

Alice in Customerland

Why the future of customer experience research will be more human-centered

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To facilitate this ongoing dialogue, ESOMAR creates and manages a comprehensive programme of industry specific and thematic events, publications and communications, as well as actively advocating self-regulation and the worldwide code of practice.

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Introduction

The rise of bots, artificial intelligence (AI), virtual reality (VR), Internet of Things (IoT) and other technological breakthroughs in the customer experience (CX) solution landscape indicates an increasingly automated journey, with more companies craving more data and technologically seamless experiences. However, in this paper, we predict an unprecedented demand for human care and personal relationships across customer journeys, including the possibility of failure, forgiveness and/or having fun. To envision the future of market research, we will illustrate how “augmented” research in 2027 can empower people, transform organizational cultures and inspire future value propositions. Powered by a unique hybridization of the data sciences (data mining, deep and machine learning) and human sciences (behavioral economics, social psychology, ethnography), “augmented research” can help in the design of more human-centric rather than just client-centric customer experience strategies. Deeper human understanding of customers’ and employees’ life contexts will create new engagement opportunities as well as transformational changes. Meanwhile, expanded customer data will keep fueling more transactional opportunities, but now without alienating consumers or damaging trust. But, before discussing how to get there from where we currently stand and what mutations our industry will need to operate, experience the future through an imaginary dialog between Richard, a CX market researcher and Alice, his humanoid artificial intelligence assistant in 2027.

A glimpse of 2027: A discussion with Alice

Alice: “Sometimes I have believed as many as six impossible things before breakfast.” Alice in Wonderland, by Lewis Carroll

Let me present myself: Just like you probably are, I’m a researcher, with several years’ experience working for a market research company (BVA). Like you, I’m concerned by what the future will bring for our industry. One night, after watching an episode of *Black Mirror*, I was having a dream and I suddenly woke up in 2027. I want to share this dream with you because it felt so amazingly real...

It’s 2027 and we are now in a post-data world, a world where AI-powered machines and humans work together. It seems that I am now working for a new kind of research company that is specialized in customer experience. On my screen it says: activate your virtual assistant. I guess this triggers the last generation of AI-powered bot that invaded every space. I press OK and suddenly on the screen a manga creature appears:

Figure 1.



A: Hello, I'm Alice, your personal research assistant. What can I do for you?

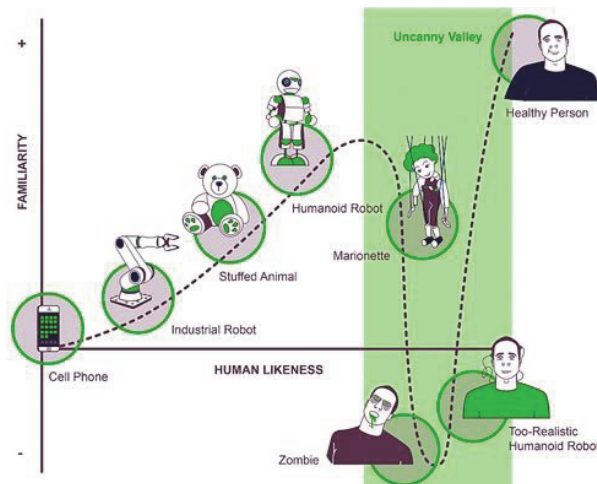
R: Wow, is this a dream or is the future of research ... friendly ?

A: Hmm. May I remind you that it was you who personalized my appearance? Still, it's important that you like me to maximize our interactions!

R: Ah, yeah I read a paper on this. It says chatting with a real robot is accepted more than chatting with a fake human.

A: Absolutely, I just found this research: it definitely applies to me!

Figure 2.



<http://www.uncannyvalley.us/about/uncannyvalley/>

R: To be honest I feel reassured now seeing you and me together: it seems you didn't take my job in the end!

A: Ah ha – you know, humans are the ones to train us, and I have learnt how to work collaboratively! So I am here to help. I propose choices to save you time, but I always leave the final decision to you.

R: You mean you don't want me to sue the company that designed you in case you are wrong?

A: Well, liability issues exist of course, but the main reason is that there is never only one solution to one problem. Only you can appreciate which method, which result or benchmark will look acceptable to your human fellows.

R: Interesting: You are right. Plurality is good. And maybe occasionally I'll put you in competition with another AI, just in case you have some built-in biases! Now, tell me about the job. Who is going to do what now?

A: Well, I'm here to "augment" your research, helping you with repetitive tasks, pattern recognitions, and predictive scenario. But I will let you do what you do best: adding context to create meaning, finding creative solutions, engaging your organization with a vision. I leave you to manage the psychology to make my findings socially acceptable!

R: You mean politics is still a human skill in 2027? Well, if together we come up with some relevant business action, that's fine. I guess we humans are still better at telling stories to get the message across.

