

# Avoid These 14 CX Misconceptions

by Rick Parrish, Kelly Price, Ryan Hart, Andrew Hogan, TJ Keitt, Faith Adams, Maxie Schmidt-Subramanian, and Samuel Stern

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## Why Read This Report

To provide a great customer experience (CX) reliably and efficiently, companies must master all six competencies of CX management (CXM). However, misconceptions can cause even the most experienced CX professionals to stumble along the path to CXM maturity. In this report, we detail the most common misunderstandings and explain how CX professionals can get back on track.

## Key Takeaways

### **Common Misconceptions Stunt CX Management**

Mistakes span all six CXM competencies and start with the belief that CX teams can assess CXM on their own.

### **Some Misunderstandings Happen At The Strategic Level**

The belief that firms should compensate employees on a high-level CX metric like Net Promoter Score is one of several strategic misconceptions. Companies should recognize employees for specific customer-centric behaviors that drive better CX outcomes, rather than the outcomes themselves.

### **Other Misunderstandings Are Tactical**

CX pros slip up at the tactical level when they think that user testing alone creates a real understanding of customers. CX pros should think of user testing as one piece of a larger research puzzle and perform an “assumption dump” exercise before every project.

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### Table Of Contents

#### 2 Avoid These Misconceptions As You Pursue CX Management Maturity

Research

Prioritization

Design

Enablement

Measurement

Culture

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## Avoid These Misconceptions As You Pursue CX Management Maturity

To provide great CX reliably and efficiently, companies must master the six competencies of customer experience management: research, prioritization, design, enablement, measurement, and culture (see Figure 1). However, common misconceptions can cause even the most experienced CX professionals to stumble along the path to CXM maturity.

Here are some of the most common misapprehensions we hear from CX professionals — and what they really need to know:

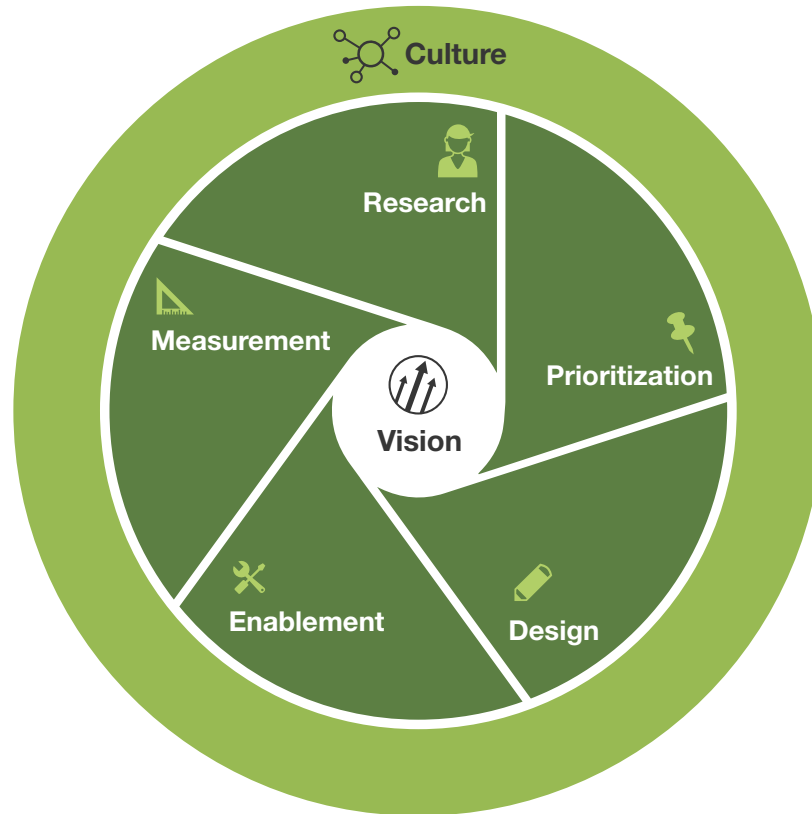
1. **“We don’t need stakeholders’ help to assess our company’s CXM maturity.”** CX executives sometimes allow only their teams to participate in CXM maturity assessments of an entire organization. These leaders worry that involving employees outside the CX function will cause three problems. First, that employees who are not CX experts won’t know the “real” answers to maturity questions. Second, that different answers from employees in various parts of the organization will muddy the picture of the firm’s CXM maturity. Third, that employees who see the assessment will expect the company to address gaps and will be disappointed if they don’t see action.

