

# The State of **CUSTOMER EXPERIENCE**



A new paradigm:  
Personalized, empathetic  
experiences at scale

Europe

# The State of CUSTOMER EXPERIENCE Europe

## ABOUT THIS RESEARCH

“The State of Customer Experience” is a benchmarking study based on surveys of consumers and customer experience (CX) decision-makers. This third edition, “A new paradigm: Personalized, empathetic experiences at scale,” uncovers how rapidly shifting customer preferences and declining satisfaction with digital channels are creating mounting business risks for organizations worldwide. In surveying CX Leaders, the report discovers profound challenges in digital transformation strategy and execution, and shares a powerful roadmap for delivering empathetic experiences at scale.

### Methodology

Genesys conducted this research in collaboration with Actionable Research, an independent research firm. The consumer survey gathered responses from 5,157 consumers, ages 14–80, to gain insights across regions and generations. The executive perspective survey polled 646 CX decision-makers (“CX Leaders”) across North America, Europe, Latin America, the Middle East/Africa and Asia-Pacific. The respondents

were drawn from multiple industries, including banking, government, healthcare, insurance, retail, technology, telecommunications and utilities. For more information, please refer to the Appendix.

This Europe edition focuses its analysis on the responses of 1,063 consumers and 122 CX Leaders gathered from Germany, the United Kingdom/Ireland and other European Union countries.

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# EXECUTIVE SUMMARY

As the world continues to face an uncertain economic future, consumers seek connection, empathy and shared values when they interact with brands. Organizations need to earn their customers' loyalty every day, proving their value through seamless and effortless engagement that turns transactions into meaningful relationships.

Customer experiences are the defining moments where loyalty is won or lost. And efficiency, effectiveness and empathy in the customer journey, enabled by a comprehensive digital transformation, are the foundations for success. The findings of the report are as follows:

## Consumers: Bad experiences kill customer loyalty

Customer experience (CX) is at the very heart of how consumers perceive a brand. Eighty-three percent of consumers in Europe say a company is only as good as its service and one-third have switched brands in the past year over a negative interaction. CX Leaders cite keeping pace with customer expectations as one of the greatest challenges they face today.

## Digital transformation: A new urgency as channel satisfaction declines

In the past year, more consumers worldwide used a digital channel than used voice to interact with an organization. But satisfaction with all channels except voice declined. The answer to why many experiences remain fragmented and transactional lies in the present state of digital transformation. Just 11% of organizations in Europe have a fully connected, omnichannel approach — creating data silos, missed opportunities for personalization and a lack of visibility into business performance.

## CX strategies: People take center stage

Human interactions play a critical role in overall customer satisfaction, yet workforce engagement is a long-neglected domain. The survey finds contact center turnover averaging 33% and organizations struggling to keep staff continually trained. Looking ahead, CX Leaders are placing employees at the center of their strategy, with improved platforms and technology, leadership development and career pathing, and enhanced remote workforce management.

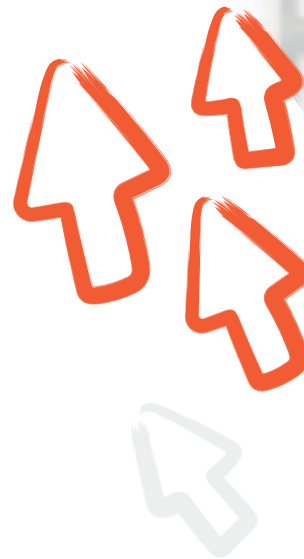




## The tech stack: Powering growth and agility

To build customer loyalty, organizations need to orchestrate holistic, empathetic experiences across all moments of engagement. This can be delivered at scale through a tech stack that enables true customer centricity, resulting in both greater loyalty and business agility. More than half of CX Leaders are implementing a CX platform that connects systems and silos to orchestrate seamless end-to-end customer experiences.

Shifts in consumer behavior and preferences create opportunities for organizations to become increasingly customer-centric and grow loyalty. They also present risks to those lacking the agility to keep up. “A new paradigm: Personalized, empathetic experiences at scale” uncovers those opportunities and presents actionable strategies for creating effortless journeys that customers will love.



01



# Consumers: Bad experiences kill **CUSTOMER LOYALTY**



- Consumers seek speed and efficiency
- Deep frustration with poor journey design
- When loyalty is lost
- Under pressure from all sides
- Fewer organizations deliver exceptional CX
- Rabobank: Pioneering conversational banking



**83%**

of European consumers say a company is only as good as its service

**66%**

say they've mostly experienced good service in the past year

**58%**

say in general they feel customer service is getting better

“The State of Customer Experience” finds CX has shifted to the heart of how consumers across Europe perceive a brand. Eighty-three percent of consumers say a company is only as good as its service.

The data reveals that, to some extent, customer satisfaction is improving. Two-thirds of respondents have mostly experienced good service in the past year, and more than half feel the experiences they receive are generally getting better. Some 39% of consumers in Europe say they've enjoyed a CX interaction in the past year.

But there's plenty of room for improvement, especially where customer experiences require empathy. Just 38% have felt like a highly valued and appreciated customer at the end of an interaction. A quarter of consumers in Europe admit to losing their temper and 13% have cried after a negative interaction.

Emotions ran highest with the survey's younger demographics worldwide. Although millennials and Gen Z respondents rated themselves as more patient with frustrations such as dropped calls or dead-end menus than Gen X or baby boomers, they were twice as likely to have cried after a negative interaction with an agent. These findings highlight how easily organizations can harm their relationships with younger generations through poorly executed experiences. Long term, it's an existential risk – Gen Z is the **largest generation** on Earth.

 = **VOICE OF THE CUSTOMER** (% agree)

**38%**

"I felt like a **highly valued and appreciated customer** following a service interaction."

**39%**

"I've enjoyed a customer service interaction."

**33%**

"I have **recommended a company** after a positive customer service interaction."

**29%**

"I **stopped doing business** with a company after a negative customer service interaction."

**13%**

"A negative customer experience has **made me cry.**"

**25%**

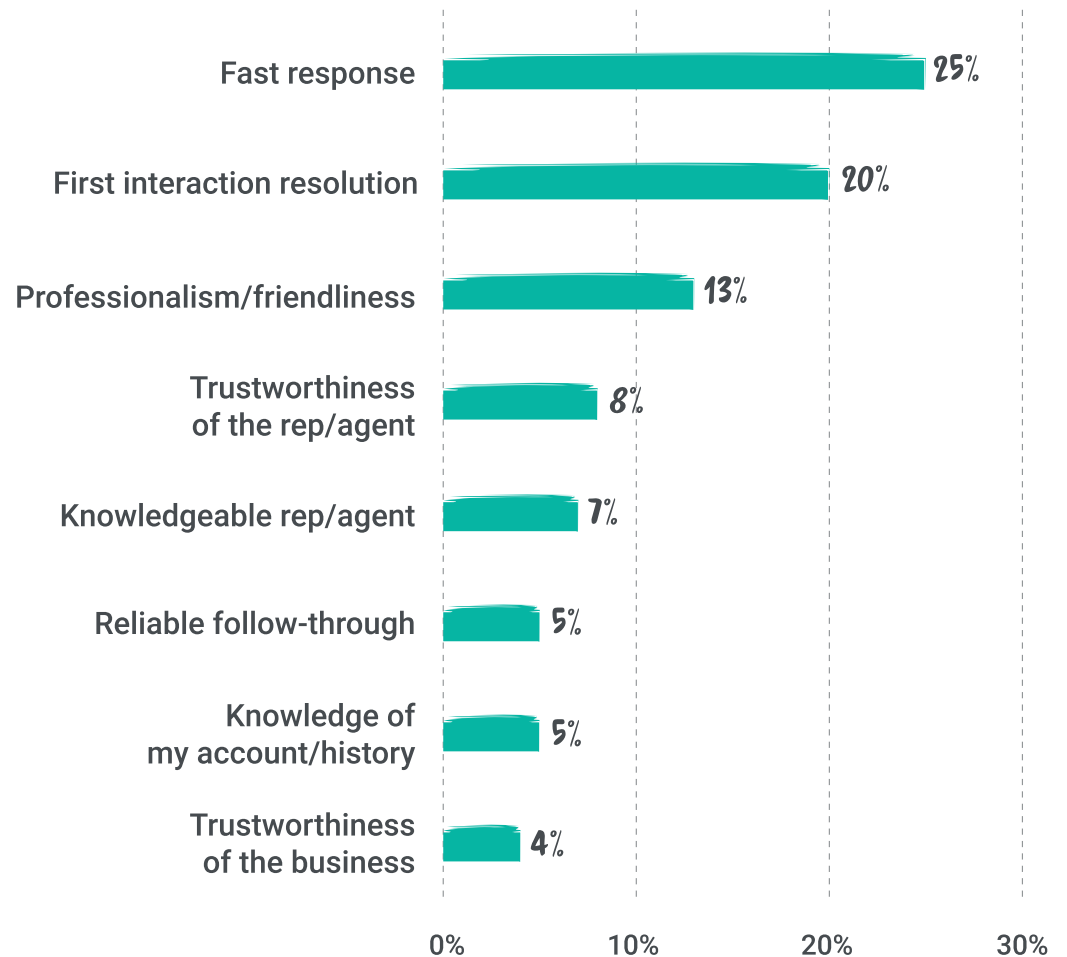
"I've **lost my temper** during a customer service interaction."



## CONSUMERS SEEK SPEED AND EFFICIENCY

Ideal customer experiences, according to the survey, are fast, professional and completed in the first interaction. Consumers in Europe say the most important factor is that their issue is resolved quickly – and they want it done fully in their first interaction. This requires organizations to predict customer intent and deploy technology that steers them intelligently across the journey. It also highlights the importance of reducing call queues, equipping employees with the necessary information to assist immediately and eliminating other sources of friction.

**Consumers:** What do you value most in a customer service interaction? (select three) % of respondents, Europe



## DEEP FRUSTRATION WITH POOR JOURNEY DESIGN

The most frustrating experiences are the result of technology failure or poor journey design. According to the survey, consumers have least tolerance for dropped calls, chatbots that can't escalate to live web chat, dead ends in contact center menus and repetitive interactions with multiple agents. These challenges can be easily avoided with well-designed journeys and connected technologies that deliver seamless experiences.

The highest CX expectations are among UK/Ireland consumers, with 54% becoming enraged by a dropped call compared to just 43% of respondents in Germany, for example. Patience also seems to run higher in Germany when it comes to repeating oneself to different agents, which provokes twice as many consumers in the UK/Ireland to lose their composure. And while younger generations generally appear to have more patience with technological glitches, they were more frustrated with not knowing their place in a call queue than older demographics, worldwide.

Whenever a customer wastes time maneuvering a fragmented journey or experiences a technical issue, loyalty is eroded. And it's only a matter of time before they decide to walk away.