A: Yes, and Ai have some problems with stories. You humans like to infer causations where there are none, and to eliminate details that rigor commands me to display. Strangely, your beliefs are often more important than the facts.

R: Ah! But you know that stories also make information easier to digest for us. They engage us emotionally and that's how you get people to act. Dashboards and algorithms are often a bit too cold and rational...

Now, Alice, could you perhaps describe some customer insight practices of 2027? I would love to see what we do for insight directors.

A: Well, I have to warn you, the role of “customer insight director” has disappeared. The customer is everyone’s job now, and “insight” was too vague a term. Now there are two new roles that have evolved from your original job. The Behavioral Opportunity Analyst, and the Customer Culture Catalyst. One is more focused on transaction analytics: markets, segments, lead, cross-sell, loyalty... and the other on human experience: the customer’s life, employee engagement, emotional journey, sense of care...

R: I see, I guess it will create some healthy debates internally! But are there still “voice of the customer” programs ?

A: Well, feedback is everywhere now: customer and employee insights have evolved into “human stories”. Together we capture interactions and design content to help everyone experience the world in exactly the way that clients or employee see it. These stories are shared in different formats, through video, chats, social interactions and Virtual Reality immersion. This way we continuously irrigate organizations with a “client culture”.

R: Wahoo, that’s a tremendous job! It seems that the customers are not so much at the center now... They’re everywhere! And I hope, in the boardroom too: I can see lots of benefit in driving change management from there. Still, I have one question about the tools: are the in-bound platforms still there?

A: We now have different types of platforms depending on purpose: “brand & customer opportunities” platforms, where CRM, A/B testing, and live brand monitoring have converged. And in addition, there are “customer & employee care” platforms resulting from hybridization of employee feedback, quality monitoring, and knowledge-sharing solutions.

R: So research is now moving into the human resources and knowledge management area?

A: Well it’s not just HR, it’s a board mission now to manage continuous customer-driven change, by growing people and organizations. These new research platforms allow the sharing of good practices directly from the field... They propose gamified motivation schemes to managers, facilitate collaborative work and reward initiative. Beyond feedback it’s all about continuous learning.

R: Ah, that’s a big shift in our added value: it sounds like we strengthen the “human side” of data, and that insights are not just for marketing anymore. One question though: what happened to our lousy satisfaction questionnaires?

A: Well, you know, feedback has also become a part of customer and employee care now. Questionnaires have evolved into AI-powered chats. They are fun and immersive, and you can answer either with your voice or send anonymized thoughts for confidential matters.

R: Ah, That’s scary! So, are we reading consumers’ minds now?

A: No! The law says this can only relate to your conscious and trained minds. And if you truly respect your customers, and employees, you won’t want to secretly read their minds! On the contrary, some companies value their input so much that they ask us to animate shadow governance forums with a direct feedback loop with the board.

R: That’s a revolution in the ways of working! But tell me, is innovation still within this scope of market research?

A: More than ever! Innovation is now a continuous process. I curate live usage and societal observatories to continuously fuel creative labs and their eco-system. From this inspiration, they are looking for the next value proposition to prototype.

R: Ah, and do we still co-create with consumers?

A: Well, today clients are involved at every business stage: they inspire, co-create, promote, demonstrate, and help each other... User-generated content has entered a new dimension: people print or tune their own products, some even sell them to their private social networks. Interestingly for research, groups of consumers give us access to all their data in exchange for privacy and protection against intrusive marketing.

R: Ah, I like the idea of becoming a trusted third party both for customers and their clients. Thank you for the tour. One last question: is there anything else that I would still do better than you?

A: Yes, celebrating! Although I could simulate joy and many human emotions with very high resolution, authentic emotional connection still works better between humans. And if I may remind you: today there is a special occasion to celebrate!

R: Ah, of course: it's the 80th anniversary of ESOMAR in 2027 – still there and highly stimulating! Now, waking up back in 2017, ESOMAR is 10 years younger! I think this is the perfect moment to celebrate the bright future of our industry! Cheers ESOMAR!

The revolutions in customerland

“When I use a word, “ Humpty Dumpty said, in rather a scornful tone, “it means just what I choose it to mean – neither more nor less.”

“The question is,” said Alice, “whether you can make words mean so many different things.”

“The question is,” said Humpty Dumpty, “which is to be master – that’s all.” (Through the Looking Glass, and What Alice Found There, by Lewis Carroll)

Customer experience in 2017: an expanding universe

It is not just the market research industry but the whole “mar-tech” space (marketing, technology, data & analytics) that is going through an unprecedented period of change. The driving forces are technological breakthrough, business model hacking (start-ups), and competitive pressure, moving at an incredible speed. But behind all these changes is a common quest: the ideal customer experience. Customer experience is the new horizon after excellence in service, greater satisfaction, or stronger recommendations for more predictable business results.

