

Gartner®

Use Quality 4.0 to Enhance Customer Experience

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LEADING QUALITY SINCE 1919

Summary

To successfully prepare for the future, quality leaders must ensure their Quality 4.0 plans enable their organizations to meet expanding customer needs and wants. This entails gaining direct access to customer data, preemptively addressing customer issues and building empathy for customers.

Overview

The instability of the past two years (brought on by the COVID-19 pandemic, supply chain disruptions and inflation) has increased customer expectations for their purchases. Previously, customers may have focused on the quality of a product; now, they also care about what it is like to buy and receive the product and interact with the company.¹

As quality leaders implement Quality 4.0 strategies, they must consider this expanded definition of quality and build out necessary capabilities.

This research provides quality leaders with key insights into these shifts in customer expectations and what drives them. It ultimately lays out three specific actions to take to ensure Quality 4.0 initiatives enable quality to meet these changing expectations.

Key Findings

- Customer expectations for experience quality significantly increased during 2020 to 2022 and are projected to keep increasing.¹
- There are seven distinct external drivers that explain why customers' experience expectations are increasing.
- To meet changing customer expectations, quality leaders must ensure their Quality 4.0 strategy enables them to collect more customer data, anticipate customer needs and increase empathy between staff and their customers.

Recommendations

To meet evolving customer expectations, quality leaders should:

- Stop relying on secondhand customer data. Instead, gain direct access to customers and their data.
- Start addressing tomorrow's customer issues today by anticipating and preemptively meeting customers' needs and wants.
- Keep the human touch by building on customer empathy and putting customers and quality staff at the forefront of the quality strategy.

Changing Customer Demands Are Daunting for Quality Leaders

The future of quality, while exciting, is consuming the minds of forward-thinking quality leaders. Questions about emerging technologies, automated quality processes and predictive analytics dominate not only search engines, but also quality leaders' investments. There is perhaps no area more daunting for quality leaders than customer expectations.

Customers and consumers alike, emboldened by various reasons, demand more from the companies they buy from. Recent studies even show that there is an increase in customers engaging in revenge-seeking behavior (e.g., public shaming or in-person shaming) in response to problems with their products/services.² Customers are not only demanding more, but in some cases, are forcing organizations to give them more.

These customers' demands have trickled their way down to quality leaders. Our interviews with quality leaders in 2022 reflect the same sentiments:

“Even if regulators approve a product, for example, a slight oil leak on an airplane is completely OK and safe, customers will still complain about it — so now we are reevaluating our requirements.”

Director of Quality, Aerospace and Defense Industry

“Quality is expected to have full information and visibility of the supply chain at their organizations, even if we have historically been siloed from that.”

Chief Quality Officer, Consumer Packaged Goods Industry

Growing in Importance: Expectations Are Moving Beyond Product Quality to Experience Quality

Whether fair for quality or not, customers now associate the totality of their product/service experience as part of their experience quality. In fact, almost half of quality leaders are finding that most of their complaints are related to experience quality rather than about the actual product quality.¹

Customers increasingly focus on the nonproduct experience aspects of quality, which include elements quality may not have any visibility into or control over. If a customer gets a product that has unsustainable packaging, has unexpectedly suffered damage in-transit or has unclear assembly instructions, they more often than not attribute that to poor quality. Most, if not nearly all, quality leaders have seen customers expect and demand more from the organization in the past two years (see Figure 1). This trend is expected to continue.