**Consumers:** How do you feel when any of the following occur in a customer service interaction? % of respondents, Europe



*Note: Consumers were given a range of options: "Doesn't bother me," "Mildly irritated," "Frustrated," "Makes me want to scream" and "So angry I vow never to use the company again." This chart shows the top two responses.*

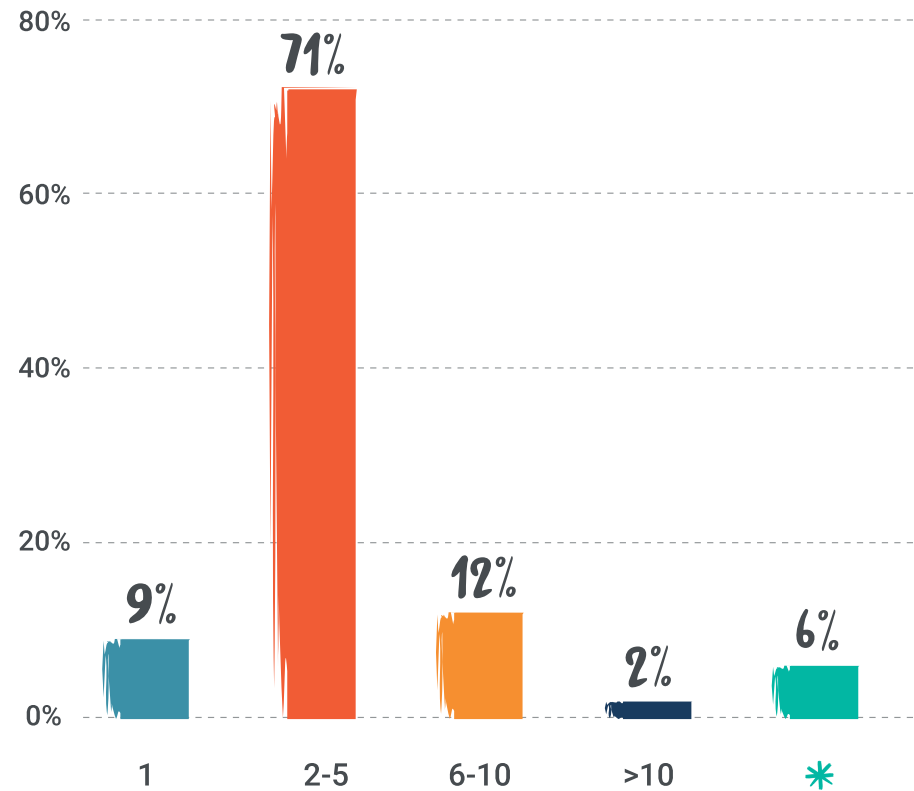
## WHEN LOYALTY IS LOST

The survey probed how many negative experiences consumers will tolerate before they finally walk away. It finds that 9% will switch brands after a single negative interaction. And 71% will switch after two to five negative interactions. (That figure is highest in the UK/Ireland at 75%.) That means about 80% of customers will leave after receiving five negative or frustrating interactions.

Almost a third of consumers across the region have stopped using a company after a negative CX interaction in the past year. These findings highlight how many customers are at risk when organizations provide even just a few poor experiences.

**29%** of consumers stopped using a company after a negative interaction in the past year

**Consumers:** After how many negative interactions would you switch to another business/provider? % of respondents, Europe



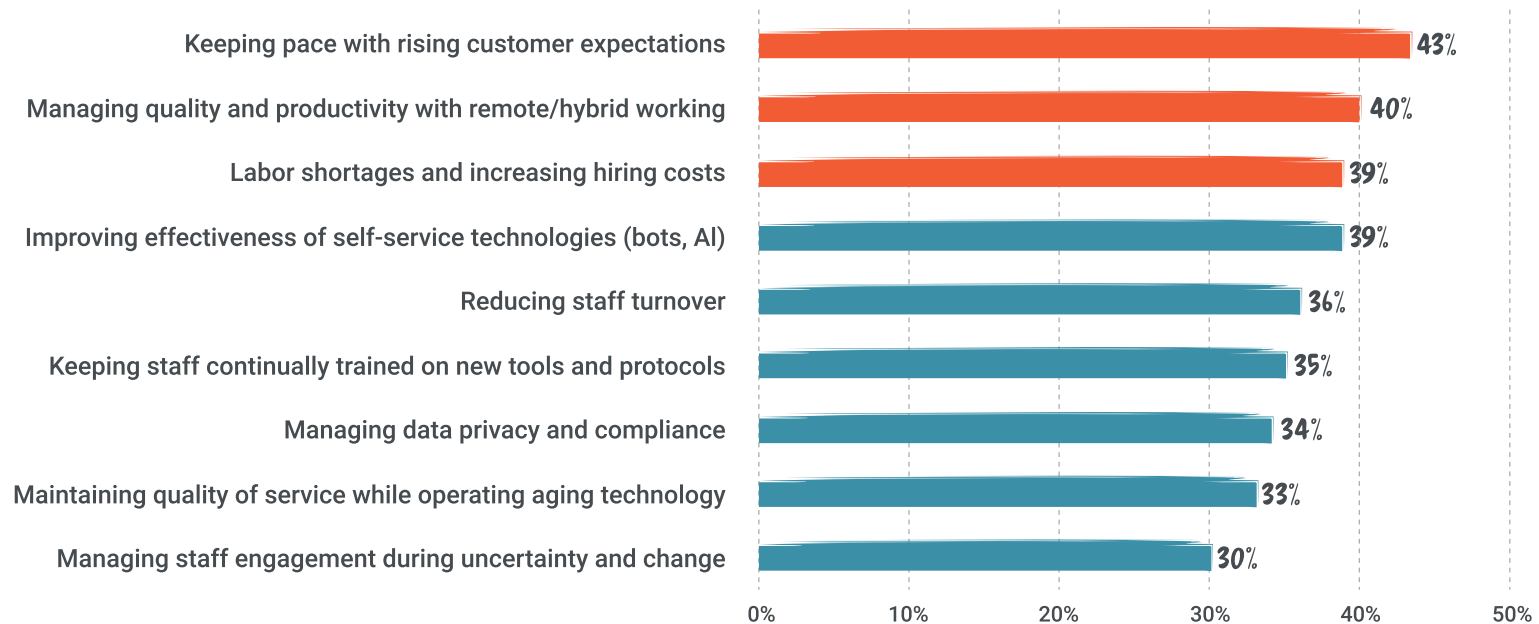
\* I'm unlikely to switch to a new company regardless of bad customer service interactions.

## UNDER PRESSURE FROM ALL SIDES

CX decision-makers are under immense internal and external pressure. External pressure comes from rising customer expectations. As new engagement channels become more widely adopted, customers are less patient with poorly designed journeys and technical problems. CX Leaders in Europe say keeping pace with changing customer expectations is the greatest challenge facing their function today.

The internal pressures that CX Leaders are experiencing reflect the reality of fundamental shifts in the post-pandemic landscape. These include surmounting the difficulties of labor shortages and the rising costs of hiring new employees, as well as managing the performance and productivity of a remote and hybrid workforce. A recent [MIT Technology Review survey](#) found just 39% of organizations will go back to operating with a full-time onsite model. In the future, using scalable approaches to workforce engagement will be critical for delivering superior customer experiences.

**CX Leaders:** What is the greatest challenge facing your company's customer experience function today? (select three)  
 % of respondents, Europe



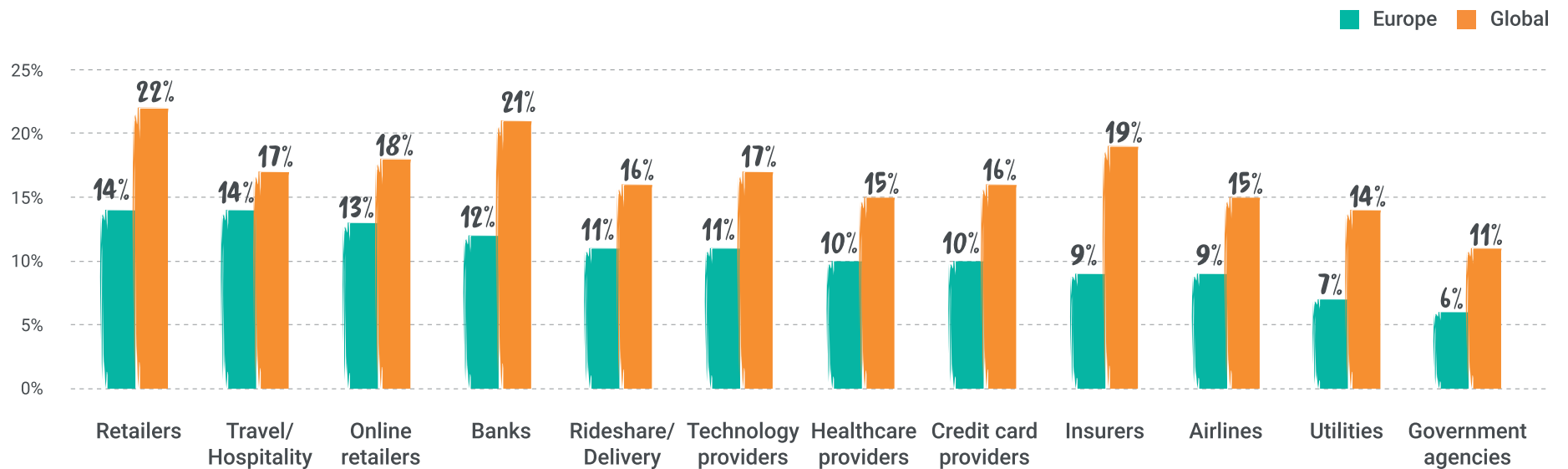
## FEWER ORGANIZATIONS DELIVER EXCEPTIONAL CX

The rising bar for customer expectations is especially evident when examining how consumers in Europe rank each industry for service quality. Although two-thirds of consumers feel they're mostly experiencing "good" service, few organizations provide service they would consider "exceptional." In a recent worldwide [survey by FT Longitude](#), 54% of banking executives say they aim to provide a personalized experience, but it often appears to customers as generic.

Still, some are delivering customer experiences that stand out. Across Europe, travel/hospitality companies and in-store and online retailers are considered to provide the best CX today. But overall, consumers in Europe are generally more reticent than the rest of the world to declare any industry's CX as exceptional. It is also clear that, in European consumers' minds, there's plenty of room for improvement.

### Consumers: Which of the following industries do you associate with having exceptional customer experiences?

*% of respondents, Europe vs. Global*





## KEY STRATEGY

### Deliver excellence by continually reimagining customer experience

For organizations seeking to grow in the experience economy, keeping pace with customer expectations is the baseline requirement – but it’s not enough. To increase loyalty and trust and attract new customers, CX has emerged as the central differentiator.

Delivering the *exceptional* in every interaction requires experience orchestration: coordinating people, channels, interactions, knowledge, data and systems in real time to deliver empathetic end-to-end experiences at scale – while also managing costs. This involves three key priorities:

01

#### Get complete **VISIBILITY**

Great customer experience begins with having a deep understanding of what your customers are experiencing, with complete visibility across the customer journey – from aggregate data all the way through to individual interactions.

02

#### **INNOVATE** for empathy and personalization

Organizations need to power their customer experiences with the flexible, scalable and adaptive technology to outpace consumers’ rapidly changing expectations.

03

#### Use AI and automation for **FLAWLESS EXECUTION**

Bring speed, scale and personalization to customer and employee experiences with artificial intelligence (AI) and automation. Machine learning and natural language processing capabilities intelligently steer customers across channels, arm agents with the relevant context and knowledge to deliver empathy in the moment, and reduce post-interaction administration by up to 90%.

# RABOBANK

Pioneering conversational banking



**Industry:** Financial services

**Location:** The Netherlands, with global operations

**Contact center:** 15,000 advisors

“Conversational banking is about intelligently steering customers to the most suitable digital channels like our app, 24/7 virtual assistant, asynchronous messaging tool or instant video calls. Ensuring they move seamlessly and friction-free between those channels is equally important.”

**Thom Kokhuis,**  
Head of Conversational Banking, Rabobank



Over \$2.2 million saved in hardware and IT staff costs



25% agent productivity gain with asynchronous web messaging



90%+ customer satisfaction for digital channels



45% of questions answered by virtual assistants

Rabobank is on a mission to create a positive influence on people and society through financial services. The cooperative bank serves retail and corporate clients in the Netherlands, focusing on the global food and agriculture sectors. Consistently delivering excellent customer experience is integral to its success.

