable track record, these service firms usually get a chance to bid for all or some of the new project.

Service providers don't guarantee success, but the lack of a qualified service provider is almost certain to result in failure.

- **Service providers recommended by their technology vendors.** Companies often turn to their IT vendors for help, but this may or may not actually work. Sometimes the vendors don't really know how strong or weak the service provider is. Sometimes they recommend service providers that have generated a lot of revenue for the vendor but not necessarily with stellar results from the end customer's perspective.

- **Gartner's Magic Quadrant (MQ), another tried-and-true approach.** The problem is that it's very hard to analyze the strengths and weaknesses of service providers using a methodology designed primarily for technology products.

- **Forrester's Wave, another tool buyers use.** This tool, unfortunately, is even more limited than the MQ because the methodology only supports the analysis of a small number of vendors.[5] And with a global market of more than 80,000 service providers, it's hard to see how an evaluation of an average of ten firms is even remotely exhaustive.

Service providers are absolutely essential to the success of CEM and CX projects and provide many of the ten core competencies needed for successful projects. Service providers don't guarantee success, but the lack of a qualified service provider is almost certain to result in failure.

As a result, Digital Clarity Group (DCG) has created a new paradigm for finding and evaluating service providers, based on extensive interviews and surveys of end customers. These interviews involve structured discussions with customers from all the CEM channel partners that a vendor works with, or the customers from a large number (in the hundreds) of the vendor's leading channel partners. Using this voice of the customer (VOC) approach, coupled with analytics, organizations seeking service providers can finally determine if any given service provider with a "great" reputation actually delivers good results according to its customers. This from-the-ground-up, data-driven approach is much more extensive and revealing than any other methodology for finding qualified service providers – including MQs, Waves, recommendations from vendors or friends, or turning to the technology vendor or other companies currently working at the organization.

This report provides an introduction and preliminary analysis of CEM service providers based on DCG's VOCalis™ (/vo'ka.lis/) methodology, along with a graphic (see Figure 5) which depicts how service companies are rated by their customers, based on actual project outcomes. (Although the names of the service firms are anonymous in this initial report, the names of companies evaluated will be divulged in Q1 2017 as the volume of interviews and ratings increases.)

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CEM Projects Are Strategic to the C-Suite but Often Risky

Putting the customer first remains a top priority in C-suites as senior executives around the world continue to transform the enterprise from the outside-in, deliver exceptional customer experiences, "go digital" in a much bigger way, and tap the power of emerging technologies to better serve and even delight customers. Increasingly, executives realize that the ability to effectively manage relationships with prospects and customers can literally make or break an organization's topline growth and bottom-line results.

Global CEOs Are Committed to Transformation in a Customer-Driven World

Recent global surveys of CEOs and other C-level executives make it clear that CEM continues to be a strategic initiative:

- **Forty-one percent of nearly 1,300 global CEOs anticipate their company will be significantly transformed over the next three years,** according to the KPMG 2016 CEO report. This percentage has increased significantly from 2015, which showed 29% of CEOs with a similar view.[6]

- **Eighty-eight percent of CEOs in the same KPMG study are concerned about the loyalty of their customers.** Almost half (45%) feel they could better leverage digital as a way to connect with customers.[7]

- **Ninety percent of 1,409 global CEOs say their companies are changing how they use technology to assess and deliver on wider stakeholder expectations**, according to PwC's 2016 survey. However, this is fraught with challenges: "CEOs are using technology to get closer to consumers but are being challenged to align all parts of their operating model behind customer strategies."[8]

- **CEOs expect to engage more digitally over the next three to five years, according to IBM's 2015 survey of 818 global CEOs.** The study also strikes a cautionary note, saying, "People's expectations are escalating – and few enterprises can single-handedly provide the compelling, individualized experiences customers now demand."[9]

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Projects Are Hard – Their Failure Rate Is Shockingly High

Despite the high expectations of global CEOs and other C-suite executives, the shortage of internal CEM and CX skills and experience within businesses, government agencies, and other organizations cannot be overstated. (In fact, many senior executives understand this reality and have accordingly placed a higher emphasis on talent development and acquisition.) Consistently, global market research over a prolonged time period corroborates that too many projects fail. CX technology buyers clearly need help:

