

# The Three Customer Service Megatrends In 2021: Post-Pandemic Customer Service Excellence

Vision: The Contact Centers For Customer Service Playbook

by Kate Leggett

January 25, 2021

## Why Read This Report

The COVID-19 pandemic has elevated the importance of customer service to nurture customers, retain and increase their loyalty, and grow revenue. Customer service leaders are also accelerating modernization strategies that were already underway within their enterprises — the value of which will extend far beyond the current circumstances. This report reveals the top three customer service trends that customer service leaders must pay attention to in 2021.

## Key Takeaways

### Digital Channels And AI Fuel Customer Service Transformation

These technologies autonomously interact with customers and take over repetitive agent tasks. Organizations must meld them into most aspects of customer service operations. Assess the breadth of available AI and automation technologies and their real impact on operations.

### Modern Agent Desktops Enable Trusted Relationships

Customer insights, collaborative workspaces, agent guidance, and desktop automation reduce the cognitive load on agents and allow them to build trusted customer relationships.

### Customer Service Organizations Must Rethink The Importance Of Resilience

The COVID-19 pandemic has highlighted the importance of software-as-a-service technologies with rapid ROI. Contact centers that modernize to improve agility will lead, while those that struggle to meet the demands of the altered economy will fall further, if not entirely, behind.

# The Three Customer Service Megatrends In 2021: Post-Pandemic Customer Service Excellence

Vision: The Contact Centers For Customer Service Playbook



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## Related Research Documents

- [The Forrester New Wave™: Digital-First Customer Service Solutions, Q2 2020](#)
- [The Forrester Tech Tide™: Contact Center Technologies For Customer Service, Q1 2021](#)
- [How To Modernize Digital Customer Self-Service](#)
- [Transform The Contact Center For Customer Service Excellence](#)



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## Customer Service Organizations Are At The Center Of An Opportunity

“The future success of customer service organizations rests on their ability to continuously anticipate,” said Terry Walls, former managing director of KPMG. Never has this statement been truer than today — in a world changed by the COVID-19 pandemic.<sup>1</sup>

This pandemic has revealed a unique opportunity for customer service organizations. On one hand, it has elevated the importance of customer service to nurture customers to retain their loyalty — and spend. Case in point? Improving customer experience and growing revenue are top post-pandemic business priorities for customer service (see Figure 1). On the other hand, it has accelerated modernization strategies that were already underway — the value of which will extend far beyond the current circumstances (see Figure 2).

Emerging stronger and leaner from the pandemic will require you to reimagine your current strategy and long-term investments in digitization, AI, and automation. And it will demand a focus on operational agility and resilience to quickly adapt to the unexpected. Customer service leaders must stay abreast of three megatrends in 2021 as they weather the storm (see Figure 3).

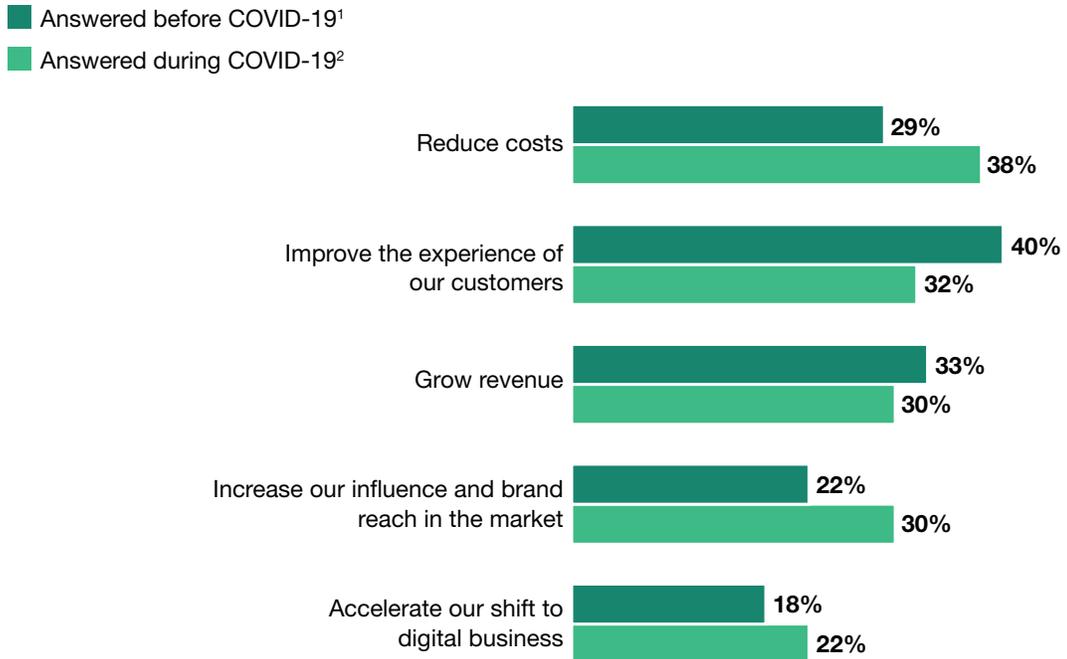
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**FIGURE 1** Improving Customer Experience And Growing Revenue Are Top Post-Pandemic Business Priorities

