

For: Customer
Experience
Professionals

Bridging The CX/UX Divide

by Leah Buley, April 22, 2015

KEY TAKEAWAYS

CX And UX Don't Work Together

Rare is the company where customer experience (CX) and user experience (UX) are aligned. More commonly, CX and UX professionals work in different parts of their firms on disconnected initiatives.

But Their Work Overlaps In Three Important Areas

CX and UX have very different responsibilities and approaches, but their work comes head-to-head in three key areas: strategy, customer understanding, and governance.

CX And UX Have Some Tension, And That's Not A Bad Thing

Firms should encourage CX and UX to work in productive tension. It will strengthen their customer understanding, help them pressure-test their strategy, and lead to better experience design.



Bridging The CX/UX Divide

by [Leah Buley](#)
with [John Dalton](#) and [Corey Stearns](#)

WHY READ THIS REPORT

Customer experience (CX) and user experience (UX) have similar names and goals but very different approaches. And as yet, there is no standard operating model for how they should work together. While technology brings fast-moving threats from challengers that see digital and CX as fundamentally intertwined, CX and UX pros remain disconnected in many firms and separated by a digital divide. This holds customer experience professionals back from seeing and delivering customer journeys in increasingly digital terms. This report presents a model for how CX pros and UX pros can work together to leverage the best of both disciplines, while preserving their distinct strengths.

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We used data from Forrester's Q4 2014 Global Customer Experience/User Experience Online Survey in the writing of this report.

Related Research Documents

[Brief: How To Hire Great UX Talent](#)

[How To Modernize User Experience](#)

[The Power Of Disciplined Simplification](#)

