

Gartner for Customer Service & Support

Find Service Technology That Solves Business Problems



Gartner®

Customer service and support leaders may lose sight of business objectives when choosing technology because they are influenced by vendor demos. This research explains how to prioritize solving business problems when guiding customer service technology investments.



Jason Bridge
Senior Director
Analyst



Drew Kraus
VP Analyst

Published 4 December 2024 — ID G00809088

Overview

Key findings

- When selecting customer service technology, leading with the technology alone risks narrowing the scope of the effort, and therefore the outcome, reducing the total potential value delivered to the business.
- Vendor-run demonstrations of customer service and support technology can steer technology selection focus away from alignment with business requirements and objectives.
- Aligning the investment in new customer service and support technology with the business need is challenging when customer service business and technology leaders pursue competing goals, which vendors can exploit to win the business.

Recommendations

- Prioritize business requirements before making technology investment decisions to reduce risk and regret.
- Prioritize and hold vendors accountable for delivering business value by incorporating use cases into demos.
- Ensure solution influencers and decision makers work collaboratively across business and technology functions to jointly capture use cases and customer journeys.

Introduction

Cloud-based technology built to manage customer service and support interactions continues to evolve at a rapid pace, vastly improving the capabilities of legacy, premises-based equivalent offers — many of which are now solely in maintenance mode. The shift to modern, cloud-based and IT technology offers opportunities and, in some cases, necessitates changes to existing technology providers and suppliers.

Customer service and support organizations often suffer from systemic and cultural disconnects that prevent them from making informed technology decisions. One example is when business and technology stakeholders inevitably participate in “art of the possible” product demonstrations from vendors that highlight the vendor’s differentiated solution capabilities. Many will leave with an overwhelming desire to capitalize on advanced technology to improve the customer service environment.

Gartner clients and Peer Insights indicate that technology-led customer service projects often result in a need to reverse-engineer business requirements to fit the selected technology. This approach leads to delays in vendor selection and service migration, poorly designed experiences and costly retraining exercises.

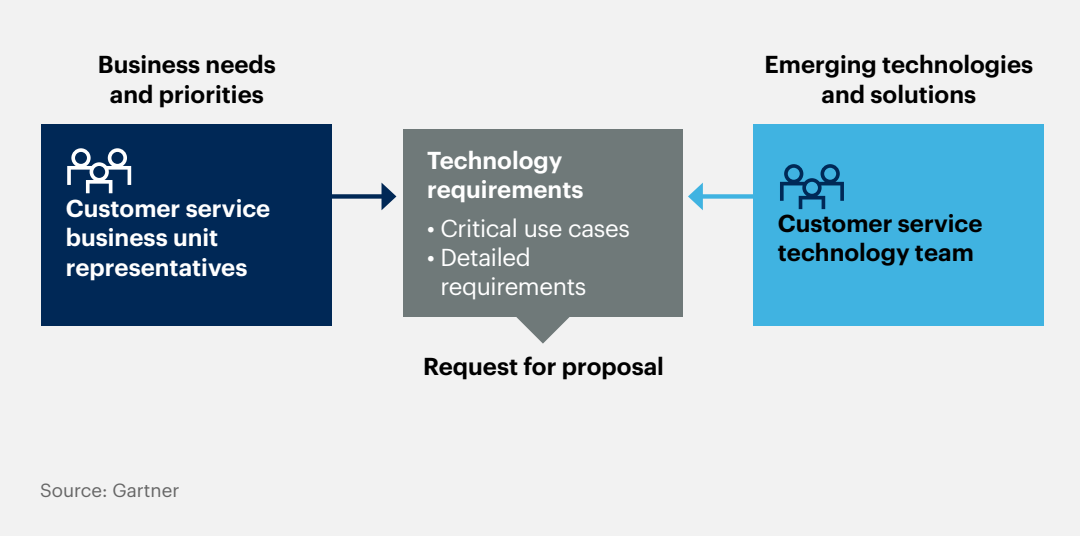


Technology projects are more successful when there are clear and compelling business needs for change, ideally encompassed within a transformational initiative. In the customer service space, disruption to operations must be minimized, especially as the staff costs are a major (65%) component of a customer service operation. ^{1,2}

The customer service and support technology leader should be the primary sponsor and driver of new investment, with input from a cross-functional team that spans technology, business, customer experience, employee experience and operations. The team must first establish the corporate strategy and objectives, then identify the business priorities for customer service and the transformational initiatives that would justify an investment in technology. Technology expert research can advise the customer service organization of the possible solutions to support any transformation.

The customer service business unit representatives and customer service technology team should work together to identify the technology requirements for a request for proposal based on business needs and priorities (see Figure 1).

