

A close-up, high-resolution photograph of two human faces. On the left, a woman with dark skin and freckles is looking down, her eyes closed. On the right, a man with light skin and a beard is looking up, his eyes open. The image is partially overlaid with a large, solid pink 'F' shape in the top right corner and a solid pink rectangle in the bottom center.

# The future is human

WHITE PAPER—2021

# Contents

This paper is for anyone leading or driving  
Customer Experience, Insights or Research efforts.

	<b>1.</b> <b>The future is human</b>	<b>2.</b> <b>The barriers to HX insights</b>	<b>3.</b> <b>The HX roadmap</b>	<b>4.</b> <b>Preparing your organization for HX</b>
Introduction	i. Dubious data Clear data ii. Disconnected data Connected data iii. Dehumanized data Human-centered data	1. Drowning in data, tangled in tech 2. The information silo 3. Dancing with democratization 4. The morning after the night before 5. The color of money	Observe Converse Empathize Connect Predict Inspire Act	Structure Systems Skills

# Treat me like a human

I am not your *consumer*, your *user*, your *respondent*. I am not the sum of my clicks, likes and shares.

I am not my purchase history, my demographics, my audience segment. I am not my asthma, my Adidas or my Apple devices.

I am none of these things and I am all of them. **I am a human. Understand me.**



## The world of experience and insights is changing for good.

Today, there is unprecedented demand for high quality data, research and experience feedback. For leaders of Experience and Insights teams, this is a transformative opportunity.

Those who succeed will operate at the strategic heart of their organizations. They will help drive innovation, customer retention, acquisition, and growth. And they will be at the forefront of a global trend toward more human-centric business practices. But seizing this opportunity involves a paradigm shift.

# 77%

of Forsta clients believe that using a range of methods helps them to get a more well-rounded view of the customer.\*

\*Source: Forsta Product Survey, October 2021

It requires a new roadmap to transcend, improve and unite the disciplines of Customer Experience, Customer Insights and Market Research.

At Forsta, we are seeing the most dynamic and forward-thinking organizations embrace this approach. They reject artificial divisions between insight sources, internal data silos and the datafication of customers and they pursue a holistic understanding of their most important stakeholder: their customer.

### Behind every data point is a person

Behind every data point is a person, a real human being. Organizations need to get closer to them to fully understand their experiences, really see who they are, better respond to their needs, and build genuine lasting relationships with them.

If you focus only on CX you just see what is now, only Qual and you miss the significance, only Quant and you miss the feel.



When we lose sight of the human, we see only patterns, data points and dollar signs.

The future of research and experience technology will transcend silos of data, methodologies and functions, and it will bring you closer to your customers. That future is here at Forsta.

We call it HX, or Human Experience.

**Human Experience  
unites the capabilities,  
data and technologies  
that help companies  
understand the people  
they serve.**

HX is the full story of your audience:

- Gathered in multiple ways – quant, qual, CX, research, observational, conversational
- Brought to life as both broad patterns and personal pictures
- Shared and understood consistently across your organization
- Used to improve performance, and build long lasting relationships.

HX gives you the insights you need for outstanding experience management.

**But the challenges are real**

Uncertainty, change, and growth mean that organizations need to understand the people they serve at scale and at depth. And they need to respond quickly. For many Experience and Insights teams, there are significant hurdles to leap if they are to meet this growth in demand effectively.

Data sources and software tools are multiplying. It takes time and expertise to find, set up and run the right systems. Platforms can be inflexible; vendor pricing and support can be restrictive.

Organizational structures get in the way. Data silos emerge in different teams, making it hard to get a joined-up view of experiences. Integrating this data is a further drain on limited resources.

And democratizing access to insights can be a double-edged sword. Stakeholders need their data yesterday. Every department wants to research customers. But Experience and Insights teams are under constant pressure to do more with less headcount. Leaders who want to meet this growing demand need to tackle these challenges head-on.

## The Human Experience roadmap

At Forsta, we help thousands of HX-centric organizations to square this circle.

The most successful Experience and Insights teams align **technology, expertise, and culture** to deliver three transformative capabilities.

1.

First, they use a wide range of data inputs about the people they serve: observation and behavioral data; conversation and feedback; empathy and emotional understanding.

2.

Next, they connect these data sources and work to remove internal silos. They integrate qualitative and quantitative perspectives; they combine digital and offline insights; they make experience data accessible across all relevant teams.

3.

Finally, they inspire their colleagues with clear stories and visualizations; they generate predictive insights that drive strategic decision-making; and they prescribe tangible actions for frontline managers and staff.

1

# The future is human

i.	
	Dubious data
	Clear data
ii.	
	Disconnected data
	Connected data
iii.	
	Dehumanized data
	Human-centered data

# We need better Human Experience insights...

The most successful companies know the value of understanding both the pattern and the person. They take the 30,000 ft perspective and zoom in to see up close and personal from 3 ft.

They combine massively quantitative data with rich human insight on a deep qualitative level.

At Forsta we call this approach **Human Experience**, or **HX**.

