FORRESTER®

Understanding The Impact Of Emotion On Customer Experience

Emotionally Savvy Brands Combine CX Discipline With Empathy To Make Customers Smile

by Megan Burns
July 13, 2015

Why Read This Report

Companies work hard to improve customer experience (CX) but often emphasize its utilitarian aspects of effectiveness and ease rather than emotion — how interactions make customers feel. This report explains why their bias toward the rational side of CX limits the loyalty boost that they can get from CX. It shows just how strong the link is between emotion and customer loyalty and lays out the basic rules that govern our emotional response to the world around us. Finally, it offers CX pros a set of proven best practices and tools that leading companies use to anticipate customer emotions, design experiences, and coach employees so that customers consistently walk away feeling good about the experience they just had.

Key Takeaways

Emotion Matters More To Customer Loyalty Than Effectiveness Or Ease
Forrester used data from more than 45,000 US consumers to understand the role that the effectiveness, ease, and emotion of CX play in creating customer loyalty. Emotion -- how an experience makes the customer feel -- contributed most to customer loyalty in 17 of the 18 industries that we studied.

If You Don't Understand Their Emotions, You Don't Understand Your Customers
Many CX issues stem from faulty assumptions about the way customers respond to the world around them. CX pros need to get smart about the rules of human emotion and teach others to see customer emotion with greater accuracy. They must also help firms use technology like speech analytics and research techniques like metaphor elicitation to reveal subconscious parts of the emotional landscape that people can't articulate.

Emotionally Savvy CX Programs Balance CX Discipline With Empathy
Firms need to incorporate emotion into all six of the major CX disciplines. How? Make sure that your CX vision describes the emotions that customers want to feel; measure how well you elicit target emotions; and be willing to hold back projects that miss the emotional mark even if they're fine from a functional perspective.

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by Megan Burns
with Michael E. Gazala, Carla O'Connor, Ryan Trafton, and Rachel Birrell
July 13, 2015

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Notes & Resources

Forrester interviewed 19 user and vendor companies, including Affectiva, Ally Bank, Artificial Solutions, Clarabridge, Continuum, Emugu, FedEx, La Quinta, Lithium, Mattersight, Medica, MU/DAI, Nuance, Scottrade, Target, TD Canada Trust, Universal Mind, Vanguard, and VML.

Related Research Documents

How People Choose

The US Customer Experience Index, Q1 2015

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## Brands Are Fixing The Utilitarian Dimensions Of Customer Experience

The essence of great customer experience (CX) is timeless: Meet customers' needs; make things as easy as possible; and leave people feeling at least as good as they did at the start, if not better. Forrester calls these the three E's of CX quality — effectiveness, ease, and emotion. The three E's are much harder to get right these days, thanks to heightened consumer expectations created by the technology and economic forces that characterize the age of the customer.[1] But many firms have risen to the challenge, at least in part. Data from two of Forrester's CX evaluation tools shows that brands now:

› **Meet more customer needs . . .** Forrester's Customer Experience Index (CX Index™) evaluates the effectiveness of brand-level experiences, while our Website User Experience (UX) Review methodology focuses directly on the effectiveness of traditional websites.[2] In 2011, only 64% of brands in the CX Index got a good score on effectiveness; by 2014, that number was up to 67% (see Figure 1).[3] Between 1999 and 2012, the percentage of sites that passed the effectiveness portion of the Website UX Review leapt from 39% to 59%.[4]

› **. . . more easily . . .** Just over half of the brands in the 2011 CX Index scored good or better on the ease criteria; by 2014, 69% of the brands in the benchmark scored that well. In 1999, only 40% of website navigation that Forrester evaluated passed the basic usability tests in the Website UX Review; by 2012, that number was up to 60%.[5]

› **. . . and in more places.** According to Forrester's Mobile Mind Shift Index, mobile devices have become central to the lives of 29% of US consumers and are heading that way for another 21%.[6] While mobile experiences are a work in progress, that's not stopping consumers from doing business on the go.[7] Nearly seven in 10 US online consumers use a smartphone to go online in retail stores; almost two-thirds use one in a restaurant or coffee shop; and 43% use their phones to go online while riding public transportation.[8] Five years ago, only 17% of US consumers even owned a smartphone.[9]

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FIGURE 1 Changes In CX Index Dimension Scores Between 2011 And 2014 (Original Methodology)

Percent of companies scoring 75 or higher for this dimension
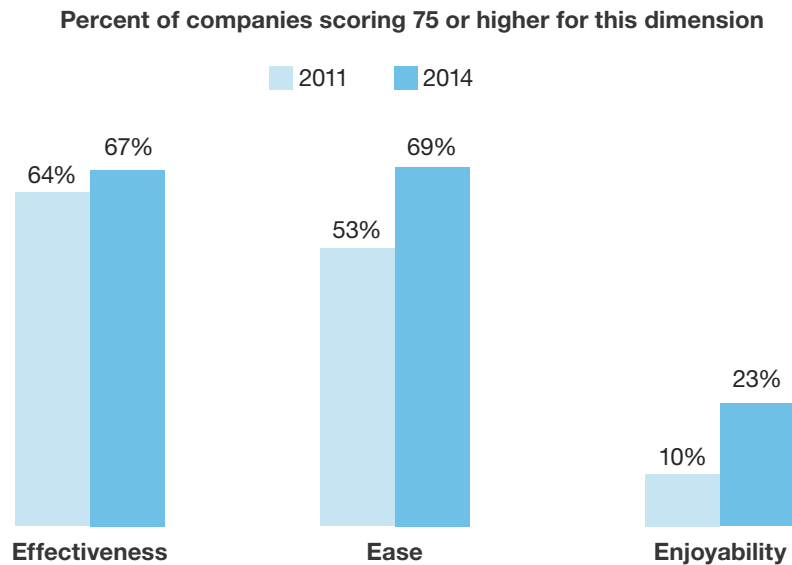
Source: Forrester's Customer Experience Index, 2011 and 2014 (original methodology)