The concept of “customer experiences” was made popular in the 1990s with Pine & Gilmore’s book *The Experience Economy*. Their main proposition was to demonstrate that, to create value beyond product and services, companies should strive to create experiences that are memorable and personal. What do Nespresso, Apple, Disney, Amazon or Uber have in common? A distinctive customer experience. Such experience helps brands differentiate and/or create stronger engagement. In 2007 Gentile proposed an updated definition integrating all the developments that Pine & Gilmore inspired:

“The customer experience originates from a set of interactions between a customer and a product, a company, or part of its organization, which provokes a reaction. This experience is strictly personal, and implies the customer involvement at different levels (rational, emotional, physical and spiritual). Its evaluation depends on the comparison between a customer’s expectations and the stimuli coming from the interaction with the company and its offering in correspondence of the different moments of contacts or touch-points”.

Today digitization of customer journeys, multiplication of data sources and the emergence of new players in every realm of CX measurement (cloud-based Customer Relationship Management-CRM- platforms, feedback-management editors, start-ups in AI and analytics) have turned the CX concept into a buzzword. And everyone in the industry is now claiming to provide “customer insights” or contribute to a superior “customer experience” – using rather stretched definitions.

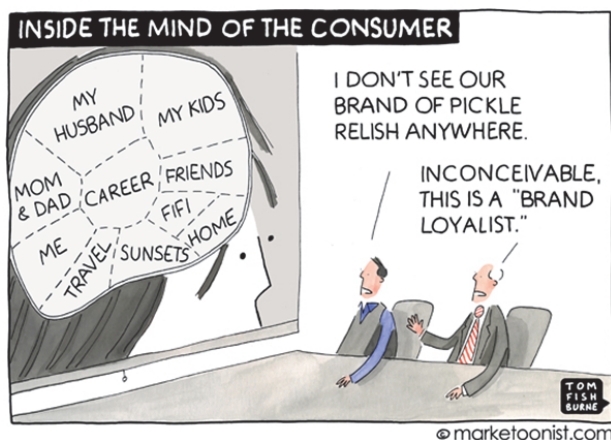
The predominant acceptance of CX is very much about key performance indicators (KPIs) and technologies under the influence of software business marketing efforts but it also relates to user experience (UX) players improving interfaces for seamless on-line journeys. Measuring CX certainly helps identify conversion issues, detect business opportunities, and/or optimize marketing strategies (providing that you have a strategy... not just a tool!). However, a “customer” cannot just be defined through cookies or as a CRM data set. To better serve your customers, surprise them, and show how much you care – not just sell them more stuff – you need to “know” them on a more emotional level. And this is where behavioral science and empathy in design thinking come into play.

The behavioral economics revolution: toward a new CX definition

By redefining the experience from the “user” point of view, Pine & Gilmore have helped marketers rediscover the power of emotions and context beyond marketing promises. Reframing the theory from “sensorial or experiential

marketing” (the company perspective) to “customer experience” (the consumer perspective) was a brilliant move to help brands redefine their proposition through the eyes of the customer, not the advertiser.

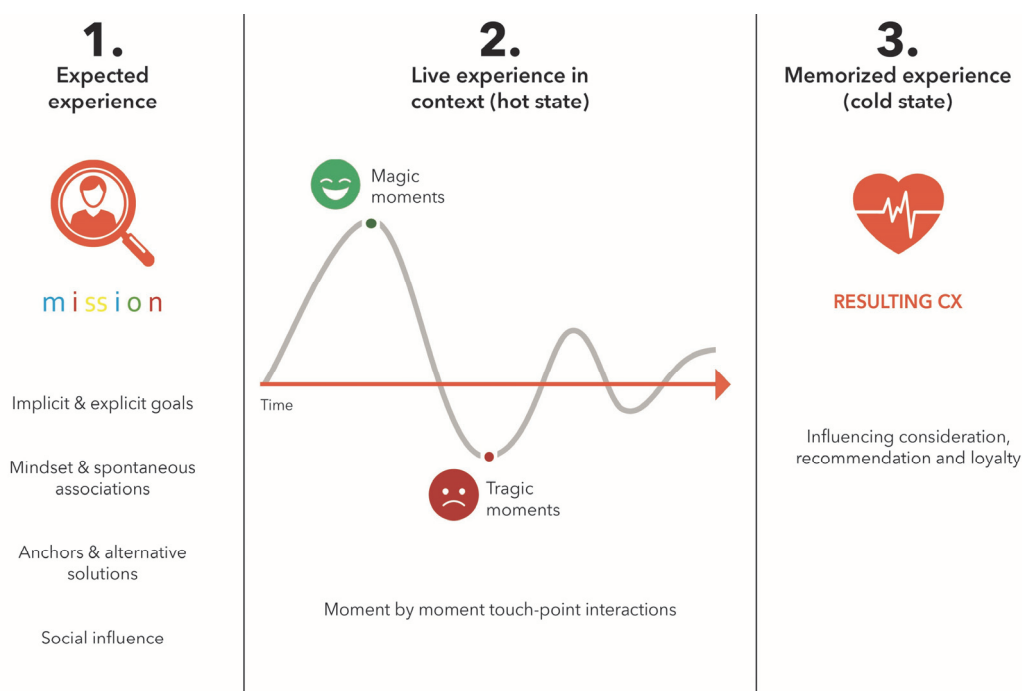
Figure 3.