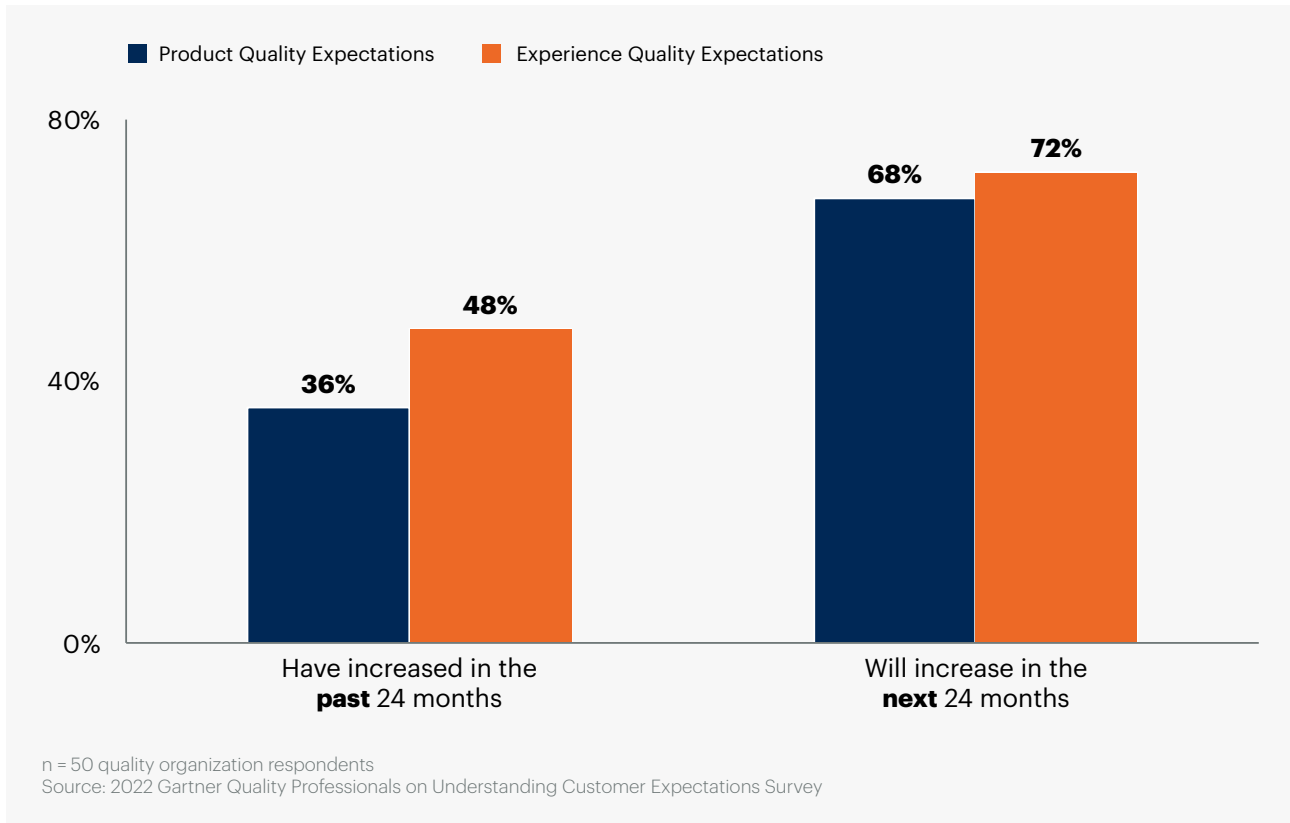
These rising expectations and resulting complaints can no longer be ignored as they are now showing up in the data that quality leaders are directly responsible for. Almost half of quality leaders find that most of their complaints come from experience quality (the buying, receiving, unboxing and interaction with company representatives) rather than the product itself.¹

Before quality leaders can determine how best to respond and solve experience quality issues, they need a better understanding of the reasons for the shift. Otherwise, leaders may be addressing a symptom but missing the root cause.

Experience quality speaks to the quality of everything beyond the product or service. This includes, but is not limited to, the customer's experience in buying the product, receiving the product, unboxing the product and interacting with the company overall.

Figure 1: Product and Experience Quality Expectations Are Increasing

Percentage of respondents selecting increased or significantly increased



7 Key Drivers Evolving Customer Expectations

To best prepare to meet these expanding customer expectations, quality leaders must first understand *why* they are changing.

To help quality leaders identify the key drivers they need to monitor, we reviewed recent primary and secondary research to understand major shifts in customer expectations and the drivers of these changes. We then carried out a series of interviews with 50 quality leaders and eight subject matter experts at the Chartered Quality Institute (CQI) and Gartner to narrow that list down to the drivers that have the greatest impact on changing customer expectations.