Yet disconnected on-premises products – including legacy Genesys and Cisco systems – meant contact center teams couldn’t transfer information, get a unified view of the customer or capture meaningful real-time data. Its previously deployed live chat and chatbot solutions operated in silos. Meanwhile, requirements like IP telephony, routing, reporting, voice recording and CRM integration were getting more complex.

### Conversational banking service model

Coupled with a company-wide cloud-first strategy, Rabobank has created a new conversational banking service model that runs on the Genesys Cloud CX™ platform. The bank has three principal customer channels: web messaging with a virtual assistant or live agent; voice, which has become a main channel

since the pandemic; and video for customers making big financial decisions. Meanwhile, outbound communications proactively support marketing campaigns and security alerts.

### Personalization and reducing customer effort

Shifting from voice to digital-first conversational banking delivers greater convenience and improved customer experience. Virtual assistants never sleep and answer around 45% of all questions 24/7. Web messaging volumes have risen from 15% to 20% of all interactions. These improvements have delivered customer satisfaction rates of 90% and above for these digital channels.

To facilitate more seamless repeat interactions, the CRM system identifies the caller and routes them to the same person whenever possible. Smart intent-based routing steers the customer to the best channel and advisor. Those rules detect factors like customer sentiment (using voice recognition analysis); current products and value; and cross-sell and up-sell opportunities.

Read the full story [→ here](#)

# 02

## DIGITAL TRANSFORMATION: A critical lack of progress



- Digital overtakes voice
- Asynchronous interactions gain ground
- Channel satisfaction declines
- Digital transformation is lagging
- Helpline: Empowering remote work and digital innovation



Consumer adoption of digital channels for CX interactions continues to increase, and the survey finds that, for the first time, email has overtaken voice as the most common method for reaching customer service.

While voice is still overall the No. 1 channel preference, this declines sharply with each younger generation. At the same time, consumers — particularly Gen Z and millennials — would increasingly prefer unassisted or asynchronous interactions. But they report that these channels aren't currently reliable in delivering high-quality experiences.

The CX Leaders survey sheds some light into why digital experiences aren't achieving high reviews for customer satisfaction. Just a small fraction of CX Leaders have connected the technology and data to deliver seamless, end-to-end, omnichannel experiences.

**76%**

of consumers in Europe have interacted with a company via email, a greater proportion than those who used the voice channel.

Email overtook voice as the

**#1**

channel for CX interaction

**13%**

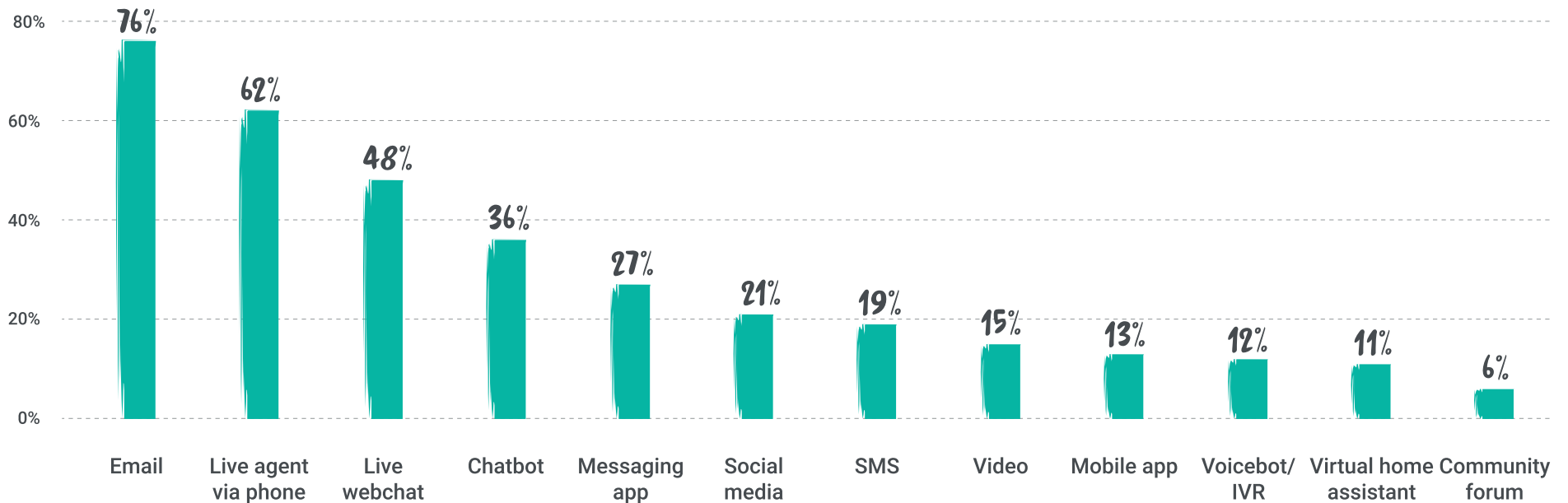
of organizations provide a fully connected omnichannel experience

## DIGITAL OVERTAKES VOICE

In the past year, more consumers worldwide used a digital channel to interact with an organization than used the voice channel. Some 76% of consumers in Europe used email for a CX interaction, while 62% called a contact center. Chatbots and messaging apps also continue to increase

in popularity for CX interactions. This is a landmark moment. Digital is no longer on the periphery as an alternative channel to voice; it's now critical for organizations to have a connected voice and digital strategy that empowers customers across their journey.

**Consumers:** Which of the following channels have you used for a CX interaction in the past 12 months? % of respondents, Europe





## ASYNCHRONOUS INTERACTIONS GAIN GROUND

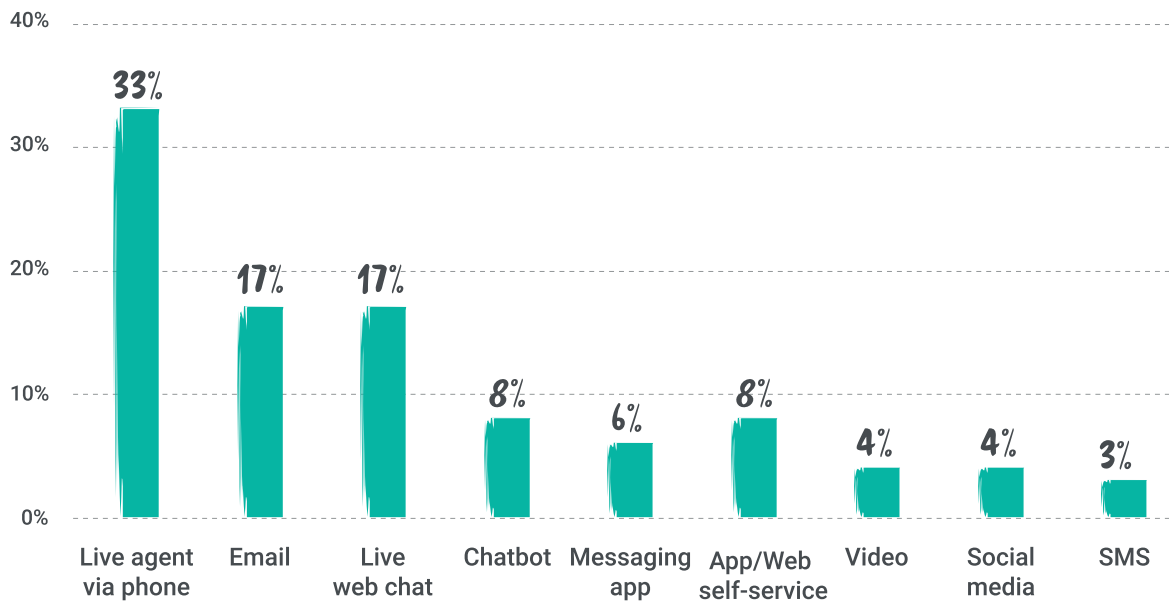
While email is widely used as a customer interaction channel, the survey data shows it's not the most preferred. Just 17% of respondents in Europe selected email as their top channel for CX interactions, since it typically doesn't result in a fast response – consumers' most important criteria.

While voice does remain the most preferred channel, that preference declines sharply with each younger generation. Globally, millennials and Gen Z show a stronger preference for digital channels, particularly messaging apps,

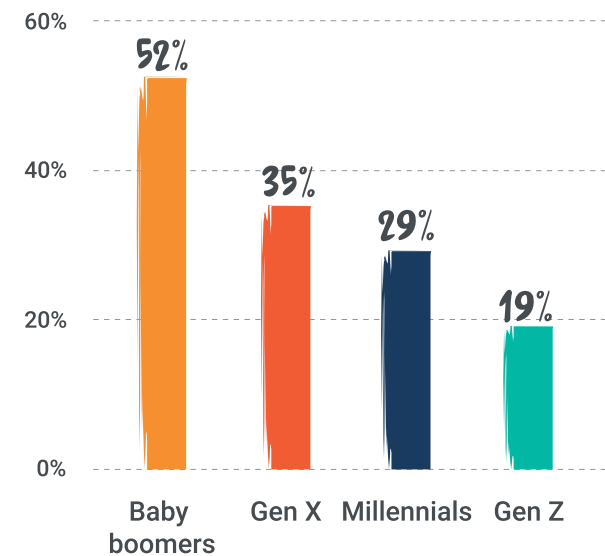
chatbots and social media. They also show a preference for service in *their* channels (e.g., WhatsApp or Instagram) rather than *your* channels (e.g., voice or email).

Ensuring that CX meets the requirements and preferences of millennials and Gen Z is essential for organizations to survive in the long term. This means providing seamless digital experiences as well as immediate, empathetic voice support when they need it.

**Consumers:** Given the choice, which would be your most-preferred method of CX interaction if it were available to you? (ranked first) % of respondents, Europe



**Consumers:** Given the choice, which would be your most-preferred method of CX interaction if it were available to you? (ranked first) % of respondents who choice voice, Global, by generation



## CHANNEL SATISFACTION DECLINES

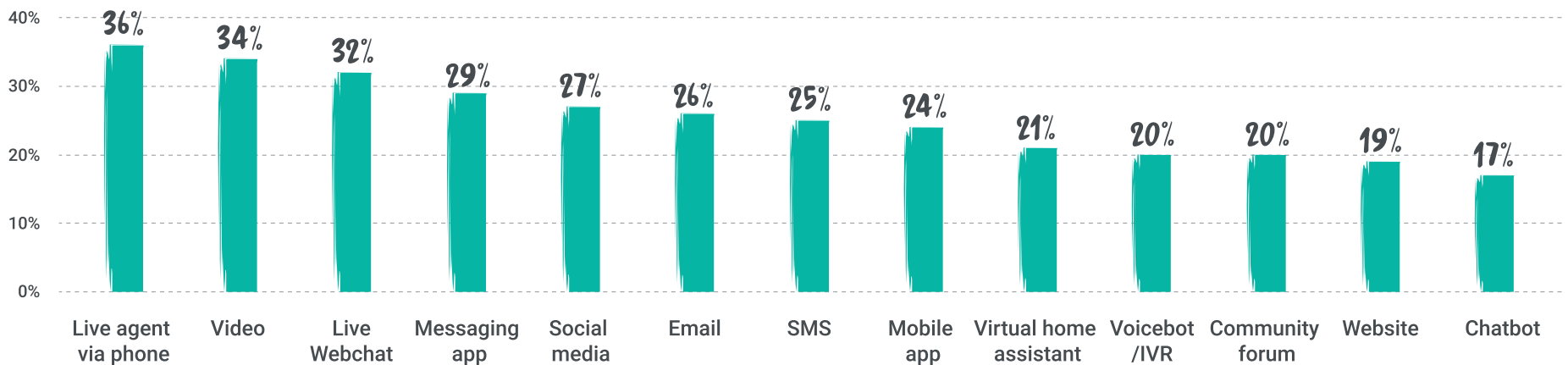
While calling customer service may not be everyone’s favorite experience, over one-third of consumers in Europe have been highly satisfied with their voice experiences. Adding video to that audio experience may not be as common, but it’s a hit with consumers – they deem video chat the second most satisfying channel they’ve used over the past year. That’s followed by the ease of engaging agents through live web chat and messaging apps (e.g., WhatsApp).

