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# Navigate The Future Of Customer Service In 2014

by Kate Leggett, February 6, 2014

## KEY TAKEAWAYS

### **In The Age Of The Customer, Delivering Good Customer Experiences Is The Key To Success**

Empowered customers are demanding superior customer experiences to garner their long-term loyalty. Better customer experiences can be correlated to increased revenue -- a win-win for businesses and customers.

### **Customer Service Leaders Struggle To Deliver Differentiated Service**

Many companies regard the customer service they deliver as a competitive differentiator. But the reality is that customer service organizations are still pressured to increase efficiencies and reduce costs. As customer service organizations try to find a balance between cost and customer satisfaction, customer service quality often misses the mark.

### **Customer Service Leaders Must Focus On The Four P's**

Good service is pain-free, proactive, personalized, and delivered with maximum productivity. The result is increased customer satisfaction and lowered operational costs.

### **Pragmatic Execution Is The Key To Success**

In 2014, we anticipate that the interest and investment in customer service improvement projects will continue to accelerate. You need to understand customer service trends, pinpoint the opportunities for wins, craft a sound business case, define projects with highest impact, and execute flawlessly.



## Navigate The Future Of Customer Service In 2014

Vision: The Contact Centers For Customer Service Playbook

by [Kate Leggett](#)

with William Band and Sarah Bookstein

### WHY READ THIS REPORT

In the age of the customer, executives don't decide how customer-centric their companies are — customers do. Changes such as the explosion of digital communications, mobility, and the acceleration of innovation are having a profound impact on customer expectations. Business and technology management professionals responsible for customer service are struggling to understand these expectations and are re-engineering end-to-end business processes, deploying new supporting technologies, and leading the organizational changes required to make the transition to new ways of working. This report is a comprehensive update to "Navigate The Future Of Customer Service" originally issued to clients on February 1, 2013. This report summarizes the top 12 customer service trends for 2014 that you must pay attention to in order to deliver customer service excellence. Use Forrester's customer service trends impact analysis framework to make your plans bulletproof.

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### Notes & Resources

We reviewed Forrester's most recent research in the customer service and CRM solutions space. We also analyzed our most recent inquiries from customer service solution buyers and users, vendors, industry analysts, and the media.

### Related Research Documents

[Embrace Continuous Improvement To Power Customer Service Operations](#)

November 6, 2013

[TechRadar™ For AD&D Pros: Contact Center Solutions For Customer Service, Q2 2013](#)

April 17, 2013

[Understand Communication Channel Needs To Craft Your Customer Service Strategy](#)

March 11, 2013



## FOCUS ON DELIVERING COST-EFFECTIVE YET DIFFERENTIATED SERVICE

In the age of the customer, executives don't decide how customer-centric their companies are — customers do. And providing good customer experiences is a win-win for customers and companies. Customers are more loyal, and loyal customers are more willing to consider another purchase from a company, less likely to switch business to a competitor, and likely to recommend the company to a friend or colleague.<sup>1</sup> For example, the revenue impact from a 10-percentage-point improvement in a company's customer experience score can translate into more than \$1 billion.<sup>2</sup>

Good service is pain-free, proactive, personalized, and delivered with maximum productivity. For many companies, delivering this level of service is a cornerstone of their customer engagement strategy. Dimension Data reports that almost three-quarters of companies view the contact center as a competitive differentiator.<sup>3</sup> In addition, our research highlights that 15% of the budget of customer service organizations is spent on technology — separate from the BT spend on customer service — in order to deliver service in-line with these expectations.<sup>4</sup>

However, the reality is that customer service organizations are still pressured to increase efficiencies and reduce costs. As customer service organizations try to find a balance between cost and customer satisfaction, we find that the quality of customer service often misses the mark.

Customers are dissatisfied because organizations often deliver:

- **Inconsistent cross-channel experiences.** While not every customer interaction has to be identical, engaging customer service experiences require that the customer experience is unified across channels.<sup>5</sup> But the misalignment of current customer service governance processes and policies — siloed efforts for mobile, Web, phone, etc. — means that customers experience a different version of the company depending on which device and communication channel they choose.
- **Reactive, not proactive customer service.** Customers want to feel like the company has their best interests at heart and that the company is partnering with its customers to keep them satisfied and loyal throughout their engagement lifetime. Customers want full disclosure of issues with products and services that they have purchased. They want to be notified, for example, that a new software patch is available for their device before they detect the problem. And better yet, they want this proactive service to happen, whenever possible, behind the scenes so that problems are addressed before they happen.
- **One-size-fits-all customer engagement processes.** Few companies have explored personalized customer service using rule-based or predictive decisioning based on the past purchase history, interaction history, and personas of their customer base.<sup>6</sup> Most companies offer the same level and quality of service for all customers, leading to customer dissatisfaction as well as missed opportunities for targeted cross-selling and upselling.

- **Inefficient interactions with agents.** A customer service experience has to be reliable and efficient. However, most companies do not empower customer service agents with the right information or make this information available in a way that is easily accessible. This means that customer service agents must often use multiple disconnected applications to resolve a single customer issue. In addition, service managers cannot enforce a standardized discovery process across all the applications that agents use, which negatively affects agent consistency and productivity, increases agent training times, and leads to a higher level of agent turnover due to frustration with the tool set.

The cost of providing suboptimal customer service is huge. For example, customers expect to be able to resolve pre-purchase questions, manage their accounts, and receive post-sales support online. Three-quarters of consumers move to another channel when online customer service fails, and Forrester estimates that unnecessary service costs to online retailers due to channel escalation exceed \$22 million on average.<sup>7</sup> In addition, Accenture found that 51% of US consumers switched service providers due to poor customer service, up five percentage points from 2012, putting \$1.3 trillion of revenue at play in the US market represented by this “switching economy.”

### The Customer Service Vendor Landscape Is Complex

The contact center technology ecosystem has grown more complex over time as new communication channels and touchpoints become available. In addition, there is constant churn of vendor mergers and acquisitions as sectors consolidate, which creates new risks for customer service planners.<sup>8</sup> New service delivery models such as more extensive managed services and cloud-based offerings present new opportunities for customer service executives, but it’s not clear whether they truly help the enterprise transform its overall customer experience. In addition, companies struggle to align customer-facing organizations that own the various customer service touchpoints that historically have not shared the same objectives, reporting structure, funding, business processes, data management strategies, technology, or culture.

Looking ahead, what are the trends in 2014 that will dominate the planning agendas of customer service organizations in an attempt to deliver pain-free, proactive, personalized, and productive service? Use our customer service trends impact analysis framework to pinpoint the key steps to make your plans bulletproof (see Figure 1).

