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Gartner for Customer Service & Support Leaders

Create A Seamless Customer Journey

Introduction

Customer service and support leaders prioritize delivering low-effort customer experiences, but have not invested in the key program capabilities needed to do so across multiple channels. Use this research to evaluate your capabilities and learn the first steps to make the customer journey seamless.

Overview

Key Findings

- The majority (59%) of organizations say that delivering a seamless customer journey is one of their top three priorities.
- For most customer service and support (CSS) leaders, delivering a seamless customer journey means improving the continuity of service channel transitions and removing the customer's need to repeat information or steps.
- Despite prioritizing improving channel transitions, few service programs have the capabilities needed to do so.
- While long-term technology investments are an important tool to improve channel transitions, certain process-oriented changes can be made now.

Recommendations

CSS leaders can start improving channel transitions by taking these first steps:

- Use consistent troubleshooting steps to minimize the customer's need to repeat information and to incentivize more self-service adoption.

- Ensure that knowledge management (KM) processes produce uniform and up-to-date content across channels.

- Use self-service as an intake and routing function to make multichannel customer journeys shorter and more personalized.

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Data Insights

CSS leaders are focused on removing points of friction from the customer journey. According to the 2022 Gartner Seamless Customer Journeys Survey, a majority (59%) of CSS leaders place delivering a seamless customer journey among their top three priorities. While 15% said it is their single top priority.
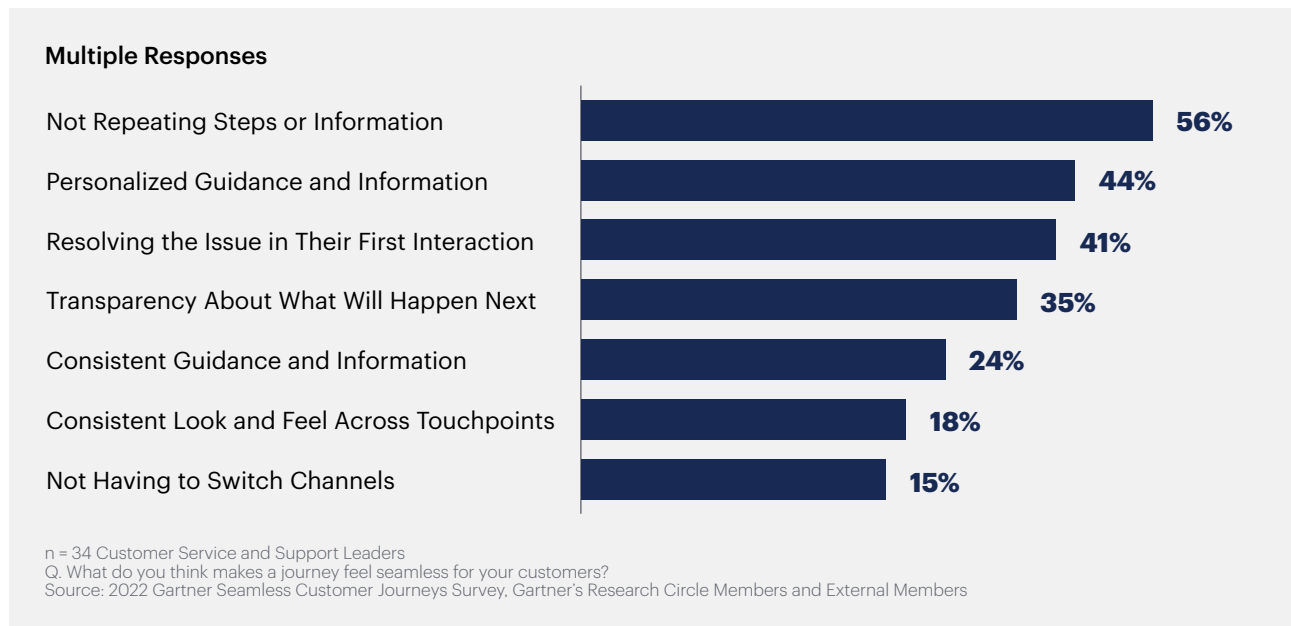
Why Improving the Customer Journey Matters

Seamless customer journeys are important for improving the customer experience, as well as delivering cost savings to the organization through efficiencies, such as lower average handle time. Disconnected customer journeys are often defined by the customer's need to repeat information. In fact, Gartner's 2022 State of the Customer Survey found that those customers who switch service channels are twice as likely to repeat information. Repeating information drives substantial (15% to 23%) declines in CX outcomes (in CSAT and Customer Effort Score [CES]), depending on the channel. For more information, see Switching Channels Shouldn't Mean Losing the Customers' Context.