**“Which of the following initiatives are likely to be your organization’s top business priorities over the next 12 months?”**

(4 or 5 on a scale of 1 [not on our agenda] to 5 [critical priority])



Note: Not all response categories are shown.

1. Base: 597 global purchase influencers (past 12 months/next 12 months) who work in the customer service, client service, or call center department; Source: Forrester Analytics Business Technographics® Priorities And Journey Survey, 2020

2. Base: 37 global purchase influencers (past 12 months/next 12 months) who work in the customer service, client service, or call center department and answered during COVID-19; Source: Forrester Analytics Business Technographics Priorities And Journey COVID-19 Recontact Survey, 2020

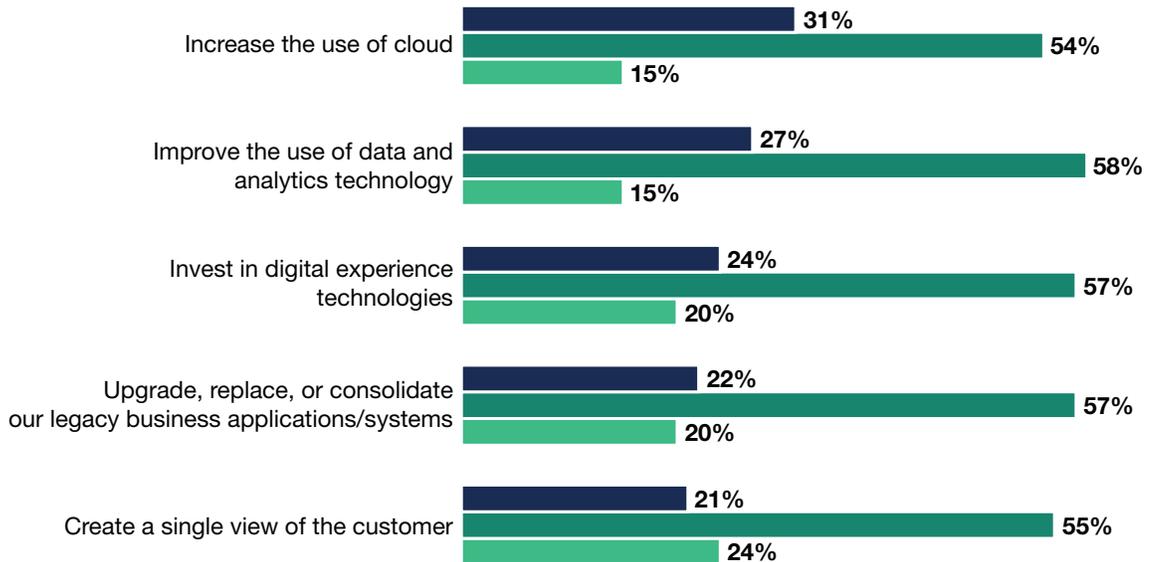
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**FIGURE 2** The Pandemic Is Accelerating Initiatives To Modernize Customer Service

**“Which of the following technology initiatives is your IT organization prioritizing over the next 12 months?”**

- High priority or critical priority
- Moderate priority
- Not on our agenda or low priority



Note: Percentages may not total 100 because of rounding.