Customer Loyalty Hinges On The Oft-Ignored Emotional Experience

Between 2011 and 2014, higher levels of effectiveness and ease contributed to a 13-percentage-point bump in customers' enjoyment of their experiences, but emotion still lagged the other two dimensions by more than 40 points.[10] That gap is not likely to narrow much because few firms tackle emotional experience improvement with the same intention and fervor that they apply to its rational cousins. That's a costly mistake. How an experience makes the customer feel is:

› **The biggest predictor of loyalty in many industries.** Forrester's most recent CX Index survey asked more than 45,000 consumers to rate their experiences with large US brands.[11] We used that data to examine which of the three E's have the greatest influence on loyalty. Emotion trumped effectiveness and ease in all but one of the 18 industries we studied. Loyalty models at FedEx show a similar dynamic: Emotional experience accounts for almost half of customer loyalty to that brand, while cognitive loyalty accounts for only about a third.[12]

› **A strong competitive differentiator.** The top 15 brands in our most recent CX Index deliver, on average, 28 positive customer experiences for every negative one — that's more than double the benchmarkwide average ratio of 13:1. CX leaders at investment firm Scottrade told us that customers who feel an emotional connection to the firm are more loyal than those who are merely satisfied. Emotionally connected customers are half as likely to take business elsewhere and five times more likely to move money to Scottrade from other firms. They're also better advocates for the firm — they're twice as likely to forward information about Scottrade to friends or family.

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CX Pros Need To Understand Four Basic Rules Of Human Emotion

Companies too often shy away from focusing on the emotional dimension of CX because emotions seem abstract, intangible, and irrational. What they don't realize is that emotions are actually quite predictable: They just follow a different set of rules than rational thought. When CX pros better understand how emotions work, they're better able to guide their firm toward making positive CX the norm. Forrester reviewed the reams of academic and business literature on this topic and identified four must-know principles:

1. **Negative experiences hurt more than positive ones help.** Humans notice and respond to danger faster, more intensely, and for a longer period of time than we respond to pleasure. This built-in risk aversion helped our ancestors evade predators and still skews our response to economic and social threats in modern life. For example, the "pain" we feel from getting hit with a $20 fee is two to five times worse than the pleasure we derive from a $20 reward. This holds true even when we anticipate the fee and are, rationally speaking, fine with paying it in return for a product or service.

   CX pros: Make eradicating pain points the top priority. When deciding what to tackle first, prioritize pain-reducing projects over those intended to move an experience from good to great. And make sure that customer journey maps incorporate the intensity and sentiment (both positive and negative) of the emotional experience (see Figure 2). Where possible, indicate the specific emotions that customers have throughout the journey: Chances are there's more than one. For example, a customer about to book a dream vacation is likely to feel a mix of joy and anxiety. Adding a map of the emotional journey helps remind employees that even minor annoyances can have an outsized impact on how customers feel.

2. **Emotions change experiences as they happen.** When the brain senses something emotionally significant, it puts all five senses on high alert. Pupils dilate to take in more detail, while ears tune out background noise to determine, for example, from which direction a siren is coming. This narrowed focus can cause customers to skip over instructions or blow right by a feature that would solve their problem in two steps. Humans are also prone to confirmation bias: We pay more attention to evidence that supports our existing beliefs about the world, good or bad.

   CX pros: Consider how experiences feel to a highly stressed customer. Persona research for Geek Squad found that some customers operate in two modes — when they're inspired to try new technology and when they're impatient because their technology isn't working (see Figure 3). The information needs and to-do list can vary drastically between the two, so designers made sure that the firm's website was easy to use in both situations. Design firm MU/DAI helped a large insurance client understand how life events like having a baby might influence the policy change experience by asking, "If someone is nervous and pressed for time, how do we account for that?"

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3. **Memories of past experiences don't match reality.** People don't remember every detail of an experience. Their memory is an average of two points in time: 1) the most intense moment (the peak) and 2) the very end (see Figure 4).[13] That means a customer might remember a call with a 5-minute hold time more favorably than one with a 2-minute hold time if the first agent ends the call on a particularly high note. It also means that when problems occur at the end of an interaction — like a waiter disappearing just as you're ready for the check — they cast a shadow over what was otherwise a great evening out.

    CX pros: Give special attention to these memorable moments. Innovation firm Continuum designs the "signature moments" of a new experience first because they're the most intense and have the biggest ripple effect if they go wrong. FedEx coaches employees to deliver bad news, like a shipping delay, very early in an interaction and move quickly to a discussion about how to minimize the fallout. And Delta Airlines sends an apology email with a 500-point SkyMiles credit to its best customers if they get stuck sitting in a middle seat on certain flights. Called "Middle Seat Mondays," the program tries to ensure an otherwise uncomfortable trip ends on a more positive note.

4. **We can't verbalize all of the emotions that we feel.** Watch a baby giggle and you've got proof that we experience emotions long before we have names for them. And throughout life, we're blissfully unaware of much of our emotional experience because it happens at a subconscious level. Nonverbal cues like facial expressions and language patterns help researchers fill in some of the missing pieces, but emotion detection is inherently incomplete.[14]

    CX pros: Help customers express the emotions that they can't put into words. Nonprofit health insurer Medica used ethnographic research to inform a redesign of its end-to-end member experience. CX leaders from the firm asked customers to bring in pictures that reflected how they wished their Medica interactions felt. Trained experts from partner firm Experience Engineering then used a technique known as metaphor elicitation to decipher subconscious emotional needs, such as balance and connection.[15] Universal Mind, a digital agency, assigns two people to watch and document the nonverbal cues that reveal how people are feeling during customer interviews, field studies, and usability tests.