Figure 1: Customer service technology selection team



Analysis

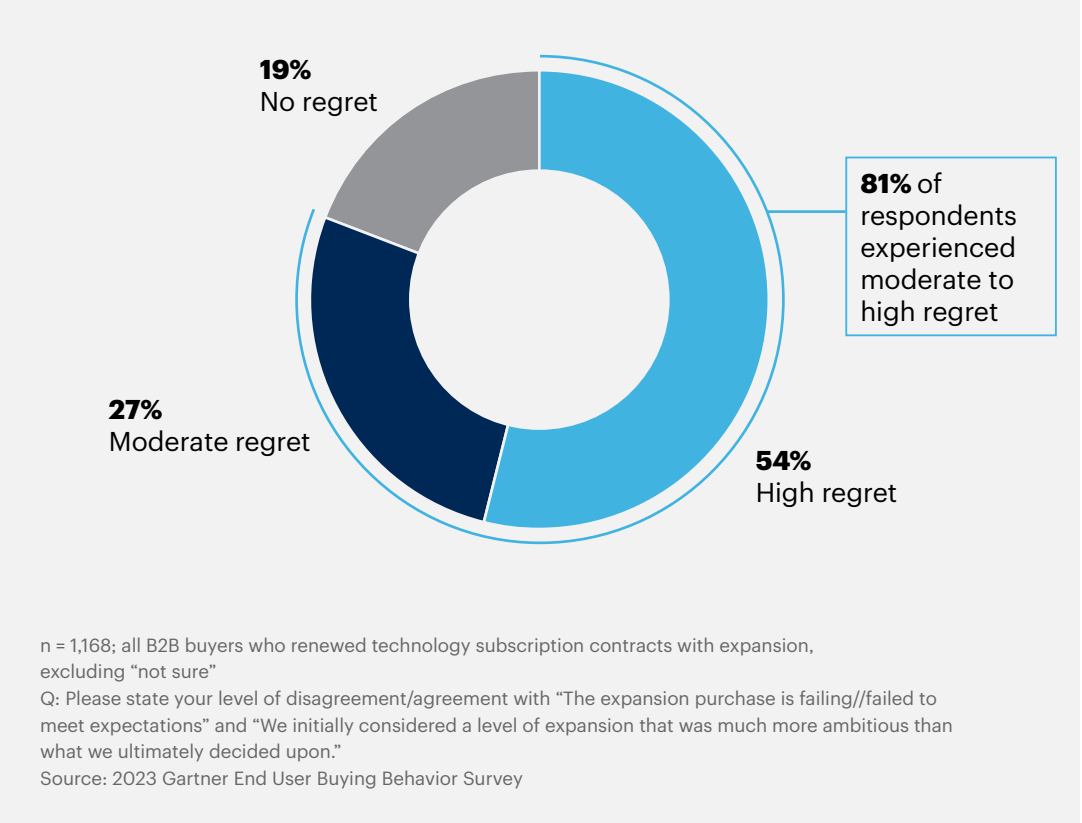
Prioritize business requirements before making technology investment decisions

Over 80% of technology buyers experienced regret with their “as-a-service” expansion purchase decisions, according to the 2023 Gartner End User Buying Behavior Survey. ³ The buyers from that statistic were notably already on the platform, having made the initial vendor selection much earlier (see Figure 2).

One of the reasons for buyer regret is that vendors frequently push a technology-led sales process that focuses on what they do differently and better than their competitors, instead of starting with their prospective client and their needs. Vendors may do this deliberately so they can control the narrative. Consumers can then be easily swayed by their polished presentations and justification.

Vendors that continue to bring innovations to their service focus on creating an urgency-driven environment that emphasizes what’s new and exciting, but doesn’t necessarily accommodate the client’s business requirements.

Figure 2: Respondents who experienced regret with a recent “as-a-service” expansion purchase