Base: 1,747 global purchase influencers (past 12 months/next 12 months) who answered during COVID-19

Source: Forrester Analytics Business Technographics® Priorities And Journey COVID-19 Recontact Survey, 2020

**FIGURE 3** The Three Customer Service Megatrends In 2021



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## 1. AI-Fueled Digital Experiences Underpin Great Customer Service

Delivering great online customer experiences has been the top priority for customer service leaders for the past five years.<sup>2</sup> Yet, few companies have taken meaningful action. The pandemic has forced contact centers to accelerate their digitization, automation, and AI strategies to react to ballooning interaction volumes. These technologies have helped companies automate repetitive agent tasks and proactively and intelligently engage with customers, allowing agents to handle complex interactions that require empathy. They've also enabled agents to onboard faster and perform at their best every day under stressful work-at-home conditions — and have armed supervisors with insights to best manage their workforces.

To best serve anxious customers devastated by the impact of the pandemic, customer service organizations must accelerate their adoption of:

- **AI-powered self-service technologies for frictionless service.** Customers actively choose to resolve problems on their own. These interactions should start with understanding the customer's intent, followed by the best action for resolution. AirAsia saw questions about refunds increase 285% month over month in the early days of the pandemic, and the company's bot successfully handled 96% of those inquiries. Qapital, a personal finance app, resolves 25,000 issues per month; less than half require agent support.<sup>3</sup>

In 2021, self-service will continue to be the gatekeeper for all channels, automating straightforward tasks to increase the speed of resolution and satisfaction.<sup>4</sup> Contact centers will continue to invest in — and rationalize — diverse self-service technologies: knowledge management for curated content, communities for peer-generated content, cognitive search to extend discovery beyond a knowledge base, chatbots to converse and guide, and decisioning engines to insert rules and logic to help guide customers to the right outcomes.

- **Digital technologies to best interact with customers on their terms.** Companies are transitioning customers to digital channels from interactive voice response technologies by layering digital-first solutions for chat, messaging, and voice onto existing customer communication modalities. Black Hills Federal Credit Union rolled out messaging to its 75,000 members.<sup>5</sup> DISH and Columbia Sportswear allow customers to interact with them within Google Search and Maps. Rich features like carousels, suggested replies, and photos allow customers to purchase, schedule, and troubleshoot without switching channels.<sup>6</sup>

In 2021, better visibility into customer journeys will enable agents to better anticipate needs and personalize interactions. Companies will work on breaking down the technology silos within and outside of customer service to best support customers along their journeys. For example, a regional healthcare provider merged collections and loyalty activities, which were historically managed by separate departments.

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- **Robotic process automation (RPA) to improve the bottom line.** RPA provides a tactical fix to digitize common agent tasks. Agents invoke attended RPA bots in the flow of work, improving productivity and quality. Unattended RPA bots autonomously execute tasks from a queue.<sup>7</sup> City National Bank, for example, reduced new client onboarding from 10 minutes to under 1 minute and saw savings equivalent to seven full-time employees. It also used RPA to handle a massive influx of PPP loan applications without overburdening agents.<sup>8</sup>

The pandemic revealed weaknesses in manual back-office processes, and shoring them up with RPA became a strategic priority.<sup>9</sup> In 2021, organizations will continue to focus on RPA, in part because of its clear ROI.<sup>10</sup> An RPA bot for high-volume, low-complexity tasks can replace three or four agents. However, for more complex work, savings are lower. RPA also has hidden benefits: It helps upskill agents and makes workplaces more attractive.<sup>11</sup> Yet, it also plugs gaps in legacy systems and delays efforts to overhaul them.<sup>12</sup>

- **Prescriptive AI to make customer service more efficient and effective.** AI streamlines inquiry capture and resolution; optimizes case routing, classification, and schedule management; and extracts information to monitor the quality of service delivered. Insights help coach agents and surface product and process trends and customer sentiment that impact customer retention. American First Finance and Sirius XM Radio use these tactics.<sup>13</sup>

In 2021, companies will continue to use AI to make operations more efficient and agents more effective. But AI can do much more, and companies should deploy more advanced use cases: It will anticipate customer needs and act on their behalf. AI-fueled discovery will serve up content and services at the moment of need. AI-fueled onboarding for customer activation and health tracking will deepen customer relationships. AI-fueled postpurchase support will schedule maintenance appointments, push fixes to connected devices, restock parts based on need, or optimize field resources to provide on-demand service.

