



Interview with

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Customer effort: Measure more than “how much”

We sat down with Forrester analyst Maxie Schmidt-Subramanian to get her take on Effort’s impact on the customer experience. We found that while measuring Effort can help identify areas for improvement in CX, most companies depend on post-call surveys as their primary Effort measurement tool. Leading companies are using advanced analytic approaches to effectively listen for Effort, driving faster, more actionable insights into the customer experience.

What is “customer effort,” and why should customer experience (CX) leaders care about it?

Customer effort is the friction that customers perceive while interacting with an organization. When effort is high, customers may feel annoyed, frustrated or stressed. We refer to that as bad effort. Think about getting transferred four times while on the phone with a company and having to reexplain your problem every time.

There is good effort, too. That’s when perceived friction causes positive emotions in customers. If you don’t believe that can be true, just think of situations where a higher effort makes you feel safer. For example, when you queue to get through airport security but then see the agents confiscate somebody’s large scissors. Or think about when a higher effort experience makes you feel proud, like when you spend hours learning to play the piano or when you painstakingly decorate a cake for your daughter’s birthday.

Most CX and service leaders measure effort using the Customer Effort Score. What are the pros and cons of relying on a survey-based approach like this?

Many CX and service leaders measure effort either with the Customer Effort Score or a direct rating question. Both questions measure a level of effort.

- The Customer Effort Score asks customers to indicate on a agree-disagree scale how strongly they agree with this statement: “The company made it easy for me to handle my issue.”
- A direct rating question asks about the level of ease but lets customers select a level directly, on a scale that can range from “not easy at all” to “very easy.”

The PROS of measuring the level of effort in a survey include:

- It’s easy for CX pros to include in existing surveys.
- It’s easy for CX pros to calculate and share the effort (or ease) score.
- If phrased as a simple question, it’s easy for customers to understand.

The CONS of measuring the level of effort in a survey include:

- Scores don’t tell CX pros whether customers feel good or bad about their level of effort, making it harder to prioritize improvement efforts.
- Scores don’t tell whether the experience exceeded or failed expectations, making it harder to interpret the score.
- Survey-based scores typically ignore 90% or more of customer interactions.¹
- An agree-disagree scale adds to respondent effort and can introduce agreement bias.²

¹ In a typical transactional survey, a sample of customers (about 20% to 30%) are invited to take a survey in the first place. And of those invited, typically only 10% to 25% respond. Therefore, surveys capture only between 2% (worst case, 10% of 20%) and 7.5% (best case, 25% of 30%) of interactions.

² Agreement scales require a major cognitive effort from respondents. They can create acquiescence bias, i.e., the propensity to agree, in such scales. Source: Anna DeCastellarnau, “A classification of response scale characteristics that affect data quality: a literature review,” *Quality and Quantity*, Springer, July 24, 2017.

What are the alternatives to using surveys to measure effort, and how do these alternatives overcome some of the deficiencies of relying solely on surveys?

CX pros should consider the following alternatives to surveys because: 1) the data covers more interactions than surveys and 2) these alternatives allow CX pros to pinpoint which aspects of the experience cause effort.

- **AI-based text and speech analytics on unstructured feedback.** Text analysis lets CX pros mine unstructured text from customer reviews, emails and call transcripts. Speech analytics can add more insights from identifying vocal cues effort. Vendors like Tethr or Clarabridge help their clients mine transcripts of calls to understand which interactions caused customer effort.
- **Facial coding on videos.** Before being acquired by Apple, technology vendor Emotient used its technology to measure stress in employees and customers of a major fast-food restaurant. By capturing customers and employees on video and measuring their stress levels, it was able to determine when to add extra shifts to improve experiences.
- **Analytics on digital behavior data.** Analyzing digital behaviors like clicking, zooming, scrolling and backtracking helps identify where customers expend effort. USAA, for example, worked with Clicktale to identify members who repeatedly went back and forth to different pages on the website to learn about and compare products. USAA also identifies where a customer's cursor is on a page. In one case, the firm found a cloud of dots around the e-signature box, indicating that the customer had only succeeded after many tries to sign the document. Vendors like Decibel Insight, FullStory and Quantum Metrics also use proprietary models to identify customers' effort in digital behavior data.



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Assuming a company can surface effort drivers in other data sources, what should they do with that data?

What is especially invaluable is that the data highlights what caused bad effort or when customers perceived bad effort.

Organizations can use that data to create customized trainings for frontline employees. If organizations can identify effort drivers that are in the control of the agent, they can share that data with employees in near real time. That enables employees to either improve CX on the fly or to engage in quick self-directed microlearning to eradicate the issue.

What are the things to watch out for when using non-survey methods to identify and measure sources of effort?

The obvious one is access to the interaction data. But what's more, companies wanting to use the above approaches must consider how customer-centric their culture really is. The above approaches create more and more detailed metrics about effort. Firms with a strong customer-centric culture will use those metrics and the insights behind them to help employees get better at doing their jobs. Companies without a strong customer-centric culture will use these metrics to control their employees, e.g., by incentivizing them on those metrics or defaulting to management by numbers. This will diminish employees' and customers' experiences.

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Visit the URL below to watch the on-demand webinar featuring guest speaker Maxie Schmidt-Subramanian of Forrester, Matt Dixon, and Ted McKenna, where they discuss the future of CX measurement and provide actionable guidance companies can use to drive faster, more accurate and more actionable insights into the customer experience.

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