In parallel, behavioral economics (BE) provides a new understanding of how real people make real decisions in real life: we are not rational “econs” making optimal decisions, but “humans” prone to external influences and making errors (a couple of them being systematic). At BVA, BE insights have inspired many of our methods, including levers to promote behavior change: ‘nudges’ which prove extremely useful to optimize customer journeys (see the ESOMAR excellence award paper “Nudge me tender”:¹⁾ In addition, because “People can perfectly explain what they couldn’t predict the day before” (Amos Tversky), cognitive biases have also helped us to filter what can be trusted from the “voice of the customer”, and what implicit drivers should be researched instead.

But behavioral economics also sheds a new light on the concept of experience. Memorized experience is, in fact, mostly influenced by emotional peaks and final moments (Kahneman), and this has changed our approach to “hot” and “cold” measurement, and also to “value” and price (see our Eureka 2016 Danone-ESOMAR paper).²⁾ In a real-life context, people assess value through relative comparison with alternatives or by time and effort to gratification, not by giving a mark of one to ten – this offers a great number of marketing levers to modify the value perception beyond a customer satisfaction score (CSAT).

Figure 4.



Today we are suggesting a revision of the CX definition through a BE lens. This has already changed the background paradigm of our research, because behavior is what people do, not what people say they will do. And business basically results from real-life behaviors: trial, purchase, habit purchase, re-consultation, churn, recommendation ... brand remains a central element of our definition as it is the emotional brain index that encapsulates and helps retrieve all cognitive associations with experience. Hence we propose the following new formulation:

“Customer experience is a trace left in the memory of a human (a customer or a prospect), associated with a branded product or service and one that will influence – consciously or not – his or her future behavior when engaging with the brand. Experience results from association with emotional imprint of past interactions with organization-branded touch points, but also from implicit comparison with alternative reference points, activated in any given situation”.

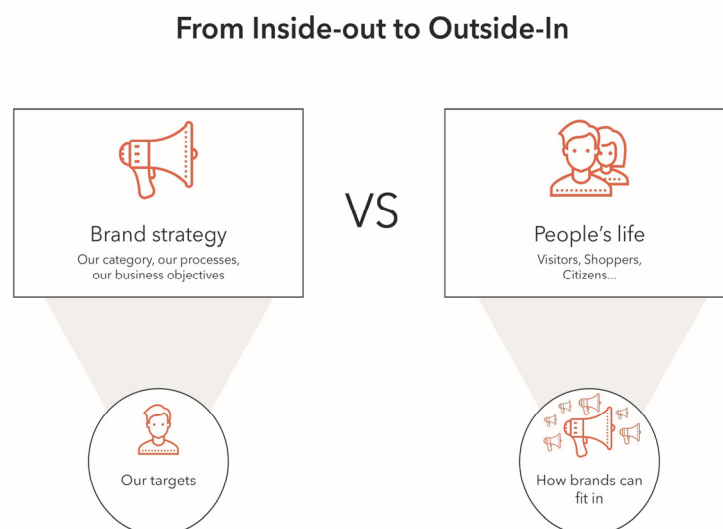
This definition emphasizes a perceptual and behavioral result within the mind of the subject (a sensori-motor result and not a description of the interaction from an outsider perspective). It also highlights the importance of situational factors framing the choice: this is to avoid mistaking the experience that brands want to deliver and what consumers truly “live” when confronted with alternatives. We have also expanded the concept of customer to one of prospects: to also measure the experience of those who can rapidly become a missed opportunity when metrics are focused on existing clients. This definition of experience from the user point of view attempts to fight the curse of brand-centric vision just as another discipline does: design thinking.

Another discipline to enter the CX space: design thinking

Design thinking was originally dedicated to creating new products or services. It was soon considered a helpful method to re-invent customer journeys. Its starting point is empathetic immersion of teams into the reality of clients: a way to force organizations to adopt a user point of view. Field observation, combined with prototyping, is a pragmatic way to help the different functions to “live” and realize what clients experience (not just to ask what they expect). UX designers apply a comparable philosophy to improve digital interfaces, facilitate a user’s navigation, and reduce effort... using real behavioral feedback from users (A/B testing), but after the design is created.