Human Experience (HX) unites the disciplines of Customer and Employee Experience with Market Research, Customer Insights and Behavioral Analytics.

It builds on the principles of Human-Centered Design by combining deep insights at the individual level with broad observation and feedback from large populations.



# ...but data isn't delivering.

Modern lives are encoded in data. People spend four hours a day on their smartphone. Two-and-a-half hours on social media.<sup>1</sup> And a lifetime on Zoom calls.

Data footprints are left in search queries, Twitter posts, Uber journeys. Cell towers and satellites track real-world movements.

Customer surveys. Web analytics. NPS feedback. CRM profiles. Social listening. Experience and Insights teams have never had so much to work with.

*So why don't we see a better return on all this data?*

Three reasons: too much of it is **dubious, disconnected** and **dehumanizing**.

HX helps resolve these data challenges by bringing **clarity, connection** and **human-centered insight**.

i.

**Dubious data**

Clear data

ii.

Disconnected data

Connected data

iii.

Dehumanized data

Human-centered data

## i. From dubious data...

In advanced economies, people are exposed to over 5,000 ads every day. That's a ten-fold increase since the 1970s<sup>2</sup>.

Online ads are unsurprisingly the main culprit: web users are trolled by algorithms, pursued mercilessly by re-targeting campaigns. In the programmatic swamp, audiences are profiled, packaged, traded and targeted in milliseconds.

It's a marvel. Especially for the tech platforms, data brokers and trading desks on the supply side of the equation.

Unfortunately for advertisers, up to 90% of online ad clicks are from bots or click farms. Fraud is staggeringly widespread and lucrative: it is forecast to be a \$150bn business by 2025<sup>3</sup>.

For comparison, that's roughly double Facebook's 2020 revenue.

Marketers are starting to have doubts: eBay, P&G and JP Morgan Chase have all slashed programmatic budgets and seen no impact on sales.

And Dubious Data doesn't just lurk in ads. Experience and Insights teams also need to be wary. Safeguards must be taken to mitigate the risks of fraudulent survey responses<sup>4</sup>, and behavioral data sources such as geo-location or on-device behavior being gathered illicitly or without fully informed consent.

i.

Dubious data

**Clear data**

ii.

Disconnected data

Connected data

iii.

Dehumanized data

Human-centered data

## ... to clear data.

HX insights are built on first-party and zero-party **trusted** data.

First-party data is behavioral: on-site, in-app, purchase history, account activity. Sources include CRM systems, web analytics or sales data.

Zero-party data is intentionally and proactively shared by a customer: experience feedback, personal profile, purchase intentions. Sources include customer and market surveys, contact center interactions and attributable reviews.

Trusted feedback, behavioral and contextual data is the foundation layer for Human Experience insights. When you know where your data comes from, you can make more confident decisions with it.

# 76%

of Forsta clients agree that better customer insights improve their strategic decision making.\*

\*Source: Forsta Product Survey, October 2021

i.

Dubious data

Clear data

ii.

**Disconnected data**

Connected data

iii.

Dehumanized data

Human-centered data

## ii. From disconnected data...

Yes, Experience and Insights teams have more data than ever.

But how much of it is readily available—in a usable format—without battling another department for it?

These days it's less about who owns the customer and more about who owns the customer data.

Technical, organizational and cultural silos all limit the effectiveness of data strategies.

We may design compelling PowerPoint models that take customers on Journeys, across Channels and through Funnels; but the reality is often a mess of disconnected systems, departmental wrangles and delays.

For many organizations, the Single View of the Customer is distant dream. The reality is a kaleidoscope of fragmented, partial views; plenty of frustration; and huge inefficiencies when trying to put the picture back together again.

i.

Dubious data

Clear data

ii.

Disconnected data

**Connected data**

iii.

Dehumanized data

Human-centered data

## ...to connected data.

The most effective organizations break down data silos to combine HX data sources into a single view.

Open integration layers, data lakes and granular security protocols are used to integrate HX data:

- between different departments: CRM, CX, Customer Insights, Digital, UX, Analytics
- across source types: customer/non-customer surveys, behavioral data, social /reviews, contact center feedback
- across formats: structured/unstructured; text, image and video; large and small datasets

Connecting different perspectives builds a more complete view; enables more powerful and predictive analytics; and helps develop products and services designed around people.

### Lenovo

#### Fewer tools, fewer silos

Lenovo, a global technology company, recently combined its legacy CX tools into a single platform. By consolidating, Lenovo now has fewer data silos, a more efficient program and a unified view of the entire customer experience.



i.

Dubious data

Clear data

ii.

Disconnected data

Connected data

iii.

**Dehumanized data**

Human-centered data

## iii. From dehumanized data...

In the long run, this may be the most significant of the three issues.

Four out of five brands fail to connect emotionally with their audiences<sup>5</sup>. Trust in brands and institutions is declining<sup>6</sup>. Machine learning algorithms reinforce biases that dehumanize individuals.