Ultimately, we distilled a list of seven key drivers that shape customer expectations for experience quality (see Figure 2):

- 1 Convergence of physical and digital experiences
- 2 Increased data collection and privacy needs
- 3 Expectations of frictionless company interactions
- 4 Rise of social commerce and influencer marketing
- 5 Productization of fulfillment
- 6 Desire for principled brands and interactions
- 7 Expectations for ecosystem reliability

Figure 2: 7 Key Drivers Evolving Customer Expectations





Driver 1:

Convergence of Physical and Digital Experiences

Description

Though it is no surprise that customers want their products and services to be straightforward and easy to use, this is especially important for products that have both physical and digital components (e.g., a smart refrigerator). As technology continues to advance, customers expect both the hardware and software aspects of a product to be of similar quality and to integrate seamlessly with one another.

Implications for Quality Management

This means that if one aspect of the product has an issue or if the hardware and software components do not integrate or work together as expected, the customer's experience with the product (and possibly with the company) suffers.

Example:

In April 2022, Apple's iHome servers were shut down, effectively rendering the iHome-branded smart plugs, motion sensors and door/window sensors useless. Though some of the iHome devices that are still being sold may be compatible with the Apple Home app, many are not and will simply not work once unboxed.³





Driver 2: Increased Data Collection and Privacy Needs

Description

Commerce has become less about one-time transactions and more about continuous interactions, during which customers exchange personal data or data about their own businesses with companies. As customers give up more data to get access to shopping portals, deals and other product or experience aspects, they expect total security of that data — as do regulators. This promise of heightened security is particularly important for businesses as customers, given their prioritization of data and intellectual property security and traceability.

Implications for Quality Management

Quality organizations that use customer complaint and feedback data to understand their customers must provide adequate protections for this data. This is essential for maintaining customer trust and ensuring customers feel comfortable sharing information on their concerns, experiences and motivations.

Example:

Earlier this year, Meta (previously known as Facebook) was fined €1.2 billion for violating EU data protection laws. The social media giant is alleged to be in violation of strict General Data Protection Regulation (GDPR) limits on how sensitive data can be used, stored or processed.⁴





Driver 3:

Expectations of Frictionless Company Interactions

Description

Customers are accustomed to accessing instant information about companies through online databases (e.g., via review sites, Reddit, Quora). These databases include answers to potential questions that cut across traditional customer touch points, even within the same organization. This has led customers to expect the same level of information and immediacy when they interact directly with a company, no matter the team they are communicating with (e.g., customer service, quality, sales). In addition, customers — especially businesses, which may be represented by several different parties — want more consistent customer journeys when engaging with a company. They expect timely communication with a representative who has full knowledge of all their previous interactions, including with other teams in the organization. This means companies must provide full visibility of all customer interactions to their representatives and take coordinated action in their dealings with customers.

Implications for Quality Management

Quality teams must strive to play their part in coordinating with other customer-facing functions across the company to ensure their full situational awareness of a customer's experience with a company. Customers' understanding of "quality" is impacted by their interactions with the overall company. Consequently, staff in the quality function must strive to gain full situational awareness of a customer's journey with the company — including their touchpoints with other teams.

Example:

Apple has rolled out a personalized support portal where customers can view a list of all their products, check their warranty coverage, access troubleshooting resources, check on all the support tickets they have opened and create new ones. Further, when a customer chooses to contact Apple's support team for additional assistance, the support person already knows who the customer is and what devices they own. This is made possible by tying the customer's phone number to their unique Apple ID.⁵





Driver 4:

Rise of Social Commerce and Influencer Marketing

Description

Consumers are increasingly exposed to influencer opinions on a product and on their experiences with a brand.

Implications for Quality Management

Consumers' increased awareness of experience-related aspects as something others care about and comment on has contributed to expanding their perceptions of "quality." At the same time, company marketing teams are steering customers to social media to share opinions to increase brand engagement. This raises challenges for feedback management and product and service improvements. As a result, companies may struggle to gather and analyze customer opinions from social media and other nontraditional feedback channels.