This doesn’t mean organizations should focus strategy on driving traffic to voice. Apart from being the most expensive channel to grow, customers have an underlying preference for speed and a first-contact resolution. Additionally, seamless digital channels are critical to engage younger generations. But this data shows that voice isn’t going away, and that

mastering voice is non-negotiable for organizations seeking to increase customer satisfaction.

The data provides a clear urgency for improving customer journeys through a connected digital and voice strategy – lowering costs and serving customers more quickly. Only 17% of consumers in Europe were “extremely satisfied” with their chatbot experiences. This suggests room for improvement in the way organizations are deploying bot technology. For example, only 43% of CX executive respondents use bots with AI capabilities to predict intent and prompt next-best actions. Self-service technologies that are part of an integrated digital strategy will drive digital adoption and increase customer satisfaction.

**Consumers:** Which channels have you been highly satisfied with over the past 12 months? % “extremely satisfied,” Europe



## DIGITAL TRANSFORMATION IS LAGGING

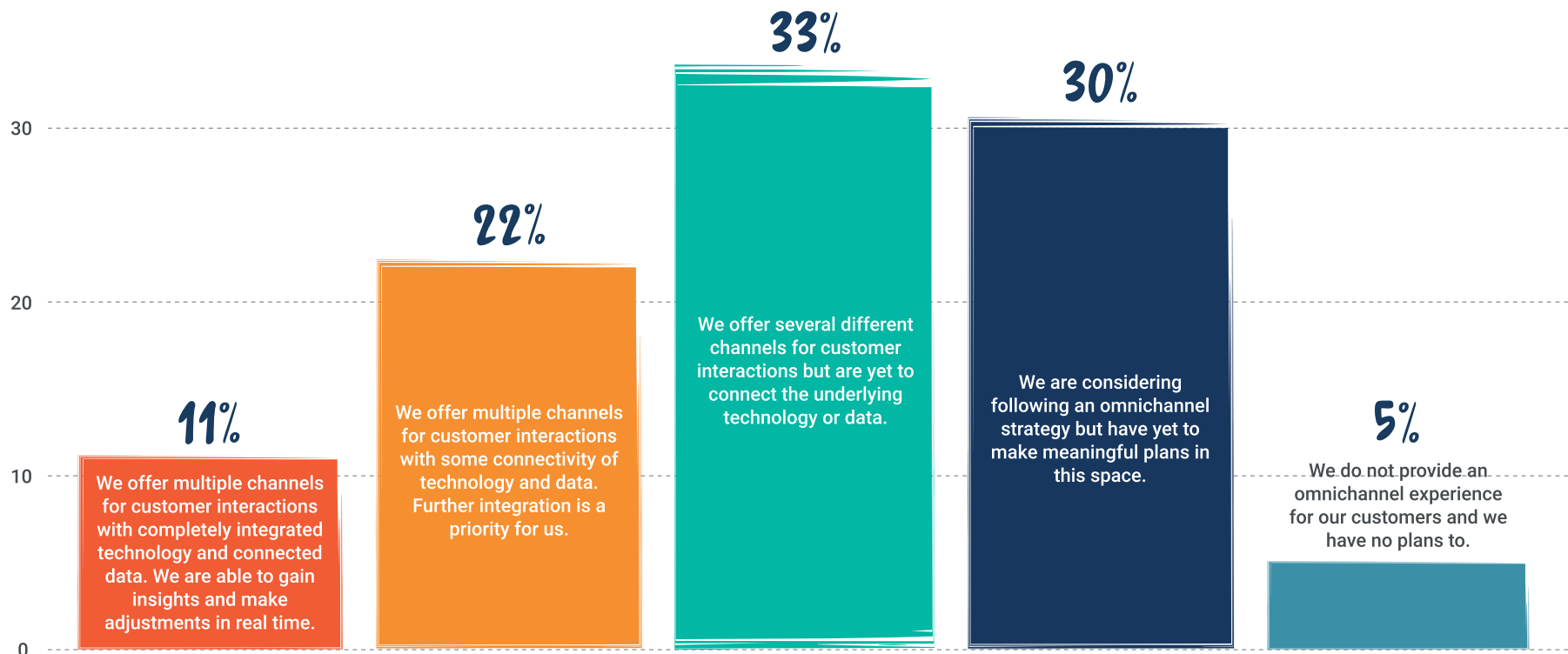
Despite organizations prioritizing CX innovation, many digital experiences remain fractured and inconsistent. The problem lies in the maturity of omnichannel strategies – or rather, the lack thereof.

Overall, few organizations (11% in Europe) have connected the technology and data needed to create end-to-end customer journeys. Half of respondents have a “multichannel” strategy – they offer multiple channels to their customers, but those channels operate independently. So, if a customer

has been browsing a website or conversing with a bot and then calls the contact center, context isn’t automatically transferred – meaning the customer will frustratingly have to start again.

Of the industries represented in the global survey sample, retailers are furthest ahead in the omnichannel journey – yet still only 20% report having connected technologies and data to deliver omnichannel experiences.

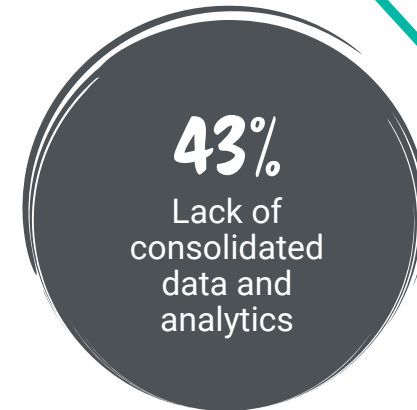
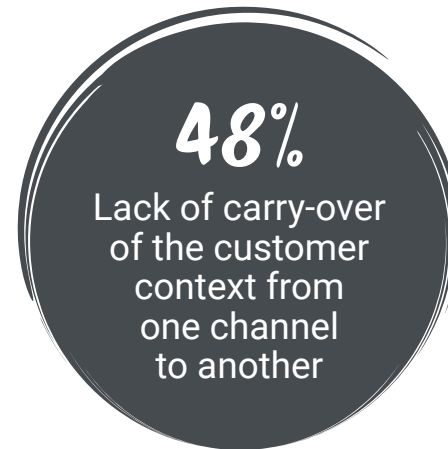
**CX Leaders:** Where are you on your journey to providing an omnichannel experience to your customers? % of respondents, Europe



Banks currently have the most fragmented landscape for their digital channels and data. According to the [FT Longitude report](#), 64% of CX Leaders in banking cite having strategies focused on products and channels rather than on the overall customer journey as their greatest challenge to improving CX.

This lack of connection means organizations have blind spots that lead to repeated requests for customer information and context. They also lack real-time insights for rapidly uncovering customer needs or monitoring quality across channels and making performance improvements to smooth the customer journey.

## ORGANIZATIONAL BARRIERS TO IMPROVING CX (% agree, Europe)



## KEY STRATEGY

### Eliminate friction across end-to-end customer journeys

The survey finds that while consumers increasingly prefer asynchronous or unassisted interactions, their satisfaction with these channels remains low and is getting worse (see page 21). Time is running out for organizations to close the gap on creating connected omnichannel experiences. Best practice organizations:

01

#### Focus on **THE JOURNEY**, not the channel

To create seamless customer journeys, organizations should bring all channels and departments onto one platform. This consolidation allows organizations to eliminate frustration by guiding customers to their desired outcome – regardless of their entry point. Having consistent experiences across digital and voice improves customer satisfaction, increases digital adoption and lowers cost.

02

#### Invest in **EMPLOYEES**

A strong voice channel is critical to customer satisfaction and requires trained, engaged and empowered employees. Using workforce engagement capabilities like intelligent forecasting and scheduling, agent-assist technology, and AI-assisted training and coaching supports CX employees from all angles, increasing efficiency, customer satisfaction and loyalty while decreasing time to resolution.

03

#### Learn and adapt in **REAL TIME**

Companies can use advanced analytics and dashboards with rich real-time data to not only improve reporting and KPI tracking, but also to adjust in the moment. This includes uncovering and resolving emerging issues, adapting to customer preferences, and monitoring new and emerging trends.



# HELPLINE

Empowering remote work and digital innovation



Industry: IT services  
 Location: France  
 Contact center: Around 2,000 agents

“Through AI and automation, we are reducing our global cost of service for the customer. Ultimately, this makes us more attractive than our competitors.”

**Lionel Florence,**  
 Director Users Digital Journeys

 **97% client retention rate**

 **Increased client satisfaction with 30% volume increase**

 **50,000 requests handled daily**

 **Over 80% First-contact resolution**

With over 200 customers, HELPLINE is the European user experience leader. At the heart of this French business are nine contact centers and 2,000 skilled technicians who help customers fix IT issues on the spot – via phone, email or chat. More complex issues can involve desktop sharing or a site visit.

“We are proud to have a 97% client retention rate, one of the best in the industry,” said Lionel Florence, Director Users Digital Journeys at HELPLINE.

### Prepared for anything

Business continuity planning (BCP) is vital to a leading IT services company like HELPLINE. “As well as improving BCP, we were keen to see how a cloud platform could support the next stage of our digital strategy,” said Mr. Florence. “For example, anticipating, automating and bringing fresh innovation like callbacks and AI-enabled bots. The trial confirmed we could do lots more for about the same level of spend.”

### An easy migration

A few months later, the trial moved to a full rollout. HELPLINE saw an increase in customer satisfaction ratings. And less complexity, as well as fewer servers, network components

and backups, resulted in cost savings.

HELPLINE focused on using the cloud CX platform as a digital accelerator. The first step was to automate its service delivery by adding smart voicebots and chatbots. Improvements in understanding and interpreting customer inputs quickly helped drive up usage and satisfaction scores.

“Now, 100% of interactions are initially handled by a bot,” added Mr. Florence. “Rather than replace humans, they improve the flow of simple user actions, releasing our technicians for more complex inquiries. Similarly, using bots to help triage and route inquiries to the right technician eliminates complicated IVR menus, boosting customer experience.”

In the event of a major IT outage, HELPLINE can handle up to 80% of its calls through automation. This significantly reduces average handling and waiting times, while ensuring regular customer communications until the incident is resolved.

“We handle around 50,000 requests daily, answering calls in under 20 seconds with a first contact resolution rate of more than 80%,” concluded Mr. Florence.

Read the full story [→ here](#)

# 03

## *CX STRATEGIES:*

# People take center stage



- Personalization decoded
- Employee experience tops strategic agenda
- Electrolux: Transforming contact centers into care centers





Leading organizations have people – customers and employees – at the center of their CX strategies. This requires understanding what both consumers and employees really want and adjusting in real time to meet and exceed their needs.

Personalization isn't a "nice to have" add-on; to secure customer loyalty and accelerate business growth, every aspect of the customer journey must be designed to drive outcomes and experiences unique to individual customers.

The links between personalization, loyalty and revenue are clear. Some 72% of consumers in Europe say they'd purchase additional items from companies that consistently personalize the experience. But just 17% of CX Leaders in Europe say their company offers a highly personalized experience today.

If guaranteed a **personalized experience** every time they buy from a particular company:



## PERSONALIZATION DECODED

Organizations that have disconnected technology and data (see page 21) have limited ability to respond to customer preferences in real time or deliver the types of personalization that customers really want. And according to the survey, the forms of personalization that consumers value most are those that happen during CX interactions.