■ **In a global survey of 1,200+ organizations, 81% of respondents said their initiatives failed over the past three years.** This failure rate could and should discourage the most stalwart CEM proponents. Fortunately, the survey also found a strong correlation between an effective program and increased profits.[10]

■ **Only 1% of US firms, and no firms in Germany, France, or the UK, achieved an excellent rating in Forrester's 2015 CX Index.**[11] In fact, 84% of the brands in the United States and Germany, 87% in the UK, and an astonishing 100% in France were rated mediocre or worse (i.e., OK, poor, or very poor).[12]

■ **In mid-2015, DCG uncovered numerous project failures when interviewing more than forty firms about their content management systems for CX initiatives.** Approximately 40% of those selection and implementation projects failed, often because stakeholders disagreed with the project team's requirements criteria, which were too technical and not strategic.[13]

■ **The Standish Group's annual survey consistently shows that around 70% of organizations fail or fall short of expectations from all IT initiatives – not just CEM.** *That is an astounding number –* one which would never be acceptable in, say, bridge construction or heart surgery or most any other high-risk yet routine discipline in the modern world.[14] And the failure rate occurs year after year, according to the annual results.

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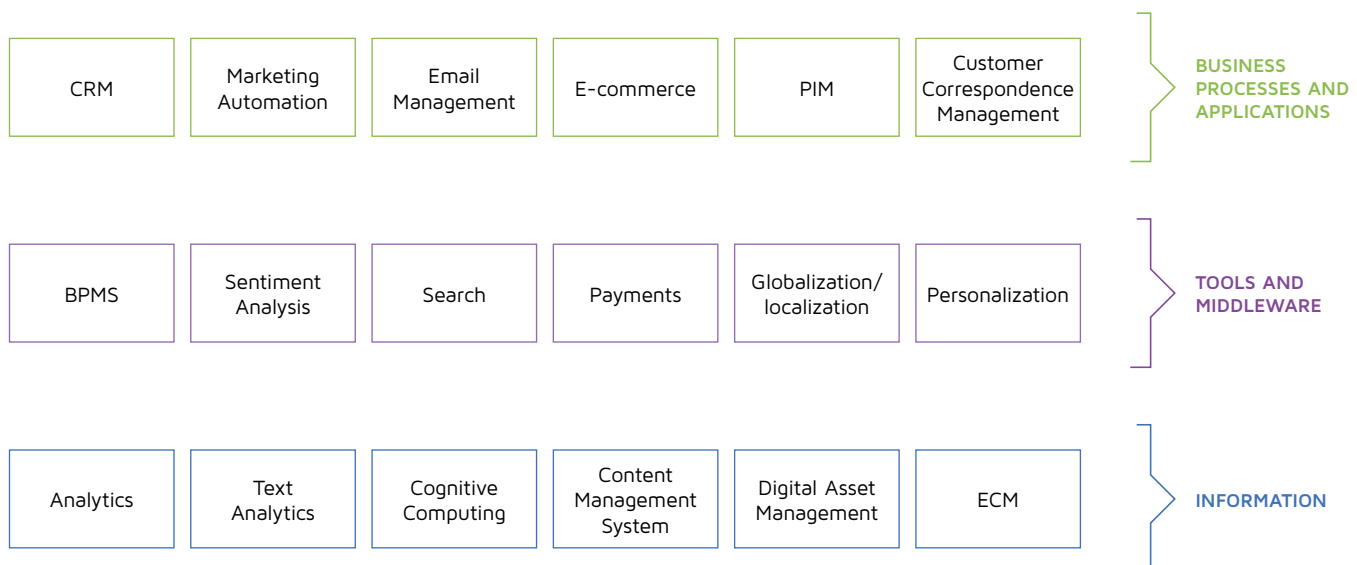## Many Firms Tap Service Providers to Augment Internal and Vendor Resources

Unfortunately, no "one-size-fits-all" solution exists for managing customer experiences, which makes projects hard, complicated, and very new to most organizations. Most enterprises lack the resources to deploy these programs internally and instead turn to their IT partners – software vendors, systems integrators, design agencies, management consultants, and other service providers – to help them skill/reskill their technical resources.[15] This is a smart approach. But therein also lies the problem – some fast-growth vendors or vendors reinventing themselves are equally overwhelmed by the need for trained technical resources. These vendors find it taxing to support their customers' requests, although they would never admit such a thing.