What do BE and design thinking have in common? *They place human understanding (not specifically customer understanding) at the heart of their approach* – unveiling emotional and irrational behavioral drivers in context. *They help companies look at their CX from the inside out and not from the outside in* (see figure 5). This is because it is very hard to switch from a brand delivery point of view (brand vision, the category strategy...) to an end-user point of view (how people live, the problems they face, and how brands may occasionally enter their world) when you are part of a marketing-driven organization.

Figure 5.



Source: BVA Group

Everyday internal constraints often overcome the ability of employees to empathize with outside clients. For CX directors, it’s even schizophrenic: how can you be judge and jury, define strategy and anticipate reaction? To succeed, both BE and design thinking have used a similar strategy: embodying business concepts: “a company”, “a brand” and “a customer” are now real people with a life of their own (that you can empathize with, using videos, personas, live

connections). By incorporating the concept of “customers” into humans, these methods are creating an emotional clash of perspectives. And, as consultants in behavioral change, we know that acting on the perceptions of company employees is critical to drive internal transformation, starting from the top. You won’t change people’s behavior unless they emotionally understand the impact of their actions toward customers. We will see that that market research can play a unique role in creating this clash and help to accelerate transformations, because data and dashboards alone, even in real time, are far too rational to produce this transformational power.

The AI and tech revolution in CX space

The last Consumer Electronic Show in Las Vegas³⁾ displayed how technologies such as virtual reality, augmented or mixed reality, artificial intelligence, or connected objects, are already finding applications in the customer journey. If you want to experience what the future for customers could be, there is a striking video scenarizing existing technologies on a larger scale.⁴⁾:

Figure 6.



Source : <https://www.youtube.com/watch?v=YJg02ivYz5s>

Source: Keiichi Matsuda

Today Big Giants such as Google, Facebook, Amazon and also Baidu, Alibaba, Tencent, and startups like Skymind are putting huge efforts into developing cloud-based, deep-learning solutions. With artificial intelligence, we are at the dawn of a massive revolution both in terms of customer and CX research. With the rise of the Internet of things, the multiplication of interfaces, and digitalization of customer journeys; customer knowledge can be tremendously enriched with contextual data:

- environmental (events, weather, life-stage)
- geographical (place, direction, speed)
- behavioral (search goals, past habits, journeys, reactions to interactions)
- social (publications, connections, influence, tastes)

Beyond more classical CRM (transactional, profiling), media (views, engagement, conversion) or more classical research data (questionnaire based).

Benefits for companies and their clients: new analytical and predictive capabilities (machine learning and deep learning) will allow the study of patterns in the business to optimize revenue opportunities, facilitating continuous lead generation, proposing to the client the relevant default communication channel, serving them faster or with more individualized offers, activating recommendations in both the physical and digital world, and anticipating possible dissatisfaction... It will also generate service innovations to improve all stages of the experience: an immersive trial, more rapid delivery or return, simplified and secured payment, support from virtual assistants or robots, anticipation of contextual services proposed at the right place and the right moment, right at your fingertips.

Benefits for market research: technology can “augment” research in many dimensions, facilitating collection of massive amounts of data from various real-time sources and nature (from sensors across journey, images, voice, internet of things), generalizing automation of some of the most repetitive yet critical tasks to provide reliable research data (sample control, data cleaning, consistency checks), accelerating continuous data processing and using AI to predict customer behavior and automate relevant retro-feedback to clients or brand owners. Ultimately tech-empowered research tools should free researcher time to solve higher value problems: a forward- looking prospective, drawing assumptions, refining research design, defining benchmarks, KPIs and action standards, and working on an action plan. Augmented research is also about using AI to improve human decision making, de-biasing organizations of their behavioral tendencies (over-confidence, confirmation or present bias).

The dark side of the technological revolution

The multitude of brands using AI-powered new tools (push notifications, bot conversations, in-mails), competing in a battle for attention and conversion, combined with the increase of interfaces, will generate unbearable levels of solicitations. While originally social networks and the internet empowered consumers by giving them voices, forcing brands to listen, it seems the situation has reversed. Authentic dialog is not happening beyond mere transaction, and the use of personal data is now perceived as giving unfair advantage to brands. This will create counter reactions on the customer side: (Some episodes of *Black Mirror* and *Real Human* TV series are great indicators of what could happen, see figure 6)