Seamless customer journeys are also good for reps, since they spend less time gathering basic information and can deliver shorter assisted interactions. A seamless customer journey is relevant not only to the customer, but also to the employee experience and operational costs.

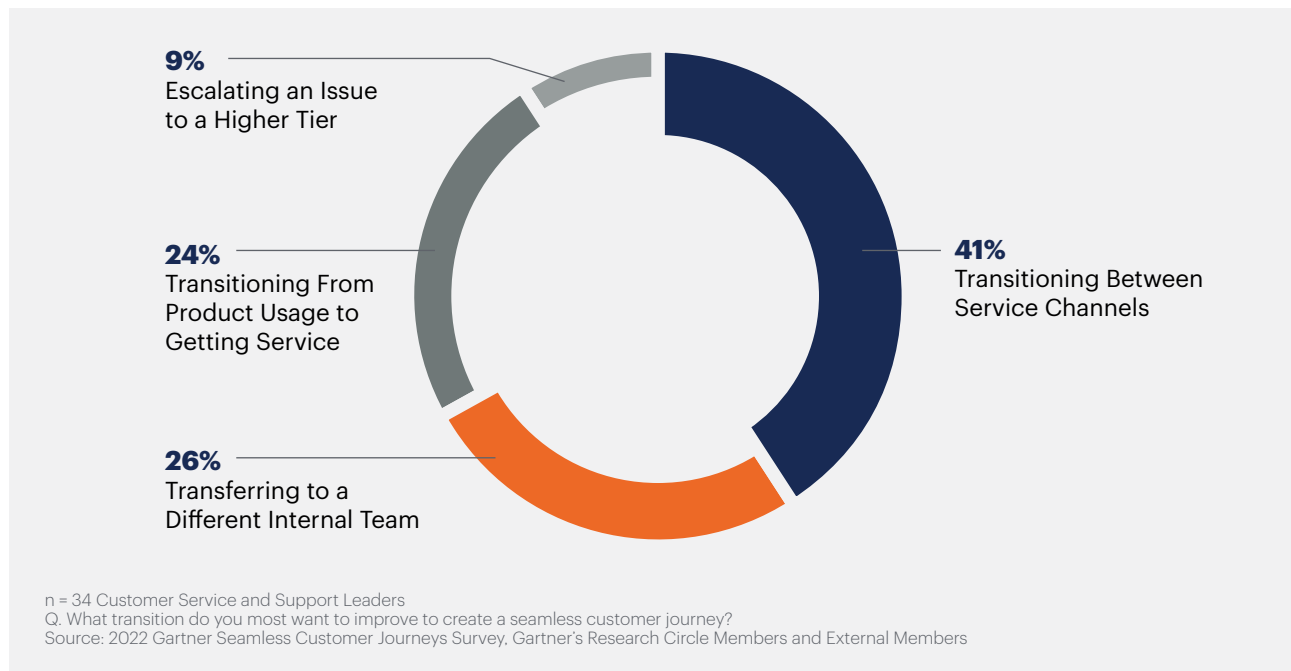## Companies Focus on Smooth Channel Transitions

An array of factors are relevant to improving the service journey. Figure 1 shows that service leaders think the most important contributing factor in making the customer journey feel seamless is enabling the customer to avoid repeating steps or information. In contrast, leaders are least concerned (15%) with avoiding the need to switch channels entirely.

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Figure 1. Contributing Factors That Make a Customer Journey Feel Seamless

Multiple Responses

Factor	Percentage
Not Repeating Steps or Information	56%
Personalized Guidance and Information	44%
Resolving the Issue in Their First Interaction	41%
Transparency About What Will Happen Next	35%
Consistent Guidance and Information	24%
Consistent Look and Feel Across Touchpoints	18%
Not Having to Switch Channels	15%

n = 34 Customer Service and Support Leaders
Q. What do you think makes a journey feel seamless for your customers?
Source: 2022 Gartner Seamless Customer Journeys Survey, Gartner's Research Circle Members and External Members

In fact, when asked about the most critical kinds of transitions that stand in the way of providing a more seamless journey, leaders point to channel transitions. Forty-one percent of CSS leaders say that improving transitions between service channels is most likely to help create a seamless customer journey (see Figure 2). In short, they embrace channel switching as long as the transition is seamless.