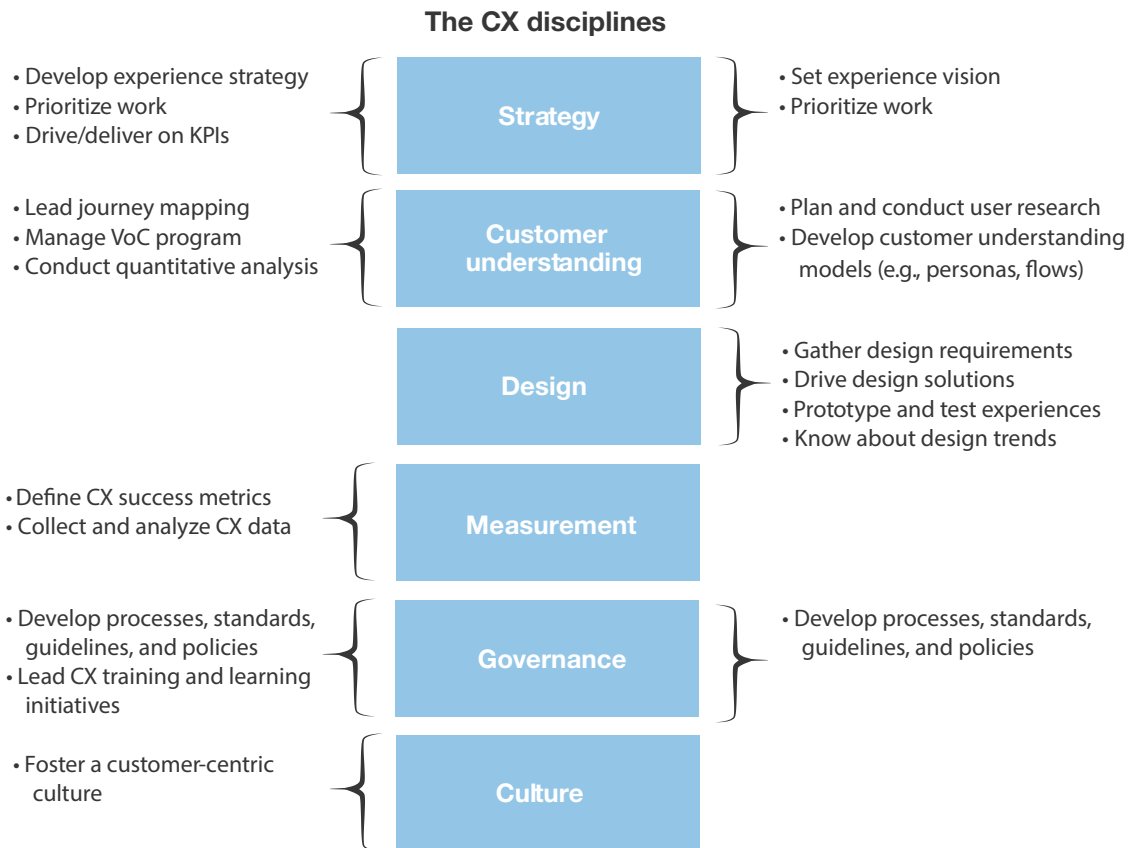
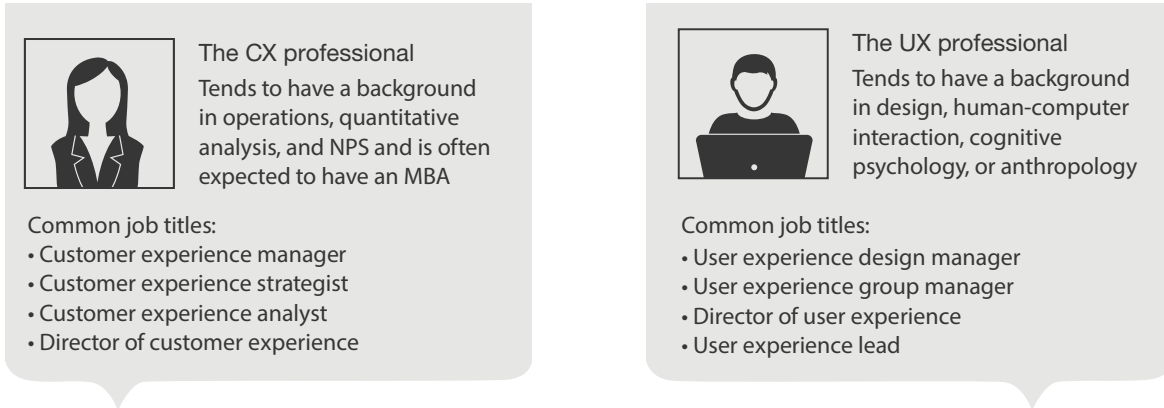


ARE CX AND UX THE SAME? NOT AT ALL

CX and UX are related disciplines with similar goals. But in many firms, sloppy language and unclear definitions create confusion about how CX and UX relate. To ground the discussion for CX professionals, Forrester turned to publicly available comparison data: job listings.¹ Jobs data shows that CX and UX have distinct responsibilities that collectively span the six CX disciplines — plus a few key areas of overlap (see Figure 1).²

- **CX pros drive measurement and culture.** A large component of the CX professional's job is measurement. CX pros use diagnostic tools like ForeSee, Medallia, and call center data to report on key measures like Net Promoter Score (NPS), repeat purchases, and referrals and assess opportunities to improve the customer experience.³ Most CX job listings also emphasize the CX professional's role in shaping a customer-centric culture through learning initiatives and more general nods to fostering culture. CX pros often bring a background in program management, quantitative analysis, or operations management — with an MBA preferred, thank you.
- **UX pros drive design.** The bulk of a UX professional's work is to drive a design process that includes user research, ideation, iterative design, prototyping, and end user validation. As such, UX pros must also bring knowledge of design trends, standards, and best practices. Employers expect UX pros to possess technical knowledge and an ability to collaborate with software development teams. Job listings also indicated that UX pros should have a background in human-computer interaction, design, anthropology, or cognitive psychology.
- **Both contribute to customer understanding, strategy, and governance.** Both CX pros and UX pros collect and analyze customer data and execute an appropriate strategy, but the approaches are quite different. CX pros skew toward customer journey mapping efforts and quantitative analysis to identify customer insights, while UX pros are more likely to plan and execute custom qualitative research and develop a variety of models and frameworks to communicate insights. Both roles set a strategy and prioritize recommended programs in light of business goals. And both develop experience-focused processes, standards, and guidelines.