This leaves project teams, quite often, without deep internal support or substantive vendor support.

That's why, when buying CX software, it's vitally important to look at the vendor's ecosystem for delivering implementation support through qualified, experienced service providers. (Figure 1 depicts selected CX technologies.)

Without a strong ecosystem, CEM initiatives may stall out while the organization struggles internally to assemble a team of project managers, business analysts, developers, and other resources who are sufficiently experienced, qualified, and trained on CX technologies and core platforms (like cloud and mobility). Ultimately, buying products involves a lot more than acquiring code – the vendor's ecosystem for supporting the buyer through service providers is equally, if not more, important.

Figure 1
Selected CX Technologies

| CRM | Marketing Automation | Email Management | E-commerce | PIM | Customer Correspondence Management | **BUSINESS PROCESSES AND APPLICATIONS** |

| BPMS | Sentiment Analysis | Search | Payments | Globalization/ localization | Personalization | **TOOLS AND MIDDLEWARE** |

| Analytics | Text Analytics | Cognitive Computing | Content Management System | Digital Asset Management | ECM | **INFORMATION** |

Choose Carefully – Service Providers Are Not Created Equal

This report's mantra may seem to be: "to lower project risk, get a service provider." And, yes, that is certainly true and part of the equation for success. However, not all service providers are equally good at CEM, so just hiring a service provider isn't good enough. Instead, it's absolutely crucial to choose the right service provider with the right experience, skills, business acumen, and strategic perspective. In other words, bringing any service provider on board usually lowers the risk of failure or mediocre results, but that alone is not enough for successful outcomes. Instead, the correct mantra is, "to lower project risk, get the right service provider for your CEM initiative."[16]

Here are the reasons why engaging the right service provider is vital:

- **Most CX products that are on the market for a while, with a good track record, can get the job done.** One product may require more work than another, but most of the products are sound. This statement flies in the face of conventional wisdom, which says teams must deeply analyze the product's functionality, rate and weight each feature at a detailed level, and spend weeks deciding which product scores highest. Sure, the team can do this, but often the effort put into such a detailed analysis is truly overkill. If the technology vendor is reputable, the software has a good installed base, and the references are strong,

then whichever shortlisted product is chosen is likely to be capable of getting the job done. *But that's only a latent success, not a given result. The most crucial ingredient is the service provider*. The service provider sets the project's success in motion by doing or guiding all the work. Without a strong service provider, even the best of products may not succeed in the end, while with a strong provider, even "B" products may deliver a resounding success.

- **Within reason, the technology selection is almost inconsequential to success as compared to the service provider selection.** Choosing an appropriate technology to solve the problem at hand doesn't get the project team any closer to success if it doesn't pick the right partner. Basically, it's like hurdling a pit of quicksand on a 3-mile hike through the jungle – you avoid a potentially fatal problem but still have to make it through the jungle. Selecting the right technology can avoid a huge problem, but it doesn't get the project team any closer to your ultimate destination. For that, you need the right service partner – one that has more than surface knowledge about the ten core competencies that CEM initiatives require (See Figure 2):

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Business process management (BPM)

With customers more likely than ever to switch brands and suppliers due to sub-optimal experiences, organizations must look at their internal processes from an outside-in perspective, aligning internal process maps with the customer journey.

Business strategy

CEM takes the definition of business strategy one step further than its typical scope, requiring a business strategy to put the views, needs, and aspirations of its users at the center of all its activities.

Content strategy

Consumers live in a media-rich world where video, audio, and text in various combinations are a given part of their daily routine. Underpinning this content is a well-defined strategy of how to create, distribute, manage, and deliver unstructured content.

Customer data/intelligence

Customer data from CRM, websites, e-commerce, social tools, billing, and other systems provides an unprecedented ability to track, understand, tailor, and anticipate digital and physical experiences for customers. Data management platforms, CRM, and analytics are crucial for gaining data, intelligence, and insight into customers.