Example:

Bissell's Little Green cleaner went viral on TikTok at the beginning of the pandemic, thanks to organic coverage of users cleaning hard-to-remove stains in their homes. This resulted in a doubling of Little Green sales in the last two years, which the company attributes mostly to trending hashtags #TikTokMadeMeBuyIt and #LittleGreenMachine.⁶





Driver 5:

Productization of Fulfillment

Description

The mass disruption of retail through e-commerce (i.e., the so-called Amazon effect) has transformed how customers view fulfillment and delivery. As Amazon Prime (originally a way to get faster delivery) became trendy and other retailers mimicked it, it cemented expeditious last-mile delivery as something customers should care about.

Implications for Quality Management

This has led to increased customer expectations for next-day or even immediate order fulfillment, completely virtual experiences and better customer order tracking and returns. These all factor into customers' impressions of experience quality.

Example:

Zappos offers free and unlimited back-and-forth shipping to make it as risk free as possible for customers to shop (much like trying on shoes at a store). In addition, Zappos offers a 365-day return policy and puts the contact information for its 24/7 customer service center at the top of every webpage (instead of buried in small text at the bottom of a site or email).⁷





Driver 6:

Desire for Principled Brands and Interactions

Description

As part of the rise in expectations for products that adhere to environmental, social and governance (ESG) standards, customers want more empathetic and relatable companies. Consider, for example, interactions with companies that rely mostly on chatbots and other nonhuman, automated relationship-management features. Though sometimes these can be effective problem solvers, the less-sophisticated ones can be frustrating to interact with. They can even aggravate customers if the interactions feel overly generic and do not resolve the issue.

Implications for Quality Management

Customers want to feel that a company is not just responsible but also empathetic to their needs. They want their concerns and requests to be properly implemented or escalated. Simply resolving product quality issues is no longer sufficient. Instead, customers want to feel listened to and cared for when issues arise or when they experience product- or experience-related frustrations.

Example:

In the early months of the COVID-19 pandemic, Airbnb and Vrbo responded very differently to booking cancellations. Airbnb stood on the side of guests and implemented maximum flexibility, whereas Vrbo took the side of its partners and maintained contractual obligations.⁸ As a result, the NPS scores for the two companies diverged, with Airbnb maintaining a score of 28⁹ and Vrbo falling to -83¹⁰ (comparably).





Driver 7:

Expectations for Ecosystem Reliability

Description

Customers are increasingly making their purchasing decisions with the expectation that products and services integrate seamlessly into their existing ecosystems — a network of coexisting products and processes. This trend has been especially prominent with — and accelerated by — the rise of Internet of Things (IoT) devices.

Implications for Quality Management

No longer is a product's or service's quality evaluated in isolation, but rather in relation to how it interacts with the systems around it and impacts the reliability of the broader customer ecosystem. This also presents challenges for establishing accountability if a failure occurs in the ecosystem, raising questions like: "What company do you go to with an issue?" and "How can a single company adequately assess and then address a quality issue that may involve other companies' or even competitors' devices?"

Example:

When managing smart home devices, customers are limited by the lack of interoperability between systems — Alexa can't talk to Google Assistant or Siri or control Google or Apple devices, and vice versa. An open-source interoperability standard, known as Matter, has been developed to ensure seamless integration of these independent systems. Essentially, it sets a common standard for manufacturers that ensures devices are compatible with any voice assistant/platform that customers may use to control them.¹¹



3 Actions Quality Must Stop, Start or Keep Doing

Tackling the shifts in customer expectations and their drivers can seem daunting to quality leaders. This is especially true when considering how these factors fit into broader forward-looking strategies as part of their organizations' shift to Quality 4.0. According to CQI, Quality 4.0 refers to the "leveraging of technology with people to improve the quality of an organization, its products, its services and the outcomes it creates."¹² It is imperative that quality leaders determine how shifting customer expectations and Quality 4.0 fit together. Ultimately, Quality 4.0 seeks to future-proof organizations — and that future is largely defined by customer needs and wants.