Figure 2. Most Important Transitions to Improve to Create a Seamless Journey

- **9%** Escalating an Issue to a Higher Tier
- **24%** Transitioning From Product Usage to Getting Service
- **26%** Transferring to a Different Internal Team
- **41%** Transitioning Between Service Channels

n = 34 Customer Service and Support Leaders
Q. What transition do you most want to improve to create a seamless customer journey?
Source: 2022 Gartner Seamless Customer Journeys Survey, Gartner's Research Circle Members and External Members
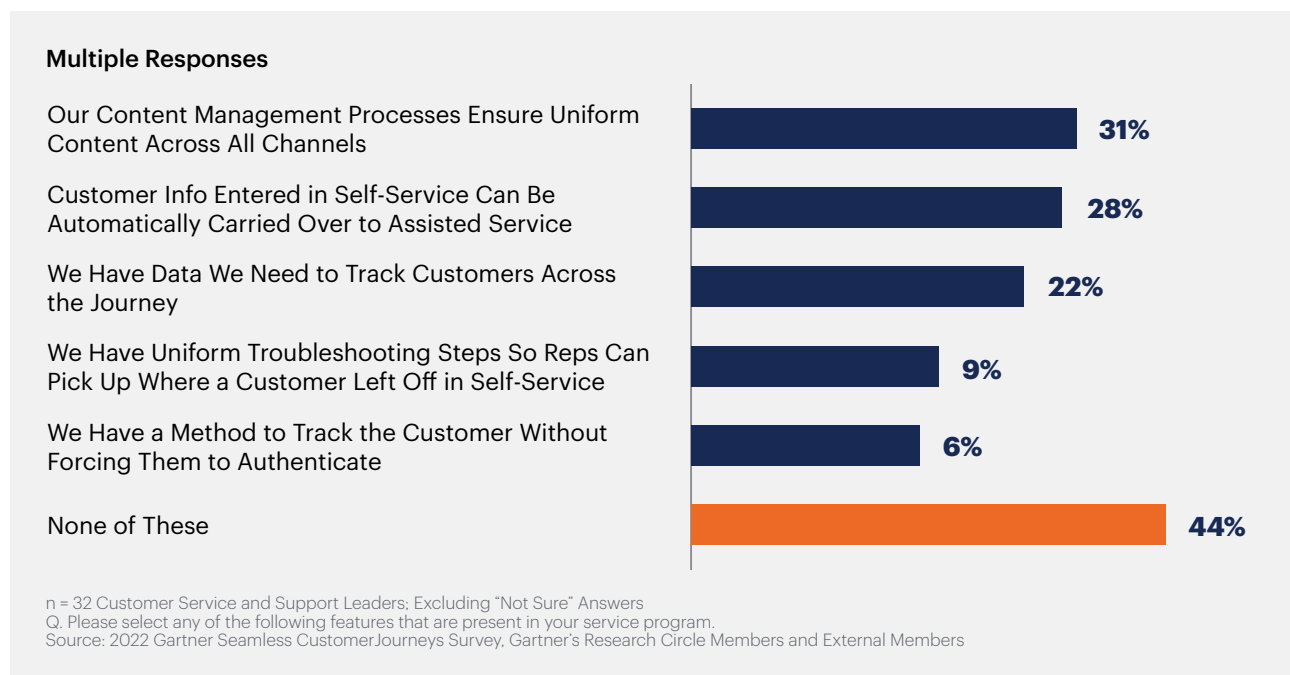
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Companies Have Only A Few Program Capabilities Needed to Deliver Low-Effort Channel Transitions

Despite the priority placed on delivering a seamless customer journey, CSS leaders indicate that many of the service program capabilities that support such a journey are not in place. Figure 3 shows that the most prevalent program capability is ensuring uniform content across all channels through content management processes — although slightly less than a third (31%) report this.

Many leaders (44%) report having none of these service program capabilities. CSS leaders have identified a key problem but have so far underinvested in the capabilities needed to address it. This presents many opportunities to make progress in delivering a low-effort multichannel journey to customers.