- **Metrics that emphasize customer engagement and retention.** Contact center metrics include a mix of cost, satisfaction, revenue, and compliance measures. As AI and automation penetrate contact centers, they optimize cost and compliance, allowing focus on quality-of-service and revenue activities. For example, to avoid long hold times, some contact centers even pivoted to pure outbound using scheduled callback, like the State of Illinois did to manage employee benefits questions while valuing its customers' time.<sup>14</sup>

In 2021, companies will orient themselves toward customer value metrics that reflect care and trust. They'll continue to track CSAT and self-service use but will fail to holistically measure service experiences that cross self- and assisted service. Better engagement correlates with customer loyalty measures that are indicative of retention, enrichment, and advocacy. Increasing these measures impacts top-line revenue and helps elevate contact centers to a more strategic company role.

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## 2. Modern Agent Desktops Empower Agents To Best Serve Customers

Customers prefer self-service for simpler customer service inquiries and voice for escalations and dispute resolution (see Figure 4). During the pandemic, contact centers saw unprecedented spikes in call volume from devastated customers. For example, Neustar, an information services and technology company with several hundred banking clients, saw a 21.5% increase in calls across all banks in late February with average wait times of more than 3 hours.<sup>15</sup>

AI-infused agent desktop technologies have become critical to optimizing the outcomes of these crucial human connections with customers — and doing the right thing for them. In doing so, customer service organizations become more important for customer retention and enrichment, which elevates these activities to a more strategic company role. This type of work is also more rewarding and offers agents a real sense of purpose, which aligns well with the growth of Millennials and Gen Z in the workplace. Customer service leaders must make it easier for agents to understand and support customers by empowering them with:

- **Customer data platforms that deliver true one-to-one engagement.** AI-powered agent desktops must help agents understand the customer and their preferences, value to the organization, and health. Third-party and real-time data such as journey information, buying indicators, and life events must enhance customer data.<sup>16</sup> This data fuels next best agent actions and drives personal interactions. Malaysian Maybank, for example, uses customer contact preference and journey information to maximize outbound calling success.<sup>17</sup>

The pandemic has broadly refocused companies' efforts on nurturing existing customers, rather than on customer acquisition. In 2021, companies will continue to empower agents with customer insights. They will start to expose customer data to influence activities with clear ROI, such as collections, or to connect customers with hyperlocal resources, like Decathlon has done to realize a 49-point increase in Net Promoter Score.<sup>18</sup> They will also explore customer visualizations, like Gucci has done, to better understand their customers.<sup>19</sup>

- **Adaptive desktops that facilitate agent work.** You must reduce agents' cognitive load. Current options include scripts, tip balloons with step-by-step instructions, and unified agent desktops. Agent-facing bots also automate routine work and provide insights at the right time. Thermo Fisher Scientific, for example, uses in-line guidance to support onboarding its 70,000 employees on new software releases.<sup>20</sup>

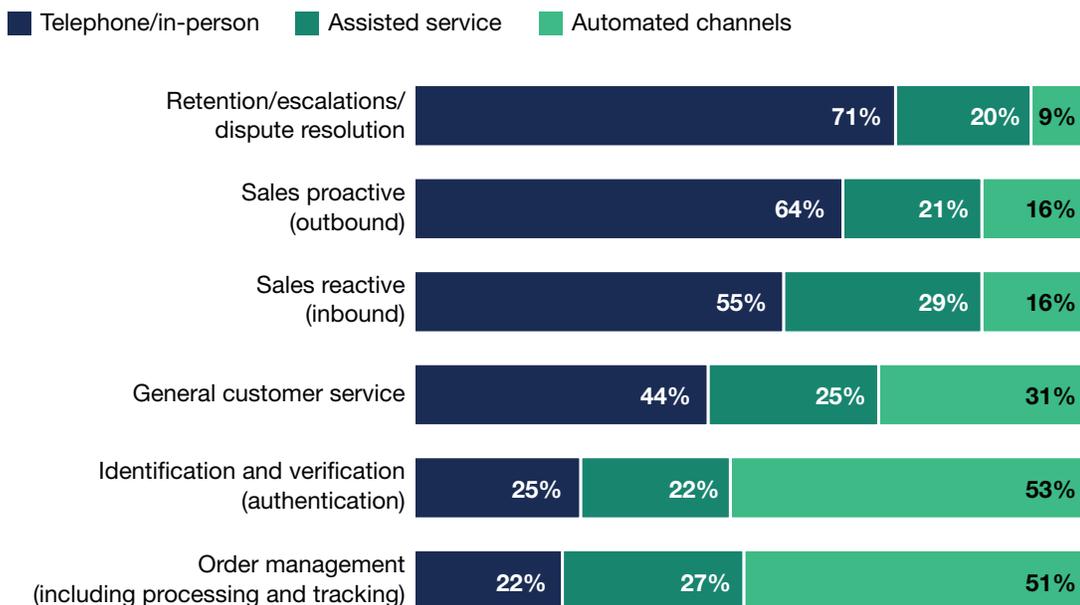
The pandemic has elevated the need to make work easier for agents, and this will continue in 2021. Computer vision can identify assets and analyze images for troubleshooting. Cognitive solutions can search through data sets to identify best resolutions. Mixed reality can guide field workers through complex work. Agents want to work with advanced technologies.<sup>21</sup> And CSAT is higher when bots and agents work together.<sup>22</sup> Yet, few companies consider how automation will affect the employee experience, and customer service organizations must develop career paths for agents in an AI-first world.<sup>23</sup>