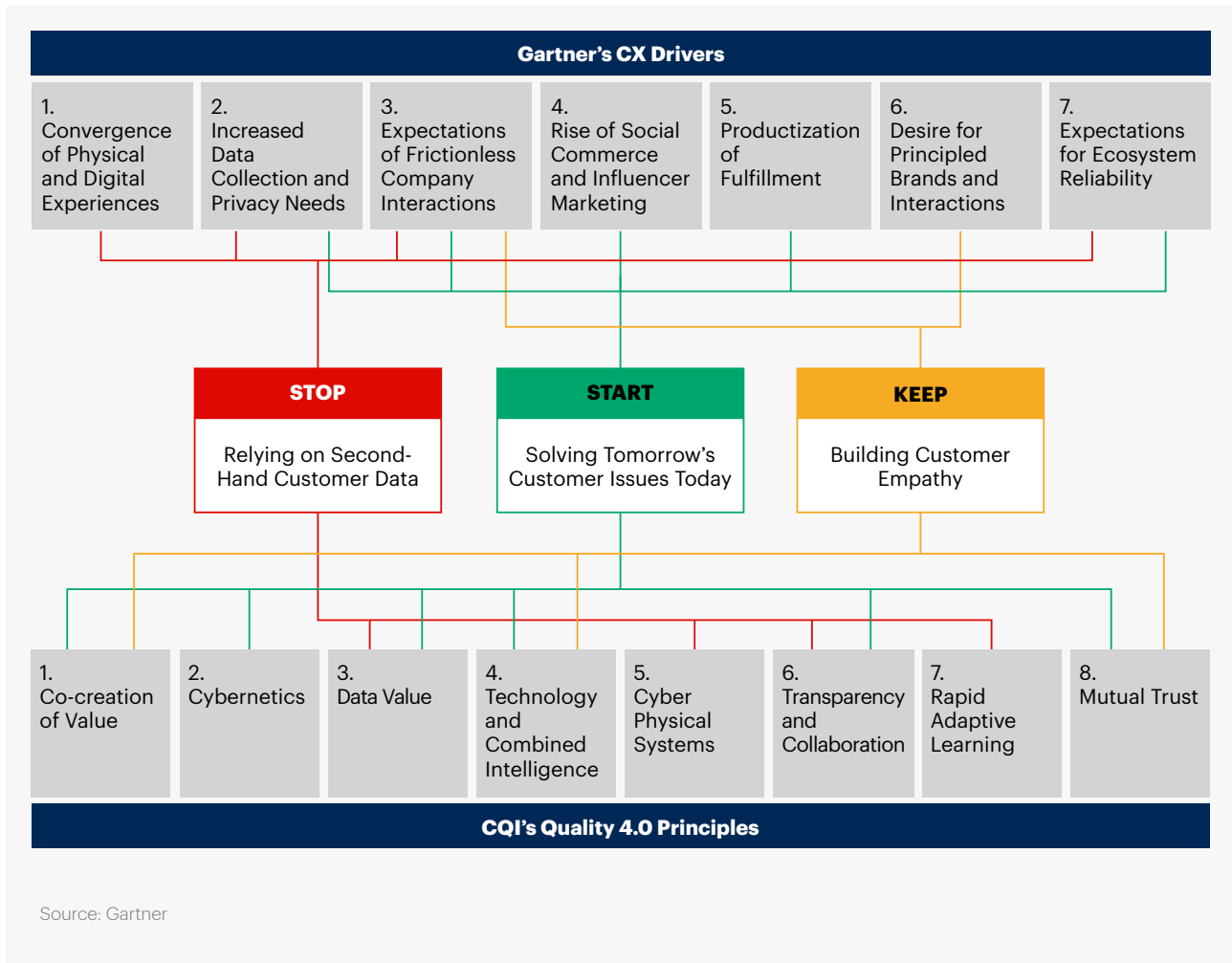
Therefore, a Quality 4.0 strategy that fails to account for expanding customer expectations for quality is doomed. But what steps should quality leaders take to ensure their Quality 4.0 plans enable them to meet shifting customer expectations? To find out, we conducted an analysis of how the seven drivers of customer expectations align with CQI's eight principles of Quality 4.0. (See Figure 3 for an illustration of this exercise.) The eight principles give quality leaders a basis on which they can conceptualize how to use emerging technologies to augment the way quality is consistently and reliably delivered to customers.¹²

(For additional information on our research methodology for this section, see the Evidence section.)