**Reality:** CX teams must cast a wide net to truly understand the state of their companies’ CXM. CX pros should survey a wide range of stakeholders, and then look for both trends and gaps across business units, roles, and levels of seniority. CX teams that do this will discover three things: First, that the right answer to a CXM question depends on context, like the differences between two business units. Second, that exposing differences will reveal bright spots and problem areas. Third, that broad stakeholder involvement will generate excitement for CXM improvements and help break down the institutional barriers that stymie CX transformations.

2. **“We should aim to master all six CXM competencies.”** It’s easy for passionate CX professionals to assume that the more sophisticated the CXM, the better. After all, achieving the highest level of CXM allows companies to consistently provide exceptional experiences. As one CX professional told us, “I want [my company] to check all the boxes for CX management so I know we’re doing everything we need to succeed.”

**Reality:** Depending on a company’s overall strategy and level of urgency for CX transformation, top-notch CXM isn’t always necessary for success.<sup>1</sup> CX pros should target a level of CXM maturity based on their company’s mission, vision, and values and how vital CX is to the brand’s ability to compete for customers.<sup>2</sup> Maturing beyond that level wastes resources and reduces the ROI of CX investments. Companies that don’t need reliably great CX to thrive can settle for simply establishing each competency without mastering it. This alone will allow them to fix their worst experiences and avoid creating new ones. In contrast, brands that depend on a differentiated experience but don’t aspire to be CX leaders can stop when they’ve advanced each competency to an intermediate level. Only firms for which CX is the bedrock of their existence or potentially critical for business success need to innovate in each competency.

**FIGURE 1** The Six Competencies Of CX Management



## Research

The research competency requires companies to understand their customers in depth and communicate that understanding to stakeholders. CX professionals short-circuit rigorous research when they say:

3. **“We understand our customers because we user test our products and services.”** Firms that equate prototyping and testing with customer understanding research risk creating products that work well but don’t serve customers’ needs. The team leading one firm’s website redesign discovered this when it added a feed highlighting friends’ activity. The team tested the design to ensure that it worked well, but it failed to understand that the feature was useless because users rarely visited the site and weren’t looking for friends there. The firm’s research lead told us that its “culture of testing [without deeper customer understanding] was resulting in a mismatch between user goals and the product approach.”

**Avoid These 14 CX Misconceptions**

**Reality:** CX pros should think of user testing as one piece of a larger research puzzle. Teams should perform an “assumption dump” exercise before every project, to identify what they *think* they know about customers and whether they have evidence for these beliefs. This will help teams identify where the research process should begin: When there is little evidence of a real customer need, teams should begin by researching customers’ goals and problems before moving into solution development and testing. Once teams do have strong evidence of a customer need, they can start prototyping and testing.<sup>3</sup>

4. **“We can create good personas without knowing what we’ll use them for.”** When CX pros launch persona projects without considering why, their efforts result in personas that might be interesting but are not suited to any particular purpose. As a result, firms become disillusioned with personas. As one stakeholder put it: “[Personas] have actually become a way that people don’t think about our customers in real terms anymore. We now think about [the persona’s] face, but I don’t think that actually helps you understand what people are doing.”