In many areas, the explosion of data about people has the unintended consequence of obscuring the human, the individual person we try to create experiences for.

When we lose sight of the human, we see only patterns, data points and dollar signs.

People are labeled solely by the value they represent: they become users, consumers, subscribers, viewers or respondents.

Where did the human go?

Data without depth is not a trivial matter. People are the most valuable asset in any organization. If we don't understand and connect with them on a human level, we're following in the footsteps of a thousand failed brands.

i.

Dubious data

Clear data

ii.

Disconnected data

Connected data

iii.

Dehumanized data

**Human-centered data**

# ...to human-centered data.

Positive human experiences are underpinned by empathy and understanding.

Qualitative insights—combined with large-scale data—reveal the texture, stories and emotions that help deliver these experiences.

Video discussions, individual interviews, group interactions, smartphone diaries: this is what gives data a human face and heart.

Only by understanding the whole person do we see the whole picture. We make data work so much better when we humanize it.

# 78%

of Forsta clients want to put customers at the heart of their decision making.\*

\*Source: Forsta Product Survey, October 2021



## Giving data the human touch

eBay wanted to combine hard data with face-to-face discussions so they could relate better to the real people behind their sellers, bidders and buyers. They didn't just want to rely on facts and figures: they wanted to see their customers' emotions, passions, frustrations and faces.

Using the Forsta platform, eBay gathered feedback through online forms and then held remote video interviews with carefully selected participants. Recordings captured not only their answers, but also their facial expressions and body language.

By combining the different types of data, eBay can now put customers onscreen to illustrate findings from analytics—and use the hard data to validate qualitative insights from video interviews.

*"In most presentations, you're forced to help bring to life the voice of the customer through text and pictures but with this new approach, you can bring the customer into the room with you to tell their story."* — Sam Harami, Director of Global Customer Loyalty, eBay

A close-up, profile shot of a man with dark hair, looking down at a smartphone he is holding. He is wearing a white smart earpiece in his left ear. The background is dark, and the lighting is dramatic, highlighting his face and the phone.

# 2

1. Drowning in data, tangled in tech
2. The information silo
3. Dancing with democratization
4. The morning after the night before
5. The color of money

# The barriers to Human Experience insights

## Overview

Today, many organizations are a long way from understanding the full Human Experience of their audiences.

To do so effectively requires clear vision, a collaborative culture, the right systems and partners. However, bad habits, structural barriers and inflexible technology stand in the way.

And, it is also a journey, even for the most successful human-centric organizations.

At Forsta, we work with 18 of the top 20 companies in the Fortune 100, over 3,000 companies across the globe, and nearly two million Customer Insights and Experience professionals use our technology.

We're uniquely positioned to understand this journey and the challenges. Here are five of the most significant barriers we encounter:

---

**1. Drowning in data, tangled in tech**

---

**2. The information silo**

---

**3. Dancing with democratization**

---

**4. The morning after the night before**

---

**5. The color of money**

---

# 1. Drowning in data, tangled in tech

**"I never expected to spend so much time in the weeds."**

There has been steep growth in the volume and variety of data sources for Experience and Insights teams: behavioral data, social posts, reviews, video transcriptions, text analytics, CRM records... and so on.

But more signals bring more noise: data is in different formats and time periods; it's hard to join together for analysis; and there are usually gaps and inconsistencies to resolve.

In the absence of a common data platform to combine and manage these inputs, teams spend too much time on *data wrangling* tasks. This usually means cleaning, formatting and importing CSV files. Repeatedly.

The data comes in so many shapes and sizes because of a related challenge: the rise of the so-called *Frankenstack*: the multi-headed beast of too many different software tools.

Large companies now use an average of 300 different SaaS applications<sup>7</sup>; for some, the number is far higher. Experience, Insights and Research teams can choose from nearly 1,200 specialist software tools<sup>8</sup>.

The result? Organizations often have multiple survey platforms, NPS tools and CX feedback solutions. Social listening, review management, text analytics and data visualization software are all similarly duplicated or overlapping.

---

## 1. Drowning in data, tangled in tech

---

2. The information silo

---

3. Dancing with democratization

---

4. The morning after the night before

---

5. The color of money

---



For Insights and Experience leaders, this is an even bigger problem than workflow and data integration. With so many similar tools, budget is inevitably wasted; data security becomes more challenging; and each system has its own learning curve and training requirements.

For these reasons, leading organizations with a strong HX vision are rationalizing software and consolidating data with common platforms.



### Giving Best Buy instant insights during the pandemic.

When Covid-19 first hit, customer expectations and priorities changed quickly. For retailers like Best Buy, the challenge was to keep people safe while limiting the inconvenience. With almost 1,000 stores to adapt to a new way of working, they needed to improvise quickly and focus on changes that would best suit customers' needs.

Best Buy quickly adapted its feedback process across all regions and touchpoints by adding new questions to surveys, combining sales with feedback data and delivering daily insights straight to the people who could act on them.