**Figure 1** Customer Service Trend Impact Analysis Framework

Opportunity areas	Trend	Impact on our organization			Indicated action
		Low	Medium	High	
<b>Deliver pain-free customer service</b>					
Omnichannel service	Customers demand omnichannel service.				
Mobile customer service	Mobile-first must become a customer service mindset.				
Business process management	BPM standardizes service delivery.				
<b>Proactively engage your customers for service</b>					
Outbound notifications	Customers expect outbound notifications.				
Engagement	Customers are willing to be proactively engaged.				
Knowledge	Content evolves from being purely reactive to giving advice.				
<b>Personalize customer service interactions</b>					
Decisioning	Decisioning powers offers, actions, and connections.				
Customer feedback	Customer feedback operationalizes insights.				
Analytics	Analytics improve end-to-end service.				
<b>Focus on productivity for optimized service</b>					
Agent experience	The agent experience is no longer an afterthought.				
Software-as-a-service (SaaS)	SaaS solutions offer business agility for customer service.				
Customer data management	Reliable data at the right time becomes a cornerstone to good service.				

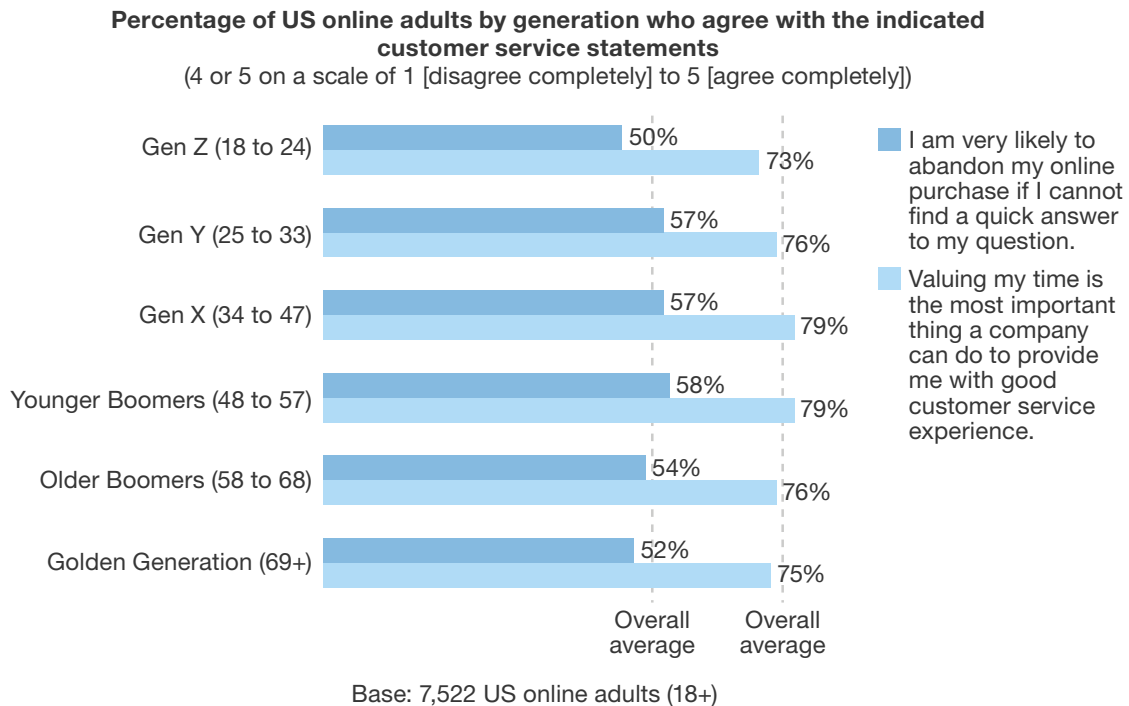
## **DELIVER PAIN-FREE CUSTOMER SERVICE**

Customers want to feel empowered to get service anywhere, anytime, and expect their service interactions to be pain-free. Over half of US online consumers will abandon their online purchase if they cannot find a quick answer to their questions, and three-quarters say that valuing their time is the most important thing a company can do to provide them with good service (see Figure 2).<sup>9</sup>

It's no surprise that customers are often frustrated with the effort that it takes to receive customer service. Forrester data shows that 67% of US online consumers say that they've had unsatisfactory service interactions in the past 12 months.<sup>10</sup> This parallels recent data from Accenture Global Consumer Pulse Research survey, which says that 91% of respondents are frustrated by having to contact a company multiple times for the same reason; 90% by being put on hold for a long time; and 89% by having to repeat their issue to multiple representatives.<sup>11</sup>

Companies must strive to deliver effortless or pain-free service, streamlining the process to deliver the right answer to a customer question. Pain-free service is a win-win for customers and customer service organizations: Customers are satisfied because service is efficiently delivered. Companies are satisfied because costs are contained. Pain-free service minimizes handle times and customer re-contacts and maximizes first-contact resolutions. To deliver pain-free or effortless service, you must pay attention to these three trends (out of a total of 12).

**Figure 2** All Generations Of Consumers Demand Effortless Customer Service



Source: North American Technographics® Customer Experience Online Survey, Q4 2013 (US)

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Source: Forrester Research, Inc.

### Trend 1: Customers Demand Omnichannel Service

Customers want to use a breadth of communication channels — self-service, voice, digital, and social channels — to interact with a company. Across all demographics, voice is still the primary channel used, but is quickly followed by self-service channels, chat, and email. In addition, channel usage rates are quickly changing, with newer channels such as co-browsing, virtual agents, and SMS gaining traction.<sup>12</sup> Customers want consistent service experiences across these channels. They also expect to be able to start an interaction in one channel and complete it in another without having to repeat themselves.<sup>13</sup>

In 2014 and beyond, customer service professionals will work on better understanding the channel preference of their customer base and guiding customers to the right channel based on their inquiry. They will work on breaking down communication silos within and outside of customer service and standardizing the resolution process and customer service experience across channels and touchpoints. In fact, in a recent Forrester survey, 74% said that improving cross-channel customer experiences was their top objective.<sup>14</sup> To be able to offer the most effortless customer service

experiences, companies will look at mapping the most prevalent end-to-end customer journeys across touchpoints and channels, identifying the pain points and disconnects, and addressing them with attention to technology, data management strategies, business process rework, and better organizational alignment.<sup>15</sup>

### **Trend 2: Customer Service Will Adopt A Mobile-First Mindset**

Globally, more than 1 billion individuals own a smartphone today, and adoption will continue to expand at a rapid pace to a projected installed base of 3 billion devices by 2017.<sup>16</sup> Mobility is likewise gaining in importance in customer relationship management (CRM): Organizations reported that mobile CRM delivered a 60% increase in customer satisfaction, a 30% increase in sales, and a 30% increase in productivity.<sup>17</sup> Today, virtually all customer service vendors offer some mobile customer service capabilities.<sup>18</sup> Many specialty customer service vendors supporting field agents also have robust mobile extensions of their applications. However, customer service mobile applications remain nascent as more companies focus on their mobile marketing, sales, and eCommerce mobility strategies.<sup>19</sup>

In 2014, customers will demand that companies support them on their omnichannel journeys, which often start on mobile devices. Customers will also demand multimodal capabilities from mobile devices — for example, navigating a visual interactive voice response (IVR) to streamline the process of connecting to the appropriate customer service agent. Companies need to adopt a mobile-first mindset for their products and services. They must create centers of excellence that span marketing, customer service, eCommerce, and BT functions that are responsible for crafting a company's mobile engagement strategy and designing mobile architecture blueprints to manage companywide mobile technology investments.<sup>20</sup> More companies will move away from duplicating their web presence for their mobile offering and will focus on deploying the right usage scenarios that add value to customers in a mobile environment, with focused user experiences that allow tasks to be efficiently accomplished.