Hold vendors accountable for delivering business value

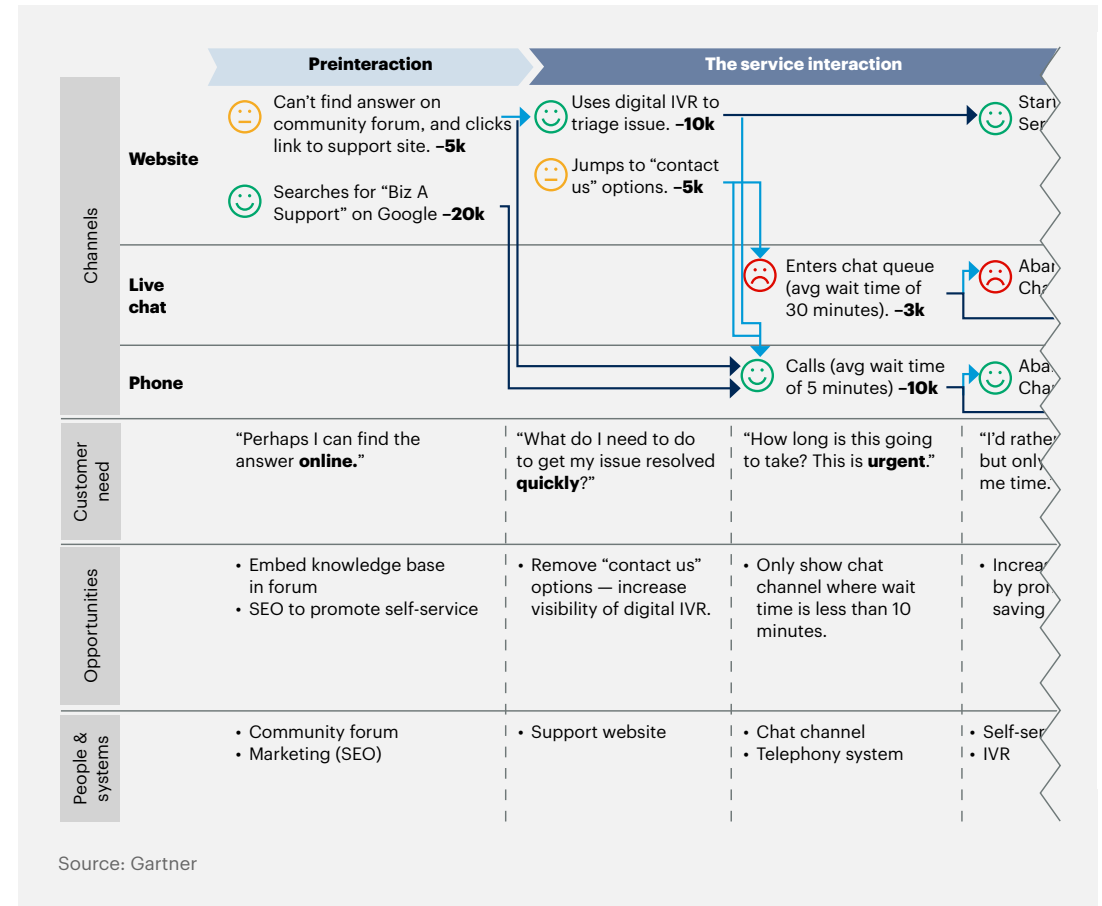
From a business perspective, use cases describe the different ways customers use a service or capability to meet their needs or address specific issues in their customer service journey. Use cases are numerous and specific to each client’s customer service organization. They differ between vertical markets, customer demographics and the organization’s technological maturity.

Documenting priority use cases will drive a set of functional requirements that vendors can use to map their platform capabilities for demonstrations. Without these use cases, the vendor will focus on their strengths and what catches their interest, instead of showing how their platform can align with and enable the use case’s real-world interactions.

Customer journey mapping is a great tool to capture use case nuances (see Lead Customer Service Journey Mapping Efforts That Drive Action). This collaborative process involves gathering qualitative and quantitative data to understand customer journey experiences and identify the gaps between their expectations and lived outcomes.

By mapping out customer journeys and identifying the touchpoints, internal stakeholders and systems at each step, customer service leaders can develop a clear view of associations between business functions, their responsibilities and the resulting impact on customer experience. The customer journey mapping exercise generates a set of documented use cases that reflect the current and potential future state of customer service interactions (see Figure 3).

Figure 3: Example of a customer journey map for service and support
Encompassing channels, VoC, volumetrics, needs, opportunities and enablers