**Reality:** CX pros should start by defining the purpose and scope of their persona effort. A macro-level persona project creates enterprise personas to facilitate widespread alignment around a firm’s core customers and inform high-level business decisions. A micro-level project generates personas to guide design decisions for specific products and feature sets. After establishing the scope, create an action plan for how the persona will drive change. Answer questions like, “Who will need to use the persona, and how?” and “What existing processes will we inject the personas into?” When choosing an agency to develop personas, choose a partner that also offers a sound implementation plan.<sup>4</sup>

**Prioritization**

The CX prioritization competency requires firms to focus on what’s most important for their customers’ experience and their own business success. CX professionals lead prioritization efforts astray when they contend that:

5. **“We should prioritize efforts based primarily on complaint volume or intensity.”** The loudest and most frequent complaints are not necessarily the most important. Focusing on them will burn out a CX team and divert its attention from higher-value customers who might not be as vocal about their problems. HSBC Canada found that most of the complaints to its call center came from customers with lower lifetime values and fewer assets under management. In the meantime, more valuable customers who had problems were suffering in relative silence, so the bank wasn’t improving their experience.

**Reality:** CX pros should focus their companies’ resources on improving their most valuable customers’ most important interactions.<sup>5</sup> Improvements to these experiences will boost CX quality for other customer segments, too. For example, USAA invented the mobile check deposit feature to solve a key pain point for its most important persona. The feature proved so useful that now nearly all banks have copied it.

**Avoid These 14 CX Misconceptions**

6. **“We should start our CXM efforts by establishing the prioritization competency.”** When companies begin their CX transformations, CX pros face a long list of possible projects that they could tackle — *if* they had enough resources, which they typically don’t. Firms often assume that the solution is to quickly establish the prioritization competency to help them focus all their other CX efforts. Unfortunately, companies that try this approach find it impossible to prioritize effectively because they lack critical inputs to the prioritization model, like the customer impact and business impact of proposed initiatives. The reason: These inputs to the prioritization competency are outputs from other competencies.

**Reality:** CX pros should establish the research and measurement competencies before focusing on prioritization. The research competency reveals what’s most important to customers; the measurement competency shows what’s broken about the current CX and how that has an impact on business KPIs like revenue per customer. CX pros can use this information to assess the customer impact of possible CX changes and focus their efforts where they’ll have the greatest effect. For instance, CA Technologies used customer feedback and deeper research to understand that technical support was a critical driver of the experience and that the company was slow to respond to routine technical problems. Armed with this knowledge, the company took on a four-year effort to reduce the inconsistencies in the support organization by instituting global training programs.

## Design

The CX design competency involves defining and refining experiences based on the brand’s vision and research-based customer understanding. CX pros hinder their ability to design great experiences when they say that:

7. **“We can substitute employees for customers when user testing designs.”** Even when employees are customers of their own companies, they carry knowledge, opinions, and motivations that taint feedback with an inside-out perspective. For instance, research shows that during usability testing, employees spend less time on task on competitor sites, and they rate competitor apps and websites more critically than nonemployee testers.<sup>6</sup>

**Reality:** To test experience designs more effectively, CX pros should recruit only nonemployees who are actual or potential customers of the experience the company is designing. There are many inexpensive ways to recruit testers, such as internal customer databases and Craigslist.<sup>7</sup> When legal or organizational hurdles make looking outside the company impossible, test with employees who are either new and have less institutional knowledge or are in roles with no exposure to the experience the company is testing.

8. **“We should design our CX for ease; we don’t need to worry about emotion.”** When companies remove roadblocks and decrease friction, they often eliminate confirmations and information that create more positive emotional experiences. That’s a problem because our research shows that emotion is the most important dimension of an experience for most industries.<sup>8</sup> Consider the difference between a one-click purchase of a tube of toothpaste and a similar purchase of

**Avoid These 14 CX Misconceptions**

a major appliance. Toothpaste is a simple and familiar product, so customers will feel positive about an easy order process that saves them time. However, customers buying a dishwasher may feel uneasy with a one-click process that fails to provide reassurance that they're choosing a trustworthy brand that meets their needs from a provider that will stand behind the product.

