



# Effort & Ease in CX

# When Effort is Meaningful

Think back to great experiences you have had as a customer of different brands; how would you describe these experiences? Consistently, we hear from customers across channels and industries that the best interactions meet expectations, make customers happy, and allow customers to feel like they accomplished something. And what influences all of these outcomes? The amount of effort required to interact with your brand!

Most customer experience (CX) surveys will include outcome measures to explore loyalty (e.g., NPS), intentions (e.g., likelihood to maintain relationship), and satisfaction (e.g. OSAT / CSAT) as a way to gauge overall health of the relationship or understand brand perceptions. Additionally, many companies focus on measures that prove how well they are delivering on customer expectations and meeting needs with improved outcome or performance metrics.

The Customer Effort metric became popular in the 1990s as companies realized that understanding the amount of effort it takes a customer to do business with them is critical. At the time, the focus was mostly on call center experiences. The thinking was that effort should be low for easy interactions whereas customers should expect to put in more effort for complicated or involved experiences. Effort plus satisfaction would help the organizations understand whether they were delivering on expectations.

## Considerations for Measuring Effort

Within the past year, there has been renewed interest in understanding effort. Many transactional and relationship questionnaires will include a metric like “Ease of Doing Business” and may ask a version of the Customer Effort metric.

### CUSTOMER EFFORT SCORE

Overall, how easy was it to solve your problem with ABC Company today?

Very Easy

Easy

Neither

Difficult

Very Difficult

Customer Effort Score (CES) =



EASY



DIFFICULT

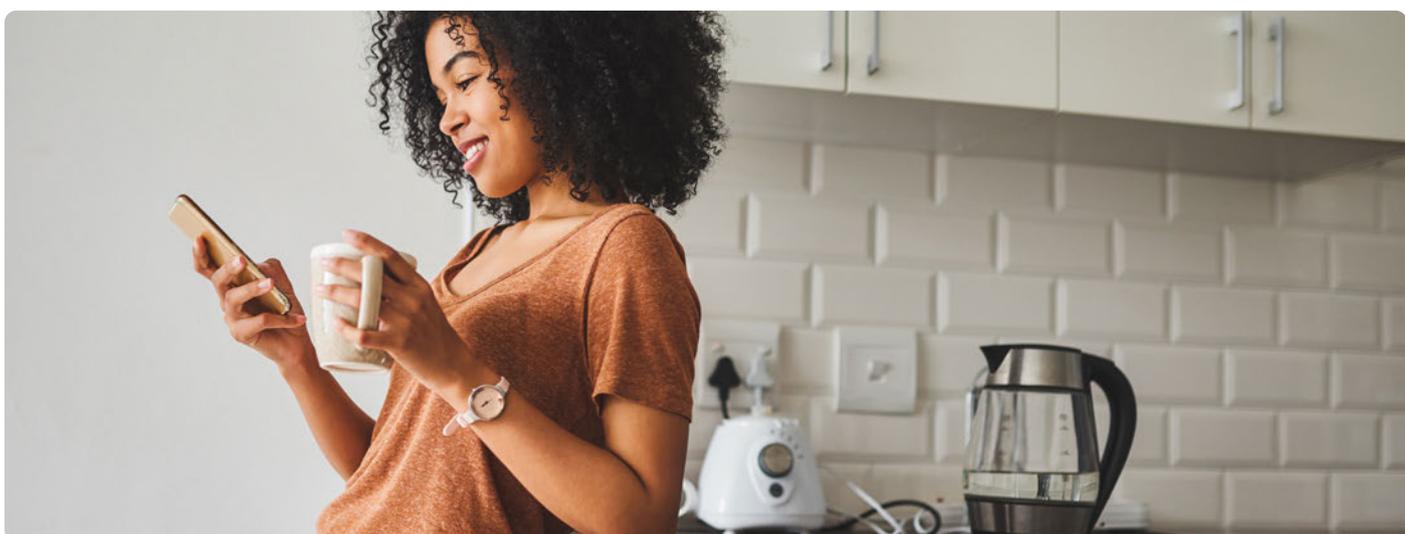


Gartner also has a version of CES which is on a 7-point scale. Like the original CES, the Gartner CES question relates specifically to a reported problem or issue “The company made it easy for me to handle my issue,” but could probably be reworded to focus on any type of interaction.

CES or other “ease” metrics are included in surveys when a company wants to gauge how easy it is to work with them.

This type of metric has become even more important as companies engage in digital conversion, digital development, delivering consistent omni-channel experiences, and focus on self-service or self-reliant strategies. The renewed focus on customer effort has also inspired discussions around what should actually be measured in order to understand whether effort is important, especially

given the desire to provide differentiated experiences. Today, companies realize that being easy to work with is a tablestakes expectation. So how can organizations gauge whether or not they are providing friction-less experiences? The answer is to determine whether these experiences are meaningful. In the next section, we provide suggestions on ways to explore effort in a meaningful way.



# Opportunities to Explore the Meaningfulness of Easy Experiences

The best approach for an organization will depend on what the brand is hoping to achieve from an experience standpoint, as well as the impact of effort on satisfaction and loyalty.

## Only Effort?

Some companies will continue to only measure effort or another “ease of doing business” metric to explore whether specific interactions are simple to accomplish or if the amount of effort meets customer expectations. These standalone metrics can be very valuable to meet this need at a surface level—and potentially uncover major process gaps that create friction.