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- **Collaboration and knowledge as part of a workstream.** Agents work on complex issues such as product and policy exceptions or previously unknown product defects. They must often collaborate with back-office workers, engineers, or product experts. Customer service organizations must upskill agents to keep up with new product introductions or stay current on changing policies or emerging issues — and this is particularly difficult to do with current work-from-home models.

In 2021, agent desktops will embed collaborative zones to enable expert resources to swarm around an issue. Case in point? Microsoft already embeds Teams in its agent workspace, and this need prompted Salesforce to acquire Slack. Speech and text analytics will monitor and score customer interactions. Quality scores will drive just-in-time coaching on specific subjects to the agent desktop — as well as supervisor intervention for guidance.

**FIGURE 4** The Complexity Of Inquiry Determines Channel Choice**Preferred contact channels by inquiry type**

Note: Percentages may not total 100 because of rounding.

Base: 748 respondents to NTT's annual global research study

Source: "2020 Global Customer Experience Benchmarking Report," NTT

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### 3. Customer Service Technology Enables Resilience And Sustainability

The COVID-19 pandemic catalyzed the need for change across business models, ways of working, talent, and risk insight and planning. For example, in the early days of the pandemic, business process outsourcers (BPOs) collectively moved hundreds of thousands of agents home overnight. As customer interactions spiked, BPOs struggled to comply with security and privacy policies as well as with tactical management of remote agents. To become more resilient, with more sustainable operations, contact centers will:

- **Adopt alternate labor models to deliver value-added experiences.** Contact centers have already started to leverage the unique skills of digital natives, who are adept at context switching between interactions to support digital channels, and lifestyle workers, who bring unique skills to the workplace and prefer gig economy or work-at-home models. For example, TechStyle Fashion Group hires agents who are passionate about fashion. As the pandemic hit, these types of brands were poised to shift to 100% work-at-home models.

In 2021, pandemic-fueled innovation in the customer service tech stack will continue to deliver improvements to make work-at-home models the primary labor models. In addition, brands that had brick-and-mortar presences will continue to reassign in-store or in-branch personnel to pre- and postpurchase support roles, like Samsung did.<sup>24</sup> They will also extend their captive workforces with brand advocates who can have authentic conversations with customers in an attractive cost model.

- **Become data-driven to effectively deliver service.** Companies track hundreds of measures, including cost, CSAT, and compliance. Newer technologies like speech analytics allow organizations to track the success of every interaction and identify coaching opportunities. Yet, work-at-home models have surfaced gaps in customer understanding and supervisor practices that relied more on walking the floors than on hard data. For example, service technicians often lack asset location and state data, which affects service delivery.

In 2021, customer service organizations will be more disciplined in collecting data and using it to train models that optimize onboarding, retention, and customer enrichment. Organizations will also seek technology solutions, such as behavioral analytics, to match callers' psychographic profiles to the best-skilled agents to serve given personality types; speech analytics, to route calls to supervisors when they sense customer frustration; and behavioral guidance, to provide live, spoken feedback to agents.