Figure 1 CX And UX Job Listings Show Different Responsibilities — Plus A Few Key Overlaps

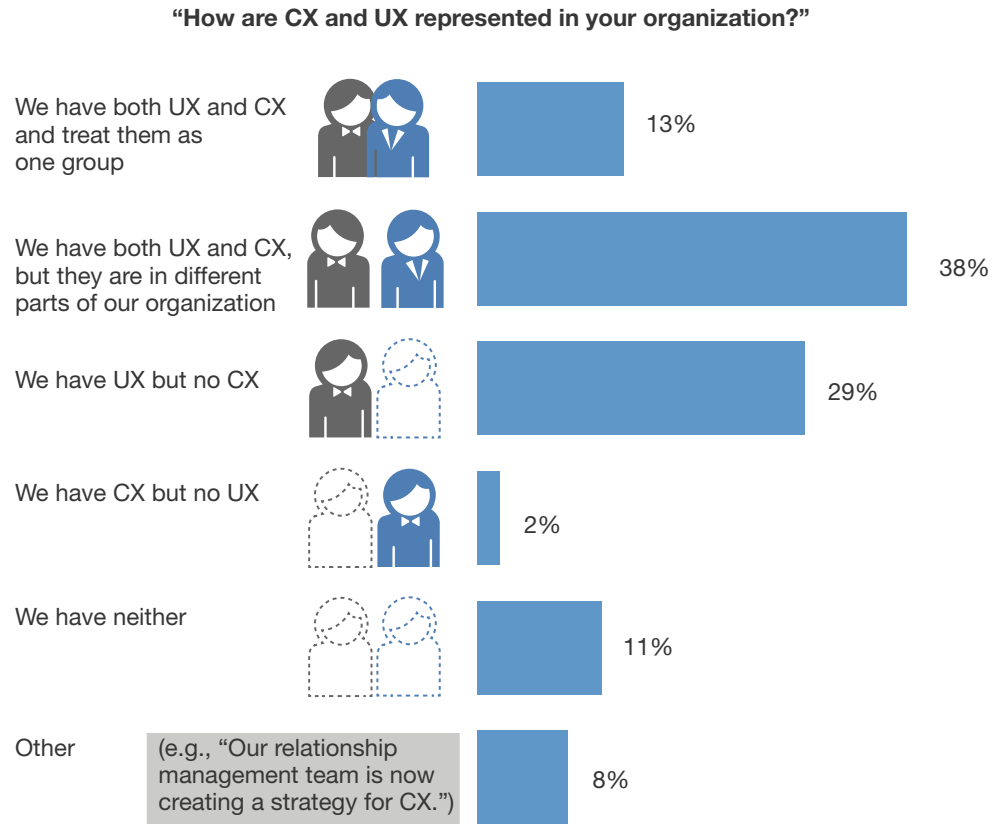


And There's No Blueprint For Collaboration

Based on the jobs data, it's clear that CX and UX have complementary skills that cover a wide swath of customer experience concerns. This makes them natural partners to champion and shape customer experiences together.⁴ But there's no standard blueprint for how to do that. Firm by firm, definitions and operating models for CX and UX vary widely. And in many firms, they don't work together at all. Here's the messy truth (see Figure 2):

- **CX and UX are separate in most firms.** In 38% of firms, CX and UX are both formalized functions, but they are separate from one another. Informatica, MasterCard, and PayPal follow this model. In this structure, UX typically aligns with technology or product, and CX is a peer on the marketing side. Collaboration across those lines often takes place informally, if at all.
- **Few treat CX and UX as a joint function.** Firms like Discover and Kohl's have set up CX and UX as one joint operation, but just 13% of UX professionals said that this was their company's operating model in a recent survey.
- **UX is CX sometimes.** Companies with a recent startup heritage like Mindbody, True&Co, and Zipcar often have a strong UX function that plays a key role in defining products and services. Firms like these have so-called CX professionals, but they focus squarely on customer service and support. And many have no CX at all — 29% of our survey respondents fit that model.⁵