Based on this exercise, we provide three simple and digestible actions quality leaders should take to ensure their Quality 4.0 plans enable their organizations to meet customer expectations:

- **Stop** relying on secondhand customer data.
- **Start** solving tomorrow's customer issues today.
- **Keep** the human touch.

Figure 3: Relationships Between Customer Experience Drivers and CQI's Quality 4.0 Principles



Action 1:

Stop Relying on Secondhand Customer Data

Description

To give customers the demanded high experience quality, quality organizations need direct access to customers and their data, rather than secondhand customer data (e.g., data given to quality from other functions).

Why This Matters for Quality 4.0

As quality leaders are expected to resolve salient customer experience issues, effectively finding the root cause of customer problems requires quality to hear directly from customers. Yet less than one-third of quality leaders say their staff is exposed to or trained on effective customer interactions (see Figure 4).¹ As a result, most quality organizations must rely on secondhand customer data to solve customer issues.

Relying on secondhand customer data collected by other functions fails in two major ways:

First, secondhand customer data is structured to fit the needs of the function that is collecting the data, not quality's. When functions such as marketing, sales and customer service aggregate and translate customer data, they focus on commercial needs but leave out critical details that quality needs. For example, when quality engineers at one large life sciences manufacturer began to analyze complaint data to find the root cause of common customer experience issues, they discovered that most complaints described medical instruments as painful to hold but failed to mention which parts of the instruments caused the pain.

As a result, quality engineers spend time attempting to translate this data to something usable. With the increase in volume, velocity and diversity of secondhand customer data that quality must now analyze to get a holistic view of the customer experience, the time wasted translating data will soon become untenable.

Second, the data that quality receives from other functions is often dated. By the time quality engineers translate the customer issues and figure out how to fix them, new problems have already occurred.

The longer the lag between the problem occurring and quality finding a solution, the greater the risk of dissatisfied customers voicing their complaints publicly on social media outlets or industry forums. Therefore, as part of its Quality 4.0 data strategy, quality needs to include collecting data firsthand through direct customer interactions. This can take various forms, such as facilitating targeted focus groups, observing customers using products or conducting interviews on-site. This will not only increase the relevancy and timeliness of quality's data; it will also increase transparency, collaboration and mutual trust between quality and customers — core values of Quality 4.0.