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FIGURE 2 Incorporate Emotion Into Customer Journey Maps

Showing the emotional experiences on a journey map helps employees understand the specific emotions that customers feel and how their intensity varies over time.
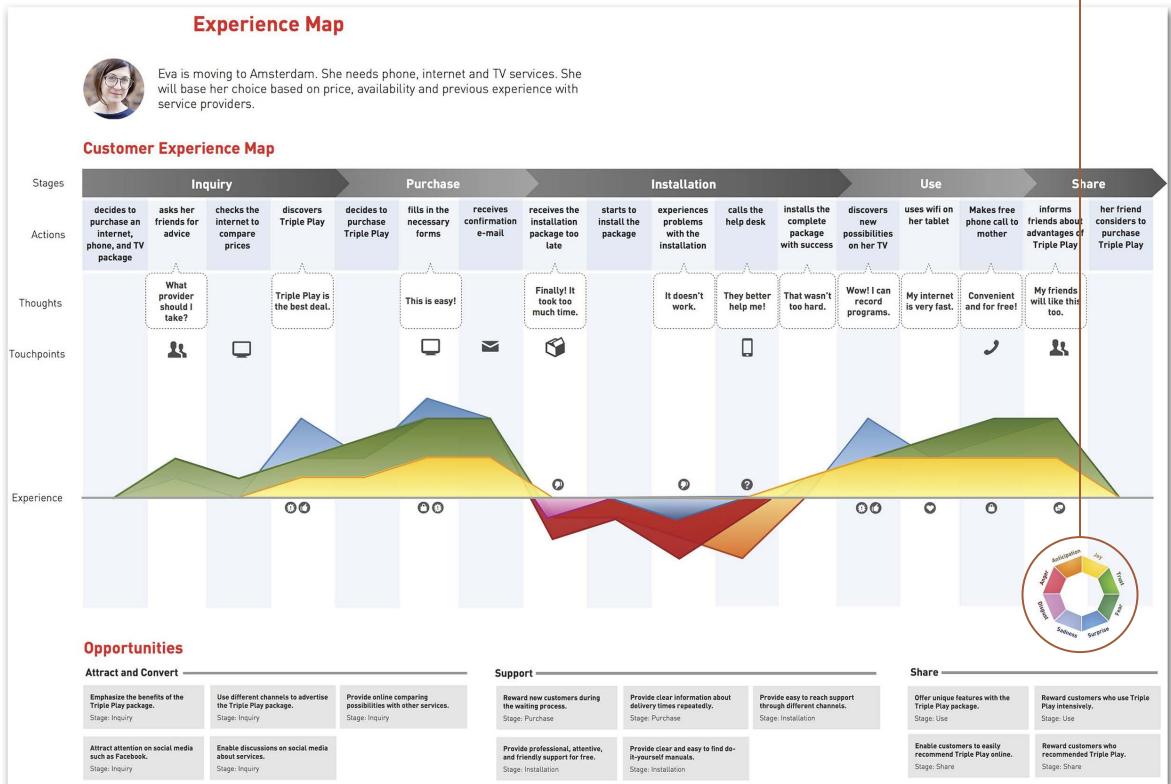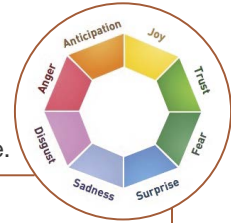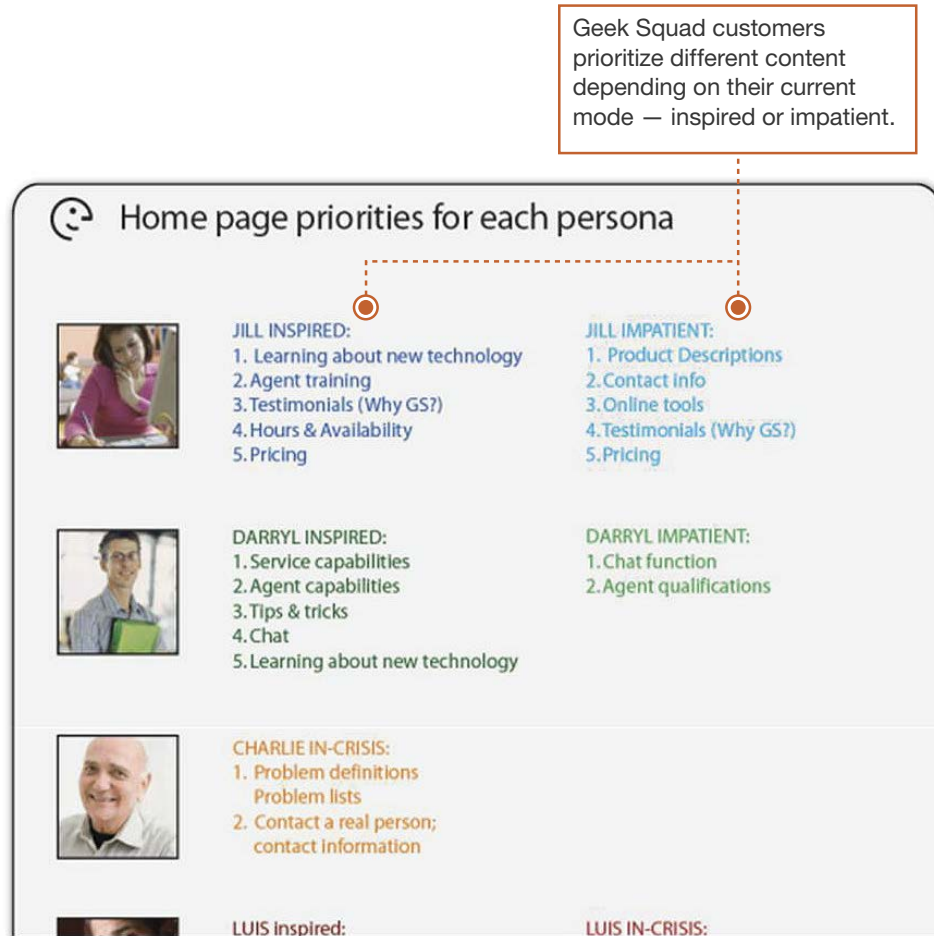