**Reality:** To design for emotion, use techniques that go beyond simply understanding pain points and uncover deeper needs like confidence and security. Then create experiences that elicit these emotions.<sup>9</sup> The Home Depot CMO Kevin Hofmann says: "Lots of things that we sell are complicated and scary, and oftentimes, just a one- or two- or three-time purchase for a customer in their lifetime. So [we offer] ratings and reviews, videos, high-fidelity images to make sure that customers can buy with confidence."<sup>10</sup>

**Enablement**

The enablement competency requires firms to provide employees and partners with the resources they need to deliver the right experiences. Faced with this daunting task, some CX pros mistakenly assume that:

9. **"We can rely on employees' common sense to deliver the right experience."** Empowering workers to do what they think is right is a key to retaining valuable employees.<sup>11</sup> However, giving employees too much latitude will lead to inconsistent experiences. For example, management consultancy Oliver Wyman notes that retailers that rely on store managers' discretion to execute special offers are at the mercy of each individual manager's skill set. This causes different performance from location to location.<sup>12</sup>

**Reality:** To balance empowerment and structure, CX pros must work with their business colleagues to establish guardrails around employee decision making.<sup>13</sup> For example, Ritz Carlton Hotels famously allow employees to spend \$2,000 per day, per guest to solve customer issues. This policy empowers employees to solve customer problems in the moment, within a well-defined limit. To follow Ritz's example, CX pros should identify moments of truth in the customer journey and provide employees clear, flexible guidelines on how to react.

10. **"We can avoid tackling the root causes of CX problems by treating their symptoms."** It's no wonder that CX pros would rather implement surface-level fixes than take on the complex ecosystems of people, processes, and technologies that lie behind experiences. Lloyds Banking Group (LBG) told us that in 2014, its CX transformation faced inadequate structures, processes, and peer alignment throughout the company. LBG tried to sidestep these deep challenges by focusing on simple fixes, like an iPad app for branch staff. LBG's CX efforts stalled.<sup>14</sup>

**Reality:** CX pros must convince their colleagues that it's worth the trouble to find and fix deep-seated impediments to CX improvement. Mapping the CX ecosystem is an essential first step.<sup>15</sup> LBG used CX ecosystem mapping to show stakeholders that new policies on product disclosure

**Avoid These 14 CX Misconceptions**

and risk, along with better employee training — not a simple iPad app — were the real keys to improving the in-branch customer experience. Faced with this reality, LBG elected to address the root causes of the problem and expects to improve in-branch CX while saving £500 million.

**Measurement**

The measurement competency requires companies to quantify the quality of experiences and their link to the organization's overall metrics. CX professionals hamstringing their measurement programs when they believe that:

11. **“There is a perfect top-level CX ‘beacon’ metric for our company.”** Many CX professionals waste time trying to find an enterprise-level metric that measures everything about CX in a single number and is actionable. But the quest for the perfect beacon metric is futile: No metric is perfect; each has limitations. Net Promoter Score (NPS), the most popular beacon metric, can obscure situations in which a customer's experience was negative, but not negative enough to make her stop recommending an otherwise good company.<sup>16</sup> Customer effort score, another popular high-level metric, measures only the ease of an experience and ignores its emotional dimension.

**Reality:** Find a beacon metric that is acceptable for your business by answering three questions: Does the survey question behind the metric make sense for *your* customers?<sup>17</sup> Does the metric energize *your* employees to improve CX?<sup>18</sup> Is the metric a good leading indicator for those customer behaviors that drive success in *your* organization? Then create a system of leading indicator metrics beneath the beacon that point to key improvements and create shared accountability for CX. Ingredion chose NPS as its high-level metric, and then created a measurement framework with operational, perception, and outcome metrics.<sup>19</sup> This framework helps Ingredion cascade its CX vision into the company and drive accountability for employees working individually and as part of cross-functional CX initiatives.<sup>20</sup>