### **Trend 3: BPM Tools Are Being Used To Standardize Service Delivery**

Forrester has found that more organizations are formalizing agent actions to streamline service delivery, minimize agent training times, ensure regulatory and company policy compliance, and control costs.<sup>21</sup> Traditional business process management (BPM) vendors have moved into the customer service space, and many traditional customer service vendors now offer process guidance capabilities.<sup>22</sup> In addition, a new set of vendors that offer combined robust BPM and CRM capabilities have gained traction. These solutions allow the visual modeling of customer service process flows that lead agents through a set of process steps that map to user interface (UI) screens. Agent screens contain the scripts, content, and back-end data that are relevant to that step of the process.



In 2014, expect to see continued focus on guiding agents through the service resolution process and the end-to-end process, which may involve back-office tasks. Customer service vendors will continue to mature their offerings with simpler visual modeling tools geared toward the business user. Also expect to see out-of-the-box best-practice process flows and industry-specific solutions. We will see better reporting and analytics in order to monitor overall key performance indicators (KPIs) and optimize the success of each process flow. We will also see workforce management capabilities such as quality management, scheduling, and performance management extended from the front office to the back office in order to optimize the execution of the end-to-end process.<sup>23</sup>

### **PROACTIVELY ENGAGE YOUR CUSTOMERS FOR SERVICE**

Customer service organizations are pressured from all sides: Customers are dictating the way service needs to be delivered, and organizations face new threats from new competitors and new modes of competition. Yet many companies are still managing their customer service organization as a cost center, with little flexibility to do the right thing for their customers. It's no wonder that 82% said that their customer service provider could have done something more to prevent them switching to another brand.<sup>24</sup>

Companies are starting to embrace a new type of customer service engagement that relies on customer context, personal information, and predictive intelligence to generate proactive experiences, which Forrester defines as:

*Experiences that anticipate customer needs and satisfy them before the customer takes action.*<sup>25</sup>

Customer service organizations are leveraging proactive experiences to gain customers and retain those that they have. Companies must pay attention to these three trends (out of a total of 12) to understand and anticipate customers' unique needs and preferences for proactive customer service.

### **Trend 4: Customers Expect Outbound Notification**

Proactive outbound communications notify customers of key events of interest to them, such as flight schedule changes, bank balance changes that exceed a certain threshold, or the availability of a new bill to be paid. Consumers are able to opt into these notifications and identify their preference for the types of notifications they want to receive, the channel they want to receive it on, and times they don't want notifications to be sent. Proactive communications deflect inbound calls, which reduces costs and boosts consumer satisfaction and revenue.<sup>26</sup> Forrester's Forrsights Networks And Telecommunications Survey, Q1 2013, shows that 29% of enterprises are planning to invest in proactive outbound communications in the next 12 months.<sup>27</sup> In addition, several vendor acquisitions in 2013 have focused on merging these capabilities into a greater customer service solution, bridging the gap that traditionally exists between inbound and outbound communications.<sup>28</sup>

In 2014, organizations will continue to adopt proactive outbound communication compliant with outbound regulations and will rely on vendor expertise in specific verticals to help pinpoint implicit and explicit preferences to personalize service.<sup>29</sup> The types of proactive outbound communications will increase to include emergency notifications, collection messages, and customer support services such as service alerts, workarounds, new content, and personalized offers.<sup>30</sup> More powerful smartphones and increased bandwidth will allow proactive outbound applications to use rich media with embedded links to improve the user experience. Outbound communication technology will also be more deeply integrated into the contact center to support scenarios where customers want to connect to an agent after receiving a message.<sup>31</sup>

### **Trend 5: Companies Will Explore Proactive Engagement**

Proactive engagements anticipate the what, when, where, and how for customers, and prioritize information and functionality to speed customer time-to-completion.<sup>32</sup> For example, customer behavior can be monitored as customers interact with a company, tracking, for example, the pages that the user navigates to and time spent on these pages. This data is coupled with customer insight from other information systems and is used to proactively reach out to customers via, for example, an invitation to chat, or an offer, or a multimedia tutorial, at the right time when assistance is required. Proactive engagement can also streamline customer journeys, simplifying such things as the steps to rebook a cancelled flight.

In 2014, organizations will continue to explore rules-driven proactive pre-purchase and post-purchase engagements. These engagements will take the form of proactive virtual agents and chat sessions, and proactively pushing offers and content to help a customer or to make a sale. They will also be focused on analyzing customer behavior and streamlining customer service business processes to support these behaviors. Forward-thinking organizations will explore more sophisticated uses of proactive engagement, such as connecting the best company resource to the customer at the right moment of opportunity. Learnings from these proactive engagements will be used to improve operational performance and to predict future customer behavior, such as prediction of future purchases or likelihood of attrition.

### **Trend 6: Knowledge Will Evolve From Purely Reactive To Giving Advice**

Customer service agents rely on knowledge management solutions to effectively answer customer inquiries. In addition, 67% of consumers use web self-service knowledge to find answers to their questions.<sup>33</sup> But structured knowledge has its downfalls. Knowledge is often difficult to locate, difficult to maintain, and is not often contextual. Companies are currently focusing on the following knowledge management basics: 1) making content generation more collaborative, with a greater reliance on user feedback; 2) making content easier to find by using natural language solutions; 3) using machine learning to dynamically rank content for more successful searches; 4) tightly linking case management and knowledge management solutions for greater service efficiencies and contextualization; and 5) using analytics to obtain insights on the value of knowledge.

During 2014, expect organizations to double down on their knowledge strategy for agents and customers. They will look for ways to complement the power of structured knowledge management with user-generated content from discussion forums. They will also rely more heavily on virtual agents to support more natural conversations. Organizations will also focus on making knowledge practices more agile so that knowledge can evolve in line with customer demand.<sup>34</sup> They will use analytics to track the effectiveness of knowledge usage and use this data to promote the best answer for a particular question. They will explore using social listening insights to stay ahead of the curve on knowledge creation. They will also explore embedding knowledge bases directly in devices so that contextual break-fix knowledge can be proactively delivered. These strategies will allow companies to evolve from treating knowledge as purely reactive to seeing knowledge as a proactive form of engagement.