Source: Pinterest

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FIGURE 3 Geek Squad Has Different Personas To Reflect How Customers Feel In Different Modes

Geek Squad customers prioritize different content depending on their current mode — inspired or impatient.

Home page priorities for each persona

JILL INSPIRED:
1. Learning about new technology
2. Agent training
3. Testimonials (Why GS?)
4. Hours & Availability
5. Pricing

JILL IMPATIENT:
1. Product Descriptions
2. Contact info
3. Online tools
4. Testimonials (Why GS?)
5. Pricing

DARRYL INSPIRED:
1. Service capabilities
2. Agent capabilities
3. Tips & tricks
4. Chat
5. Learning about new technology

DARRYL IMPATIENT:
1. Chat function
2. Agent qualifications

CHARLIE IN-CRISIS:
1. Problem definitions
   Problem lists
2. Contact a real person;
   contact information

LUIS inspired:

LUIS IN-CRISIS:

Source: Organic

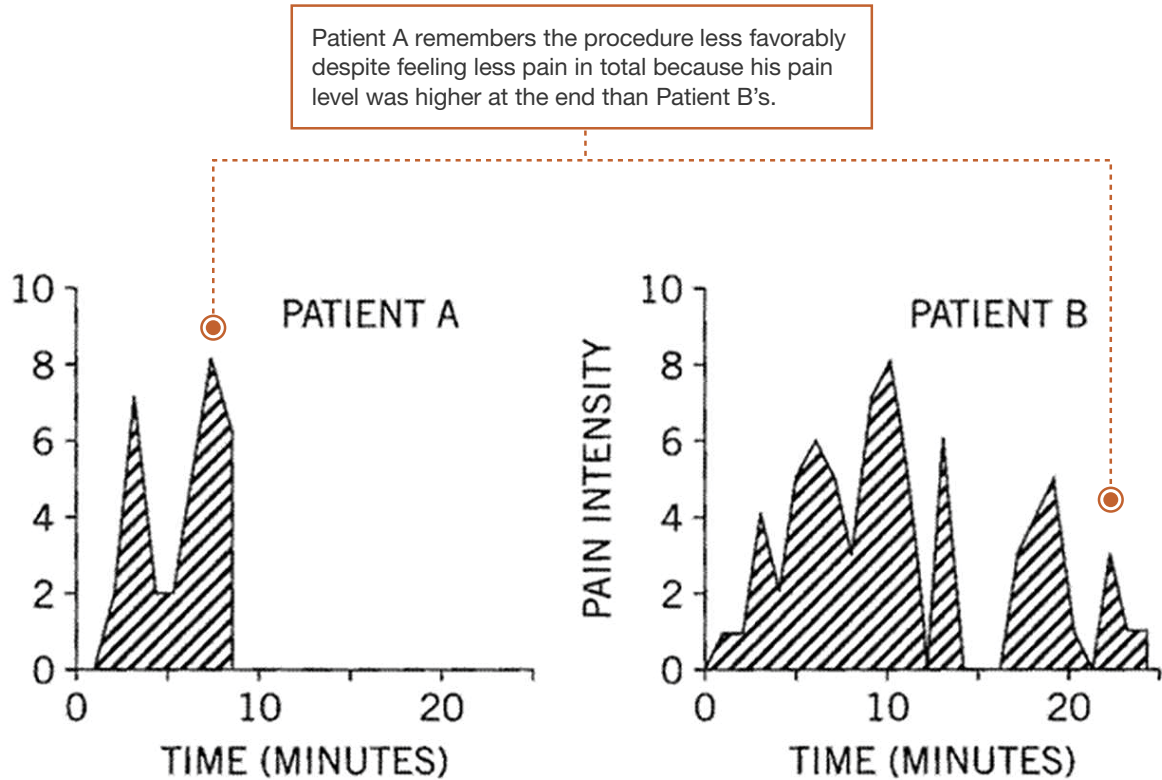FOR CUSTOMER EXPERIENCE PROFESSIONALS   July 13, 2015

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FIGURE 4 Memory Is An Average Of The Peak And Very End Of An Experience

Patient A remembers the procedure less favorably despite feeling less pain in total because his pain level was higher at the end than Patient B's.

Source: Daniel Kahneman, *Thinking, Fast and Slow*, Farrar, Straus and Giroux, 2013

Emotionally Intelligent Brands Merge CX Discipline And Empathy

Forrester asked 19 emotionally savvy brands, design agencies, and technology vendors how they navigate the complexity of emotional experience. The secret? Weave emotional considerations into all six disciplines of your CX management program:

› **Strategy.** When GMAC Financial Services rebranded as Ally Bank, it decided to use emotion as its primary differentiator. CX leaders from the firm explained: "The world didn't need another bank. Our goal was to create a brand that feels like an ally. We're in business to make money with our customers, not off of them." Similarly, Vanguard and Scottrade have CX strategies that reflect their different customer bases. Vanguard, which serves a range of investors from young people just starting to save to empty nesters managing complex portfolios, aims to meet clients wherever they are in their relationship with money. Scottrade, on the other hand, targets self-directed investors who consider money management more of a hobby than a chore. Its CX vision is simply to unleash the passion that these clients already feel for trading and investing.