- **Bots strike back:** consumers will have AI portable assistants that are also able to clear discussions with zillions of bots, blocking ads or spam, and managing their time while minimizing interruptions. In the world of tomorrow each of us can have a virtual clone that can partially replace and protect us from demands, but also making it hard to know who is talking to whom.
- **Consumer business power:** social commerce recommendations and peer-to-peer trading enabled via a block chain will oblige brands to approach their consumers with renewed humility, to get credentials instead of pushing them advertising. Permission marketing will return and trusted third parties will be filtering brand access to consumer communities (some managed by researchers!).
- **Protection:** Major data breaches and cyber attacks will increase expectations of data privacy and security, and people will refrain from clicking on links even for a poll. Services to protect consumers, anonymize their identity, create safe avatars of them, unplug them... will flourish. Creating multiple islands in an ocean of data will increase the difficulty of analyzing and reaching relevant targets.
- **Human first:** the multiplication of AI-driven services, fully automated journeys, the threat of replacement, a lack of human contact, combined with an identity crisis will create social acceptance issues. As a reaction, human contact and human-made products and services will gain huge social value. In a very artificial world, where every interface attempts to mimic humans, (and humans try to become perfect), the fact of endeavoring to serve someone even in a clumsy way, the risk of failure, and the power of forgiving will become a sign of authentic human-to-human relationships – just like having fun or showing a contextual sense of humor.

Figure 7.



© Black Mirror



© Real Humans

Our industry through the CX looking glass

"My dear, here we must run as fast as we can, just to stay in place, and if you want to go anywhere, you must run twice as fast." The Red Queen.

2017: Market research into the rabbit hole?

The convergence of CRM and feedback-management tools is challenging the market research industry, which used to collect its own data. The emergence of CRM platforms and inbound-marketing strategies is closing the loop in real time – from contact question to sales conversion. Every bit of feedback can be turned into "the next best action" following the "real-time" question: "If you are dissatisfied, our operator will call you back"; "If you liked this product, may we suggest this one too"? "Was your visit memorable? Share it with your friends ...", all driving an improved perception of return on investment (ROI) and real-time "insight to action". Meanwhile, although providing strategic

insights and deep customer knowledge, traditional market research still struggles to connect its learnings to business results and demonstrate ROI for their customers.

Automation will certainly facilitate production of all standard research approaches, but the “push button” myth of fully mechanized research is wrongly assimilating data to insights, and supposes highly structured data. Insightful explorations and customer knowledge usually require some thought in placing relevant assumptions, in elaborating research design, in cleaning the data... It also requires some psychology in the delivery of results to the target audience: standard KPIs are often not relevant to many situations, and good or bad news cannot be presented in the same way. So automation will provide “more of the same old thing” faster and at a cheaper cost, accelerating depletion of the past profit-pool of the industry (such as brand trackers), but without creating a breakthrough in the way insights are delivered and made actionable today.

Now, given current mutations across sectors (retail & e-commerce, bank and telecom, transportation and entertainment), we don't know what the profile of the market research customers of the future will be. Will they be New Giants? Old Stars? Hybrids? However, one thing is certain: the market research players who will dominate in the future are those who will truly help their customers succeed with their own clients (or consumers). Market researchers can only succeed through co-evolution with their customers and their ecosystem. Although this sounds like going back to basics, this promise of a deep understanding of your customers has never been so crucial when end clients are also rapidly adopting new usages. And researchers have a couple of assets to leverage.

From a BtoB to a BtoBtoC to human-to-human

If market research customers win with their clients, you as market researchers win too! Hence the period we are now entering should offer fantastic opportunities for CX research. But, as we mentioned earlier, true “understanding” of your customer must extend far beyond the creation of data flows to track satisfaction scores or manage feedback. Intimate understanding of, or true empathy with, the end client becomes a competitive advantage when you can anticipate – not just track – your customer's client's reactions: the churn he won't bother to tell you about. Winning market researchers are better at anticipating end clients than their customers are, and better than anyone else. To do this, you need to go beyond the data and bring it alive with some human behavior and psychology acumen, plus sectorial expertise – because behind the figures are people, who buy, adopt, recommend and make the business thrive in real life. Talented researchers help managers “become” the customer, not just listen to them.

On the other side of the “looking glass”, facing the customers are the employees. They are either the face of the brands or those who manage all the touchpoints and processes in back offices. They are also the ones who will undergo massive transformations to adapt to changing demands, with all the stresses and uncertainties entailed. Any corporate or technological transformation is first and foremost a human and organizational challenge. Getting feedback from your employees is a step in the right direction, but it's insufficient if you can't relate new ways of working to a client-driven motivating challenge. Convergence between CX research and employee feedback is a proven key to building a sense of purpose, by promoting changes with the end client's perspective in mind. But starting to introduce AI in CX processes, claiming you will do more of the same thing more cheaply (i.e. with fewer people) is certainly the worst narrative of all: don't expect your employees to find motivation and invent new ideas to delight your clients starting from there!