12. **“If we build dashboards and reports, employees will use them.”** Unfortunately, only 19% of internal stakeholders use insights from voice of the customer (VoC) programs to improve CX.<sup>21</sup> In response, CX pros usually try to create more compelling data by fielding more surveys and creating new dashboards that push data to recipients.<sup>22</sup> But easy access and good data visualization won't go far with stakeholders who don't know the data exists, doubt its importance, or struggle to find the right data when they need it.<sup>23</sup>

**Reality:** To overcome these problems, CX pros should start by uncovering the reasons for stakeholders' resistance. Use tools like personas and journey mapping with those internal customers to understand their business and personal goals, attitudes toward CX metrics, and decision-making processes. Use these findings to make metrics relevant, specific, easy, and appealing to stakeholders. The head of the NPS program of Nationale-Nederlanden appealed to employees' curiosity to pique interest in NPS insights. When he first introduced the NPS



**Avoid These 14 CX Misconceptions**

dashboard, he made it black to stand out from the sea of orange corporate color. Employees who saw a coworker with a black screen got curious. Access to that dashboard was exclusive — it required a special code — which drew people in even more.<sup>24</sup>

**Culture**

The culture competency requires a business to create a system of shared values and behaviors that focus employees on delivering great CX. Customer-centric cultures matter because they allow companies to deliver great experiences by default and resist forces that might degrade the experience. CX culture transformations stall when CX professionals convince executives that:

13. **“We should compensate employees on NPS or another high-level metric.”** Recognizing employees and partners solely for getting a high rating from customers is a trap. When companies reward survey scores, employees find ways to game the system — like coaching customers on what scores to give or arguing that bad scores were unfair. When Guitar Center noticed that customer survey results and comments didn’t match, it had to retool its employee rewards program to stop store associates from influencing survey results. Similarly, Porsche discovered that its stellar Net Promoter Score was the result of dealers offering freebies to customers in exchange for higher scores.<sup>25</sup>

**Reality:** Companies should recognize employees for specific customer-centric behaviors that drive better CX outcomes, rather than the outcomes themselves.<sup>26</sup> Valuing behaviors helps employees focus on improving aspects of the experience that they can control, like showing empathy, practicing active listening, or demonstrating that they value customers’ time. Hertz identifies the right behaviors to reward by asking customers about specific employee behaviors like courtesy and speed of service.

14. **“A reorganization will fix our company’s culture problems.”** In reality, no organizational structure will cure all CX ills.<sup>27</sup> In fact, customer-centric reorganizations often do more harm than good: According to a Harvard Business Review study, companies’ return on assets suffered for three years after they reorganized to be customer-centric.<sup>28</sup> For example, software and services firm SunGard suffered an 81% drop in return on assets in the four years following its customer-centric reorganization in 2002. That kind of short-term pain saps support for customer centricity and builds enthusiasm for the next reorg, which traps firms in a cycle of repetitive reorganizations that never achieve their goals.

**Reality:** CX pros should provide detailed guidance to all employees and partners about what they can do to contribute to the intended experience. This behavioral guidance should be specific and role-appropriate, and it should build upon existing examples of positive customer experiences.<sup>29</sup> For example, Quest Diagnostics created a cross-functional core team to define supporting statements for each of its five guiding principles. The team had representatives from every functional area, as well as regional operations and corporate locations. The statements it developed went through a review process, with only critical changes made. The goal was to ensure that participants saw that the final statements still reflected their original contributions.