Almost two-thirds of consumers say the most critical form of personalization is “Being connected straightaway with the right person to help me” and more than half prioritize “Receiving the services I need at any time and in

my preferred channel of choice.” The third most important is “Being offered services and products that are customized to my needs.”

These preferences require organizations to know who the customer is and what their needs are – identity and intent. And they can achieve this at scale using real-time analytics and natural language processing capabilities to extract patterns and insights and drive positive outcomes. Engaging the customer in their preferred channel with the right offer, web message, bot or agent-assisted service ensures the customer feels known, heard and understood – the foundations for a lasting relationship.

**Consumers:** What type of personalized experiences would be most valuable to you? (select three) % of respondents, Europe



## EMPLOYEE EXPERIENCE TOPS STRATEGIC AGENDA

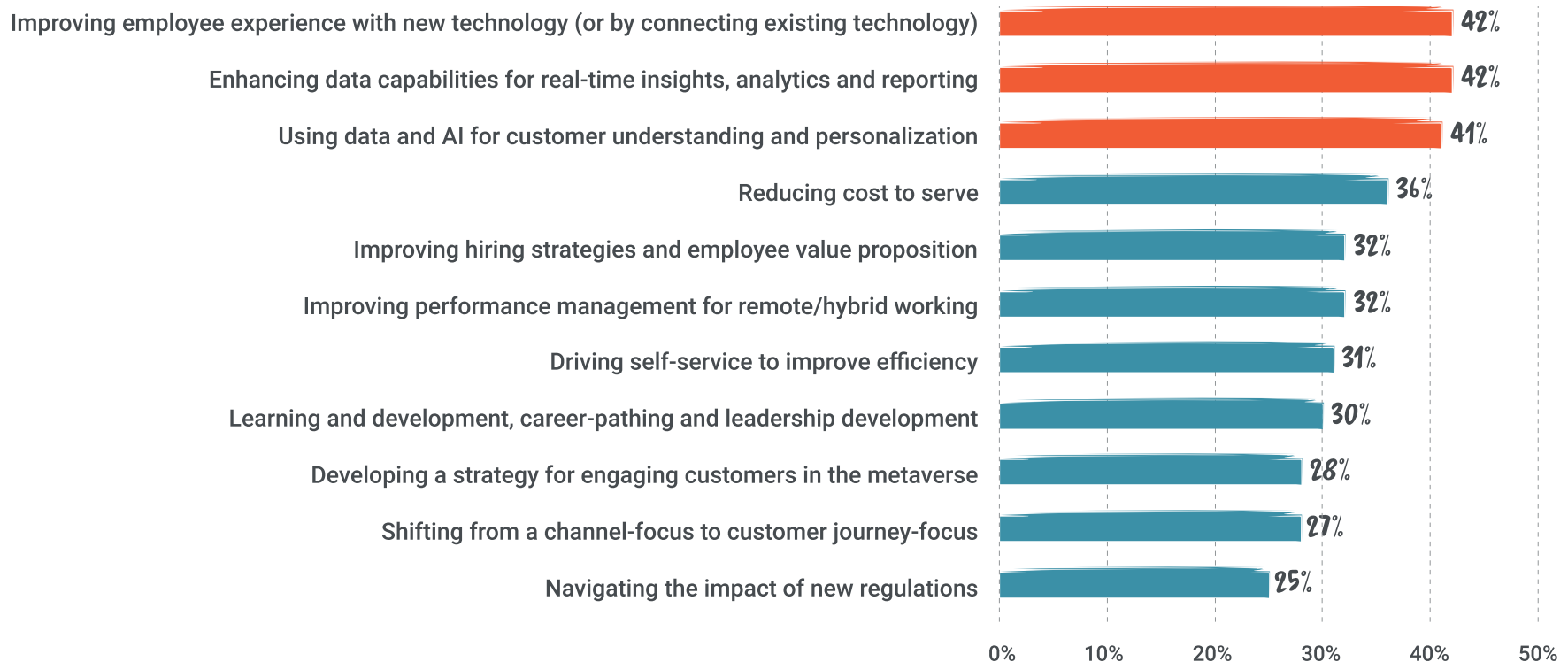
Driving personalization requires a focus on people and technology. As in the previous edition of “The State of Customer Experience,” imperatives such as “Enhancing analytics for real-time insights, analytics and reporting” and “Driving self-service adoption to improve efficiency” are near the top of the CX strategic agenda for the next two years.

What’s new is that contact center *employee* experience is emerging as a top CX priority for business leaders in Europe. CX workforce management is

undergoing many changes – from new remote and hybrid working models, to talent shortages and the rise of the gig economy.

According to the survey, average annual staff turnover in the contact center is 33% in Europe, which is increasingly unsustainable. Forty-two percent of CX executives surveyed by MIT Technology Review say recruiting for contact center roles is “**extremely challenging.**”

**CX Leaders:** What are your company’s biggest strategic CX priorities for the next 1–2 years? (select three) % of respondents, Europe





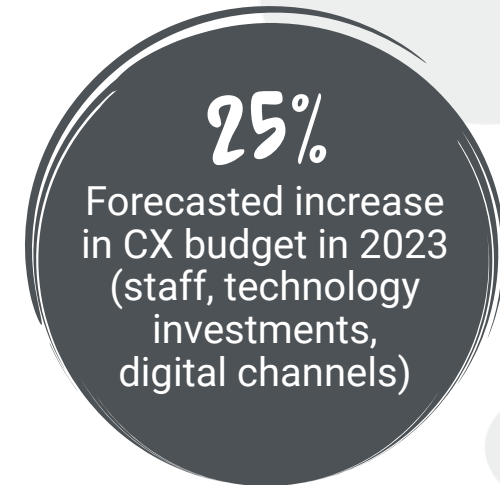
The pivot toward workforce centricity is timely, as until now, employee experience has been largely neglected. Nearly half (47%) of respondents say their organization currently does very little or nothing at all to make contact center jobs easier.

The future opportunity is to deploy new technology, or connect existing technology, in ways that link customer and employee experiences – orchestrating the two in parallel. For employees, the improved experience will involve a simplified desktop, instant knowledge and suggestions, analytics that make it easier to course-correct, and gamified KPIs for motivation and teamwork. Organizations will also explore innovations in generative AI and large language models for reducing agents’ administrative workload.

A better platform with tools that allow employees to succeed is critical to their engagement; a Genesys [survey of 16,000 contact center agents](#) found learning new skills and technologies is what they enjoy most about their job.

Building employee skill profiles into a customer experience platform will also ensure the right resources are available at the right time for customers – driving personalization as interactions are routed to the employee best suited to assist.

## HEADCOUNT AND BUDGET FORECAST, 2023 *(Europe)*



## KEY STRATEGY

### Put empathy into action for customers and employees

Empathy isn't sympathy; it's stepping into the shoes of your customers and employees to deliver personalized, relevant interactions. To get ahead, organizations must:



01

#### Orchestrate the customer **JOURNEY**

Putting empathy into action is where orchestration technology excels. AI can listen to customers; understand and predict what they're looking to achieve; act quickly and precisely; and then learn continuously from the process. Similarly, AI can listen to employees, route interactions to them where they're likely to succeed, and then support them through to resolution.

02

#### Harness knowledge to **EMPOWER** humans and bots

Employees know their value and are questioning the way they work. In 2023, organizations will increasingly support human and virtual agents with AI and automation technologies to personalize and resolve interactions. AI and automation can also offload routine tasks to digital and self-service channels, freeing up agents for higher value-add interactions.

03

#### Scale **EFFICIENTLY** with automatization

To deliver the personalized approach every customer deserves without having costs spiral, organizations need to develop scalable strategies. Automation capabilities that enable organizations to personalize at scale include predictive engagement, chatbots and voicebots and predictive routing. These allow organizations to develop meaningful customer relationships and increase sales conversion rates while tightly managing cost.

# ELECTROLUX

## Transforming contact centers into care centers



**Industry:** Manufacturing and retail  
**Location:** Sweden and global  
**Contact center:** 1,000 agents across Europe

“The system flags excessive webpage dwell times so agents can launch a timely webchat offering support or a tailored offer. And we can also set up alerts if shopping basket checkouts appear to stall, again enabling agents to reach out and get the sale back on track.”

**Mateusz Jazdzewski,**  
 IT Peace of Mind Solutions Manager and Head of CX Product, Electrolux

- 45-second reduction** in wait time and significantly less customer effort
- 56-second reduction** in Average Handle Time
- Improved** First-contact resolution, NPS and employee satisfaction
- over 75%** bot intent recognition

One of the world’s biggest home appliance manufacturers, Electrolux strives to improve everyday life for millions. It competes in a fast-changing market, where customers regularly switch between visiting stores and shopping online. Driven by the rise in eCommerce, Electrolux saw an opportunity to develop business-to-consumer and direct to consumer channels; getting closer to customers and driving sales. Success meant redesigning its contact centers for greater efficiency and faster innovation.

### Holistic customer-centric solution

Electrolux implemented Genesys Cloud CX™ to form a solid omnichannel foundation that ensures efficient multitasking with inbound, outbound, email and chat conversations managed from a single desktop. Agents quickly collaborate with colleagues using the Genesys Cloud CX interface, rather than having to navigate multiple screens and apps. Managers and supervisors have visibility into what’s happening, instantly drilling down into reports and monitoring queues and workloads.

Voicebots and chatbots powered by Google Cloud Contact Center AI detect customer intent and suggest

self-serve options, or intelligently route calls to the best specialist with the right skills. **Genesys Predictive Engagement** connects the dots on website journeys by leveraging AI and analytics to uncover visitors’ behaviors and interests – and then personalizes engagements in real time.

### Efficiency and productivity

Service efficiency has also improved, with a 56-second reduction in average handle time. During the first three months after implementation, the company’s Google Cloud concierge bot recognized over 75% of customer intents. These included requests for appliance repairs, made in English and Italian, for instance.

“Bot intent recognition rose and, in some cases, reached almost 100% as we added use cases and training,” said Jazdzewski.

Employee satisfaction has improved, too. “Agents have responded very positively,” said Jazdzewski. “Genesys Cloud CX has improved their day-to-day work with neat shortcuts and better search capabilities and wrap-up tools.”

Read the full story [→ here](#)

# 04

## THE TECH STACK: Powering growth and agility



- Integrated platforms enable CX orchestration
- Benefits of the cloud
- From on-premises to the cloud
- Most valuable CX capabilities
- Data security tops consumer concerns
- Siemens Healthineers: Harmonizing customer experience around the globe





To enable a digital transformation around customers and employees, CX Leaders have innovation, technology integration and data connectivity at the top of their tech agenda.

Some 57% of CX Leaders say that implementing a customer experience platform that integrates systems is a top technology priority for 2023. They're looking for better visibility, from enterprise level down to individual interaction data, to drive omnichannel CX and coordinate each step of the customer experience.

**57%**

of CX Leaders  
prioritize a customer  
experience platform that  
integrates systems

**#1**

The top benefit of  
cloud is increased  
cybersecurity

**47%**

of CX Leaders think  
a customer data  
platform has the  
greatest value for CX

## INTEGRATED PLATFORMS ENABLE CX ORCHESTRATION

The number one technology priority for CX Leaders worldwide is implementing a customer experience platform that integrates systems such as unified communications, CRM systems, enterprise resource management (ERP), AI tools and workforce planning. CX Leaders are seeking to improve customer satisfaction and drive business process efficiency through digital transformation.

More than half of CX Leaders in Europe consider connecting technology, data and knowledge as key priorities for improving both customer and employee experiences.

