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# The Future of Customer Experience: How Data Moments Win the Competitive and Customer Edge

By Jeannie Walters



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**The Future of Customer Experience:**  
How Data Moments Win the Competitive and Customer Edge



Jeannie Walters



**Customer experience** is much more than a buzzword – it's fundamental to business survival. Offering a great CX goes beyond saying you're providing great experiences. It means tying together each moment across a customer journey to make personalized suggestions, simplify processes, and optimize opportunities.

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## Does your customer experience work for your customer?

Providing an outstanding customer experience requires far more than knowing a generic customer's journey. It means knowing:

- Exactly who that customer is
- Where they are on that journey
- What they want next

The only way to gain these imperative functions is to use data to become agile and make decisions that are both right for the business and right for the customer.

Customer moments can be made even more meaningful and personalized by having data available and visible to the right people, tools, and technologies throughout the customer's journey. In other words, data moments lead to a seamless overall experience.

So, how do businesses meet the expectations of customers and maintain revenue objectives when it comes to customer experience?

*Let's explore...*

**“With all the abrupt changes we've seen around the world and their impact on business, the pressure to be agile is off the charts.”**

— **Chris O'Hara**, Global Head of Marketing and Solutions SAP Customer Data Solutions

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## First things first: Keep the customer at the heart of what you do

Data is all around us, and many would argue that businesses collect far too much of it without understanding what to do with it. Data collection for the sake of data collection is checking a box on a spreadsheet – correctly harnessing that data is a strategy.

How companies use data is the key difference between a successful business with happy customers and a struggling business with frustrated customers. But data only works if we have ways to work with it.

First, leaders need to identify what experience is the most important for customers, and what the ultimate goal for their customers is. Proactive and positive customer experiences are designed and delivered, then refined and redesigned.

To do this well, you have to start with a customer journey built from individual touchpoints for each individual customer.

And remember: First-party data collected by your brand is data that your competitors likely won't have. Since you can't just buy first-party data, the more you acquire, the greater the opportunity for getting closer to your customer – but only if you harness a great data management strategy to best use the information that consumers are turning over to you.



“When it comes to customer experience, every single touch point and user experience matters. It’s no good to have a great in-store experience but a poor online one, or vice versa. It’s no good to have a great website but a poor delivery experience. If your 3rd party delivery driver throws the package containing a fragile item over the fence, the customer is going to blame you, and this is going damage your overall CX, no matter how good the purchasing experience was.”

— **Branwell Moffat**, UK Director of CX Consulting at KPS Digital

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## Step 1: Cutting through organizational-speak to actually understand the real customer experience

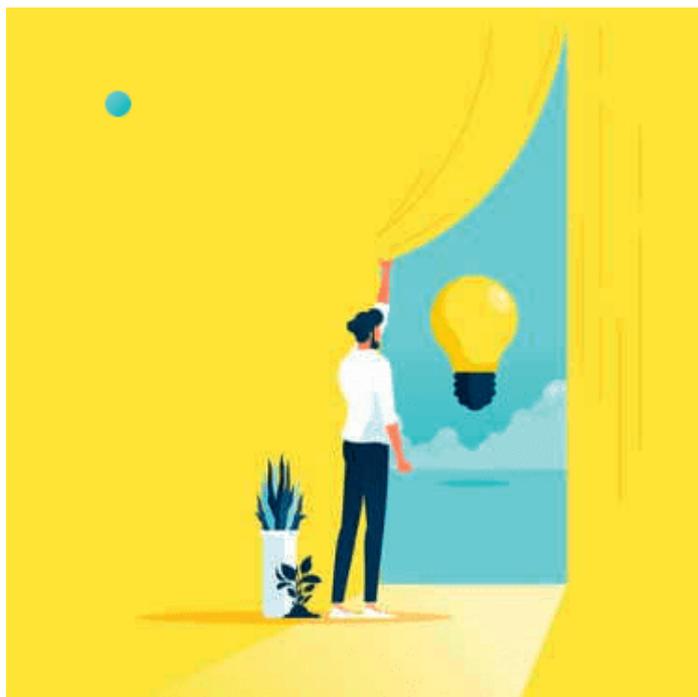
Process maps, PowerPoints, and internal organizational charts only tell one side of the story, and often companies get far too caught up in those things, completely forgetting the reason they exist is thanks to their customers.