Figure 2
The Ten Core Competencies for CEM
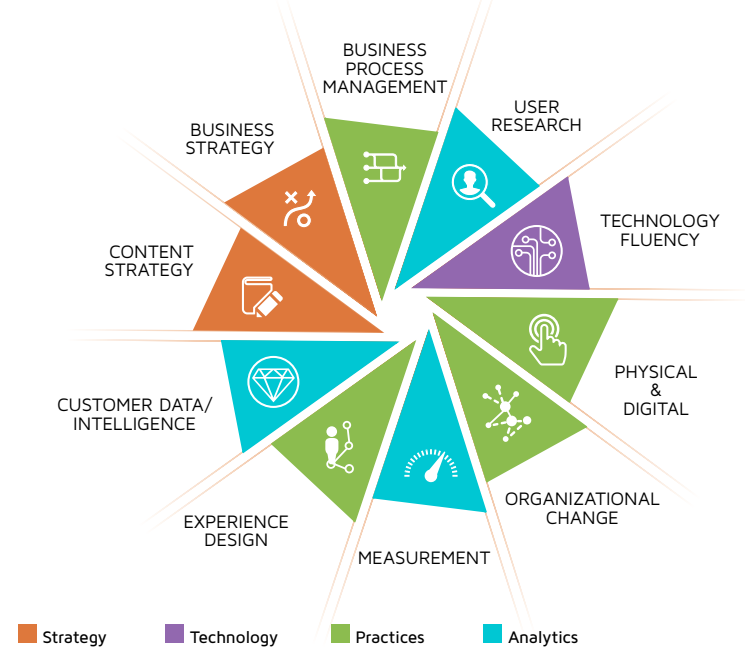
Experience design

Experience design combines research insight, design, and technology to create great experiences for customers by engaging customers' senses, emotions, and values over time using all media available, from physical to digital. Experience design focuses on the entire customer journey across channels, touch points, and interactions.

Measurement

This is how an organization can determine whether it is actually providing great customer experiences or if it is falling short. Employees and business units need a complete picture of how the measurement is calculated, and guidance for what and how they can do better.

Organizational change management

Re-orienting a business from top to bottom around CX inevitably requires changes in an organization's existing division structures, reporting lines, job roles, and compensation. For change to be successful, leaders – from senior executives to team leaders – must lead, plan, and manage the process so that employees understand the rationale and purpose behind the changes.

Physical + digital

While digital is an essential part of CEM, humans are social creatures, and their lives – and interactions with brands – are made up of in-person, physical experiences that are equally important. An organization must address both worlds because different demographics, such as age groups and geographic regions, require different ways and media to liaise with suppliers.

Technology fluency

Vendor certifications and deep expertise in fields like cloud computing, managed services, J2EE, CMS, and commerce comprise just one piece of the technology fluency needed for CEM initiatives. Teams must also troubleshoot the specific quirks with any vendor's or open source product, and customize those products to suit the organization. This requires substantial training in a vendor's baseline technologies as well as training and certification in specific products.

User/customer research

For an organization to succeed, it needs a thorough understanding of its customers, its sales channels and partners, and its employees. This encompasses a variety of techniques ranging from observational market research, ethnographic research, and segmentation, to personas and user scenarios, social listening, and gathering solicited and unsolicited feedback.[17]

It's not just about working with a service provider. It's about working with the right service provider at the right time.

It's important to note that different types of service providers are strong or weak at each of the core competencies. Figure 3 shows how they stack up against one another. This should definitely be taken into account when selecting a service provider.

Figure 3
Factors to Consider When Choosing a Service Provider

	Management consultancies	Advertising/ creative agencies	Marcomms/PR firms	Digital agencies	Systems integrators
Branding, Positioning & Storytelling	Some	Core	Core	Some	None
Business Strategy	Core	None	None	Some	None
Business Process Transformation and Implementation	Some	None	None	None	Some
Content Strategy	Some	None	Good	Good	Some
Customer Data/Intelligence	Good	Some	None	Very good	Good
Earned Media	None	Good	Core	Some	None
e-Commerce	Some	None	None	Good	Good
Experience Design	None	None	None	Very good	Good
Measurement	None	Good	None	Very good	Good
Migration and Integration	None	None	None	Some	Core
Organizational Change Management	Core	None	None	None	Some
Paid Media	None	Core	Good	Very good	None
Physical + Digital	None	Some	None	Very good	None
Technology Fluency	Some	None	None	Good	Core
User Research	Very good	Good	Some	Some	None

Legend:
- No capability
- Some capability but not a major thing
- Good capability: regularly does
- Very good capability: often does
- Core capability: major part of business

Table 1 identifies the reasons that companies engage service providers for assistance with their CEM initiatives. These reasons are valid and can be used to make the business case. However, going with the understanding that not just any service provider will do, Table 2 identifies actual problems and issues that arose when firms brought in service providers poorly aligned with their projects.