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› **Customer understanding.** Leading CX brands don't just look for hidden emotions. They make sure to understand the multilayered emotions that customers bring with them to an interaction. Why? Because that context can radically alter someone's response to a website, app, or employee conversation. The firms we spoke with probe for emotional context on five levels — customer temperament, the industry or domain, past experiences, the physical environment in which an experience takes place, and the specific goal the customer is trying to achieve with the interaction at hand (see Figure 5).

› **Design.** Emotionally savvy firms obsess over details, knowing that small moments can have a big and often subconscious impact. Apple employees don't open iPhone boxes for customers, as they don't want to deprive them of the anticipation that comes before the big reveal. Ally Bank doesn't use the standard asterisk to indicate required form fields on its website because designers don't want customers to think, even subconsciously, of caveats or fine print. And Medica asked employees to stop using phrases like "The system says . . ." and "It looks like . . ." because they make customers anxious about the accuracy of the information they're receiving. In all cases, designers told us that prototyping and frequent iteration are the only way to hone in on the emotional X factor that customers can feel but can't describe.

› **Governance.** Leading CX firms put processes in place to manage the emotional side of their CX on an ongoing basis. For example, TD Canada Trust tests its digital capabilities with regards to the emotional response of customers before launching widely. Medica set up a review board to keep customer communications in line with the plan's experience vision. The team includes key players like legal and compliance and has, to date, reviewed more than 300 pieces of collateral for qualities like plain language (good), condescending tone (bad), and evidence that Medica is a partner in the customer's healthcare journey (good). The group's leader credits its success in part to the distinct lack of a "CX police" culture. "We have some grueling meetings, but we laugh a lot, too."

› **Measurement.** Once it realized the importance of emotions to loyalty, FedEx changed its metrics for B2B contact center agents. Before, they were 95% operational and only 5% emotional; now, those numbers are reversed. Mattersight helps one client measure how well experiences end by counting the number of calls where the customer makes a positive comment in the last 2 minutes. It also crafted a metric for a large insurance client that measures the amount of empathy that employees show when talking to customers. At first, it found empathy in just 3% of customer calls. In the next nine months, the client coached employees on how to respond to each personality type, such as telling an efficiency-driven customer how many minutes it will take to complete a transaction instead of just apologizing for the time it's taking. After nine months of tracking and coaching, the client's empathy score jumped to 35%.

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> › **Culture.** Companies that consistently deliver great CX aim to hire emotionally intelligent employees, but they don't stop there.[16] FedEx created a 50-page guide that teaches employees how to detect emotional states from a customer's voice and offers tips like resisting the urge to interrupt because it makes customers feel "inadequate, uninformed, and powerless." Medica tracks how deeply emotional awareness has penetrated its culture via a question in the employee survey asking people how responsible they personally feel for delivering on the brand's emotional CX vision.

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FIGURE 5 Emotional Context Exists At Five Levels

Level	Description	Example
Customer temperament	The customer's personality and, in particular, how sensitive they are to emotions in general	Technology from Mattersight infers a caller's personality from voice clues like the words they use, how fast they talk, and the pitch of their voice. When a customer calls again in the future, the system can route her to an agent with a proven track record for engaging well with that personality type. The caller's personality style can also pop onto the agent's screen as she takes a call. This helps employees anticipate the best communication style from the moment the call begins, rather than using the first minute or two to get a feel for the person on the other end of the line.
Industry or domain	A customer's preconceived notions about the industry or domain in which a company does business (e.g., investing, healthcare, technology)	Researchers at Vanguard used a tool called an emotional inventory to understand the range of emotions people have about investing in general, independent of the firm involved. Customers circled emotion words from a list that best matched the way they felt about investing. The most popular choices among new investors were "overwhelmed" and "confused." The words "cautious" and "discouraged" came up most with seasoned investors, a reflection of the hit that many portfolios took during the recent recession.
Past experiences	The attitudes and expectations that customers have because of past interactions with the firm or broader life experiences	Customers expect companies to remember their past interactions, good or bad. Knowing that history also helps CX pros anticipate how someone might react during journeys that bring back bad memories. That's why Medica took the opportunity to interview a member who had recently been denied coverage for treatment of her son's serious condition. It knew that even if she understood the decision from a rational perspective, the emotional toll of compounding money worries with those about a sick child would color future interactions with the plan.
Physical environment	Emotions triggered by sights, smells, sounds, textures, and other inputs in the customer's environment as they have an interaction with a firm	CX leaders at La Quinta helped general managers tune back in to environmental clues they'd stopped noticing with a field trip to the local mall. Managers were told to pay close attention to what they saw, smelled, and touched as they shopped for a specific item. After discussing that experience, the managers applied their newly heightened senses to their own properties and found a plethora of issues that were unconsciously influencing customers, such as the proximity of trash bins to the breakfast buffet.
Immediate goal	Emotions associated with the goal that the customer is trying to accomplish on a particular journey	The economic and emotional cost of picking the wrong shoes is vastly different from the cost of underestimating how much homeowner's insurance you need. Booking a flight for a vacation elicits different emotions than flying to a funeral. And today, the simple fact that someone has to contact the call center suggests a problem because either the issue is complex and/or the customer tried to take care of things online and couldn't.