## **PERSONALIZE CUSTOMER SERVICE INTERACTIONS**

Customer service organizations are making sure that foundational elements of customer service are in place — accurate content, clean data, good customer segmentation strategies, and customer-centric policies — to better serve their customers. They are then building on these foundations to deliver differentiated one-to-one service tailored to each customer and his or her specific set of circumstances. Personalized service adds value to commoditized products and services and spurs customer loyalty. Companies must understand these three important trends (out of a total of 12) to be able to do this well.

### **Trend 7: Decisioning Will Power Offers, Actions, And Connections**

Decisioning — automatically deciding a user's or system's next best action — is pervasively used in customer service organizations. Rules drive the routing of interactions to the right resource and are used to automatically recommend the right answer to customer questions. Many organizations use a combination of rules and predictive analytics to present personalized cross-sell and upsell offers to customers or to decide whether to present an offer at all based on customer sentiment. In addition, predictive analytics are used to recommend the right content to customers and to connect a customer to the right resource based on customer data and behavioral attributes.

In 2014, customer service organizations will continue to investigate methods to recommend agent “next-best actions” during the service resolution process to offer service tailored to the customer's unique needs and past purchase history.<sup>35</sup> These next-best actions encompass cross-sells and upsells and also help guide agents through the most successful resolution path by presenting them the next-best process step to take, which is aligned with business imperatives.<sup>36</sup> Predictive analytics will continue to be explored to recommend the right content to customers and connect customers to agents and increase satisfaction and reduce overall costs. Expect predictive analytics vendors to continue to move away from selling decisioning platforms to selling packaged usage scenarios for customer service that are easier to deploy and monetize and that include business-friendly tools to create and tune models. Also expect vendors to automate and simplify model building so that decisioning technologies can be more pervasively used.

### **Trend 8: Customer Feedback Will Be Used To Operationalize Insights**

Companies use feedback about their products, services, and organizational processes so that they can improve the quality of their products and services. Feedback should be solicited via surveys — the most common feedback channel that consumers use to complain to companies about poor service — as well as social listening.<sup>37</sup> Forrester finds that 60% of companies gather feedback about their interactions with a company; however, only 33% analyze customer insight across organizational boundaries.<sup>38</sup> Without this, companies cannot act on pertinent feedback to deliver quantifiable business value.

In 2014, customer service organizations will leverage customer feedback on two fronts: 1) They will double down on their efforts to gather customer feedback across communication channels and touchpoints and act on it, and 2) direct customer feedback will start to be used as a metric to measure the success of operations. Organizations will append feedback to customer records and use it to personalize future interactions. They will also associate it with customer service agents and use the insights for agent coaching to improve the quality of service delivered. Vendors have been making it easier to link feedback to customer records and agent identities. In addition, vendors now offer sophisticated text analytics and data mining algorithms to uncover significant patterns in data that can be used to drive business decisions that help boost revenue and customer retention.<sup>39</sup>

### **Trend 9: Analytics Will Improve End-To-End Service**

Customer communication channels and touchpoints are often managed by different functional organizations within a company.<sup>40</sup> Few companies extend the measurement approaches of voice-only call centers to other communication channels. Dimension Data reports that only 30% of organizations measure web self-service interaction costs, 20% of web chat costs, and 10% of social media interaction costs. Forrester also reports that 58% of companies inconsistently measure or fail to measure their customer's cross-channel journey.<sup>41</sup> Without these metrics, organizations can't answer basic questions such as cost, reason for cross-channel escalations, and overall customer satisfaction.

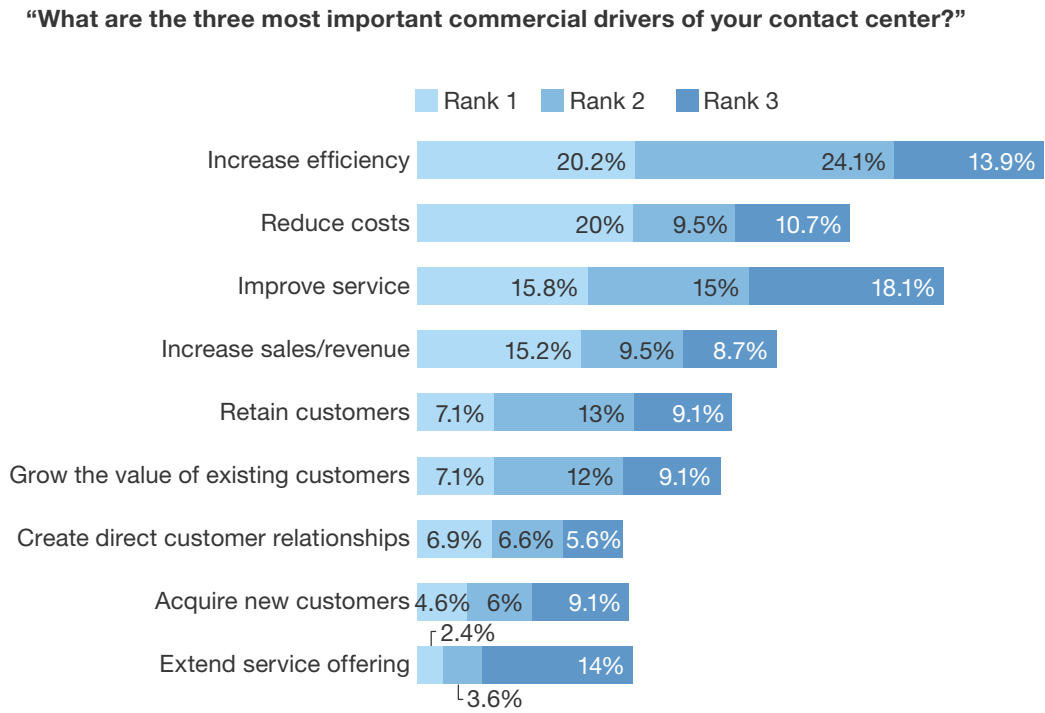
In 2014, expect customer service organizations to start moving forward with more holistic measurement programs for communication channels and touchpoints. This will allow organizations to understand the cost and success of end-to-end customer journeys and pinpoint areas of addressable pain — such as an escalation from a mobile self-service session to an agent-assisted call. It will also allow organizations to derive insights from their customer behavior — such as an analysis of the variation of journeys by customer tier or issue type — insight which organizations will be able to use to better personalize end-to-end experiences, increasing satisfaction and long-term loyalty. Vendors have been making it easier to link feedback to customer records due to CRM and workforce optimization vendors' acquisition and integration of social listening and enterprise feedback companies. In addition, vendors now offer sophisticated text analytics and data mining algorithms to uncover significant patterns in data that can be used to drive business decisions that help boost revenue and customer retention.

### FOCUS ON PRODUCTIVITY FOR OPTIMIZED SERVICE

Customer service organizations strive to deliver a differentiated service experience for their customers that adds value to commoditized products and services and incurs customer loyalty. Yet they must provide these differentiated experiences at a cost that makes sense to the business, which means that efficiency remains a central concern (see Figure 3). Forward-thinking customer service leaders measure productivity and satisfaction of end-to-end customer service processes, which includes both front- and back-office steps.