CX Leaders in Europe are also focused on accelerating digital transformation through connecting systems and data, which will support the desire expressed by 41% of respondents to enhance their self-service strategies and deploy better bots. The same proportion also aim to invest in tools that will improve contact center operations, such as automated scheduling and reporting.

**CX Leaders:** Which of the following technology initiatives will you use to support your strategic priorities over the next 1–2 years?  
*% of respondents, Europe*





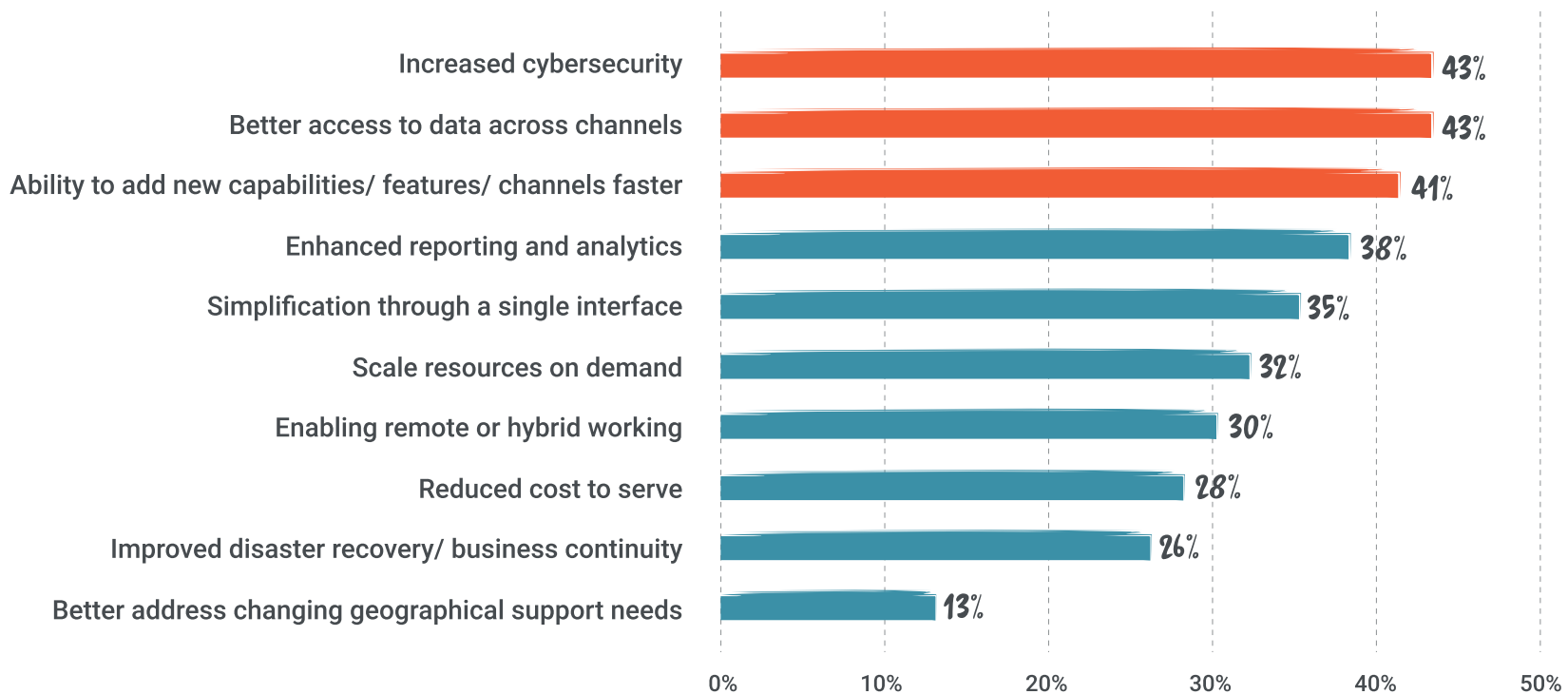
## NEED FOR AGILITY DRIVES CLOUD MOMENTUM

The survey reveals more than half of customer experience management technologies in Europe are currently being delivered via all-cloud platforms and solutions, or in hybrid cloud/on-premises models.

The top benefits of using cloud-based CX technologies include the increased cybersecurity provided by cloud-based contact center solutions; gaining better access to data across channels; and being able to adapt to changing

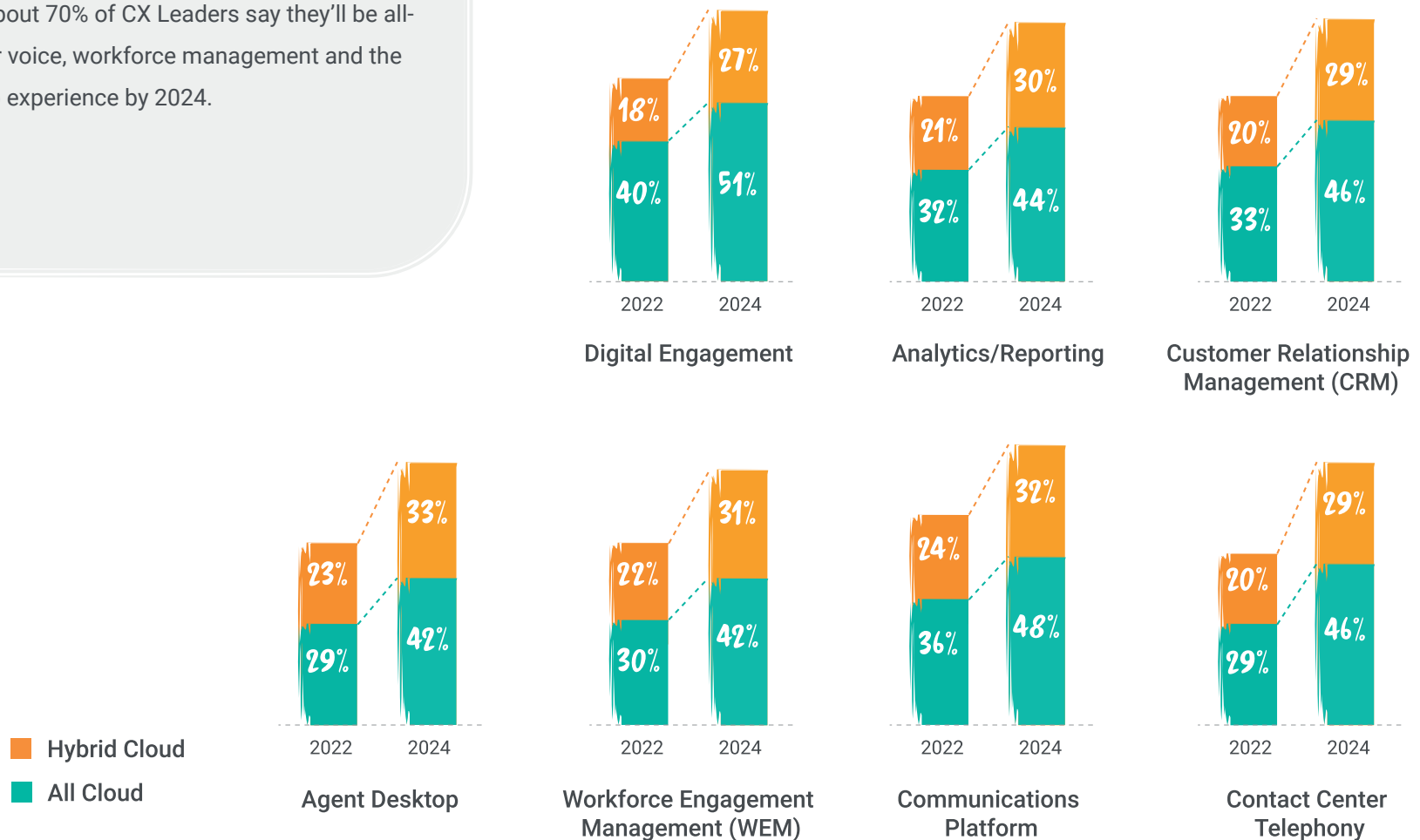
market conditions by deploying new capabilities, features or channels faster. Three out of 10 CX Leaders in Europe say a leading benefit of the cloud is enabling hybrid and remote working models. And about one-third cite reduced cost to serve as a top benefit of the cloud, as they're able to scale more efficiently.

**CX Leaders:** What have been the greatest benefits of moving to a cloud-based infrastructure? % of respondents, Europe



Of the CX Leaders in Europe currently using on-premises and hybrid-cloud solutions, the greatest momentum toward cloud is focused on CRM solutions, communications platforms, and analytics and reporting dashboards. Approximately eight out of 10 respondents expect to use cloud for those technologies within two years' time. About 70% of CX Leaders say they'll be all-in on cloud for voice, workforce management and the agent desktop experience by 2024.

**CX Leaders:** How are you delivering your customer experience infrastructure today and in two years' time? % of respondents, Global

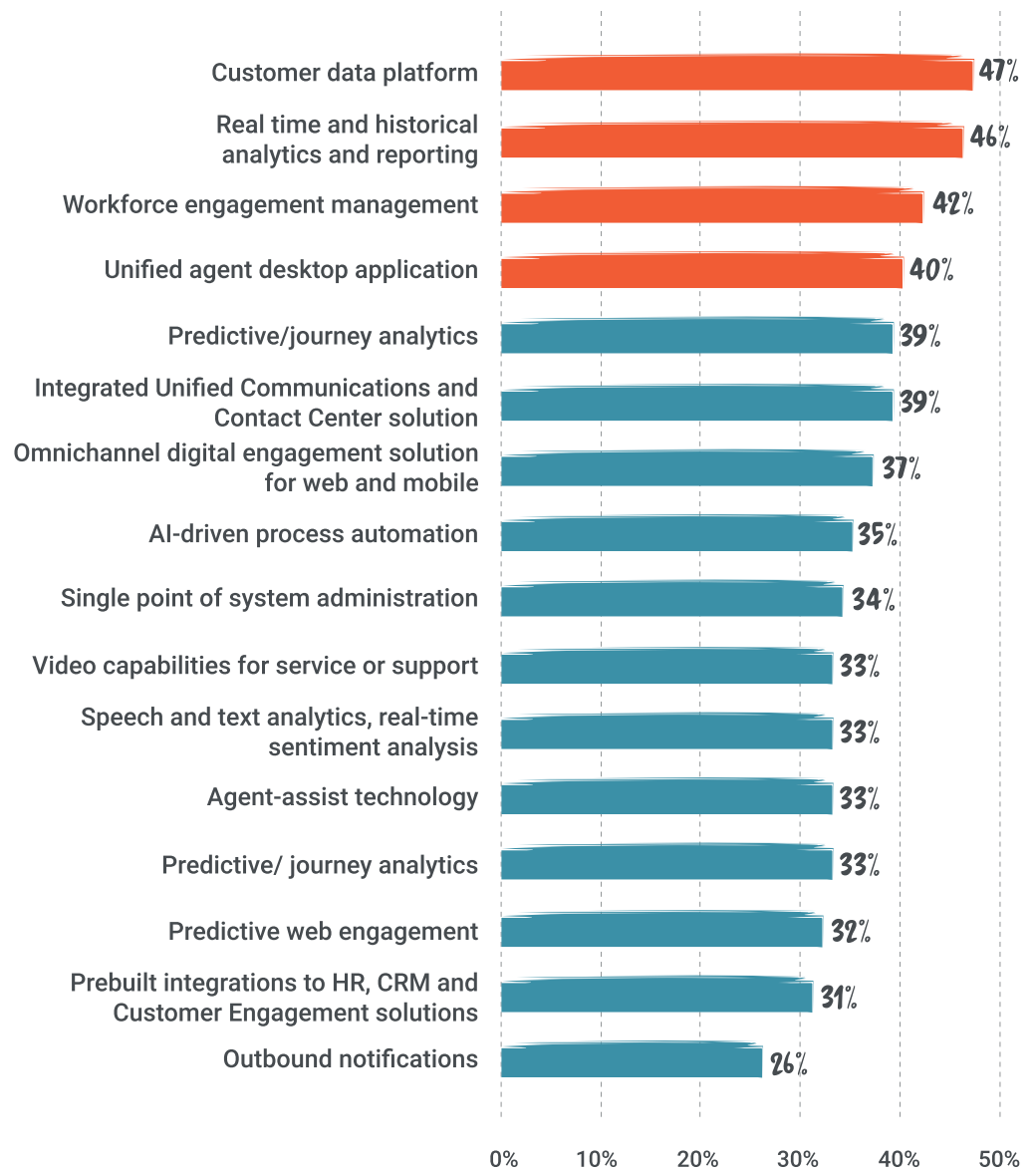


## REAL-TIME ANALYTICS ARE TRANSFORMATIONAL CAPABILITIES

The capabilities CX Leaders in Europe consider most critical for improving customer experience are customer data platforms that provide a single unified view of the customer, real-time and historical analytics and reporting, and workforce engagement management.