Table 1
Reasons to Use a Service Provider for CEM Initiatives

Strategy		■ Align the organization on CEM as a core value
		■ Overcome a limited vision of what CEM entails
		■ Provide insight/guidance into the "art of the possible"
Skills		■ Offset missing internal CEM skills
		■ Provide skills/experience on newly emerging technologies
		■ Overcome limited skills on new platforms (e.g., cloud, mobile, social)
		■ Supplement a small internal technology staff
		■ Keep CEM going while other projects use internal resources
Project management		■ Institute CEM best practices
Data insight		■ Provide the data/analytics/metrics/etc. to understand, identify, and leverage CEM data
Organizational change management		■ Evangelize CEM
		■ Provide a bridge across the organization that fosters change
		■ Create a better partnership between marketing and IT
		■ Bring an organizational change management methodology

Table 2
Problems When Hiring the Wrong Service Provider

Skills	
	■ Lack of essential knowledge and depth on a particular platform/product
	■ Poor job with development/customization
	■ Impossibly complex migration to the new platform (should have known so at the start)
	■ Inability to integrate the new platform with other applications (and should have known so at the start)
	■ Incorrect assumption that SaaS will have no impact on existing IT operations
	■ Uneven knowledge/skills across geographic regions
	■ Incorrect assumption that SaaS applications are simple to configure
	■ Bad technology implementation due to all of the above

Project management	
	■ Project off schedule when it's too late to alter much
	■ Work secretly offshored to remote service providers (e.g., to India, Romania) instead of local resources (US, UK, etc.)
	■ Conflict, disruption, and lost productivity due to different values between the service provider and the client
	■ Project timeline overruns due to lack of necessary skillset in service provider team
	■ Client assigned to the "B" team; not seen as a priority client
	■ No communication between the technology vendor and service provider to resolve critical problems (despite certified rating)
	■ Inconsistent quality of work across regions and widely varying project approaches
	■ Poor coordination within the service provider due to recent acquisitions

Budget	
	■ Overcharges for items that were never budgeted
	■ Budget overruns due to miscommunication, misaligned vision, lack of understanding/experience

Methodology	
	■ Poor requirements gathering (wish list rather than realistic list)
	■ Failure to map and understand the impacted business processes
	■ Conflicting approach/methodology, such as: agile vs. waterfall, offsite vs. remote working, and "do & dump" vs. educate
	■ No process for handing off training and documentation to key users
	■ No knowledge base to consult when problems arise after the project goes live

Organizational change management	
	■ Failure to fully involve individuals impacted by the changes
	■ Dependency on management inputs without talking to workers

Lower Your Risk When Selecting Service Providers

The true keys to successful technology solutions are people and process – and CEM is no exception. Digital leaders know this but lack the data and insights to make the best choices for their organizations. Better decisions, better performance, better services, better success rates – all are possible with verifiable knowledge of what works and what doesn't. VOCalis, a new offering from DCG, addresses this critical market need.

VOCalis is a VOC assessment service to evaluate the performance of CEM service providers (such as digital agencies and systems integrators) according to their customers. Under the VOCalis banner, DCG gathers input from customers who are implementing CX solutions and from the service providers who are working on those implementations. These projects can be very large-scale CEM transformation projects or smaller scoped projects to implement a specific technology. We analyze and aggregate the inputs, providing insights to buyers, service providers, and vendors through benchmarking data, research reports, custom analysis, and subscription-based research.

Evaluating any type of technology service provider is hard. Industry analysts shy away from it because these firms are difficult to categorize and even harder to compare in a meaningful way. Inevitably, attempts to compare service providers result in a least common denominator analysis that looks at numbers of trained staff, certifications, numbers of projects, average project size, and other metrics that can be obtained from the service providers.