**Avoid These 14 CX Misconceptions**

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## Endnotes

- <sup>1</sup> For more details on planning the extent of a CX transformation, see the Forrester report "[The Five Essential Steps To Plan Your CX Transformation.](#)"
- <sup>2</sup> For more information on the three levels of CXM maturity in Forrester's CXM maturity model, see the Forrester report "[Gauge Your CX Management Maturity.](#)"
- <sup>3</sup> For a primer on effective customer research, see the Forrester report "[The Six Key Steps To Instituting Good Customer Research.](#)"
- <sup>4</sup> For more information on developing and using personas, see the Forrester report "[Persona Pitfalls: Seven Missteps And How To Avoid Them.](#)"
- <sup>5</sup> For best practices on prioritization, check the following report. It also contains a customizable prioritization matrix. See the Forrester report "[Prioritize Your CX Efforts By Three Categories.](#)"
- <sup>6</sup> Source: Joanne Locascio, Rushil Khurana, Yan He, and Jofish Kaye, "Utilizing Employees as Usability Participants: Exploring When and When Not to Leverage Your Coworkers," Association for Computing Machinery Digital Library, pp. 4533-4537.

**Avoid These 14 CX Misconceptions**

- <sup>7</sup> For more information on customer recruitment strategies, see the Forrester report [“How To Recruit Customers For Research.”](#)
- <sup>8</sup> Emotion has a bigger influence on customers’ loyalty to a brand than the ease or effectiveness of an experience in all 18 industries that we tested across seven global markets. For more details, see the Forrester report [“The US Customer Experience Index, 2017.”](#)
- <sup>9</sup> Even companies that try to design for emotion rarely tap its full potential. For best practices, see the Forrester report [“Designing For Emotion.”](#)
- <sup>10</sup> For more details on how The Home Depot and other companies design digital interactions for emotion, see the Forrester report [“Bridge The Gap From CX Strategy To Digital CX.”](#)
- <sup>11</sup> Feeling empowered to solve problems and challenges is the No. 1 driver of employee loyalty. Source: Forrester Data Global Business Technographics® Applications And Collaboration Workforce Survey, 2016.
- <sup>12</sup> Source: “Your Customers Want a Consistent In-Store Experience,” Oliver Wyman ([http://www.oliverwyman.com/content/dam/oliver-wyman/global/en/files/archive/2011/Consistent\\_In\\_Store\\_Experience.pdf](http://www.oliverwyman.com/content/dam/oliver-wyman/global/en/files/archive/2011/Consistent_In_Store_Experience.pdf)).
- <sup>13</sup> For a road map to establishing CX enablement, see the Forrester report [“Five Steps To Enable Customer Experience Delivery.”](#)
- <sup>14</sup> For more information on Lloyds Banking Group’s CX transformation, see the Forrester report [“Case Study: Lloyds Banking Group Transforms Through 10 Customer Journeys.”](#)
- <sup>15</sup> For detailed instructions on CX ecosystem mapping, see the Forrester report [“A Step-By-Step Guide To Mapping Your Customer Experience Ecosystem.”](#)
- <sup>16</sup> Net Promoter and NPS are registered service marks, and Net Promoter Score is a service mark, of Bain & Company, Inc., Satmetrix Systems, Inc., and Fred Reichheld.
- <sup>17</sup> Typical top-line CX metrics rely on a survey question — sometimes several. Answering that survey question is part of the customer experience. At a minimum, therefore, your survey question must make sense to customers. Customer satisfaction and effort clear that hurdle easily. NPS sometimes doesn’t. For example, CX professionals in financial services firms find that customers write in the open comment after an NPS question, “I gave a low score because I just don’t talk about finances to my friends.” Or CX professionals in nonprofit organizations find that customers feel ashamed to give a low score on the recommend question for an organization that does so much to cure cancer, educate children, etc. And there are other situations (limited choice, limited buying decision power, specialty industry) where the same issue applies. But the question should also make the customer feel good. The NPS question implicitly asks a customer for a favor: “Would you recommend us?” That can be an awkward way to start a survey.
- <sup>18</sup> A top-line metric that engages employees is simple to understand and creates a common language that employees can rally around. And it taps into issues that employees are passionate about.
- <sup>19</sup> A CX measurement framework needs three types of metrics: interaction, perception, and outcome. Interaction metrics measure what happens during the interaction. These metrics help to contextualize and operationalize perceptions. Perception metrics measure how customers feel about what happens and how this affects their overall CX. These metrics help to assess how well a company delivers against customers’ CX quality expectations. Outcome metrics measure what customers do as a consequence of the experience. They help tie CX quality perceptions to success (i.e., financials). For more details on the three types of metrics and setting up a systematic CX measurement program, see the Forrester report [“Establish A CX Measurement Program In Seven Steps.”](#)
- <sup>20</sup> For more details on Ingredion’s CX metrics framework, see the Forrester report [“How To Set Employee Goals That Drive Great CX.”](#)
- <sup>21</sup> Source: Forrester’s Q4 2016 State Of Customer Experience Programs Online Survey.