Customers need a way for businesses to simply tell them what they need to know. This means brands need to spend more time looking at and understanding how customers ACTUALLY experience their journey.

They certainly don't march through it linearly anymore, moving from an eager prospect to an excited new customer to a loyal shopper. Today, consumers make decisions based on their roles, responsibilities, and real lives. They expect all interactions with brands to reflect the seamless experiences they have when ordering items online.

Observe what really happens to understand their challenges, opportunities and needs throughout their journey. Data at various touchpoints along the journey can help you see everything from what is missing for customers to what they'd like to see next.

Rather than a narrow focus on stages of a journey, agile and innovative companies are focused on winning the moments that matter.



**Remember:** The customer journey starts well before a sale is made – sometimes even before a business manager articulates the existence of a problem.

Customer feedback mechanisms like surveys and real-time transactional responses aren't the only way that customers tell you how they feel – they show you through their actions.

Robust data platforms allow business leaders to see for themselves in real-time when customers are hesitant to share information or not moving forward with the next logical purchase or step in the journey.

Having access to this level of transparency allows leaders to examine and explore which customers are behaving in what way, and what triggers are needed to help customers feel secure and cared for throughout their journey.

A complete view of the customer, available across sales, marketing, and service, helps organizations better manage the customer relationship to meet their expectations.

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## Step 2: Adaption and evolution: Agility rules the future of CX

We're entering a new era: Consumers don't just want products, they want services, experiences, and relationships with brands. To provide this, businesses must understand who their shoppers are, what they enjoy, and how they want to complete a sale to personalize the customer experience.

To make this leap in evolution, agility becomes the name of the game. To truly adapt and evolve at the speed today's customers expect, you need data that isn't organized by silo or locked up in one tool.

Businesses must be consistently aware of changing marketplace needs, and that means having access to the right information at the right moment. Remember: Visibility into data is just as important as the data collected.

It's easy to say look to the data - but what is it telling you about what customers really want? The old way of doing things was to pore over mountains of data to find one or two insights. Today, artificial intelligence (AI) and machine learning (ML) can help sift through those data mountains to identify what

preferences your customers have today and where they're likely headed tomorrow.

Companies focused on customers look at the entire journey and provide a seamless way to move the data among the various tools, views, and teams. There's a single view of the customer no matter what team or tool is interacting with that customer.

This means customers don't have to explain where they are on their journey by repeating their problem to a customer service agent minutes after a frustrating experience with a chatbot. The agent already knows and has their personalized preferences, purchase history, and service requests at their fingertips.

**More than pricing, and even the product itself, customer service is the biggest driver of customer loyalty.**

Research shows that providing great customer service is key to building customer loyalty and driving business growth. In a digital-first economy, customer service is critical to the customer lifecycle and loyalty. To avoid churn, sales and service must be able to work together in real-time and efficiently - and securely - share information about each customer to gain insights and understand what's expected from consumers. That's why it's so critical to CX that all systems within an organization are able to operate in a silo-free manner, providing the data that reps need to know, when they need to know it.

Of course, customer service and preferences aren't the only part of the customer experience equation.



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## Step 3: Managing CX inside and out, and front to back

Brands need to manage the customer experience with supply, inventory, and labor demands to make sure it aligns with changing customer expectations in each moment.

It's one thing to know your customers. But to deliver a proactive, positive end-to-end experience, you need to have visibility into your organization in new ways.

It's not enough to react to what happens. Smart businesses use data insights to act.