Companies must understand three important trends (out of 12) to be able to provide a service experience that delivers the satisfaction measures that customers demand at a cost that a business can accept.

**Figure 3** Many Customer Service Organizations Focus On Increasing Efficiency



Base: 801 US contact center decision-makers

Source: Dimension Data’s 2013/14 Global Contact Centre Benchmarking Report

61372

Source: Forrester Research, Inc.

### **Trend 10: The Agent Experience Is No Longer An Afterthought**

A good web user experience delivers contextual content to the user, provides better navigation, and presents data in a way that is easier to understand.<sup>42</sup> There are many examples of companies that have achieved significant returns by improving the usefulness and usability of their sites.<sup>43</sup> Customer service agents, who use tens or even hundreds of disconnected applications during their workday, are demanding that the same focus on usability be applied to their tool set so that they can focus on solving the customer's issues and delivering differentiated service.

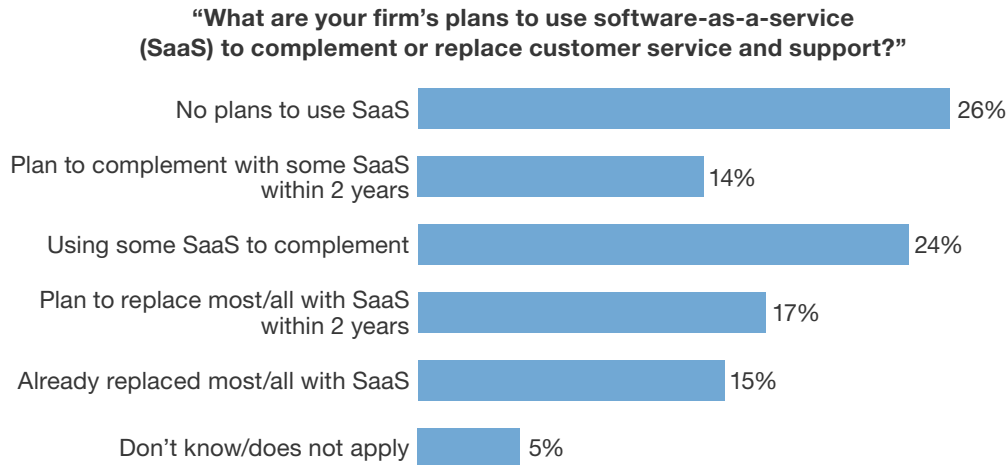
In 2014 and beyond, customer service leaders will continue to work on simplifying the agent workspace. This includes removing extraneous data elements from agent screens, automating tasks to increase agent productivity, and making relevant information to help personalize the interaction — such as the products that customers own, the services they subscribe to, and what customer tier they're in — easily accessible to agents. These efforts also involve deploying customer-centric task flows that map to frequent contacts types, where tasks can be accomplished using the least number of steps.

### **Trend 11: Customer Service Organizations Are Adopting SaaS Solutions For Agility**

Forrester data shows that 15% of organizations have already replaced all or most of their on-premises customer service applications with software-as-a-service (SaaS) solutions, 24% complement their existing solutions with SaaS, and 31% plan to replace and/or augment their solutions with SaaS within two years (see Figure 4).<sup>44</sup> The main benefits of SaaS include increased business agility and speed of deployment and allowing for more focus on other projects critical to the success of the business. Vendors are doubling down on efforts to offer comprehensive customer service SaaS solutions. All major customer service vendors now offer a SaaS option. In addition, a new crop of SaaS-based social customer service solutions have gained market attention.<sup>45</sup> Small to midsize contact centers tend to predominantly use SaaS solutions, while very large contact centers retain a mix of on-premises and SaaS-based solutions. Irrespective of the size of the contact center, SaaS requires new ways of thinking about vendor selection, contracting, risk tolerance, and organizational skill set requirements.

In 2014, customer service organizations will continue to evaluate their SaaS strategy, either by replacing or complementing existing solutions. They will also continue to mature their skills that address emerging needs around SaaS and cloud initiatives, such as: 1) moving to an agile project development methodology; 2) transitioning to new governance models where technology management provides “just enough” centralized coordination and oversight to achieve enterprisewide goals; 3) vendor management processes, which includes negotiating new types of contracts, service-level agreements (SLAs), and pricing models; and 4) risk mitigation plans in the case of mergers and acquisitions or vendor failure.<sup>46</sup>

**Figure 4** More Customer Service Solutions Are Projected To Be Deployed As SaaS Solutions



Base: 1,255 US online adults from companies with 20 or more employees  
(percentages do not total 100 because of rounding)

Source: Forrsights Software Survey, Q4 2013

61372

Source: Forrester Research, Inc.

### **Trend 12: Reliable Data At The Right Time Will Become A Cornerstone Of Good Service**

Customer service agents need the right data at the right point in the service process to provide the right answers to customer questions. This involves accessing data from the disparate front- and back-end systems that comprise the greater customer service ecosystem as well as trusting the data that is found. Good, reliable data is the result of mature data quality and data governance practices. Unfortunately for many companies, data governance is not a priority, and only 15% of organizations surveyed in 2013 identified their data governance maturity as high.<sup>47</sup> Inattention to data issues in customer service initiatives affects the quality of service delivered; agents do not trust the customer and product data they have access to, leading to a decrease in productivity as the agent verifies information at hand. In addition, data conflicts and duplicate data increase operational costs and noncompliance rates.<sup>48</sup>

In 2014, data pros who support customer service operations will continue to face challenges in convincing business process owners to take ownership and accountability for the quality and usefulness of the supporting customer data. To make progress, customer service leaders must understand what data is needed at a particular point in the service process and ensure that data is available for service agents to use via agile integrations with other systems.<sup>49</sup> They must also make investments in data quality and master data management and governance policies. Only when customer service organizations take responsibility for the master data that affects their operations will customer data management efforts truly become a strategic investment that delivers significant business value.