We take a different approach. Rather than trying to compare and contrast service providers based on the data they give us as analysts, why not ask their customers directly about how they have performed in the past? And ask many customers – hundreds – not just a few. After all, while technology vendors sell products, service providers sell promises. One of the strongest predictors of future success is demonstrated consistency in past performance as measured by many customers.

VOCalis Provides Insights to Customers, Service Providers, and Vendors

VOCalis offers a standardized open benchmark for determining good performance by implementation partners. The program evaluates implementation partners of all shapes, sizes, and locations, and measures their relative performance side by side. This approach provides insights for customers, service providers, and vendors:

- **Buyers can use this data to help select the best implementation partner to meet their specific needs.** Matching service providers to the buyer's size, budget, region, and project type is far superior to hiring whichever service provider the vendor recommends.

We take a different approach. Rather than trying to compare and contrast based on our view as analysts, why not ask their customers about how they have performed in the past?

- **Service providers can compare and benchmark themselves with peers.** This allows service firms to better understand what buyers are seeking and how buyers evaluate success.

- **Technology vendors can better understand how different channel partners are faring with customers using their technology** and, in many cases, identify problem situations before they snowball out of control.

The Service Provider Analysis Draws upon Primary Data from End Customers

The VOCalis approach reflects the views and feelings of customers that hired implementation partners. Performance data gathered through interviews and surveys is the sole metric for ranking one implementation partner against another. More predictable or obvious metrics, such as financial stability, and highly subjective metrics, such as market perceptions regarding the partner viability or competitive standing (for example), play no role in this analysis. VOCalis simply, but powerfully, reflects the voice of the customer. To gather customer data we take four different routes: online surveys of service provider customers,[18] in-person interviews with service provider customers,[19] phone interviews with service provider customers,[20] and phone interviews with service providers.[21] These inputs provide a true 360-degree view of project activities and recognize the complexity of CEM engagements (see Figure 4).

Figure 4
VOCalis Maximizes Rich Data Collection on Service Provider Performance

PROPOSAL, DISCOVERY & DESIGN
- Customer's needs
- Scope of work
- Customer's definition of success
- Roles and responsibilities
- Risk management
- Pricing issues
- Other key topics

IMPLEMENTATION
- Technical competency
- Staffing levels
- Managing scope changes
- Dispute resolution
- Quality control
- Project documentation
- Other topics

Customer surveys and interviews

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PROJECT OUTCOMES
- Budget
- Project results
- Business value versus investment
- Other outcomes

The Clarity Index for Service Providers Tells the Story

The VOC data gathered on a weekly, and even daily, basis is compiled into the Clarity Index for Service Providers™ and published quarterly (see Figure 5). The index visualizes rich customer feedback data into a format that is easy to read and understand. At a glance, any reader can see how different implementation partners fare in the analysis – whether they are providing above-average or below-average project work. The data collection tool and analysis process examines each service provider's results based on four focus areas:

1. business value provided,

2. project management capabilities,

3. relationship management, and

4. technical skills.

The Clarity Index for Service Providers gives DCG the means to plot service providers in three dimensions:

1. the breadth and reach of the service provider (is it a local or global player?),

2. the typical size of projects that the service provider engages in; buyers are asked to identify their project scale accordingly, and

3. most importantly, how existing customers rate the quality of the service provider's work.

As might be expected, very few service providers deliver consistently outstanding work, but increased due diligence is strongly recommended when customers consistently encounter challenges in working with the service provider. The index has been designed to help project teams build shortlists of service providers that meet their needs in terms of scale, reach, and service quality.