Using Forsta's multi-touchpoint surveys, advanced analytics and live dashboards, Best Buy's CX team was

able to act on real-time insights, overcome pandemic challenges and even make innovations to pricing strategy, reporting processes and digital sales.

By August 2020, business performance was better than it had been pre-pandemic, and Best Buy was awarded 'Best in Industry' in the Ipsos Big Box Retail Awards.

***"Forsta enabled speed and flexibility as needs shifted [during the pandemic], especially in regard to the numerous survey and reporting updates. These quick updates to surveys and reporting enabled us to bring Covid-specific insights directly to senior leaders."***

— Jaclyn von Oven, Director of Customer Experience Measurement and Insights, Best Buy

### 1. Drowning in data, tangled in tech

2. The information silo

3. Dancing with democratization

4. The morning after the night before

5. The color of money

## 2. The information silo

**“They’re for storing grain and missiles. Remind me why we hide our most useful data in them?”**

---

1. Drowning in data, tangled in tech

---

### 2. The information silo

---

3. Dancing with democratization

---

4. The morning after the night before

---

5. The color of money

---

There are always strong reasons to handle research and experience data with care: breaches of privacy, compliance or commercial secrets are costly.

But good governance is not a good reason to prevent data flowing between teams with similar goals. At its worst, this is just a fig leaf for tribalism or competition between departments.

Experience and Insights resources can often be managed by separate teams with different reporting lines and KPIs. They may use different platforms for similar purposes. Rigid processes and systems make sharing data hard and slow. The problem is particularly acute in large international organizations with complex structures, and not made any easier by data privacy regulations that vary widely across regions.

This pattern is repeated within different types of teams: customer analytics, product management, user experience, brand marketing, data science. All stand to gain if insights and experience data is brought together, managed consistently and made securely accessible to those who need it.

In many organizations, this silo-busting is already underway with customer data. Sales, Marketing and Service teams organize data using platforms such as Salesforce: a unifying layer with open connections to thousands of specialist third party apps and data sources through the Salesforce AppExchange.

Experience and Insights teams need a similar approach if they want to put humans at the heart of their organization's decisions.

## 3. Dancing with democratization

**"I want other teams to get closer to customers. But we have to clean up the mess when they do it badly."**

---

1. Drowning in data, tangled in tech

---

2. The information silo

---

**3. Dancing with democratization**

---

4. The morning after the night before

---

5. The color of money

---

For many Experience and Insights teams, 'democratizing' access to data can feel like a no-win scenario. You're damned if you do, damned if you don't.

But let's start with the positives.

A focus on customer centricity means that more colleagues in more departments want to embed the customer perspective into their decisions. By enabling colleagues to self-serve basic requests, Experience and Insights specialists can focus on higher value work.

In theory, this is a good thing. But it rarely works out so simply.

As more non-expert users work with customer insights data, the risks increase: poor design leads to unreliable data; poor analysis leads to the wrong conclusions.

Asking the wrong people the wrong question using a self-service tool, with no governance: a little knowledge really can be a dangerous thing.

So, how do Experience and Insights teams strike the right balance between control and empowerment?

Technology can play a strong role here. Research, reporting and data visualization software needs to be easy to use with built-in guardrails, layered permissions, templates, education, onboarding and human support.

## 4. The morning after the night before

**"This is not what I  
thought I bought."**

---

1. Drowning in data, tangled in tech

---

2. The information silo

---

3. Dancing with democratization

---

**4. The morning after the night before**

---

5. The color of money

---

Save time. Save money. Have more impact.  
Free your team to focus on strategic work.  
Be fitter, happier, more productive.

We've all been seduced by technology  
pitches. They are often compelling. We say  
yes in the belief that—this time—things really  
will be different.

Then, as we get to know what we've  
bought, the scales gradually fall from our  
eyes. Technology disappointments usually  
cluster around three factors.

### **Any color as long as it's black**

SaaS (Software-as-a-Service) platforms  
are designed for robustness, scale and  
efficiency. These build-once-deploy-  
everywhere models have created the  
fastest-growing and most profitable  
businesses in history.

But for complex B2B organizations,  
such black-box approaches are highly  
constraining. The software needs you to  
adapt entirely to its model; but there is no  
corresponding flex in the software to fit with  
your needs.

It is rare to find a platform that combines  
the robustness of good technology with  
the flexibility to fit around an organization's  
unique requirements, structures and  
workflows.

### **Mind the gap**

It's the best-kept secret of automation: you  
need plenty of human skill and time to get  
it right.

Many SaaS providers believe their tools  
can slot easily into Experience and Insights  
teams with minimal effort. For the simplest  
tools, this may even be true.



### Opening up data

Transport Focus, the UK's independent watchdog for transport users, makes its data accessible to the public. However, its legacy system delivered an extremely poor user experience. By consolidating all data in an intuitive platform with state-of-the-art visualizations, Transport Focus has broken down barriers and increased stakeholder engagement.

*"We're able to be so open. It's incredibly easy, you have access to everything with no login required".*

---

1. Drowning in data, tangled in tech

---

2. The information silo

---

3. Dancing with democratization

---

**4. The morning after the night before**

---

5. The color of money

---

But most require expert services for setup and on-going support.