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## RECOMMENDATIONS

### PRAGMATIC EXECUTION IS THE KEY TO SUCCESS

In the age of the customer, where customers own the relationship they have with companies, delivering customer service in-line with customer expectations becomes a strategic imperative. As companies selectively undertake both small and large customer service projects to move the needle on the quality of service delivered, a solid business case and flawless execution remain critically important.<sup>50</sup> To be successful, be sure to:

- **Audit your customer service ecosystem.** Perform a thorough audit of the customer service technologies you use as well as the processes you support across the different communication channels. Understand the maturity of the technologies you have, using Forrester's TechRadar™ for contact center solutions to guide you.<sup>51</sup> Pinpoint newer technologies and business process changes to deliver a better customer service experience.
  - **Understand your customer.** Survey your customers to understand how they want to interact with your customer service organization. Use this data to formulate plans to evolve your offering.
  - **Pinpoint the best opportunities for improving customer service.** Assess your operations against best practices, and identify areas of opportunity. Use Forrester's best practices framework for customer service that defines the critical capabilities necessary for building high-quality customer service experiences that align with customer expectations.<sup>52</sup>
  - **Build a sound business case.** Be pragmatic in choosing projects to tackle. Build a sound business case using Forrester's Total Economic Impact™ (TEI) methodology to justify your initiative. Then follow best practices in executing your changes.<sup>53</sup>
  - **Incorporate feedback loops.** Continually measure the success of customer service interactions against cost and satisfaction goals. Look for ways to evolve customer service in a way that it stays aligned with your company's overarching goals and mission.
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## SUPPLEMENTAL MATERIAL

### Methodology

Forrester conducted the North American Technographics Customer Experience Survey, 2013 fielded in October 2013 of 7,538 US individuals ages 18 to 88. For results based on a randomly chosen sample of this size (N = 7,538), there is 95% confidence that the results have a statistical precision of plus or minus 1.13% of what they would be if the entire population of US online individuals ages 18 and older had been surveyed. Forrester weighted the data by age, gender, income, broadband adoption, and region to demographically represent the adult US online population. The survey sample size, when weighted, was 7,522. (Note: Weighted sample sizes can be different from the actual number of respondents to account for individuals generally underrepresented in online panels.) Please note that this was an online survey. Respondents who participate in online surveys have in general more experience with the Internet and feel more comfortable transacting online.

Forrsights Software Survey, Q4 2013, was fielded to 2,074 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from SMB and enterprise companies with two or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded during October 2013 and November 2013. ResearchNow fielded this survey online on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates. We have provided exact sample sizes in this report on a question-by-question basis.

Forrester's Business Technographics provides demand-side insight into the priorities, investments, and customer journeys of business and technology decision-makers and the workforce across the globe. Forrester collects data insights from qualified respondents in 10 countries, spanning the Americas, Europe, and Asia. Business Technographics uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

We have illustrated only a portion of survey results in this document. To inquire about receiving full data results for an additional fee, please contact [Forrsights@forrester.com](mailto:Forrsights@forrester.com) or your Forrester account manager.

### ENDNOTES

- <sup>1</sup> Forrester data confirms the strong relationship between the quality of a firm's customer experience (as measured by Forrester's Customer Experience Index [CxPi]) and loyalty measures such as willingness to consider the company for another purchase, likelihood to switch business, and likelihood to recommend. See the July 7, 2011, "[The Business Impact Of Customer Experience, 2011](#)" report.
- <sup>2</sup> To help customer experience professionals prove the business value of a better enterprise customer experience, we built simple models that show how revenue increases when a company's Customer Experience Index (CxPi) score goes up. Our models show that the benefits are significant across all 11

industries we looked at. Wireless carriers and hotels have the largest potential upside: more than \$1 billion. Customer experience professionals should use the interactive models in this report to estimate the range of benefits their firm might see. That data — combined with customers' verbatim comments and customer experience stories — will help customer experience leaders make a powerful case for change. See the July 7, 2011, "[The Business Impact Of Customer Experience, 2011](#)" report.

<sup>3</sup> Results have increased by over 8 points from 63.3% in 2012 to 71.6% in 2013. Check out the 2013/14 Global Contact Centre Benchmarking Report from Dimension Data, published in November 2013.

<sup>4</sup> Forrester's research shows business units accelerating plans to spend their own money on technology. See the October 10, 2013, "[Technology Management In The Age Of The Customer](#)" report.

<sup>5</sup> Organizations must work toward providing seamless cross-touchpoint customer experiences. See the May 7, 2013, "[The Unified Customer Experience Imperative](#)" report.

<sup>6</sup> Targeted offers are a core ingredient of a customer service strategy of cross-selling and upselling. Firms must personalize all offers that they present to a customer, whether that is by an agent or via a mobile or self-service session. Organizations must also strive to determine whether or not to present an offer based on the customer's satisfaction with the interaction. The ability to optimize agent actions may be either rules-driven or based on predictive models, or some combination thereof. See the February 1, 2013, "[Navigate The Future Of Customer Service](#)" report.

<sup>7</sup> When consumers switch from the Web to the phone, email, or chat, a company's cost to serve them goes up dramatically. Forrester built models to total the unnecessary costs that a retailer might incur as a result of missed self-service opportunities. Calculations showed an extra \$22,567,967 in sales and service costs that could have been avoided if the website had enabled users to complete their goals online. See the August 21, 2012, "[Websites That Don't Support Customers Waste Millions](#)" report.

<sup>8</sup> The customer service vendor landscape is quickly consolidating. Source: Kate Leggett, "Market Consolidation In The Customer Service Space — A Slew Of Companies That No Longer Exist," Forrester Blogs, November 24, 2012 ([http://blogs.forrester.com/kate\\_leggett/12-11-24-market\\_consolidation\\_in\\_the\\_customer\\_service\\_space\\_a\\_slew\\_of\\_companies\\_that\\_no\\_longer\\_exist](http://blogs.forrester.com/kate_leggett/12-11-24-market_consolidation_in_the_customer_service_space_a_slew_of_companies_that_no_longer_exist)).

<sup>9</sup> Source: North American Technographics® Customer Experience Online Survey, Q4 2012 (US).

For more information on customer service strategy, see the March 11, 2013, "[Understand Communication Channel Needs To Craft Your Customer Service Strategy](#)" report.

<sup>10</sup> Source: North American Technographics Customer Experience Survey, 2013.

<sup>11</sup> Accenture Global Consumer Pulse Survey measured the experiences of 12,867 customers in 32 countries and across 10 industries to gain insight into the changing dynamics of today's "nonstop" customers and assess consumer attitudes toward marketing, sales, and customer service practices. The survey included 1,256 US customers. Source: "Global Consumer Pulse Research," Accenture (<http://www.accenture.com/microsites/global-consumer-pulse-research/Pages/home.aspx>).