Figure 5
The Clarity Index for Service Providers
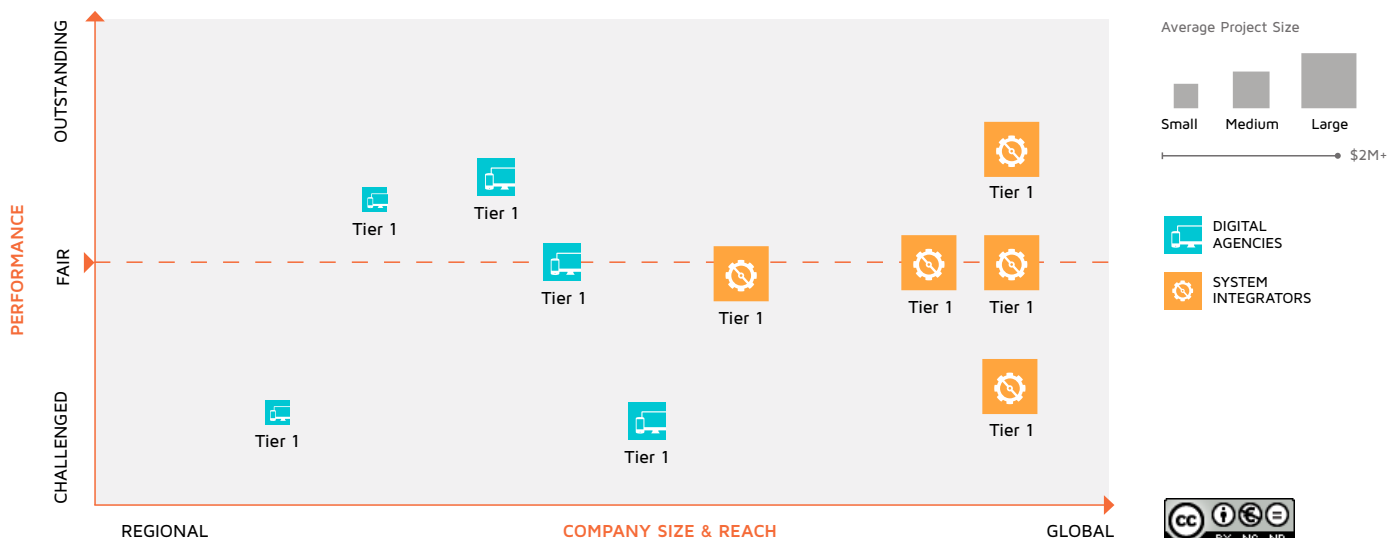
The Voice of the Customer Speaks Volumes

Already, the VOCalis interviews are reaping great insights and detailed information about service provider performance. Here are the voices of four customers we interviewed who had plenty to say that would help future buyers of professional services:

- **Avoid relying on the vendor's support staff.** "We used the vendor's own professional services only to discover that they really only understood their own products and not how they [their products] integrate and run with other systems. We ended up having a very difficult time and wish we had disengaged from them sooner. Ultimately we brought in another service provider that turned the situation around in a couple of months. In our opinion [the second firm] knew as much, if not more, about the technology vendor's systems than the vendor itself."

- **Be careful when service providers are deeply embedded with your own senior executive team.** "It took us two years to remove a major system integrator from the project due to its influence over our most senior management. Once we finally did remove them from our project we discovered we had to rip and replace two years of development code."

- **Watch out for a revolving door of service personnel.** "Not one member of the original service provider team assigned to us remained at the end of the project – they continuously swapped out key team members without telling us. At the end of 18 months we were working with the fourth project manager they had assigned to us."

- **Beware of the digital agency punching above its own weight (and failing).** "We selected a midsized and well respected digital agency to work on our project. They were great people and did some awesome design work, but both we and the service provider soon came to the realization that they were out of their depth meeting our complex requirements."

All of these situations could have been avoided if as much work had gone into selecting the service provider as it did the technology vendor. And hearing the voice of the service provider's customer can definitely help.

Already, the VOCalis interviews are reaping great insights and detailed information about service provider performance.

Endnotes

1 Customer experience management (CEM) is a business discipline that encompasses the strategies, processes, skills, technologies, and commitments that aim to ensure positive and competitively outstanding customer experiences. For more details, see "The CEM Imperative: Customer Experience in the Age of the Empowered Consumer."

2 For more insights into which executive drives CEM, see "Who Drives Customer Experience: The CIO, The CMO, or Fill-In-The-Blank?"

3 See DCG's report, "Innovative Programs for Developers Are Crucial to CEM Success."

4 The term "service provider" refers to outside agencies that firms engage to design, develop, implement, and in some cases also run IT applications and systems. This report specifically refers to service providers for CEM initiatives. Service providers come in many shapes and forms. Some are global operations employing hundreds of thousands of people with a very broad and deep set of skills across a range of technologies. Others can be small companies focusing their efforts on a particular technology, location, industry, or on a combination of all three. For a more detailed breakdown of the service provider landscape see DCG's report, "The Five Types of Customer Experience Management Service Providers."