Tech platforms—funded with the expectation of high margin, low overhead operating models—are reluctant to hire experienced (AKA costly) Experience or Insights consultants. Instead, they offer Customer Success and Technical Support teams.

There is a sizable gap between this reality and the expectations of customers. The expertise then needs to come from additional consultants, agencies or full-time hires; none of which featured in the original budget or business case.

Hybrid and partnership models help to offset this risk. In hybrid models, technology firms have the required 'grown up' expertise in-house; or they have strong research agency and management consultancy partners.

### That bullet's not silver

Technology products are never standalone entities. They interlock with an organization's

structure, workflows, culture and—above all —people.

For any technology to be effective, it requires some level of adaptation and behavior change.

Data visualization tools are a good example. 'Self-service' dashboards are now a staple output for Experience and Insights teams. Stakeholders can access data, run queries and create their own reports.

But—perversely—some teams find their workloads increasing after rolling out such tools. Stakeholders try the new dashboards; realize how much more data is available; briefly try to run their own analyses; but quickly exhaust their own patience or skill levels. Feeling frustrated, they ask their Insights or Experience colleagues to run more analysis for them.

Technology roll-out or change projects should always include these environmental and behavioral aspects as part of the initial scoping work. Software doesn't exist in a vacuum.



## 5. The color of money

**"Our new owners make us document the commercial impact of every project we do."**

- 
1. Drowning in data, tangled in tech
  2. The information silo
  3. Dancing with democratization
  4. The morning after the night before

---

### 5. The color of money

---

There is increasing scrutiny on the ROI and commercial impact of Experience and Insights teams. They need to manage resources and costs effectively; and they need to prove their commercial value to their organizations.

On the cost side of the equation, suppliers' pricing models and license tiers can be too heavily weighted in the vendor's favor. Value-based pricing helps to redress this balance with a more equitable sharing of risk and reward.

Proving ROI on the output side involves both tangible and intangible factors.

Tangible factors help turn insights into actions on the front line: closed-loop reporting, red-flagging of serious issues, ensuring store-level or agent-level performance meets the expected

standard. This can in turn drive referrals and recommendations, reduce churn and stimulate account growth. A measurable dollar value can be attached these outcomes; but software systems need to be highly configurable to ensure this can be implemented and measured across complex organizations and hierarchies.

Intangible factors also contribute positive ROI for Experience and Insights teams but the commercial value needs to be estimated. This can be done by gathering feedback from stakeholders to determine the role played by Insights and Experience teams in influencing decisions. Clear and timely reporting through mobile apps, storytelling and data visualization can all help improve commercial impact with stakeholders.



3

# The Human Experience roadmap

---

Observe

---

Converse

---

Empathize

---

Connect

---

Predict

---

Inspire

---

Act

---

At Forsta we begin with the premise that behind every data point is a person, a real human being.

You need to get closer to them to fully understand their experiences, really see who they are, better respond to their needs, and build genuine lasting relationships with them.

**The future of technology will transcend silos,  
build a fuller, richer picture of your customers,  
and genuinely bring you closer to them.**

**That future is here today.**

**We call it Human Experience.**

HX involves understanding customers from all angles, all the time.

It's making use of all the sources of data and insight in your business. It's about everyone in your business really knowing the customer in the round. And it's helping translate data, insight, and empathy into stories that fuel action for growth.