Figure 2 CX And UX Teams Are Structurally Disconnected In Most Firms



Base: 112 global CX and UX professionals

Source: Forrester’s Q4 2014 Global Customer Experience/User Experience Online Survey

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The Result: Fragmented Organizations And Experiences

To rationalize the relationship between CX and UX, some firms have settled on the interpretation that UX is a specialty within CX that focuses specifically on digital interactions. In this theory, CX governs the end-to-end experience and sets high-level strategy that UX professionals then execute at digital touchpoints. It's a tidy explanation but ultimately misguided because it leads to fragmented customer experiences. The "UX is for digital" mindset:

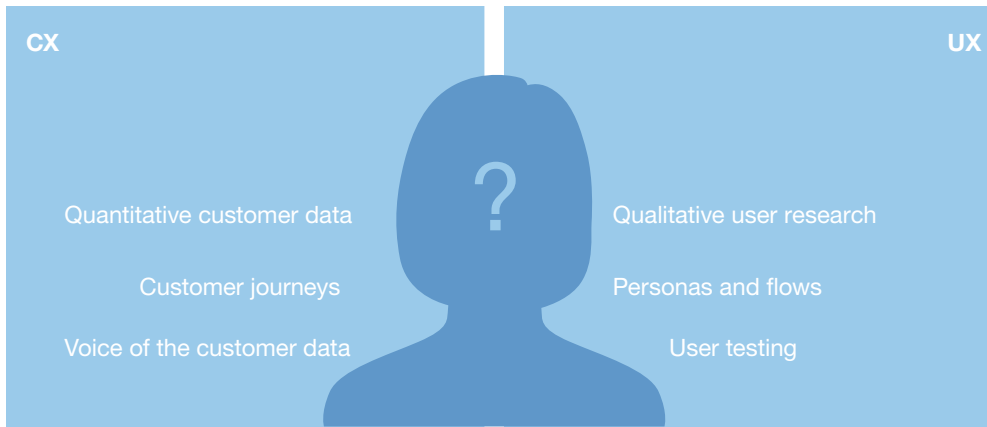
- **Creates confusion about what digital actually means.** "Digital" is an unstable term. It can be a word that applies to digital marketing — social, email, and web banner buys. Or it can just as easily be a way to talk about core product interactions, as UX professionals commonly use it. Multiple teams in the firm end up talking about the digital customer experience but only really referring to what they're working on. Slicing up the digital pie in this way encourages firms to treat different digital channels as distinct touchpoints, when they would be better off asking how digital experience design can enhance every customer interaction.
- **Thwarts customer understanding.** UX teams and CX teams both gather data for customer understanding, but they don't do it together. With UX and CX off and running on their own research streams, organizations struggle to integrate these two views of the customer. For example, the fledgling CX team at a publishing company found that UX teams had hired their own behavioral scientist to lead UX research, but the CX team was confounded and confused that no quantitative customer satisfaction data was collected as a part of that process. Firms see similar challenges when they try to rationalize the relationship between their marketing-generated segments and their UX-led personas.
- **Fragments strategy.** In a recent survey, 72% of firms said that their marketing teams set digital customer experience strategy, while 57% said that UX strategy is set within technology, illustrating the messiness of the situation.⁶ Working in isolation from each other, CX and UX teams run the risk of developing conflicting strategies. Andrew Reise Consulting reported that it's not uncommon to find a firm with a digital strategy that makes sense on its own but doesn't align with the overall CX strategy.

