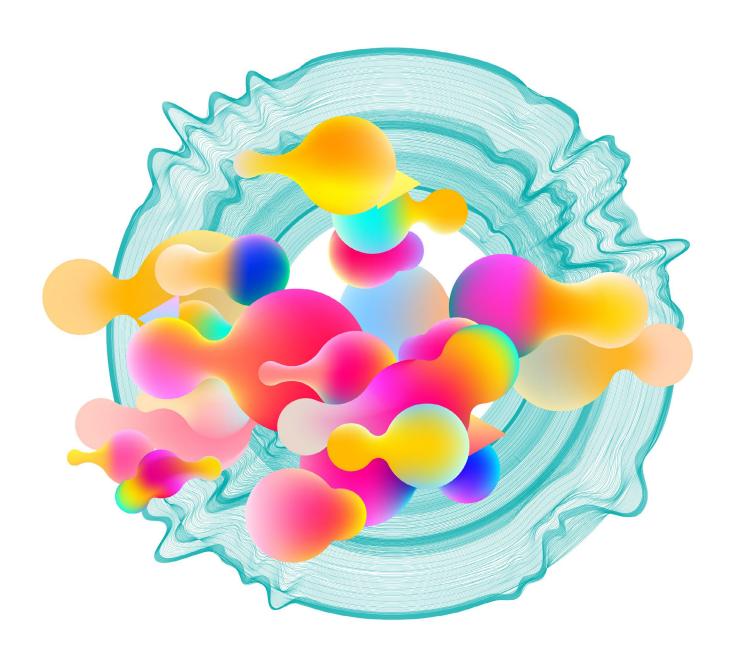**Deloitte.**
Digital

Brands think they orchestrate CX. Consumers sing a different tune.

Insights from our new research on customer experience orchestration.

October 2023

Enterprise leaders across business-to-consumer sectors almost unanimously believe that great customer experience (CX) is foundational to elevating customer trust and loyalty—and to improving brand resilience and growth. Most feel very confident about the quality of CX their brands provide.

Consumers agree that when they encounter excellent CX, they're more trusting and more willing to spend money with the brand. However, they're lukewarm about the overall state of CX from the brands they know.

Why the disconnects? Turns out, the issue is disconnection itself.

In spring 2023, Deloitte Digital surveyed 700 US brand leaders across 17 business-to-consumer industries, as well as 1,000 US consumers to determine the state of customer experience orchestration and the benefits that accrue to those brands that get it right. In this first installment of our four-part report, we examine some of the foundational issues that stand in the way of better CX today—and that need to be solved in order to meet the expectations of customers going forward.

Orchestrating growth.

This article is part of a four-part series exploring our latest research on CX orchestration and what it means for your business.

Part 1: The connections that matter

Part 2: Opportunities and benefits

Part 3: Advancing personalization

Part 4: Best practices and technologies

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The customer disconnect.

Business leaders have long recognized consistency is essential to building awareness, conversion and loyalty among customers. Toward that end, they have worked to institute guidelines for every outward-facing brand representation and experience—from logos to store layout, ad copy to customer service scripts.

As CX has emerged as a critical differentiator and key to competitive advantage, organizations across industries have endeavored to weave into each customer interaction not only consistency but also personal relevance, convenience and simplicity.

According to our research, 90% of brand leaders say customers would rate the CX they provide as good or excellent.

Consumers, however, have a sharply different perspective, with just 50% rating the CX they receive from brands as good or excellent.

Why such a wide gap? Our research reveals that *consistent experiences at each touch point* is no longer enough. **Consumers expect and reward *connected experiences across touch points***—over time and at different stages of the journey.

This is what we refer to as experience orchestration. In real-world terms, it's about ensuring that everything a brand learns about a customer is "passed on" and used to inform and elevate that customer's next experience with the brand, no matter the channel or stage of the journey. In so doing, the brand is able to reduce friction along the customer's own self-designed path of engagement—rather than forcing the customer through a predesigned funnel.

Ninety-five percent of business leaders claim they are at least somewhat familiar with this concept. And they recognize it matters: 98% say customers trust them more when they are provided consistent, positive experiences—and 96% believe those experiences help foster greater loyalty. Consumers are remarkably aligned on this point, with 98% saying they trust and are more loyal toward businesses that provide consistent, positive experiences.

Unfortunately, those connections happen too rarely in the eyes of consumers. When asked how often they leverage data about past purchases, feedback, preferences and behaviors to personalize experiences, business leaders say they do it nearly 70% of the time—but consumers say brands only appear to recognize and serve them in ways that reflect and build on past interactions about half the time. Similar divides appear between leaders and consumers regarding how often businesses ask for feedback, follow up on feedback, and provide experiences that appeal to the customer's feelings and emotions.
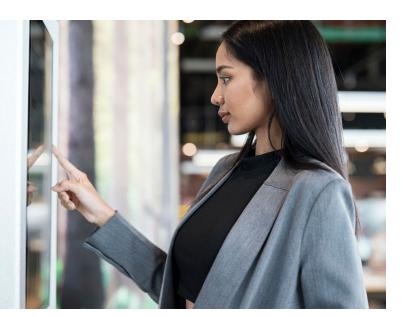
Customers spend

1.5x as much

with brands that orchestrate consistent, positive experiences.[1]

How we define experience orchestration.