Having deeper insights allows CX Leaders to gain a better understanding of their customers and employees, and then develop targeted strategies for engagement across digital and voice channels. Workforce engagement management capabilities will also enable CX Leaders to build a culture their employees will love. These include performance management, quality management and intelligent forecasting to avoid staff burnout during interaction volume spikes.

**CX Leaders:** How valuable are each of the following features for managing your customer service/support needs? % responding "extremely valuable," Europe



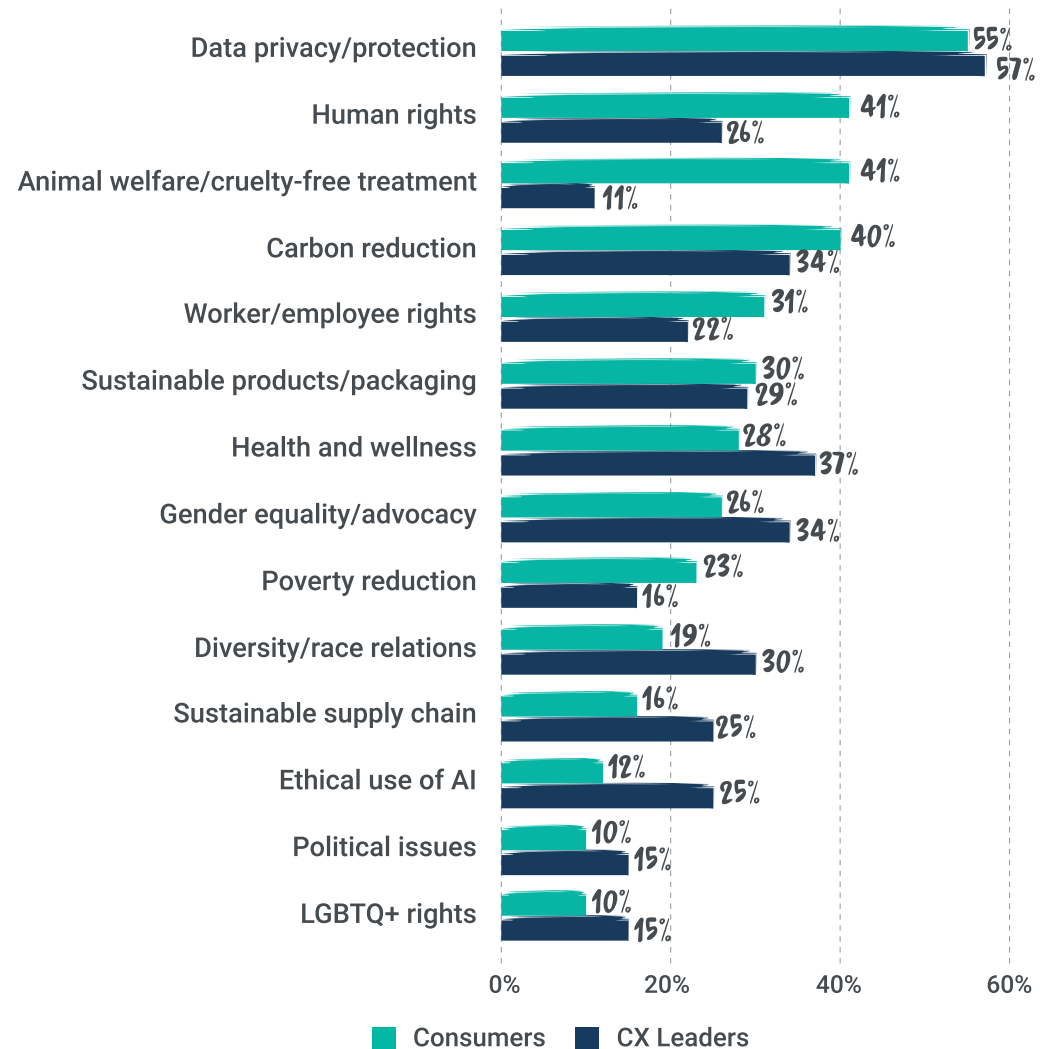
## DATA SECURITY TOPS CONSUMER CONCERNS

Consumers expect the organizations they buy from to share their concerns about ethical issues and reflect their values around social responsibility. Data privacy/protection is consumers' No. 1 concern, selected by 55% of respondents in Europe. Building and maintaining customer loyalty rests on having secure, reliable processes that safeguard sensitive information.

CX Leaders consider cybersecurity to be a leading benefit of cloud technology – providing the privacy protections their brands rely on. To grow loyalty and trust, organizations need to make data privacy a leading pillar of their brand.

**Consumers:** Which of the following social, ethical or environmental issues do you care about and expect the companies you buy from to stand for and advocate around?

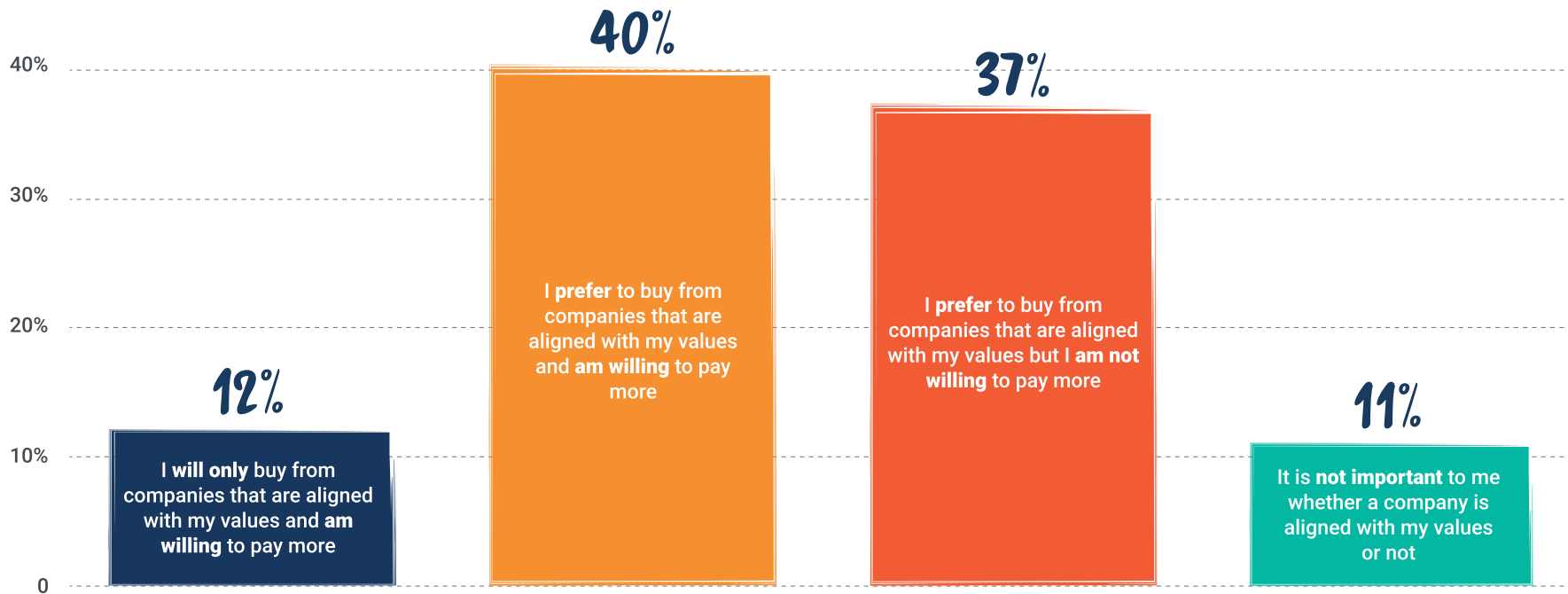
**CX Leaders:** What issues does your company prioritize/speak out about actively? % of respondents, Europe



Getting strategic and brand alignment around the issues consumers care about can increase loyalty. In Europe, 52% consumers state they'll pay more to buy from companies aligned to their values. Some 12% say they would only buy from companies aligned to their values.

**52%** of consumers in Europe will pay more to buy from companies that support their social, ethical and environmental concerns

**Consumers:** I only buy/prefer to buy from companies that are aligned to my social, ethical or environmental concerns and am willing to pay more. % agree, Europe



## KEY STRATEGY

### Develop a tech stack that ignites growth and reduces cost

Leading organizations use their technology infrastructure to drive customer loyalty through personalization at scale and increase employee engagement – all while managing costs. Best practice organizations should:



01

#### UNIFY TECHNOLOGIES for customer and employee experiences

Enterprise innovation cycles have shortened dramatically. Throwing resources at short-term problems can cause issues like technical debt, difficulty sustaining differentiation, and fragmented experiences for customers and employees. Moving forward, CX Leaders should streamline and seamlessly integrate CX and EX technologies for a unified approach to digital transformation.

02

#### Embrace open, **CLOUD-BASED** architectures

Flexible, composable and scalable technology architectures focused around microservices, open APIs and cloud-native platforms will pave the way for innovation at lower cost and with less risk. They will provide access to a best-in-class ecosystem, unify data and communications, and support global consolidation and data virtualization.

03

#### Make **RESPONSIBLE TECHNOLOGY** part of the brand

With great data comes great responsibility. Data privacy and protection is consumers' greatest ethical concern – and one they expect organizations to similarly prioritize. World-class cybersecurity, data governance and privacy compliance are table stakes, and must apply to all partners and suppliers in the technology ecosystem.



# SIEMENS HEALTHINEERS

Harmonizing  
customer experience  
around the globe



**Industry:** Healthcare and life sciences

**Location:** Germany

**Contact center:** 2,200 agents

*“We completely redesigned our call flows and rolled out a new global contact center solution in just eight months — connecting 2,200 agents in 236 offices in 35 countries — a remarkable achievement that would have been unthinkable before.”*

**Jochen Hostalka,**  
Senior Vice President IT



**Connected 2,200 agents**  
across 236 offices in just eight months



**6- to 8- week**  
onboarding for new sites



**Routed calls**  
intelligently based on urgency

Siemens Healthineers is a life sciences and medical technology giant with a presence in 150 countries. Every day, an estimated 5 million patients worldwide benefit from its innovative digital technologies and services, including diagnostic and therapeutic imaging, laboratory diagnostics and molecular medicine.

Often the first point of contact, its contact centers keep customer service on track — from coordinating engineer appointments to resolving technical queries from clinicians. Previously, these siloed operations ran on unreliable PBX systems that stifled collaboration and service improvements.

“We wanted to get to a customer-centric model that was always-on and always there for our customers,” said Jochen Hostalka, Senior Vice President IT for Siemens Healthineers. “That meant finding a rock-solid cloud platform...that allowed us to standardize, quickly execute and harmonize customer experience around the globe.”