A MODEST PROPOSAL: DON'T RESOLVE THE TENSION; EMBRACE IT

These differences reflect fundamental tensions between traditional business practices and today's Agile customer-centric product development approach. On one hand, CX pros have an enterprise perspective, which is not unlike their business counterparts in marketing, finance, and operations. On the other hand, UX pros are born and raised in the world of software development, which has perfected the art of the quick pivot in response to technology and market pressures. There's nothing wrong with these different occupations working in the same firm. Indeed, the creative tension emerging from these overlapping roles is a source of strength. Properly aligned and managed, CX and UX skills can:

- **Round out customer understanding.** Think of CX's quantitative data as the key to understanding “what” is happening and UX's qualitative data as a way to find out “why.” Together, they create a more complete understanding of customers (see Figure 3). For instance, AnswerLab helped an eCommerce provider identify how to attract users to a new area of its site by first conducting a quant survey and then following up with qualitative user research to better understand some of the surprising trends in the survey data.⁷ It works the other way too. Staples wanted to validate its qual-based personas, so it developed a quant study that combined a web survey and analytics data to prove that they were valid.⁸
- **Pressure-test strategy.** One key difference in approach is that CX pros use analysis tools to develop a strategy, and UX pros do so through research and testing (see Figure 4). These two directions naturally come into conflict when formal strategy gets put through the iterative learning process and comes back with holes and disagreements. But firms that anticipate and tolerate a bit of give as the strategy meets real life will be able to plan appropriately and leverage customer involvement to make a better product. For example, the UX team at Mindbody learned in the course of user research that a costly investment that the firm was considering would not be successful without first addressing fundamental issues in other parts of its system.
- **Do great design faster.** CX teams often outsource design to agencies, but the work can be more enduring when partnering with in-house experience design staff. When Calpers decided to improve its interactive voice response (IVR) system, the deputy director of the customer service and support branch tapped the in-house UX team for help. The UX team liaised with an outside agency to drive the standard user-centered design process: research; problem framing; baseline measurement; iterative design and testing using prototypes; and finally remeasurement against the baseline. Being involved all the way through meant that it made choices for the long term — such as pushing for professional voiceover artists, not an employee voice, and establishing criteria for when it could add special messaging to the IVR. In the end, the UX team assumed responsibility for ongoing maintenance.

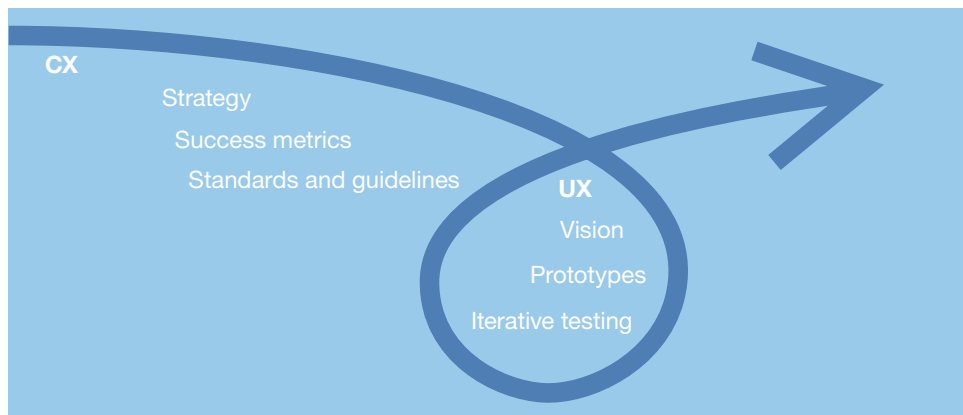
Figure 3 Complementary Data For Customer Understanding



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Figure 4 Pressure-Tested Strategy



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RECOMMENDATIONS

HOW TO BUILD A BRIDGE

Org structures and operating models can put up barriers between CX and UX, but they're not insurmountable. Customer experience and UX professionals just need to build a structure to connect their work. Here's how:

1. **First, double-check the blueprints.** Examine how your firm is (or isn't) connecting CX and UX. If you find that they're disconnected, the first thing to do is stop talking about CX and UX, and start talking about the work to be done. Lean on the six CX disciplines as a framework to focus efforts. When undertaking a CX initiative, assess your bench strength within each of the disciplines, and then deploy resources where there is a strong skills fit, regardless of whether it comes with a UX or a CX title.
2. **Then, construct the span.** Create a regular operating mechanism for CX and UX to come together and align efforts. A CX council is a good way to do this, if you have one. Even if you don't, require CX and UX to meet regularly and collaborate on strategy, research, and planning. To strengthen the relationship of CX and UX, consider connecting their resources in the budgeting process.
3. **Now, move information from one end to the other.** Become rigorous about sharing data and artifacts between CX and UX. Some firms are experimenting with tools like Evernote and UX360 to do this job. For example, the MailChimp team uses Evernote to store all data and research about customers. Customer feedback forms, Google analytics data, tweets, blog comments, email delivery stats, industry research, account closing information, and user research studies all go into Evernote, where employees can mine both CX and UX data.⁹

SUPPLEMENTAL MATERIAL

Survey Methodology

We fielded Forrester's Q4 2014 Global Customer Experience/User Experience Online Survey to 112 CX and UX professionals. The sample consists of volunteers who participate on the basis of interest and familiarity with specific marketing and strategy topics. For quality assurance, respondents are required to provide contact information and answer basic questions about their firms' size and principal business.

Forrester fielded the survey from November 2014 to December 2014. Respondent incentives included a copy of a report resulting from this data.

Exact sample sizes are provided in this report on a question-by-question basis. Panels are not guaranteed to be representative of the population. Unless otherwise noted, statistical data is intended to be used for descriptive and not inferential purposes.

Companies Interviewed For This Report

Andrew Reise Consulting	PayPal
Calpers	The Principal Financial Group
Continuum	Rosetta
EffectiveUI	T3
Fjord	Tandemseven
Grainger	True&Co
Informatica	TSB Bank
Livework	USAA
Manifest Digital	Waters
MasterCard	Wiley
Mindbody	Zipcar
NetIQ	

ENDNOTES

- ¹ We compared 25 job descriptions for CX professionals with 25 for UX professionals from the job site indeed.com. Our sample set included CX and UX jobs in retail, financial services, healthcare, insurance, and software. (Note: Many of the customer experience job descriptions that we found were for customer support or retail sales roles. To weed these out, we selected roles that seemed to have managerial responsibilities encompassing some or all of the six CX disciplines.)
- ² The six disciplines of customer experience maturity are strategy, customer understanding, design, measurement, governance, and culture. See the [“The Path To Customer Experience Maturity”](#) Forrester report.
- ³ Net Promoter and NPS are registered service marks, and Net Promoter Score is a service mark, of Bain & Company, Satmetrix Systems, and Fred Reichheld.

- ⁴ One notable absence from the requirements for either role was culture change. Of course culture change is not one person's job. A customer-centric culture is shaped by hiring learning and development managers, the professionals who own performance management — and all of this derives from strong leadership support at very top. For more, see the "[How To Build A Customer-Centric Culture](#)" Forrester report.
- ⁵ Source: Forrester's Q4 2014 Global Customer Experience/User Experience Online Survey.
- ⁶ In fact, many groups own portions of a firm's overall digital experience strategy. Forrester found that sales organizations, marketing, technology, and even line-of-business owners all pony up funding and perform strategic services with respect to digital experience strategy. But judging by the numbers, digital CX strategy has the strongest tie with marketing, and UX strategy with technology management. See the "[The State Of Digital Experience Delivery, 2014](#)" Forrester report.
- ⁷ Source: Elizabeth Walter Shelly, "The Formula for A-ha! UX Insights: How Much + Why," AnswerLab blog, October 1, 2013 (<http://answerlab.com/blog/2013/10/01/ux-insights-how-much-why/>).
- ⁸ For more information, see the "[Quantitative Research Turns Staples' Personas Into Robust Decision-Making Tools](#)" Forrester report.
- ⁹ Source: Aaron Walter, "Connected UX," A List Apart, August 27, 2013 (<http://alistapart.com/article/connected-ux>).

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