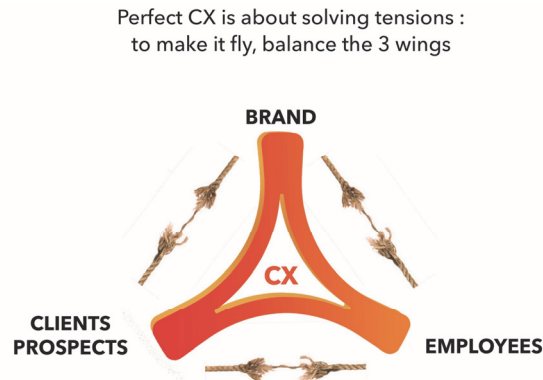
The customer's transformation: who is to oversee the customer?

The reality is that, although many companies claim to be customer centric, most are still stakeholder centric. They put internal stakes and financial results first, and have some tools to show that they listen to their customers, while having no CX strategy. Most often their costs, brands, or processes are higher up the agenda than customer concerns. And employee motivation also often appears way back down the list. With the transformations taking place today, an in-depth understanding of customers can no longer be the privilege of one function, be it the Insight Director, the CMO or the CXO. Successful companies (like Zappos, Lego or Decathlon) have a completely client-obsessed board, starting with the CEO. At the highest level, a deep understanding of how clients behave in the market place and of their motivations and barriers is what will inspire transformational moves.

Having a shared customer culture across the organization is a true competitive advantage: HR will then play a critical role to nurture it. At any level empowered employees can make their decisions with the client in mind. Unfortunately, existing processes and territories frequently get in the way. Current hierarchical organizations in functional silos are no longer efficient in an agile world. And new collaborative ways of working need to fit in with the internal culture to create seamless experiences from the customer perspective. Hence a customer feedback program (voice of the customer) is never enough: it often highlights the symptoms more than the root causes. You may manage day-to-day

improvements with it, but you can't expect to inspire a revolution with metrics stuck within an existing silo, true encouraging feed-back to a human requires more than just figures. This is when an outsider perspective is required: to rethink the whole not just the parts, also using benchmarks from other industries as a change agent. To facilitate collaborative work in our customer's organizations, at BVA we consider that *CX is not about putting clients first or brand first or employees first, it's about resolving tensions between all between all three*: and most of the time, it starts with getting people to collaborate. To this end we have created a consulting framework and metrics to identify and monitor these gaps, not just to give every silo its own perspective.

Figure 8.



Source: BVA Group

Transformation is first and foremost a matter of cultural change toward a more customer-minded organization, and not all companies have the same maturity in CX. But you can only consider, manage, and anticipate customer behaviors if you know them very well, some of them personally, not just through dashboards and KPI's. And you can only expect your employees to care about customers if they also feel well treated. And finally you can only expect clients to recommend you if their experience with brand was seamless... CX is a systemic network of interactions, and collaborative work helps reduce these tensions, starting at the highest level: the board. Creating an inspiring CX vision helps align everyone, with technology coming as an enabler. If you have an inspiring value proposition for clients and customers, the adoption of new tools will become easier. But if you impose new tools, threatening people's job and questioning their sense of purpose, don't be surprised to encounter resistance to change. Of course, technology can inspire services that customers wouldn't think of, and vision is often an act of creation. But in the end the value of any new product, service or experience will be judged through the eyes of the user, and in change management, social acceptance matter.

CX-augmented research: the future looks bright

On paper CX market research has some of the best assets to meet all these challenges and should have a bright future. But not all market-research players have the same maturity in CX transformation (you might like to read the previous paragraph again, mirroring your own organization vs. your customer's). Some changes and hybridization will be required to meet evolving market needs, and regain uniqueness against tech-driven competitors, still leveraging existing assets:

- *A long customer relationship and end-client knowledge:* CX Researchers have been in contact with their customer's clients for a long time. We could say that they even know them sometimes better than the fast-changing marketers do. However, to create an "outside-in" perspective, and generate the emotional clash that inspires action, researchers will need to push their consulting abilities further, and invent engaging ways of delivering their message beyond dashboards, figures or verbatim.
- *A culture of self-marketing to improve through:* To have an impact, market research must demonstrate how it drives value in and risk out by transforming data into bottom-line impact. A deeper understanding of companies' organizations and connections with C-level audiences will support this. The challenge is to co-design case studies with high profile customers, showing how research has contributed to solving broader business issues, rather than just answering functional questions. Researchers can also valorize their trans-sectorial knowledge and database benchmarks to enrich their consultancy.
- *Masters in data science, but could be more tech savvy?* CX Researchers know a lot about data, but sometimes a bit less about the technological state of the art: cloud platforms, user interfaces, social data... So hiring new tech

capabilities (as a service) beyond analytical skills will be critical, including UX knowledge to engage clients/citizens as human partners (do not call them respondents anymore, as you owe them feedback!). Sourcing quality data (from a client or third party) will become a full-time job, and the ability to connect the dots across different data sources a valuable talent. Because mis-match is the rule in the unstructured data world (where collection method, questions, periods differ), making different sets compatible will require both rigor and creativity: Ai & humans will complement each other.