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Technology Is Part Of The Problem And Can Be Part Of The Solution

Thanks to technologies like websites, IVRs, and mobile devices, we can now shop, deposit checks, or book a holiday at any time from anywhere. But one CX pro told us that he worries we've "cut the soul out of customer interactions" by removing the person-to-person connection. And many self-service tools leave customers confused and frustrated, with no one to turn to for help. In our research, we found many vendors focused on solving problems that other technology created (see Figure 6). CX pros should get smart about some of the tools available to help manage customers' emotional experience, especially those built in to platforms that their companies already own.

› **Text analytics unlocks the emotional clues in unstructured data.** This tool helps brands monitor the balance of positive and negative customer feedback and extract themes from terabytes of data that would be impossible to parse manually. It can also help reduce a company's dependence on surveys. For example, a retailer applied text analytics to social media data to see if changes in store design produced the emotions it was hoping for without having to ask shoppers directly. CX pros at Intuit used text analytics in a third way — to find and fix problematic customer journeys. They mined unstructured data to see which life events were confusing Turbo Tax users most and then changed the interface based on what they learned. TurboTax now guides users to the right tax forms more clearly and offers tips on how to answer new questions. These changes helped drive its Net Promoter Score up by 20% and call volumes down by 20%.[17]

› **Speech analytics goes beyond what customers say to how they say it.** Although they're less commonly used than text analytics, many companies use CFM and/or natural language processing (NLP) platforms to extract emotional insights from voice recordings. These tools mine keywords, volume, pitch, speed, and other language patterns to detect changes in sentiment and intensity over the course of a conversation. Some brands study past calls as part of a closed-loop voice of the customer program, feeding results into project plans and using them to coach frontline employees. Mattersight helps automate emotional experience management by matching callers with agents who excel at serving that customer's personality type. Many speech-based IVRs can preempt CX disaster by routing calls directly to a live agent when they sense mounting frustration in a customer's voice. And because most voice analytics platforms can process multiple languages out of the box, they're particularly useful for CX pros at global brands that need to understand cultural variations in emotional response.

› **Real-time context helps individualize each experience.** Delta Airlines avoids making a bad situation worse when passengers call about a canceled flight. The airline's IVR can tell when the caller ID field matches a mobile phone that recently received a cancellation notice via text message. It skips the standard menu in favor of a single, context-aware question: "Are you calling about the text message we just sent you?" Google Now learns customer routines such as when they leave for work and their usual route, sending up-to-date traffic reports and suggesting alternate routes to help users avoid a frustrating commute.

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› **Virtual assistants (VAs) bring some humanity back to digital experiences.** The natural language platforms behind speech-based IVRs and virtual chat sessions can express emotion in surprising ways if companies invest the necessary effort. A German utility firm humanized its VA for customers and employees by referring to her as a "digital employee," complete with employee number. It spent months crafting her personality, set up a Facebook page for her, and even had her participate in the 2014 social media sensation "Ice Bucket Challenge." Similarly, Nuance helped Domino's develop Dom, a virtual ordering assistant. With almost half of Domino's orders placed digitally, the company was looking for ways to make the ordering experience more engaging; it turned to Dom to help showcase more of the brand's personality. Dom congratulates customers for placing a great order; tells pizza jokes; and, if you propose marriage, suggests ordering a pizza to celebrate. Domino's customers like Dom: The ordering app, which features Dom, has an average rating of 4.5 stars across more than 450,000 reviews on Google Play and a perfect five out of five from close to 2 million customers in the iTunes App Store.

› **Facial emotion analysis traces the emotional ebb and flow.** Researchers have studied how people express emotion facially for more than 50 years.[18] New software solutions use that insight to interpret facial expressions, which they capture via optical sensors such as a camera, and from them infer a person's emotional experience (see Figure 7). Vanguard used a tool called RealEyes to understand the mix of emotions that various images evoked before choosing one for its new public website. Affectiva, a startup spun out of MIT's Media Lab, helped a large software firm see where its product delivered "wow" moments and where the UX frustrated people most. Candy maker Hershey used Affectiva's technology to create a new shopping experience where customers can get a chocolate sample just by smiling for the camera in an in-store display. And Pepper, a robot equipped with cameras and touch sensors to help it detect and respond to human emotion, sold out in Japan in its first minute of sales in June 2015.[19]

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FIGURE 6 Technologies That Help Manage Customers' Emotional Experience

Technology	Description	Example vendors
Text analytics	Text analytics identifies structures and patterns in text. In the context of emotion detection, they look for keywords (e.g., thrilled, annoyed, angry) and text patterns (e.g., multiple exclamation points, all capital letters) that offer clues about the emotions that the author of the text was trying to convey.	• Attensity • Clarabridge • Nice Systems • OpenText • InMoment • Luminoso
Speech analytics	Speech analytics interprets data sources such as agent-customer conversations and voice comments left by customers during phone-based surveys. It analyzes the topics covered, the cadence and tone of the conversation, and other important elements needed to understand the customer's emotional state.	• Mattersight • Nice Systems • CallMiner • Genesys
Real-time context	This category includes a range of different technologies that can personalize a customer's experience in real time. Forrester calls the application of personalization to customer experience "individualization," defined as experiences that use customer data to structure interaction, functionality, and content around the needs of individual customers.	• Evergage • Reflektion • Certona • Monetate
Virtual assistants	Virtual assistants are software services that use natural language processing and knowledge repositories to provide automated assistance by simulating a two-way conversation with customers.	• Artificial Solutions • CodeBaby • Creative Virtual • eGain • IBM (MyCyberTwin) • IntelliResponse • Next IT • noHold • Nuance (virtuOz.com)
Facial emotion analysis	A new crop of tools use cameras to capture a user's facial expressions as they consume content or interact with a digital experience. These tools use algorithms and stores of past data to infer the person's emotions based on the location, movement, and texture of key facial landmarks.	• Affectiva • RealEyes • Sensory Logic