### Seismic shift in IT delivery

“We completely redesigned our call flows and rolled out a new global contact center solution in just eight months — connecting 2,200 agents in 236 offices and 35

countries — a remarkable achievement that would have been unthinkable before,” said Hostalka.

The cloud CX platform was easily integrated with the company’s existing internal ticketing system and agent workflows. Today, new sites can be remotely provisioned much faster, typically between six to eight weeks. “Managing IT projects from a distance, in different countries with different cultures and people you have never met, used to be a challenge,” added Hostalka. “Now, we have happier end users and just don’t see any issues when we go live.”

Additionally, the company can better serve its users by routing calls based on importance. For example, intelligent routing policies within the cloud CX platform can distinguish between a general practitioner carrying out a routine consultation and a clinician with a patient undergoing an urgent scan.

“Our agents used to have various screen pops and would have to move between five or six different applications,” said Hostalka. “Now, everything’s in one place, which means faster service and less stress.”

Read the full story [→ here](#)

# THE PATH FORWARD:

## Experience orchestration delivers empathy at scale

This report finds organizations in Europe are falling behind on their ability to meet customer expectations. While 83% of consumers say a company is only as good as its service, they also say that they are frequently dissatisfied with most CX channels today. With digital channels achieving broad penetration and growing preference for asynchronous and unassisted interactions, a connected voice and digital strategy is now more critical than ever for reimagining the customer experience.

Moving to a customer journey approach – through connected technology, measurement and management – means creating a future where experiences will be orchestrated in real time. This will use cloud-based technologies, automation and AI to coordinate people, channels, interactions, knowledge, data and systems into empathetic end-to-end experiences.

The strategies shared in this report will position organizations for success:

### **Deliver excellence by continually reimagining the customer experience**

Delivering the *exceptional* in every interaction requires experience orchestration: coordinating people, channels, interactions, knowledge, data and systems in real time to deliver empathetic end-to-end experiences at scale – while also managing costs. It requires complete visibility across the customer journey; flexible, scalable and adaptive technology to exceed customer expectations; and AI and automation for flawless, cost-effective execution.

### **Eliminate friction across end-to-end customer journeys**

To create seamless customer journeys, organizations should bring all channels and departments onto one platform. This consolidation allows organizations to eliminate frustration by guiding customers to their desired outcome, regardless of the entry point. Having consistent experiences across digital and voice improves customer satisfaction, increases digital adoption and lowers cost.

## Put empathy into action for customers *and* employees

Putting empathy into action is where orchestration technology excels. AI can listen to customers; understand and predict what they're looking to achieve; act quickly and precisely; and then learn continuously from the process. Similarly, AI can listen to employees, route interactions to them where they're likely to succeed and then support them through to resolution.

## Develop a tech stack that ignites growth and reduces costs

A tech stack that powers growth is one that unifies the customer and employee experiences to drive efficiency and personalization across the end-to-end journey. Flexible, scalable and secure technology architectures focused around microservices, open APIs and cloud-native platforms will

pave the way for innovation at a lower cost and with less risk. They will also provide access to a best-in-class ecosystem, offering even greater opportunities to reimagine the customer experience.

Success in the experience economy today requires a people-centric, unified approach to deliver the power of empathy to every experience. Make this your top goal. Start now. Never stop. It's the path to increased customer loyalty, profitability and business resiliency.

In future, **exceptional experiences** will be intelligently orchestrated to deliver empathy from end to end.

**AI and automation** will coordinate people, channels, interactions, knowledge, data and systems for hyper-personalization at scale.

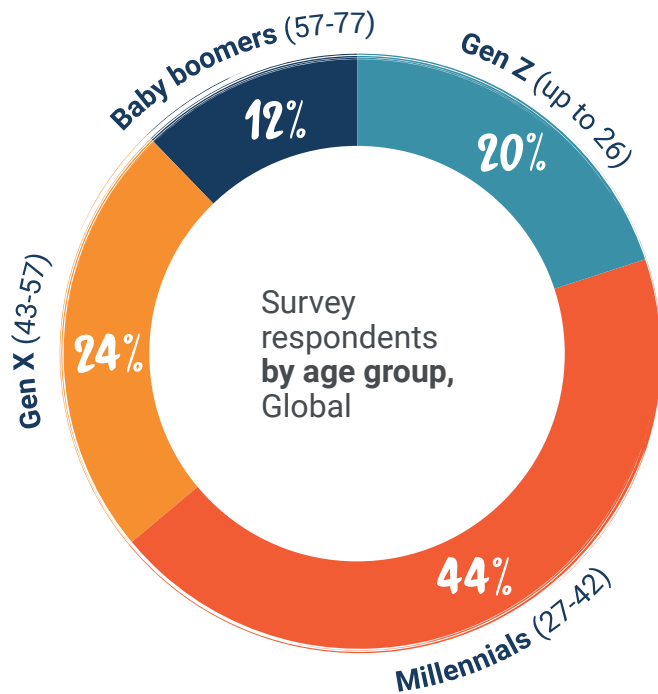


# APPENDIX

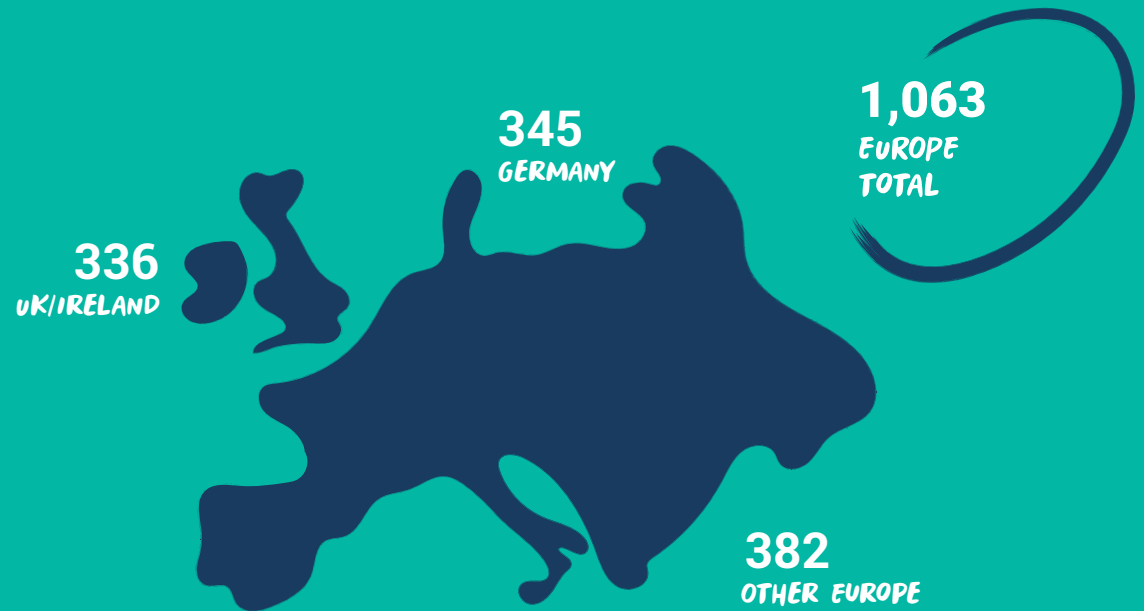
## METHODOLOGY

In November 2022, Genesys worked with an independent research firm to survey 1,063 consumers and 122 CX Leaders residing in countries throughout Europe. Among the business respondents,

the industries represented were banking, government, healthcare, insurance, manufacturing, professional services, retail, technology and telecommunications.



### Consumer survey



# CX LEADERS survey

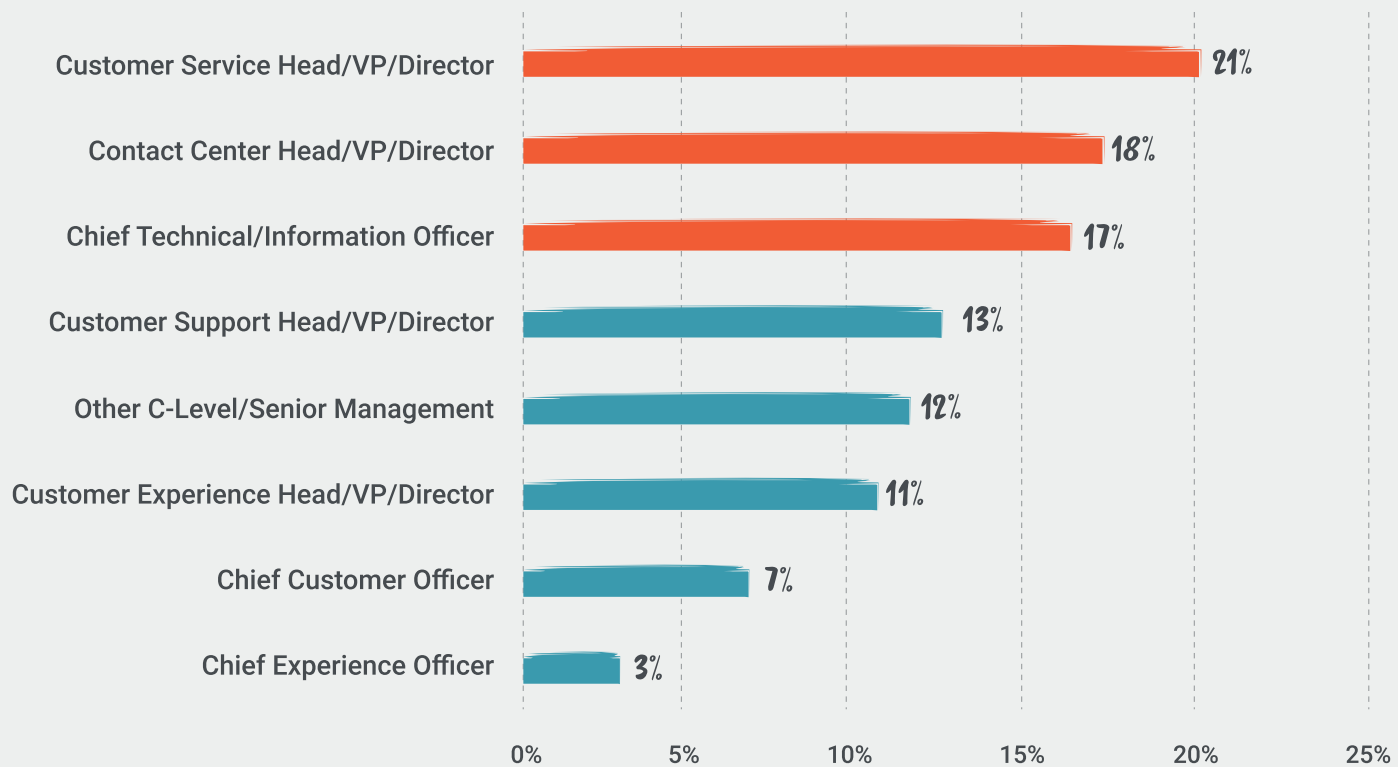
122 respondents



## CX Leaders by country



## Respondents by job title





## ABOUT GENESYS

Every year, Genesys® orchestrates more than 70 billion remarkable customer experiences for organizations in more than 100 countries. Through the power of our cloud, digital and AI technologies, organizations can realize Experience as a Service®, our vision for empathetic customer experiences at scale. With Genesys, organizations have the power to deliver proactive, predictive, and hyper-personalized experiences to deepen their customer connection across every marketing, sales and service moment on any channel, while also improving employee productivity and engagement. By transforming back-office technology into a modern revenue velocity engine, Genesys enables true intimacy at scale to foster customer trust and loyalty.

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