5 An analysis of ten Forrester Waves from 2016 shows an average of 10.1 vendors and 26.5 criteria per wave. For more on the methodology, see Forrester Marketing Policies.

6 The KPMG Now or Never 2016 Global CEO Outlook includes a survey of nearly 1,300 CEOs in ten of the world's largest economies, plus an additional eighteen countries.

7 Ibid.

8 Redefining Business Success in a Changing World CEO Survey, PwC's 19th annual global CEO survey, was conducted with 1,409 CEOs in eighty-three countries.

9 Redefining Competition, Insights from the Global C-suite Study – The CEO Perspective, is the second part of IBM's new C-suite Study. In 2015, IBM surveyed 5,247 business leaders from twenty-one industries across more than seventy countries. The current installment focuses on the responses of the 818 CEOs who participated in the C-suite study.

10 The survey conducted globally across thirteen countries by independent market research firm Dynamic Markets (on behalf of Avaya) included: the United States, Canada, Mexico, Brazil, the United Kingdom, Germany, the Netherlands, Russia, China, Singapore, Japan, India, and Australia. More than 1,500 employees at 1,268 businesses were interviewed; 54% of the respondents were at senior-management level or above. See http://www.avaya.com/usa/about-avaya/newsroom/news-releases/2014/pr-140429.

11 The research evaluated consumers' attitudes toward 299 brands in the United States and 203 brands in Europe.

12 Forrester surveyed 46,000 consumers in order to evaluate the CX performance of 299 US brands across 17 industries. In a change from previous CX Indexes, "excellence" was reserved for those brands that "design and deliver a CX that actually helps the business by creating and sustaining customer loyalty." The Q1 2015 CX Index was published April 20, 2015; the Q3 report was published September 28, 2015. See Michael Gazala's blog analysis of the declining scores. Joana van den Brink-Quintanilha's October 5, 2015 blog post makes it clear that Forrester interprets an "OK" rating as "mediocre," rather than as "not bad."

13 For a description of failed CMS projects, see DCG's report, "Five Crucial Lessons Learned in Content Management System Selections," by Connie Moore.

14 See Standish Group 2015 Chaos Report, Q&A with Jennifer Lynch.

15 For an overview of the service provider landscape, see DCG's report, "The Five Types of Customer Experience Management Service Providers," by Alan Pelz-Sharpe and Jill Finger Gibson.

16 See DCG's blog post, "Do you suffer from service provider afterthought syndrome?"

17 See DCG's report, "Ten Core Competencies for Customer Experience Management," by Jill Finger Gibson.

18 The VOCalis survey is available online at no charge and with no access restrictions other than validation that the surveyed person is genuinely an implementation partner's customer and has been directly involved in the project work. Online access to the survey is available through the DCG website and on occasion via direct outreach campaigns.

19 DCG analysts travel to many industry events in the course of each year where we gather data via interviewing customers at these events.

20 Most survey data gathered so far has been conducted via phone, speaking directly with the customer involved in the implementation project.

21 We also reach out to the service provider's lead personnel to get their perspectives on how key areas are working on various projects. We know that problem situations are not solely due to the actions of a service provider; actions by customers can also aggravate or elevate negative situations. Service providers regularly report that buyers provide incomplete requirements or assign staff that are unqualified to work with them on projects.

About Digital Clarity Group

Digital Clarity Group is a research-based advisory firm focused on the content, technologies, and practices that drive world-class customer experience. Global organizations depend on our insight, reports, and consulting services to help them turn digital disruption into digital advantage. As analysts, we cover the customer experience management (CEM) footprint – those organizational capabilities and competencies that impact the experience delivered to customers and prospects. In our view, the CEM footprint overlays content management, marketing automation, e-commerce, social media management, collaboration, customer relationship management, localization, and search. As consultants, we believe that education and advice leading to successful CEM is only possible by actively engaging with all participants in the CEM solutions ecosystem. In keeping with this philosophy, we work with enterprise adopters of CEM solutions, technology vendors that develop and market CEM systems and tools, and service providers who implement solutions, including systems integrators and digital agencies.

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