- <sup>12</sup> Consumers' preferences for customer service channels are rapidly changing. And it's not just the younger generation of consumers — there's disruption and change across all ages and demographics. Adoption of online customer service channels, such as chat with live agents and social media, is exploding as consumers expect relevant and seamless customer service across channels. See the March 11, 2013, "[Understand Communication Channel Needs To Craft Your Customer Service Strategy](#)" report.
- <sup>13</sup> Sixty-nine percent agree with the statement, "I would like to be able to move between customer service channels and not have to repeat my situation every time." Sample size: 7,538. Source: North American Technographics® Customer Experience Survey, 2013.
- <sup>14</sup> In a survey of 86 customer experience professionals, 77% said that improving the online customer experience was the major objective of their customer experience program, 74% of respondents said that improving cross-channel customer experiences was their major objective. See the April 24, 2012, "[The State Of Customer Experience, 2012](#)" report.
- <sup>15</sup> High-quality data, when used effectively, can provide that elusive single view of a customer — a fundamental element to enable customer service reps to offer personalized, value-added service. IT must partner with business process pros supporting customer service operations and change the conversation to focus on the quantifiable business impacts of poor data quality — such as increased operational costs and lower customer satisfaction scores — and craft a solid business case to drive data improvements. See the December 13, 2011, "[The Secret To Better Customer Service: High Data Quality](#)" report.
- <sup>16</sup> Source: Forrester Research World Smartphone Adoption Forecast, 2012 To 2017 (Global).
- <sup>17</sup> Mobility has become a key corporate priority. For example, a recent Forrester survey found that 47% of firms said that supporting more mobile devices, such as smartphones, was a critical or somewhat critical telecom priority for their company, and 49% of enterprises identified supporting more mobile applications for out-of-office users as an important telecom initiative for their firm in the coming year. See the August 22, 2011, "[Best Practices: The Right Way To Implement Mobile CRM](#)" report.
- <sup>18</sup> Major CRM suite customer service solutions offer mobile capabilities to varying degrees of completeness of solution. See the July 11, 2012, "[The Forrester Wave™: CRM Suite Customer Service Solutions, Q3 2012](#)" report.
- <sup>19</sup> Forrester ranks mobile customer service solutions in the survival phase in an assessment of the maturity and business value derived of 24 contact center solutions for customer service. Mobile customer service solutions are hampered by the number of mobile form factors and operating systems to support, the changing vendor landscape, and the choice of value-add use scenarios to deploy. Once these early adoption issues are solved, new quantifiable case studies will come to light, confidence will go up, and mobile customer service's value will be realized. See the April 17, 2013, "[TechRadar™ For AD&D Pros: Contact Center Solutions For Customer Service, Q2 2013](#)" report.
- <sup>20</sup> Mobile is the visible manifestation of a much broader shift to systems of engagement that marry physical context and digital intelligence to deliver service directly into a person's hands. This shift will add value and take cost out of every business service, workflow process, and business application. But mobile engagement

will also require wholesale changes to a company's app design, service delivery, IT skills, technology assets, and even your business model. Because mobile projects span business, marketing, and IT, they require coordination across all three groups. Best-in-class companies have dedicated executives and a well-funded mobile center of excellence to bring the right people and funding together. See the November 16, 2012, "[Great Mobile Experiences Are Built On Systems Of Engagement](#)" report.

- <sup>21</sup> Customer service managers struggle to balance customer experience and cost: Siloed communication channels, impersonal service, and an inability to enforce company processes or meet regulatory compliance negatively affect satisfaction and increase costs. By extending business process management (BPM) best practices and technology to the front office, customer service organizations can improve the consistency of service delivered, elevate agent efficiency, personalize service, and meet compliance goals — at a cost that makes sense to the business. See the October 5, 2010, "[Extend Business Process Management To The Front Office To Transform Customer Service](#)" report.
- <sup>22</sup> Niche customer service vendors such as Sword Ciboodle, KANA, Numara Software, Pegasystems, and others offer BPM capabilities for customer service to varying degrees. See the December 10, 2010, "[Market Overview: Customer Service Specialty Solutions](#)" report.
- <sup>23</sup> Although the back office is a part of the business that remains largely "unseen" by customers, it can become the leading source of headaches for your customer service organization. According to some experts, issues with back-office processing — such as data entry errors, workflow delays, and billing mistakes — can make up 10% to 20% of all the call volume flowing into a contact center. In fact, Tarp Worldwide, a firm known for its customer experience consulting work, has repeatedly found that up to 60% of customer dissatisfaction sources are found in the back office. Source: Craig Seebach, "Taming the Back Office Effect on the Call Center — Part 1," ICMI, September 20, 2009 (<http://www.icmi.com/Resources/Articles/2009/September/Taming-the-Back-Office-Effect-on-the-Call-Center-Part-1>).
- <sup>24</sup> Source: "Global Consumer Pulse Research," Accenture (<http://www.accenture.com/microsites/global-consumer-pulse-research/Pages/home.aspx>).
- <sup>25</sup> The emergence of powerful mobile devices, connected sensors, and open application programming interfaces (APIs) makes it possible to deliver a new type of customer experience known as proactive experiences. See the November 20, 2013, "[Anticipate Your Customer's Next Move With Proactive Experiences](#)" report.
- <sup>26</sup> Companies eliminate repetitive inbound calls on common topics by proactively providing customer information on changes or account updates. This reduces the number of both support calls and opportunities for mishandling customer information. Customers appreciate receiving timely information that indicates the company is looking out for their best interests. Proactive communication is also used to alert customers to special events that help predict a customer's interest and target promotions to generate new revenue. This supports marketing campaigns without the expense of other forms of expensive advertising. See the February 7, 2012, "[Update 2012: Proactive Outbound Notification Saves Money](#)" report.

<sup>27</sup> The Forrsights Networks And Telecommunications Survey, Q1 2013, is a survey fielded to 2,347 North American and European network and telecommunication decision-makers from SMB and enterprise companies with two or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded during January 2013 and March 2013.

<sup>28</sup> In 2013, Genesys Telecommunications Laboratories acquired SoundBite; Nuance Communications acquired Varolii.

<sup>29</sup> In 2009, the US Federal Trade Commission (FTC) added two amendments to the Telemarketing Sales Rule (TSR) that let callers sign up for the no call list. The amendments restrict prerecorded messages to customers unless the customer has previously agreed to accept such calls from the seller. This will not limit calls that are purely informational prerecorded messages, such as appointments or flight schedule changes. This puts the burden on vendors to get customers' permission upfront and ensures that the vendors only send information of interest to customers. See the February 7, 2012, "[Update 2012: Proactive Outbound Notification Saves Money](#)" report.

Customer service managers find that interactive proactive communications improve customer satisfaction, add value with personalized messages to individual recipients, and reduce contacts into the contact center. See the February 7, 2012, "[Update 2012: Proactive Outbound Notification Saves Money](#)" report.

<sup>30</sup> For example, VMware uses Twitter to push out new knowledge base content to its followers, deflecting calls from the contact center. See the March 25, 2011, "[Case Study: VMware Uses Knowledge Management To Empower Its Customers With Relevant Content](#)" report.

<sup>31</sup> Proactive outbound communications embrace the agile customer journey by allowing customers to interact with an agent after receiving an outbound message. See the February 7, 2012, "[Update 2012: Proactive Outbound Notification Saves Money](#)" report.

<sup>32</sup> The emergence of powerful mobile devices, connected sensors, and open application programming interfaces (APIs) makes it possible to deliver a new type of customer experience known as proactive experiences. These experiences change the way customers relate to and engage with services by closing the gap between problem and solution, integrating siloed information and services, and personalizing experiences based on context. See the November 20, 2013, "[Anticipate Your Customer's Next Move With Proactive Experiences](#)" report.

<sup>33</sup> Forrester asked 7,506 US online consumers what communication channels they had used to receive customer service in the past 12 months. Source: North American Technographics® Customer Experience Online Survey, Q4 2012 (US).