- *Human sciences as the second R&D leg:* Market researchers historically work hand in hand with academic researchers. They have a once-in-a-lifetime opportunity to breathe new life into the customer-understanding framework with behavioral science insights. This means that they should challenge some convenient but irrelevant metrics, and propose new frameworks that the clients will buy into. Because there are new ways of obtaining intimate knowledge about consumers (sometimes using people as the best emotional captor ever made...), market research can provide more than “empathetic” immersion, using ethnography and video self-reports. Early behavioral targeting can help refine characteristics of the people to observe and where, and increase the likelihood of findings that will be relevant at scale.
- *A sense of ethics, and a trusted third-party:* The human side of data will become increasingly important in the future. Researchers with a culture of being alternatively the voice of the customer or the employee or the citizen can leverage this: promoting sensitive data protection know-how, and consulting with brands to rethink the relationship with their clients. As consultants they can advise brands how to secure their data eco-system in the longer term. And they can also protect the people who trust them from excessive solicitations as a counterpart to using their data to generate insights.

Figure 9.



To manage all this, hybridization of research organizations including data science specialists (data mining, machine learning) and human science research profiles (ethnography, psychology, behavioral economics) will become a must. Because in the end, behavioral knowledge provides meaning to customer big data. It helps manage customer-driven marketing, using data to inform this, as opposed to data-driven marketing that lacks authentic customer knowledge. And to truly “know your customers”, two eyes are better than one. In my organization (BVA-group) we bet that combining data science and technology with behavioral science and empathy is the mix that will deliver the best results.

Alice: “Would you tell me, please, which way to go from here?”

The Cheshire Cat: “That depends a good deal on where you want to get to?”

Alice: “I don’t much care where,” said Alice

“Then it doesn’t much matter which way you go,” said the Cat.

“So long as I get SOMEWHERE.” Alice added as an explanation.

“Oh you’re sure to do that,” said the Cat, “if only you walk long enough.”

Endnotes

1. https://2016.esomar.org/web/research_papers/Ethnographic-Research_2609_French-Government-Nudge-Me-Tender.php
2. <http://researchchoices.org/content/public/T5G/brand-renovation-drive-value-in-and-risk-out-new-value-kpis-for-brand-experience-redesign>
3. <http://www.ces.tech/>
4. <https://www.youtube.com/watch?v=YJg02ivYzSs>

The Authors

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Appendix: Some interesting views on AI to stimulate future thinking

A view from **Sara M. Watson**, columnist, affiliate with the Berkman Klein Center for Internet and Society at Harvard University, and a writer in residence at Digital Asia Hub. “We Need to Tell Better Stories About Our AI Future: It's not as simple as man versus machine”:

https://motherboard.vice.com/en_us/article/we-need-to-tell-better-stories-about-our-ai-future

A view from **Margaret A. Boden**, Research Professor of Cognitive Science at the University of Sussex, UK, and the author of “AI: Its Nature and Future”

<https://www.project-syndicate.org/commentary/artificial-intelligence-no-singularity-by-margaret-a--boden-2017-02>

A View from **Jerry Kaplan**, teaching the social and economic impact of AI at Stanford University. Author of “AI : What Everyone Needs to Know”, from Oxford University Press: “AI's PR Problem: Had artificial intelligence been named something less spooky, we'd probably worry about it less”

<https://www.technologyreview.com/s/603761/ais-pr-problem/>

A view from **Luciano Floridi**, Professor of Philosophy and Ethics of Information at the University of Oxford, faculty fellow at the Alan Turing Institute. Author of The Onlife Manifesto: “Being Human in a Hyperconnected Era “Charting Our AI Future”

<https://www.project-syndicate.org/commentary/human-implications-of-artificial-intelligence-by-luciano-floridi-2017-01>

A view from **Charles-Edouard Boué**, CEO of Rolland Berger Consulting, author of “La chute de l'Empire humain, Mémoires d'un robot”, Grasset 2017, <http://www.lefigaro.fr/societes/2017/05/19/20005-20170519ARTFIG00271-charles-edouard-bouee-nous-disposerons-tous-d-une-intelligence-artificielle-portative.php>

A view from **John Hagel**, Chairman of the Deloitte Center for the Edge (Silicon Valley) and **John Seely Brown**, co-chair, and co-author of “A New Culture of Learning” and “The Power of Pull”, visiting scholar at the University of Southern California, former chief scientist of Xerox (Palo Alto Research Center)

<https://hbr.org/2017/06/great-businesses-scale-their-learning-not-just-their-operations>

A view from **Gartner**, the world's leading information technology research and advisory company:

<http://www.gartner.com/smarterwithgartner/gartner-predicts-a-virtual-world-of-exponential-change/>