- **Embrace customer service technologies with quick time-to-value.** McKinsey & Company reports a 24x increase in migration to cloud technologies, 27x increase in deployment of new service technologies, and 43x increase in deployment of collaboration technologies.<sup>25</sup> Case in point? When the UK issued new financial regulations, TSB Bank deployed an AI-powered bot that supports PCI-compliant authentication for remote agents in five days.<sup>26</sup> Yet, these investments are balanced against a decrease in overall tech spend.<sup>27</sup>

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Companies are making these changes for the long term, and in 2021, customer service organizations will continue to adopt technologies that rapidly deliver value. Vendors will also offer try-before-you-buy models to prove ROI and pivot to more attractive consumption- and outcome-based pricing models. Organizations that deploy these technologies to rapidly react to changing customer behavior will lead. Those that struggle to meet the demands of the altered economy will fall further, if not entirely, behind.<sup>28</sup>

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## Supplemental Material

### Survey Methodology

The Forrester Analytics Business Technographics® Priorities And Journey Survey, 2020, was fielded in December 2019 and January 2020. This online survey included 19,739 respondents in Australia, Canada, China, France, Germany, India, the UK, and the US from companies with two or more employees.

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The Forrester Analytics Business Technographics Priorities And Journey COVID-19 Recontact Survey, 2020, was fielded from April 29 to May 25, 2020. This online survey included 1,755 respondents in Australia, Canada, China, France, Germany, India, the UK, and the US who had already completed the Forrester Analytics Business Technographics Priorities And Journey Survey, 2020.

Forrester Analytics' Business Technographics ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of business and technology products and services. Dynata fielded these surveys on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates.

Please note that the brand questions included in these surveys should not be used to measure market share. The purpose of Forrester Analytics' Business Technographics brand questions is to show usage of a brand by a specific target audience at one point in time.

## Endnotes

- <sup>1</sup> Source: "Predictions 2021: Customer Service," Forrester (<https://www.forrester.com/fn/16sPtW3O2SdUjlxUYTXCAs>).
  - <sup>2</sup> Source: Forrester Analytics Global Business Technographics Priorities And Journey Surveys, 2016 to 2019, and Forrester Analytics Business Technographics Priorities And Journey Survey, 2020.
  - <sup>3</sup> AirAsia and Qapital use a chatbot from ada.support.
  - <sup>4</sup> Source: "2020 Global Customer Experience Benchmarking Report," NTT (<https://hello.global.ntt/en-us/insights/2020-global-cx-benchmarking-report>).
  - <sup>5</sup> Source: "Black Hills Federal Credit Union: Serving Members Goes Mobile," Quiq (<https://quiq.com/black-hills-federal-credit-union-goes-mobile/>).
  - <sup>6</sup> Source: "DISH and Columbia Go Live with Google's Business Messages," [24]7.ai blog, June 25, 2020 (<https://www.247.ai/blogs/dish-and-columbia-go-live-googles-business-messages-leveraging-247ai-enable-consumer>).
  - <sup>7</sup> Forrester defines attended RPA as automation that interacts in real time with humans who initiate and control robot tasks; often embeds functions within apps; and associates with front-office, agent-led activities. Forrester defines unattended RPA as automation that replaces a complete human function in a lights-out, batch-oriented manner; creates a virtual workforce; and, generally, associates with back-office activities. For more information, see the Forrester report "[Attended-Mode RPA: The Differences You Need To Know](#)."
  - <sup>8</sup> "City National Bank set out to achieve automation for better customer service. Automation is saving 40 hours of work time each day. Then when COVID-19 hit, they were able to deploy a bot to process SBA loans in just 2 days." Source: "City National Bank Successfully Reduces Client Onboarding Time from 10 Minutes to Under One Minute," UiPath (<https://www.uipath.com/resources/automation-case-studies/city-national-bank-process-excellence>).
- PPP: Paycheck Protection Program.
- <sup>9</sup> COVID-19 is rapidly shifting firms' automation agendas toward back-office processes and business resilience. See the Forrester report "[Top Trends And Emerging Technologies, Q3 2020](#)."
  - <sup>10</sup> Thirty-two percent of global infrastructure decision-makers expect their organization to use RPA as a primary automation technology over the next 12 months. Source: Forrester Analytics Business Technographics Infrastructure Survey, 2020.
  - <sup>11</sup> See the Forrester report "[Use RPA To Deliver Better Customer Service Experiences](#)."

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<sup>12</sup> See the Forrester report “[RPA Operating Models Should Be Light And Federated.](#)”

<sup>13</sup> Source: “America First Finance Customer Success Story,” YouTube video, April 19, 2020 (<https://www.youtube.com/watch?v=eO8PQtvGZ2I>).

Source: Brian LaRoche, “SiriusXM CallMiner Success Story Podcast Highlights from CCW,” CallMiner blog, July 25, 2018 (<https://callminer.com/blog/siriusxm-callminer-success-story-podcast-highlights-from-ccw/>).