Connected data between supply and customer demand is how leading businesses get and stay ahead. It's not just supply management, it's labor and other internal needs, too. Hiring and employee management anticipates spikes in demand and adjusts accordingly. Increases in digital usage leads to more robust technology stacks to support future needs.

“Great CX means knowing your customers better than your competition can. Understanding them requires extending beyond publicly available information to include operational data from systems such as returns management, consent and identity preferences, and even inventory to truly deliver an end-to-end experience. That's how CX helps you drive conversion, retention and ultimately growth.”

— Sameer Patel, CMSO, SAP Customer Experience

Up-to-date and accessible data helps customer experience leaders improve communication with customers and set better expectations.

Consider how digital supply management can provide the right information at the right time so customers can feel informed and empowered. If supply management status is handled as something to “report” to teams, that's already too late in the customer journey to fix issues that arise.

Agility requires insights that drive better decisions in forward-thinking ways, not reacting to what's already happened.

Today, what happens when data from across the organization isn't as connected as it should be? Customers expect to find what they need, when they need it. That means if a product isn't in stock at a specific store, they want to know if they can get the product elsewhere. With connected data, the retailer can not only let them know where it's

available from another location, but offer to send it to them directly.

The customer walks out of the store knowing their item is on the way, creating not just a sale, but a moment in the journey that builds long-term loyalty.

“The search, the clicks, the ordering process, the delivery, the service: It’s ALL CX Whether it’s someone looking at an Instagram ad for your product, then buying directly from you, or buying from a retail partner, they’re still initially engaging with your product and your brand. When they buy the product, they’re engaging either with you directly or with your retail partners – and that impacts the experience with your brand and your product. Whether they get the product from a store or someone delivers it to their door – directly or indirectly – that’s an engagement with you, your brand, and your product.”

— Alex Timlin, Head of Customer Experience Solution  
Go To Market, SAP

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## The future of customer experience is now, and it’s agile

Make no mistake about it, customer experience is not only an outcome of great business strategy, it’s a winning business strategy in itself. Positive customer experiences lead to more revenue, more loyal customers, more referrals, and even happier employees.

Customer experience isn’t an area of a business, it IS business.

Let’s explore what CX is and how to look at business problems through the customer lens. Business is about buying things, selling things, and engaging with customers. This is grossly oversimplifying things to make a point, but the point is very simple. The purpose of your business is to sell things or provide services to people who buy those things and get value from them. You want those people to either keep the product or service, buy it again, and/or refer other people like them to your product or service.

And the future of customer experience is adaptable and resilient, no matter what the world brings.

Each part of the customer’s journey can be personalized and made more meaningful with the right data infrastructure combined with a powerful vision. Marketing can send the right message at the right moment. The customer receives education on exactly what they’re seeking. A seamless purchase experience leads the customer to refer a friend. That friend is greeted as a friend because even that data is accessible and visible to those serving them.

And the referring customers is happy to receive a note of gratitude for the referral – complete with a

coupon for their next purchase. Agility means creating more moments of meaning in ways that are both individual and scalable.

Customers tell us they want more personalized experiences. Businesses want higher profitability and better results. Actionable insights at the right

moment along the customer's journey lead to better actions and outcomes for both customers and businesses. Data moments are not just the future of customer experience, they are today's competitive advantage. Is your organization set up for success? ■



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## JEANNIE WALTERS

For more than 20 years, Jeannie Walters has been dedicated to creating meaningful moments and real results.

As the Founder and Chief Experience Officer of Experience Investigators, Jeannie has helped organizations – from small businesses to Fortune 500s like Verizon and Allstate – To Create Fewer Ruined Days for Customers™.

She is a TEDx speaker, a founding member of CXPA, co-host of the top-rated Crack the Customer Code podcast, and a four-time LinkedIn Learning instructor whose courses have been watched by more than 200,000 online learners.

[experienceinvestigators.com](https://experienceinvestigators.com)

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