<sup>34</sup> A knowledge base is typically used to empower agents and customers with answers to customer questions. But traditional knowledge management is difficult because of the confusion around the term and its checkered reputation. There should be more focus on establishing a collaborative content hub. Source: Kate Leggett, "The New Knowledge Management: What Does A Collaborative Content Hub Look Like," Forrester Blogs, August 1, 2012 ([http://blogs.forrester.com/kate\\_leggett/12-08-01-the\\_new\\_knowledge\\_management\\_what\\_does\\_a\\_collaborative\\_content\\_hub\\_look\\_like](http://blogs.forrester.com/kate_leggett/12-08-01-the_new_knowledge_management_what_does_a_collaborative_content_hub_look_like)).

- <sup>35</sup> The goal of “next best action” is to target offers to boost customer lifetime value, deliver consistent cross-channel experiences, harvest customer leads from sales, marketing and other sources, and continue to optimize back-office orchestrations. See the April 13, 2011, “[Boost Customer Lifetime Value Through Next Best Actions In Multichannel CRM](#)” report.
- <sup>36</sup> Next-best action can cost-effectively improve the consistency of service delivered across multichannel customer-facing business processes. It can also help organizations elevate agent efficiency, personalize service, and meet compliance goals. See the May 31, 2011, “[Best Practices: Next Best Action In Customer Relationship Management](#)” report.
- <sup>37</sup> VoC programs are typically built on surveys. They are the main mechanism for collecting customer feedback, offering a way for companies to ask about perceptions of experiences. Surveys are also the most common feedback channel that consumers use to complain to companies about poor service. Quantitative survey data can help companies measure the quality of the experience they’re delivering and identify key drivers of good and bad experiences. See the May 1, 2013, “[How To Build Your Voice Of The Customer Program](#)” report.
- <sup>38</sup> Sixty percent of companies consistently gather customer feedback about their interactions with a company; 33% consistently analyze this feedback across organizational boundaries. See the March 22, 2013, “[The State Of Customer Experience Management, 2013](#)” report.
- <sup>39</sup> Several case studies highlight the business results that can be achieved by acting on gathered feedback. See the November 6, 2013, “[Embrace Continuous Improvement To Power Customer Service Operations](#)” report.
- <sup>40</sup> For example, 81% of eBusiness and channel strategy executives own the web self-service touchpoints, and 58% own the mobile channel. See the December 18, 2012, “[Choose The Right Customer Service Solution For Your Business](#)” report.
- <sup>41</sup> Thirteen percent of companies do not track what happens during customer interactions; 45% sporadically or inconsistently track what happens during customer interactions. See the March 22, 2013, “[The State Of Customer Experience Management, 2013](#)” report.
- <sup>42</sup> Data from 60 website usability projects showed that success metrics increased when known usability problems were addressed. These problems included navigation, aligning content with user needs, and the presentation of content. See the November 12, 2010, “[Europe 2010: Fixing Known Usability Problems Pays Off](#)” report and see the October 10, 2008, “[How Much Will Your Web Site Metrics Improve?](#)” report.
- <sup>43</sup> Customer experience professionals don’t have to look far to find examples of companies that achieved significant results by improving the usefulness and usability of their websites. See the October 10, 2008, “[How Much Will Your Web Site Metrics Improve?](#)” report.
- <sup>44</sup> Source: Forrsights Software Survey, Q4 2013.
- <sup>45</sup> Examples include Conversocial, Get Satisfaction, FuzeDigital, MindTouch, and Zendesk.

<sup>46</sup> Organizations are increasingly adopting software-as-a-service (SaaS) CRM solutions. To be successful, they have to focus on increasing the use of Agile development and moving from an IT to business organizational technology structure. See the November 12, 2012, “[Capitalize On SaaS CRM Solutions With Better Governance](#)” report.

Software-as-a-service (SaaS) contracting has become more important to organizations; firms are now scrutinizing deals before signing. SaaS agreements matter more than ever because of greater quantities of mission-critical data and larger dollar amounts across a wider range of technology categories. See the September 13, 2011, “[Inquiry Spotlight: SaaS Pricing And Contracting, Q3 2011](#)” report.

<sup>47</sup> Only 15% rate the data governance maturity as high or very high — defined as incorporating both business and IT, with top-level support and spanning major parts of the organization. For the rest, data governance is centered on IT, with moderate to no business engagement and with no executive-level business support. See the May 20, 2013, “[Data Governance Equals Business Opportunity. No Really](#)” report.

<sup>48</sup> Poor data quality erodes customer satisfaction. Customer service agents need the right data about customers, purchases, and prior service history presented to them at the right point in the service cycle to deliver answers. However, when their tool sets pull data from low-quality data sources, decision quality takes a hit, leading to significant rework and customer frustration. Customer service agents quickly begin to question the validity of the underlying data when data quality issues are left unchecked. This means that agents will often ask a customer to validate product, service, and customer data during an interaction, which makes the interaction less personal, increases handle times, and instills a lack of trust with the company in the customer. Customer service agents often update customer, product, and service data in multiple disconnected applications, which incurs the risk of errors. Finally, data conflicts affect noncompliance rates. For more examples of the impact of poor data quality on customer service, see the December 13, 2011, “[The Secret To Better Customer Service: High Data Quality](#)” report.

<sup>49</sup> A mature API and SOA strategy helps organizations support agile technology integrations. See the September 5, 2013, “[Drive Business Agility And Value By Increasing Your API And SOA Maturity](#)” report.

<sup>50</sup> Forrester’s contact centers for customer service playbook outlines four steps for AD&D professionals who want to optimize and innovate with customer service operations: 1) discover: establish the value of customer service; 2) plan: set the right strategy; 3) act: execute the strategy with precision; and 4) optimize: measure and improve operations. See the June 22, 2012, “[Transform The Contact Center For Customer Service Excellence](#)” report.

<sup>51</sup> Forrester uses the TechRadar methodology to make projections for more than a decade into the future of the use of technologies in a given category. We make these predictions based on the best information available at a given point in time. Forrester intends to update its TechRadar assessments on a regular schedule to assess the impact of future technical innovation, changing customer and end user demand, and the emergence of new complementary organizations and business models. See the April 17, 2013, “[TechRadar™ For AD&D Pros: Contact Center Solutions For Customer Service, Q2 2013](#)” report.

- <sup>52</sup> Use Forrester's best practices framework and assessment tool for customer service to understand how your organization stacks up against more than 150 best practices that drive customer retention, customer loyalty, reduced cost, and increased revenue. Use the framework to define strategy, gain executive buy-in, build stakeholder consensus, manage customer service agents more effectively, and select the right technologies for loyalty-creating customer experiences. See the December 26, 2012, "[Assess Customer Service Capabilities To Pinpoint Opportunities For Better Service](#)" report.
- <sup>53</sup> Forrester's Total Economic Impact™ methodology helps customer service leaders make better decisions by helping them quantify, communicate, and realize the complete business value of a technology investment. See the September 10, 2012, "[Win Funding For Your Customer Service Project](#)" report.



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