Figure 3. Prevalence of Service Program Capabilities That Support Seamless Customer Journeys

Multiple Responses

Capability	Percentage
Our Content Management Processes Ensure Uniform Content Across All Channels	31%
Customer Info Entered in Self-Service Can Be Automatically Carried Over to Assisted Service	28%
We Have Data We Need to Track Customers Across the Journey	22%
We Have Uniform Troubleshooting Steps So Reps Can Pick Up Where a Customer Left Off in Self-Service	9%
We Have a Method to Track the Customer Without Forcing Them to Authenticate	6%
None of These	44%

n = 32 Customer Service and Support Leaders; Excluding "Not Sure" Answers
Q. Please select any of the following features that are present in your service program.
Source: 2022 Gartner Seamless CustomerJourneys Survey, Gartner's Research Circle Members and External Members

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What You Can Do Now

Fix the Process, Then the Technology

Given the lack of program capabilities shown in Figure 3, many organizations will need to make investments in technology to deliver better transitions across service channels. However, CSS leaders can also take a few process-related steps to set up their organization for success.

Use Consistent Troubleshooting Steps to Reduce Repetition and Incentivize More Self-Service Adoption

One key type of self-service content to get right is troubleshooting steps. Inconsistent troubleshooting steps can cause customers to feel they are repeating information and even starting over. As Figure 3 above shows, only 9% of leaders say that they currently have uniform troubleshooting steps, so that a rep can pick up where the customer left off in self-service. Standardizing troubleshooting steps across channels, including the interactive voice response system (IVRS), builds confidence in the steps already taken and enables customers to continue moving forward after transitioning between channels.

A channel transition can happen between any two channels, but it is particularly useful when transitioning into an assisted interaction with a rep. The rep can start the conversation by continuing the journey at whatever step the customer last completed. This not only shortens the total time of the expensive live contact, but also teaches the customer that they can advance their issue in self-service without a rep. This incentivizes future self-service adoption by showing customers that their effort is being used to expedite the process — even when a transition to a rep is needed.

Even complex tasks that will eventually require the assistance of reps can progress in self-service. For instance, a complex 15-step troubleshooting process can be broken down into smaller pieces. The first steps in that process can be accomplished by the customer in self-service. The customer can then transition for assistance after advancing their issue part of the way. This minimizes time with the rep and encourages a digital-first precedent.

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What You Can Do Now

Ensure That KM Processes Produce Uniform Content Across Channels

Under one-third (31%) of leaders say they currently have a content management process in place that ensures uniform content across all channels (see Figure 3). Uniform content across channels facilitates a seamless customer journey by enabling customers to switch channels and pick up where they left off without repeating steps. Uniform content also provides consistent guidance and information — contributing factors in a seamless journey found in Figure 1 above.

Ensuring uniform and up-to-date content across channels should be a major priority, and can occur through both technology and process. The technological solution is a centralized KM system that allows for changes made in one location to be disseminated across all channels. However, absent this ability, CSS leaders can still make organizational progress such as instituting a single content development team that is responsible for the content that is published on all channels. A single content development team fights against the natural siloing of teams, channels and data that often occurs.

Use Self-Service to Make the Assisted Customer Experience Shorter and More Personalized

Too often, self-service results in one of only two outcomes: Resolution or abandonment. Instead, self-service should perform an intake and routing function in journeys that must use multiple channels.

Even when containment can't be achieved in self-service, the channel can still move the customer forward. For instance, the information that a customer provides in chat, such as their issue type and surrounding context, can provide the rep with the information needed to skip unnecessary intake steps and immediately begin resolving the customer. While the customer may need to transition from chat to voice, they are able to skip early steps and feel like they have engaged in a single, continuous interaction. Lastly, having more contextual information at the beginning of the interaction, the rep is able to provide a more personalized experience for the customer.

Self-service can also provide a routing function into other channels. For instance, website-based help articles can link to a specific channel best matched to the individual issue. Complicated, time-sensitive issues can direct customers to the phone, while simple, less time-sensitive issues can direct to email or other self-service options like chatbot. In either case, the goal is to use self-service touchpoints to shorten the journey and guide the customer forward even when immediate resolution is not possible. The customer is rewarded for starting in self-service and the company moves closer to digital-first status.

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Conclusion

CSS leaders prioritize delivering a seamless customer journey. However, they have largely not yet invested in the service program capabilities needed to remove friction from the journey. While technology investments are needed to deliver certain transition capabilities, a few process-related changes to begin delivering a low-effort multichannel journey are within reach of most organizations.

Simple process-related changes can help ensure uniform content across channels and the standardization of troubleshooting steps to help the customer avoid repetition while transitioning between channels. Companies can then advance their tech capabilities such as enabling customers to move their issues forward in self-service even when full resolution is not possible and a transition must occur.

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