However, to more deeply explore the meaning of effort or ease metrics, we recommend a couple of exercises:

- 1. Conduct driver modelling with the customer effort or ease metric as the outcome measure. This will provide a deeper understanding of what components of the experience influence and/or impact perceptions. The output from driver modelling also provides an indicator of “model fit” (with the R square) to**

**inform us as to whether or not we have measured enough to explain how effort or ease is being impacted or influenced.**

- 2. Explore sub-groups of transactions. Perceived effort may be influenced by the type of interactions. Sub-group analysis based on type of transaction may help to highlight problem interactions or interactions that are unnecessarily painful for customers.**

- 3. Explore sub-groups of customers. Beyond transaction types, there may be groups of customers that have more difficulties than others, or by aspects of the customer profile. By profiling customers who report that the company is not easy to work with, companies will have a more detailed understanding of the specific issues and problems experiences, how best to interact with these customers, and most importantly, how to improve communication and educational outreach efforts to improve their specific situations.**

It is important to also recognize that a focus on effort only is most valuable for transactional surveys where the activity can be tied to a specific interaction. For example, some companies rely on measuring customer effort for self-serve interactions like IVR, call center, and digital transactions.

The CX industry's discussion of customer effort goes beyond just measuring ease. Now, meaningful, easy experiences that meet expectations are also considered in terms of the emotional impact or connection and/or whether they successfully met the customers' needs. We discuss these two considerations in the next few sections.

## Emotional Reactions or Connections

Oftentimes, CX measurement (both experience- and performance-focused) ignores emotions. We rely on "overall satisfaction" to gauge how customers are feeling, and we sometimes structure our text analytics to explore comment sentiment in terms of negative and positive feedback. While this information is a decent gauge of whether customers perceive the relationship or individual

transactions to be positive or negative, we believe that more can be done to measure the emotional aspects of customer experiences and to provide a deeper understanding of the meaningfulness of experiences via analytics and reporting.

In the next few years, some newer versions of metrics or indices that explore customer effort will focus on additional connections to emotion. Experts from Forrester and Gartner both recommend effort or efficiency indices that fold in measures of emotions. For example, Forrester includes a measure of how an interaction made the customer feel. The scale is "upset" to "delighted." Overall, the thinking is that an interaction can require little effort, but leave a customer upset because of the outcome or the interaction itself. Alternatively, a difficult interaction can leave the customer delighted after completion.

Overall, including a measure of emotion can help to qualify the effort involved in interacting with the brand. In all fairness, the most meaningful interactions may not be the ones that are easy; instead, the most impactful interactions may be the ones that require more effort, but leave customers delighted. The goal should

be to leave customers with feelings of satisfaction, confidence, and achievement at the completion of each interaction, regardless of involvement or difficulty.

Here are some specific recommendations to explore emotions:

- 1. Ask customers how they are feeling; have them rate their emotional reaction to their experiences or ask customers to describe how they are feeling in an open-ended question.**
- 2. Leverage text analytics to understand emotion; explore the emotional components of what customers say from responses to open-ended questions. A taxonomy with embedded emotional classification will allow the organization to explore the magnitude of emotional connection or impact. For example, negative sentiment of hate is much stronger than negative sentiment of dislike or feelings of uncertainty. This is where having the right technology partner, specifically one that leverages flexibility in results filtering and robust text analytics, can really pay dividends to insure you can measure and act upon these nuances.**



## Success Versus Needs Met

Efficiency is another consideration of effort. The amount of effort to maintain a relationship or to conduct particular interactions can be evaluated within the context of efficiency. First, do customers recognize the relationship or interaction as being successful? Because when it comes down to it, the amount of effort really does not matter if success is not recognized or if the customers' needs have not been met.

Therefore, we recommend including a metric of "success" or "needs met" to explore if interactions ultimately met expectations. This metric can also be a way to qualify effort (and emotional reactions). Outcome measures of loyalty and satisfaction may not help to understand areas where the brand is falling short of expectations or where needs are not fully met.

## Summary & Recommendations

Customer effort can be an important indicator of your experience delivery efforts and your relationship with customers. However, measures of effort alone may not provide enough intelligence on the influence or impact of effort on customers' overall perceptions.

### HERE'S WHAT WE RECOMMEND FOR BRANDS:

- 1. Consider additional ways to explore emotional connections or impact and to frame effort within the context of whether needs are met or not. The industry agrees. Forrester (CX Quality—Effectiveness, Ease, and Emotion) and Gartner (VES - Value Enhancement Score—Ability to use a product/service and Confidence in purchase/use decision) have similar points of view on the role of emotions and effort when understanding key outcomes of satisfaction and loyalty.**
- 2. Include measures of a) effort, b) emotion, and c) needs met or success in addition to other outcome measures like NPS or Overall Satisfaction. It is important that the wording of these metrics reflects the best first for the audience and survey type.**
- 3. Explore different combinations of these key outcome measures to isolate strong or at risk relationships or interactions. Specifically, we can leverage combinations of effort, emotions, and success to identify areas of focus including customer relationships where customers are unhappy, perceive that working with you requires too much effort, and where needs are not being met.**

It is important to note that well placed and targeted open-end questions following these outcome measures provide additional qualitative detail to support deeper insights and in some cases, root causes when things are not going well.

From a transactional standpoint, we will be able to pinpoint individual interactions which require a lot of effort and which unhappy customers report little success. These are the interactions to focus on first for immediate impact. It is also important to explore the role of effort and emotion in the relationships that your brand works to build with customers. Asking customers to consider overall perceptions of loyalty, satisfaction, effort, emotional connection, and whether expectations are met or not provides a holistic understanding of the strength of your relationship with them.



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