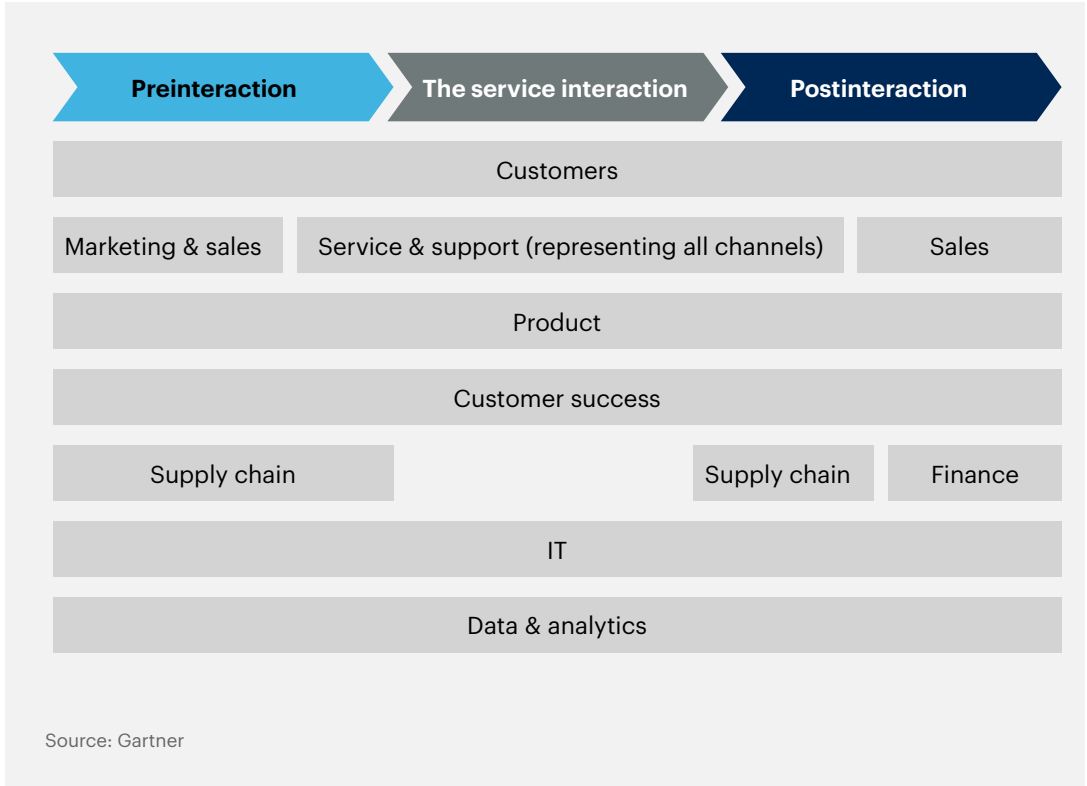


Capturing the customer journey across the highest-priority and highest-value interaction will reveal a practical set of functional requirements from which vendors can build their demonstrations. Clients must hold vendors accountable, including adherence to the “client business requirements drive the demo” mandate, which should be reflected in the vendor scoring model. This keeps the customer service and support leader in the driver’s seat of the vendor selection and investment process.

Ensure solution influencers and decision makers work collaboratively

Customer service and support leaders must assemble a cross-functional team to drive the vendor selection and investment process (see Figure 4). The functional representatives must span the entire customer journey, and not just the interactions themselves. This requires stakeholders (e.g., marketing, sales, customer service and supervisors) ensure that the scope is understood and horizontally aligned. Establishing buy-in from the contact center representatives is often a litmus test to ensure future success — as opposed to future regret.

Figure 4: Potential stakeholder to be involved in journey mapping
Reach out beyond the service and support function



The pitfalls that lead to regret can be avoided by:

- Holding vendors accountable for driving demonstrations with client use cases
- Capturing business use cases to reflect current and future interactions along the customer journey
- Leading a cross-functional vendor evaluations team

This approach directly links the highest-value, new-and-improved customer journey use cases to the quantifiable value they deliver.

While any change to customer service technology involves some level of risk, this effort takes a practical approach to mitigating that risk while mapping new investments to better customer outcomes.

Evidence

¹ **Gartner B2C Service and Support Metrics Benchmark Survey.** This survey is taken by service leaders to assess their budgets, headcount, channel productivity (both assisted and self-service), workforce KPIs and case management metrics.

² **Gartner B2B Service and Support Metrics Benchmark Survey.** This survey is taken by service and support leaders to assess their financials, business operations, talent, KPIs, customer experience and support, knowledge management and support operations metrics.

2022 Gartner Technology Buying Behavior Survey. This survey was conducted to understand how organizations approach large-scale buying efforts for enterprise technology.

2024 Gartner State of the Customer Survey.

Gartner Customer Service and Support Priorities for 2024 Survey.

³ **2023 Gartner End User Buying Behavior Survey.**

Actionable, objective insight

Position your organization for success. Explore these additional complimentary resources and tools for customer service and support leaders:



Guide

Customer Service Journey: Mapping to Maximize Value

Optimize your customer service journeys with data-driven insights to learn how to remove silos and incorporate diverse perspectives.

[Download Now](#)



Guide

The Future of Customer Service Agents and AI

Discover how AI is revolutionizing the responsibilities and skill sets of customer service agents in modern organizations.

[Download Now](#)



Report

Top Customer Service Predictions

Uncover how generative AI is revolutionizing customer service channels by enhancing voice interactions and streamlining digital communication.

[Download Report](#)



Report

Top 5 Customer Service Trends and Priorities

Explore emerging customer service trends, priorities and action steps to drive business impact.

[Download Now](#)

Already a client?

Get access to even more resources in your client portal. [Log In](#)

Connect With Us

Get actionable, objective insight that drives smarter decisions and stronger performance on your mission-critical priorities. Contact us to become a client:

U.S.: 1 855 811 7593

International: +44 (0) 3330 607 044

[Become a Client](#)

Learn more about Gartner for Customer Service & Support Leaders

gartner.com/en/customer-service-support/products/gartner-for-customer-service

Stay connected to the latest insight