<sup>14</sup> Source: “New Callback only Model at the Illinois Department of Employment Security,” Illinois Department of Employment Security, July 8, 2020 (<https://www2.illinois.gov/ides/SitePages/NewsArticleDisplay.aspx?NewsID=507>).

<sup>15</sup> Source: Miriam Cross, “How banks prepared call center reps to handle surge in volume,” American Banker, April 5, 2020 (<https://www.americanbanker.com/news/how-banks-prepared-call-center-reps-to-handle-surge-in-volume-from-home>).

<sup>16</sup> Examples of relationship graphs include household relationships, organizational hierarchies, and influencer relationships.

<sup>17</sup> Source: “Maybank Increases Agent Productivity With Acqueon iAssist Callback Manager,” Acqueon (<https://www.acqueon.com/wp-content/themes/acqueon/brochure/acqueon-casestudy-BFSI.pdf>).

<sup>18</sup> Source: Interview with iAdvize, October 2020.

Net Promoter and NPS are registered service marks, and Net Promoter Score is a service mark, of Bain & Company, Inc., Satmetrix Systems, Inc., and Fred Reichheld.

<sup>19</sup> Source: “Customer Success Stories,” Powerfront (<https://www.powerfront.com/case-studies/en-us/>).

<sup>20</sup> Thermo Fisher Scientific uses WalkMe’s digital adoption platform to relieve the stress and confusion of using unfamiliar systems. Source: “Thermo Fisher Scientific,” WalkMe (<https://www.walkme.com/customer-stories/thermofisherscientific/>).

<sup>21</sup> When we asked global information workers whether they were open to the task of training the software systems that they use at work, only 33% agreed; 56% were neutral, and 11% disagreed. Source: Forrester Analytics Global Business Technographics Workforce Benchmark Recontact Survey, 2019.

<sup>22</sup> “Issues that agents and bots worked on together resulted in the highest CSAT at 4.40 [out of 5] when averaged across 6 months. This is 7% higher than the average CSAT across all messaging issues, and 1% higher average CSAT than tickets that did not invoke a bot.” Source: “State of Customer Service Automation 2019,” Helpshift, 2019 ([https://go.helpshift.com/rs/113-UDX-599/images/Report\\_State\\_of\\_CS\\_Automation.pdf](https://go.helpshift.com/rs/113-UDX-599/images/Report_State_of_CS_Automation.pdf)).

<sup>23</sup> Only 19% of global information workers say that their company does a good job at articulating the mission of AI in the workplace; just 18% say that their company has shown concern for how implementation of automation technologies may affect their overall employee experience. Source: Forrester Analytics Global Business Technographics Workforce Benchmark Recontact Survey, 2019.

<sup>24</sup> Samsung onboarded up to 300 retail associates and 60 in-house agents in one week to advise on the website, via iAdvize, at the beginning of the COVID-19 pandemic to respond to a 200% to 300% increase in traffic. Source: Interview with iAdvize, October 2020.

<sup>25</sup> Source: “How COVID-19 has pushed companies over the technology tipping point—and transformed business forever,” McKinsey & Company, October 5, 2020 (<https://www.mckinsey.com/business-functions/strategy-and-corporate-finance/our-insights/how-covid-19-has-pushed-companies-over-the-technology-tipping-point-and-transformed-business-forever>).

<sup>26</sup> Source: “TSB launches Smart Agent developed with IBM to help customers impacted by coronavirus,” IBM press release, April 30, 2020 ([https://uk.newsroom.ibm.com/2020-04-30-TSB-launches-Smart-Agent-developed-with-IBM-to-help-customers-impacted-by-coronavirus?mhsrc=ibmsearch\\_a&mhq=tsb%20bank](https://uk.newsroom.ibm.com/2020-04-30-TSB-launches-Smart-Agent-developed-with-IBM-to-help-customers-impacted-by-coronavirus?mhsrc=ibmsearch_a&mhq=tsb%20bank)).

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<sup>27</sup> Forrester predicts that US tech investment will fall 1.5% in 2021 after years of acceleration — an incredible \$135 billion drop from 2019’s spending peak. Source: “Predictions 2021: CIO,” Forrester (<https://www.forrester.com/fn/3PKpYTyZEd9DfURrn9t8nu>).

<sup>28</sup> Source: “Predictions 2021: CIO,” Forrester (<https://www.forrester.com/fn/3PKpYTyZEd9DfURrn9t8nu>).

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