**Avoid These 14 CX Misconceptions**

<sup>22</sup> In a previous study among CX professionals who own or influence VoC programs, 65% want to make reports more actionable and 53% want to expand the number of people with which they share insights. Source: Forrester's Q4 2016 State Of Customer Experience Programs Online Survey.

The issue of actionability comes up a lot in discussions with CX professionals. The question of how to make data more “actionable” is often prompted by feedback from internal stakeholders who — upon seeing a dashboard or report — don't know what to pay attention to or how to improve CX. The knee-jerk reaction of many CX pros is to double down on surveys as a diagnostic instrument — for example, by adding more specific questions to existing surveys or fielding an ad hoc survey. Unfortunately, this practice takes up a lot of time while not typically improving guidance to stakeholders. That's because metrics aren't inherently actionable. All they can do is tell firms where there is a problem and give some insight into the nature of the problem. Building on that, CX pros must bring in other data (e.g., operational data, unstructured feedback, employee feedback) and work with stakeholders to analyze the real nature of the problem and find a solution.

An added downside of adding surveys and survey questions is that the resulting long and tedious surveys add a negative endpoint to the experience while adding to the overwhelming landslide of survey questions that appear in customers' email inboxes or pop up on their screens.

<sup>23</sup> For more information on engaging stakeholders, see the Forrester report [“How To Drive Action With Your Voice Of The Customer Program.”](#)

For the important role of data visualization, see the Forrester report [“Improve Your Storytelling With Data Visualization Best Practices.”](#)

<sup>24</sup> For more information about Nationale-Nederlanden's NPS program and other ideas for earning engagement from stakeholders, see the Forrester report [“Brief: Top 10 Ways To Rally Your Organization Around Customer Experience Metrics.”](#)

<sup>25</sup> Porsche wasn't even incentivizing NPS at the company level. Local operating groups had focused on NPS to improve their standing in the head office's eyes. Source: David Moth, “Porsche's battle to improve customer service and the Net Promoter Score,” Econsultancy blog, October 11, 2012 (<http://econsultancy.com/us/blog/10860-porsche-s-battle-to-improve-customer-service-and-the-net-promoter-score>).

<sup>26</sup> For more advice on recognizing employees for specific behaviors that drive CX, see the Forrester report [“Five Key Steps For Making Your Culture More Customer-Centric.”](#)

<sup>27</sup> For an in-depth discussion, see the Forrester report [“The Truth About Customer-Centric Org Structures: They're The Icing, Not The Cake.”](#)

<sup>28</sup> Firms did eventually see improved results from shifting their organizational structures to be customer-centric. But it was by no means a universal panacea. The competitive positioning of the firms dictated how much competitive benefit they would realize. Source: Ju-Yeon Lee, Shrihari Sridhar, and Robert W. Palmatier, “Customer-Centric Org Charts Aren't Right for Every Company,” Harvard Business Review, July 2015 (<https://hbr.org/2015/06/customer-centric-org-charts-arent-right-for-every-company>).

<sup>29</sup> For more detailed guidance, see the Forrester report [“Remove Barriers And Add Enablers For A Customer-Centric Culture.”](#)

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