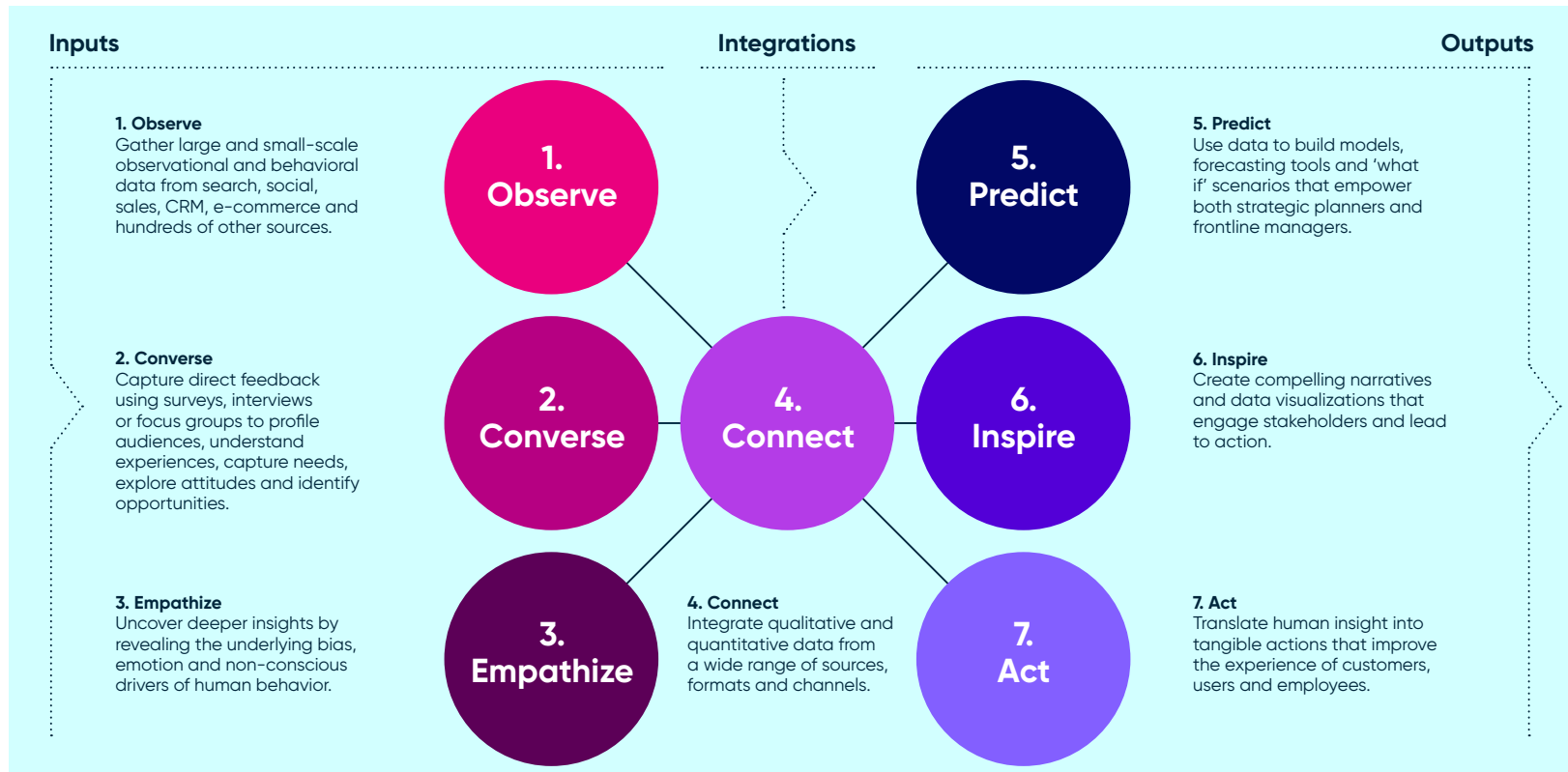
This is what smart leaders and decision makers are looking for: complete, human-centered insight, across every business function, so they can get closer to the customer and make better choices for today—and for the future.

HX comprises methods that are both broad (quantitative measures from thousands or millions of people) and deep (qualitative richness based on individuals or small groups).

The tools also combine approaches for several disciplines: market research, CX and Employee Experience, UX research, digital analytics and others.

# HX roadmap

At Forsta, we believe that seven related capabilities  
are the keys to unlocking Human Experience Insights.



Organizational Conditions for HX Success



Structure



Systems



Skills



# Observe

## How & why

Observing how people act in an environment has long been a staple of academic research.

In recent years, these methods have gained wider adoption in commercial research as the limitations of direct questioning – in surveys, interviews or focus groups – have become apparent. People don't always respond to surveys; when they do, they may not recall experiences accurately; and various biases influence their answers.

Now, with abundant data and lower cost collection methods, Insights and Experience teams have access to a far broader range of 'observational' data.

This includes:

- In-store or in-home video
- Screen recordings of website or app usage
- Behavioral, CRM or e-commerce data
- Social, search and reviews data
- Website analytics and passive device activity

**Incorporating observed and behavioral data is a core feature of the Human Experience roadmap.**

## The Forsta difference

The Forsta platform supports all types of behavioral and observed data, both qualitative and quantitative: from video observations of small groups to predictive analytics using millions of customer data points.

Forsta's centralized data hub is a source-agnostic, open integration layer that enables any external data source to be connected and analyzed alongside feedback data.

Advanced analytics capabilities support very large structured and unstructured data sets, including proprietary Text Analytics models built for specific industries and geographies.





## How & why

Behavioral data may be rich and broad; but research will always need direct feedback from people.

Asking questions, monitoring feedback, exploring issues in qualitative discussions: surveys and focus groups remain an essential element of understanding the human experience.

The key is to design experience and research programs with modern feedback tools, polished interfaces and the ability for participants to respond on their terms: whenever they want, wherever they are, on the devices they choose.



### Harmonized human insights

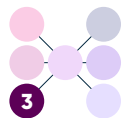
As a global leader in logistics, FedEx needs a comprehensive view of its customer experience. Starting with its vast retail network, FedEx is rolling out a transformational CX program with a fully integrated digital approach. It features closed loop, auto loop and analytics tools for action planning at strategic and tactical levels.

## The Forsta difference

Every year, over 300 million surveys are completed on our technology.

Feedback can be captured online, over the phone or face-to-face with a wide range of engaging designs and format options to ensure maximum response rates; and AI-based tools speed up survey creation with predictive suggestions for templates.