Experience orchestration is the discipline of using strategy, data and technology to drive consistent, personalized and connected interactions across all customer touch points. Organizational knowledge, strategy and customer expectations are infused into AI and analytics to drive, create, manage and evolve experiences seamlessly and at scale.

Siloed perspectives, inconsistent experiences.

It's not just brands and consumers who differ in their views on orchestration effectiveness. Views about orchestration vary even at different levels and functions of enterprises.

Executive leaders, for example, are twice as likely as functional or department leaders to say they are "extremely familiar" with experience orchestration. By contrast, more than a third of operations and sales leaders admitted they are "not at all" familiar with the concept. And notably, CXOs and other leaders responsible for customer experiences are significantly *more* likely than any other business leaders to say that managing customer experiences at scale is a major challenge to effective orchestration in their businesses. Those CX leaders should know best, since they're the ones working on making it happen every day.
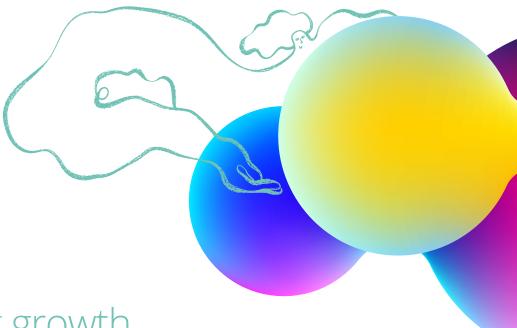
Our analysis and experience with clients across industries indicates that many of these gaps result from disconnected teams, processes and technologies within enterprises today. The siloed structure of most enterprises means that customer experience and orchestration initiatives are typically executed "vertically" within channels and moments, rather than orchestrated "horizontally" across the organization and across time.

Marketing teams may target and then retarget prospects, while commerce teams remind shoppers of abandoned shopping carts and "you might like" offers based on the products they've viewed—but too often, those teams aren't coordinating their activities in ways that make it all feel to the customer like one seamless journey.

The result? Leaders of different functional organizations generally believe they're creating consistency—but in the eyes of consumers, if it doesn't all feel *connected* it isn't actually *consistent*.

Fortunately, there may be a silver lining in all those silos: The very data, technologies and/or processes that one functional organization needs to improve its orchestration capabilities have often been effectively deployed and mastered already by other teams within the enterprise. For example, one in four product marketing leaders say their businesses don't have the right systems in place to track customer data across touch points. Yet leaders in IT or CX organizations—those who are often responsible for managing customer data across the business—almost unanimously say that those systems are, in fact, already in place and available.

Orchestrating growth.

Experience orchestration is the linchpin for elevating human experiences. It's also a critical principle and capability for the next era of business growth: The companies with the most advanced experience orchestration capabilities attributed **1.8x greater revenue increases as a result of their CX strategies** in 2022, compared to low-maturity organizations.

In Part 2 of this series we explore more about the opportunities and benefits that effective experience orchestration makes possible. In Part 3, we explore the interplay between experience orchestration and personalization, and how this potent combination helps grow customer trust and loyalty. In Part 4 we look at what good experience orchestration looks like—and what's needed to get there.

In the meantime, **here are some questions to ask yourself:**

· How often does your brand offer positive and personalized experiences across all touch points?

· To what extent are your brand's people, processes, and technology integrated to ensure the success of your customer experience strategy?

· To what extent are you actively working to provide personalized experiences that build on insight from across interactions with sales, service and marketing?

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Methodology.

The foundational research for the series on experience orchestration, conducted by Lawless Research on behalf of Deloitte Digital between March–April 2023, is based on blind surveys of:

- 700 leaders at US business-to-consumer companies with 500 or more employees. Surveyed leaders had responsibility for executive leadership or general management, customer / user experience, customer service / support, data and analytics, e-commerce, information technology, marketing, operations, product management, product marketing, sales, supply chain, or web, app or commerce design / development.

- 1,000 US consumers age 18–77 who had contacted customer support and/or communicated digitally with a brand or business in the preceding 30 days.

An organizational maturity model was developed that identified the most effective 18% of companies based on integration, coordination, alignment of KPIs, connectivity, digitization and employee empowerment. In this series we refer to those high-maturity companies as "leading orchestrators."

Sources.

1. Deloitte, owned research conducted by Lawless Research on behalf of Deloitte Digital, 2023; specific statistic here encompasses responses from both brand leaders and consumers.

Get in touch.

Tim Greulich
Managing Director
Deloitte Consulting LLP
tgreulich@deloitte.com

Jen Buchanan
Managing Director
Deloitte Consulting LLP
jenbuchanan@deloitte.com

Jon Atkin
Managing Director
Deloitte Consulting LLP
jatkin@deloitte.com