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FIGURE 7 Facial Emotion Analysis Reveals Consumers' Emotions During An Experience

Source: Affectiva

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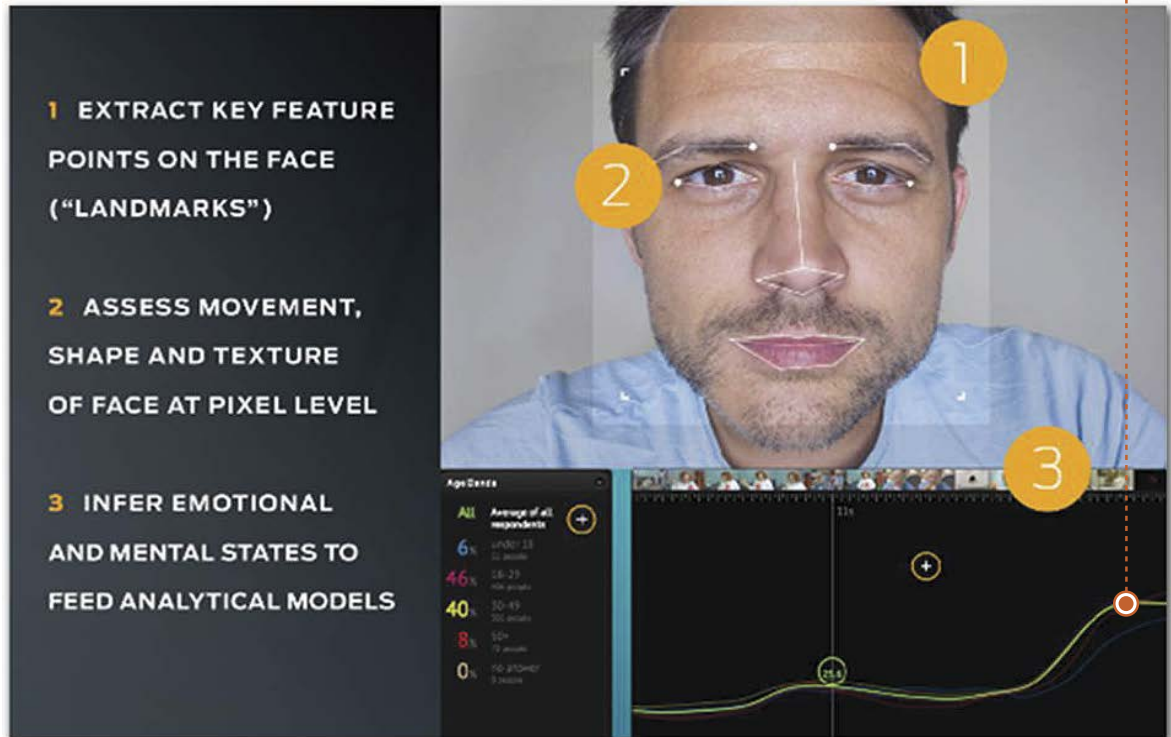
What It Means

Emotion Will Change The Look Of The CX Toolkit And The CX Team

The hard work that CX professionals put into fixing the utilitarian aspects of their CX has paid off. As firms increasingly focus their energies on improving the emotional experiences that they deliver — and wade into the murky waters of human emotion — we expect the following:

1. **Execs will learn to trust new analytics tools, especially if vendors tell better stories.** Some executives remain skeptical of the accuracy of text and speech analytics, facial emotion analysis, and other tools that infer customer emotion. Technology providers have the data to prove them wrong but need to get the word out to a broader audience. For example, experts at Nuance told us that NLP, if implemented well, can already identify a speaker's emotions with the same accuracy as a human listener when voice is the only input. One firm has developed a virtual agent that gets higher marks from customers than live agents. And the self-learning models that drive emotion analysis will only get better as more companies use them. Affectiva has fine-tuned its emotion recognition models using data from 3 million faces across 75 countries, helping it pick up on subtleties like the difference between a smirk and a smile.

2. **Few firms will train or trust their employees enough to navigate emotional experiences.** Brands like Zappos and Ritz-Carlton don't have scripts or strict rules telling employees how to treat customers. Instead, they provide guidelines and then empower their people to exercise judgment about what's appropriate at any given moment. That kind of latitude is a scary proposition for many companies, especially those that have managed costs by staffing the frontlines with unskilled, low-paid workers. Few firms will invest in hiring, training, and retaining the type of employee who can handle such freedom, but the ones that do will see their emotional experience metrics improve much faster than those that try to take a rules-based approach to empathy.

3. **Neuropsychologists will join the CX team.** With big data came the rise of the data scientist. The growing importance of customer emotion will intensify interest in neuropsychology and open up a wealth of new career options for experts in the field. While we're unlikely to see functional MRIs in the usability testing lab any time soon, some companies will seek partnerships with medical research facilities to share the cost of the expensive equipment required for this kind of testing.

4. **The job market for ethnographers will surge.** Today, many firms rely on design agencies and/or specialized research firms for customer interviews, observational studies, diary studies, and other anthropology-based research. But as we've seen with behavioral analytics, many will decide that it's too strategic a skill to fully outsource. Companies that have already started in-house design teams will make room for full-time researchers to partner with designers. Others will staff up by buying agencies, like Capital One did with Adaptive Path in 2014. The person-to-person nature of the work puts limits on the capacity of any one ethnographer, so the agencies doing this work today will add their own headcount to keep up with rising client demand.