The Forsta qualitative suite includes online focus groups, live streaming of in-person discussions and 'day in the life' storytelling mobile apps.



# Empathize

## How & why

### Empathy is a critical feature of the Human Experience roadmap.

In recent years, there has been growing appreciation of the role played by emotion in shaping decisions. The concept of 'System 1' thinking<sup>9</sup> from Behavioral Economics and neuroscience-led advances in understanding the human brain have also highlighted the need to use implicit and emotional measures in research and insights programs.

Advances in AI and sensor technology are making these techniques more widely available; they include biometrics and facial expression analysis; eye tracking; heart rate measurement; and emerging approaches that infer emotional states from indirect observations.

HX is designed for us to understand better and in the round at both the group and the individual levels.

At the heart of HX is the ambition to improve empathy among businesses for their audiences so they can grow closer to them, better respond to their needs and build firm and lasting relationships.

## The Forsta difference

At Forsta, we continually explore the latest advances in implicit research methods and Artificial Intelligence to improve our software.

Our platform includes many specialist capabilities for emotion recognition.

Vocal tone analysis can be applied to online focus groups or to call center recordings. Facial coding or eye tracking technology can be embedded in surveys to measure emotional responses to media. Eye tracking can be enabled in online qualitative research.



## How & why

Future-proofed technology for Insights and Experience is underpinned by frictionless data flows, open architecture and easy integrations with other software and data sources.

Such open ecosystems are founded on a strong 'base layer' into which a wide range of technologies can seamlessly connect: survey platforms, CRM, HR systems, social and sales data.

And connected data is more powerful. It means less duplicated work between different teams. It reveals more patterns about people. It provides richer opportunities for predictive modeling.

**80%**  
of Forsta's clients agree  
that comprehensive data  
integration means they  
get a fuller view of their  
customers.

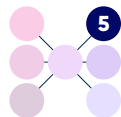
## The Forsta difference

The Forsta platform's integration layer, its centralized data hub, is truly source-agnostic: any data source can be connected to it.

Put your e-commerce store data alongside your call center feedback; your qualitative interviews and videos together with all your survey responses.

Find themes that matter by combining multiple channels: online reviews, call transcripts, open-ended feedback and social media posts. Analyze behavioral data with customer feedback—whether that comes from the Forsta survey engine or third-party providers.

Transformed, analyzed or summarized data connects to the tools you use in your organization's native environment, allowing your team keep working in their own systems: Salesforce, Slack, Zendesk, BI reporting tools and many more. And we know things change. Our platform has the flexibility to adapt over time as your business, systems and needs evolve.



## Predict

### How & why

Predictive analytics is an essential capability for modern Experience and Insights teams.

Patterns are identified from behavioral and feedback data to uncover relationships, find associations and help forecast trends.

Sophisticated models help to anticipate and fight churn, identify cross-sell and

up-sell opportunities, and find customer segments or patterns of behavior to drive new product and service development.

Predictive analytics also helps with tactical resource allocation such as call center staff planning. If you can forecast the need for customer support more accurately, you can ensure enough team members are online for peaks in demand whilst avoiding the cost of over-capacity when demand is lower.

### MARS

#### Growing human capital

To help develop a pipeline of great leaders, Mars created a tailored platform to identify the strengths and blind spots of internal candidates. The system combined self-assessment, 360 degree peer review and manager feedback. Following the roll-out, 17% of participants were promoted to Sales Director—roles which would previously have been hired externally.

### The Forsta difference

The Forsta platform has highly advanced machine learning capabilities. It combines signals from feedback, sentiment analysis, reviews, Customer Effort Scores and many other inputs to predict at-risk customers or segments and recommend remedial actions.

'Lookalike' models generate predictive NPS results for cohort groups of customers or staff. Next Best Actions (NBX) identify the optimum strategy for individual customers based on historical outcomes.

Front line managers can also benefit from these tools. Call center managers, for example, can run 'What If' simulations to model the impact of specific improvements in the way that call handlers respond to customer queries.



## How & why

Experience and Insights teams have one overarching objective: to understand people in order to inspire action.

Inspiring action amongst colleagues and stakeholder teams is no longer a question of simply delivering reports or KPIs.

It's a battle for attention, and internal audiences need to be engaged in the insights if they are to act on them.

Storytelling, data visualization and high impact reporting are all now essential components of the Insights and Experience toolbox.

### Heathrow

#### Compelling data stories

Heathrow, one of the world's busiest airports, surveys 500,000 of its 80 million passengers every year. Heathrow's Insights team uses dashboards and analytics to process all this feedback quickly, connect it with vast amounts of behavioral data and empower stakeholders to find KPIs, patterns and human insights instantly.

## The Forsta difference

At Forsta, we understand the power of storytelling in visual form.

Data visualizations are a proven method for attracting more attention, stimulating more emotion and triggering more action than flat, fact-based reporting alone.

Our data visualization platform has the industry's most customizable and creative studio dashboards for distribution of data and insights.

The Forsta Go smartphone app puts dashboards and curated comments in the pockets of executives and operational teams.

Our qualitative reporting, with video highlights and showreels, adds human depth to our data stories.

And we know how these tools work for engaging stakeholder audiences: each month, more than 20,000 people access stories and visualize data with them.



## How & why

Driving action goes beyond inspiring stakeholders and decision-makers to trigger outcomes or resolve problems.

It involves automating specific tasks natively in team workflows, on the frontline and tailored to specific individuals.

A very low NPS score may automatically send the customer an apology email with a discount code.

Training tips may be automatically sent by email to a customer support representative who fails to meet satisfaction benchmarks.

Complaints expressed in an online review may be flagged to the relevant store manager for follow up.

There are also other types of closed-loop actions that can generate more strategic or growth-based outcomes.

Product feature requests can feed into the new product innovation process. Positive comments from promoters can be used in marketing collateral. And on occasions, immediate sales opportunities can be identified and routed to account teams to follow up.

## The Forsta difference

The Forsta platform helps organizations take action at both the strategic and tactical level, and it can flex to accommodate even the most complex structures and hierarchies.

Our innovation software helps to crowdsource and rank new product or service ideas from the most informed groups—whether they be customers, employees or other stakeholders.

With prescriptive analytics and an industry leading workflow engine to manage closed loop outputs and strategic action plans, the platform provides fast and automated resolution of issues.

Targeted interventions. Quick responses to problems. Training tips for individual team members. The Forsta platform activates human-centered insight right at the frontline to improve the experiences of your customers and your team.



4

Structure

Systems

Skills

# Preparing your organization for HX

## Overview

Building a culture and roadmap for Human Experience Insights is a significant undertaking. For some organizations, it is an ongoing journey; for others, it involves some fundamental transformations.

Every day, we support thousands of customers at different stages along this journey. The most successful and the most advanced share a number of common features.

Read on to discover what they are, and how they can help you prepare for HX success.

---

**Structure**

---

Systems

---

Skills

---



# Structure

## Strong alignment between departments

CX, UX, Consumer insights, CRM, Analytics and other teams work closely together on Insights and Experience work-streams. They collaborate on shared initiatives; pool budget and team members where necessary; and have a functional matrix reporting that ensures a 'no surprises' culture.

## Good governance

Clear rules are in place with RASCI or equivalent models for multi-team projects. Each team's exclusive area of responsibility is documented; 'gray' areas of overlap are identified and subject to regular review. A steering group comprising members of all relevant teams meets on a weekly or monthly schedule to ensure efficient resource allocation, manage common projects and resolve any potential conflicts.



# Systems

## Documented data and insights framework

Data and insight requirements for relevant teams and stakeholders are clearly documented. All data sources and outputs are similarly identified. Best practice guidelines and Standard Operating Procedures for Insights and Experience data have clear ownership, are consistent across teams and reviewed as needed by the steering group.

## Collaborative software sourcing

The specific needs of each team are documented. Functionality required by several teams is identified and software platforms are procured centrally so that budget can be deployed effectively.



# Skills

---

## Continuous team development

Skills requirements in each team are mapped as part of the data and insights framework. A skills matrix highlights those that are common to all teams and those that are specific to individual teams. A joint development plan maintains alignment between teams and encourages career moves within organizations. Between 5% and 10% of each team member's working time is allocated to training and development, with a plan that combines structured courses, self-paced micro-learning and on-the-job coaching.

---

## Effective engagement of partners

Specialist expertise comes from agencies, consultants and freelancers. To smooth out peaks and troughs in team resourcing, retainers and secondments are provided by strategic partners.

## Ready for HX?

At Forsta, we're confident we can help create better Human Experiences for the people who matter to you.

Find out what our technology and experts could do for your organization.

Get in touch at [\*\*forsta.com/contact\*\*](https://forsta.com/contact)  
and visit [\*\*forsta.com\*\*](https://forsta.com)

## Endnotes

<sup>1</sup> Time spent on social media: <https://www.statista.com/statistics/433871/daily-social-media-usage-worldwide/>

<sup>6</sup> The Edelman Trust Barometer: <https://www.edelman.com/trust/2021-trust-barometer>

<sup>2</sup> Ad exposure resources: <https://ppcprotect.com/blog/strategy/how-many-ads-do-we-see-a-day/>

<sup>7</sup> SaaS application usage: <https://www.blissfully.com/blog/saas-statistics/>

<sup>3</sup> Ad fraud: <https://www.profgalloway.com/carcinogens/>

<sup>8</sup> CX and Research Software Directory: <https://www.insightplatforms.com/platform-directory/>

<sup>4</sup> Survey fraud: <https://www.ipqualityscore.com/articles/view/67/8-methods-to-prevent-market-research-fraud>

<sup>9</sup> System 1 Thinking, from 'Thinking Fast and Slow', Daniel Kahneman

<sup>5</sup> The cost of failing to connect emotionally: <https://www.warc.com/content/feed/lack-of-emotional-connection-costs-brands/en-gb/3738>



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