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5. **Emotional intelligence will top the list of sought-after employee skills.** Your emotional quotient (EQ) is your ability to correctly identify emotions in yourself and others and adjust your behavior appropriately. American Express, the Cleveland Clinic, and Southwest Airlines go to great lengths to find candidates with a naturally high EQ. Enterprise Rent-A-Car, the highest-scoring car rental company in our CX Index, promotes people into management only if they've demonstrated real-world people skills on the frontlines of a rental car center.[20] As more companies focus on emotional experience, they'll fight for the same talent pool. HR departments will help hiring managers find what they're looking for by teaching them EQ evaluation frameworks, such as the EQ program that PURE Insurance uses to train and coach employees on empathy and emotional intelligence.

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Supplemental Material

Companies Interviewed For This Report

Affectiva	Medica
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Clarabridge	Scottrade
Continuum	Target
Emugu	TD Canada Trust
FedEx	Universal Mind
La Quinta	Vanguard
Lithium	VML
Mattersight	

Endnotes

[1] Forrester defines the age of the customer as a 20-year business cycle in which the most successful enterprises will reinvent themselves to systematically understand and serve increasingly powerful customers. For more insight into the challenges facing companies in this era, see the "Winning In The Age Of The Customer" Forrester report.

[2] For details of the current CX Index methodology, see the "Introducing Forrester's Next-Generation Customer Experience Index" Forrester report.

For more information on the Website User Experience Review methodology, see the "Executive Q&A: Website User Experience Reviews" Forrester report.

[3] In the original CX Index methodology, scores of 75 or higher were classified as good or excellent; scores lower than 75 were either okay, poor, or very poor. For the exact breakdowns in 2014, see the "The Customer Experience Index, 2014" Forrester report.

[4] Between 1999 and 2012, Forrester analyzed the usability of 1,500 websites using our Website User Experience Review methodology. When we hit the 1,500 mark, we went back through the data to see how the usability landscape had changed. For details of that analysis, see the "Lessons Learned From 1,500 Website User Experience Reviews" Forrester report.

[5] Between 1999 and 2012, Forrester analyzed the usability of 1,500 websites using our Website User Experience Review methodology. When we hit the 1,500 mark, we went back through the data to see how the usability landscape had changed. For details of that analysis, see the "Lessons Learned From 1,500 Website User Experience Reviews" Forrester report.

[6] Consumers have embraced the mobile mind shift — they expect to be able to get whatever they want in their immediate context and moments of need as a result of mobile technology. Forrester tracks how quickly consumers across the globe are shifting to this new mindset. For information on the US consumer mobile mind shift, see the "The New Mobile Mind Shift Index" Forrester report.

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[7] Forrester explores those attributes that are fundamental to the best smartphone app user experiences and elucidates where the worst go wrong. See the "The Best And Worst Of Mobile User Experience" Forrester report.

[8] As part of its benchmark of consumer technology adoption, Forrester asks consumers about the locations in which they use their mobile devices. For more information on these and other adoption statistics, see the "The State Of Consumers And Technology: Benchmark 2014, US" Forrester report. (This report is only available to Consumer Technographics® subscribers.)

[9] Forrester has tracked consumer technology adoption trends for more than a decade. For a look back at the state of tech adoption five years ago, see the "The State Of Consumers And Technology: Benchmark 2010, US" Forrester report. (This report is only available to Consumer Technographics subscribers.)

[10] In 2015, Forrester began using its next-generation CX Index methodology, which replaced the "enjoyability" dimension with a more universally applicable measure of how the experience made the customer feel. We refer to the new variable as emotion. See the "Introducing Forrester's Next-Generation Customer Experience Index" Forrester report.

[11] For an overview of the results of this benchmark study, see the "The US Customer Experience Index, Q1 2015" Forrester report. (Detailed data is available for purchase from Forrester. For more information, contact data@forrester.com.)

[12] The rest of the loyalty in the FedEx model stems from factors not specifically related to the customer experience.

[13] Source: Daniel Kahneman, Thinking, Fast and Slow, Farrar, Straus and Giroux, 2013.

[14] Source: Paul Ekman, Emotions Revealed, Second Edition: Recognizing Faces and Feelings to Improve Communication and Emotional Life, Holt Paperbacks, 2007.

[15] Source: Gerald Zaltman and Lindsay H. Zaltman, Marketing Metaphoria: What Deep Metaphors Reveal About the Minds of Consumers, Harvard Business Review Press, 2008.

[16] With every new hire, a company has the chance to enhance or undercut its experience delivery. That's why CX professionals should make the prioritization of customer obsession in the hiring process an integral component of their CX transformation efforts. This report details how CX pros should work with their colleagues across the organization, particularly in HR, to focus on customer-centric hiring, make their screening and selection processes sustainable, and continuously hone their customer-centric hiring criteria to improve the quality of new hires. See the "Tune Your Customer-Centricity Machine" Forrester report.

[17] Net Promoter and NPS are registered service marks, and Net Promoter Score is a service mark, of Bain & Company, Satmetrix Systems, and Fred Reichheld.

[18] Source: Paul Ekman, Emotions Revealed, Second Edition: Recognizing Faces and Feelings to Improve Communication and Emotional Life, Holt Paperbacks, 2007.

[19] Source: Alexander Martin, "SoftBank Robot Pepper Sells Out in a Minute," The Wall Street Journal Digits blog, June 22, 2015 (http://blogs.wsj.com/digits/2015/06/22/softbank-robot-pepper-sells-out-in-a-minute/?mod=ST1).

[20] For a list of the top-scoring brands in our CX Index benchmark, see the "The US Customer Experience Index, Q1 2015" Forrester report.

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