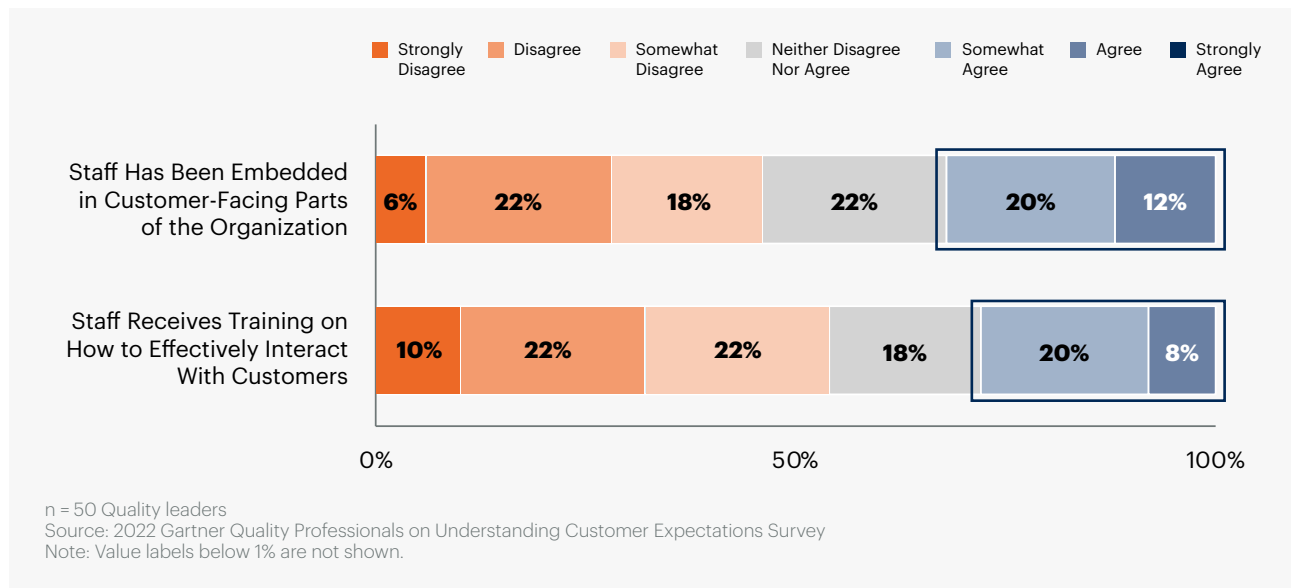
Steps to Take

For quality to **stop** relying on secondhand customer data and gather its own, quality should:

- Build up quantitative staff capabilities for collecting, storing and cleansing collected customer data to enable staff to effectively use firsthand customer data
- Build up qualitative staff capabilities for interacting with and interviewing customers to be able to get relevant firsthand data and extract insights helpful for quality
- Collaborate with commercial teams to identify preexisting customer touchpoints where quality can collect firsthand data by observing and interacting with customers

Figure 4: Quality's Preparedness for Customer Interactions

Percentage of respondents agreeing about quality staff being exposed to, and receiving training for, effective customer interactions



Action 2:

Start Solving Tomorrow's Customer Issues Today

Description

Customers do not just want yesterday's issues resolved; they want to have their future needs met, some of which may be unarticulated. For quality, this means providing customers with support before they know they need it — before any product or service issues or experience frustrations arise.

Why This Matters for Quality 4.0

Already a key feature in organizations' Quality 4.0 strategy, predictive data analytics offers an exciting avenue for companies to begin to solve problems for customers before they arise — what we call predictive customer servicing. Yet today, few quality organizations are doing anything in predictive customer servicing for experience quality. Our research shows that six of quality's top use cases for predictive analytics all pertain to preventing product or production issues (see Figure 5).¹³

There is untapped potential in using predictive analytics to anticipate and preemptively meet customer needs and wants. Predictive customer servicing enables quality to keep customers happy, increasing the likelihood that they remain loyal. And more broadly, it enables companies to capitalize on the potential for creating new revenue streams or accessing new markets — such as by updating features or developing new offerings to better meet customer needs and wants.

Steps to Take

To leverage predictive analytics to solve customer issues before they arise, quality leaders should:

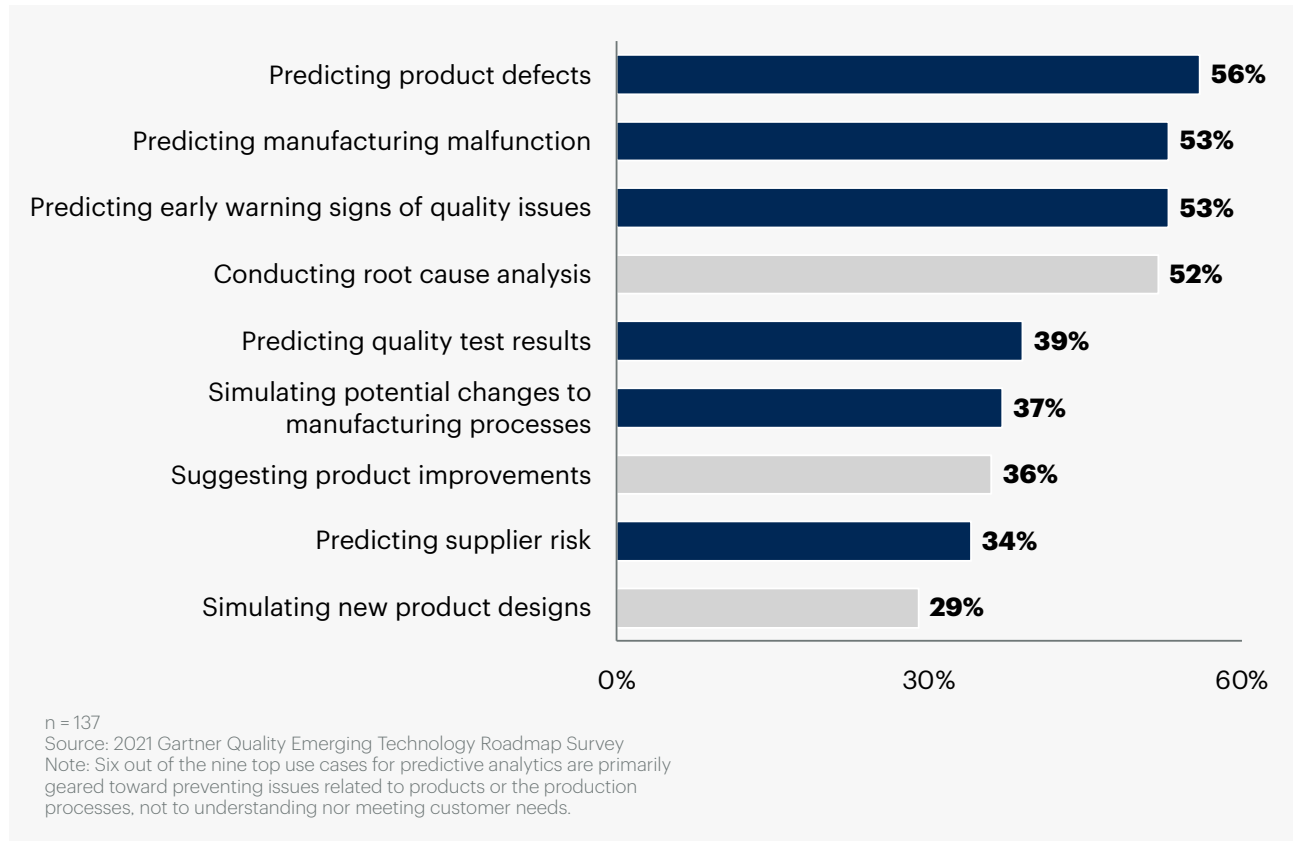
- Expand their listening post or IoT network beyond their internal value chain to include customers and suppliers
- Incorporate upstream product development team feedback in their predictive quality project selection criteria to ensure the data informs future product enhancements that meet changing customer needs

Predictive Customer Servicing in Action

Volvo has developed an early warning system using data and AI to predict when their cars will need servicing. This enables Volvo to preemptively provide customers with support and maintenance.¹⁴ Volvo also uses these capabilities to monitor a vehicle's functionality given how a customer is using it — such as in hazardous terrains or situations. Volvo then uses insights from this to inform decisions on new product designs, features and safety standards.¹⁵

Figure 5: Predictive Quality Is Predominantly Used to Prevent Product Issues

Percentage of respondents



Action 3:

Keep the Human Touch

Description

Technology cannot replace human empathy. For quality to deeply understand customers, their expectations and grievances, they must keep the human touch by empathizing with customers via intentional interactions.

Why This Matters for Quality 4.0

As part of Quality 4.0, many organizations are quick to fall into the tempting idea that every process can be enhanced with technology. This leads to overautomation of customer touchpoints with quality organizations — such as customers having to issue complaints via an online forum or interacting with a chatbot to resolve issues.

Relying on the data collected from these automated processes can often mask true customer sentiments, leading to imprecise or misleading root cause analyses. That's what the quality organization at Johnson & Johnson found during a deep dive into complaint data. When staff spent time with customers face to face, quality discovered that customers had problems that weren't being captured in the organization's data because customers lacked the time to report them, got used to dealing with the problem, assumed it was user error or didn't care enough to complain. As a result, searching for customer sentiment in data mining and process automation is futile.

Instead, quality leaders must keep the human touch by building empathy for their customers. Empathy drives trust and engagement. It also builds relationships with customers that technology alone cannot accomplish. Customers will feel more comfortable to express grievances and details about their buying motivations, needs and emotions, allowing quality to better find the cause of experience issues.

To help build customer empathy in their teams, quality leaders can use any of the four primary methods for developing customer understanding (see Figure 6).

Steps to Take

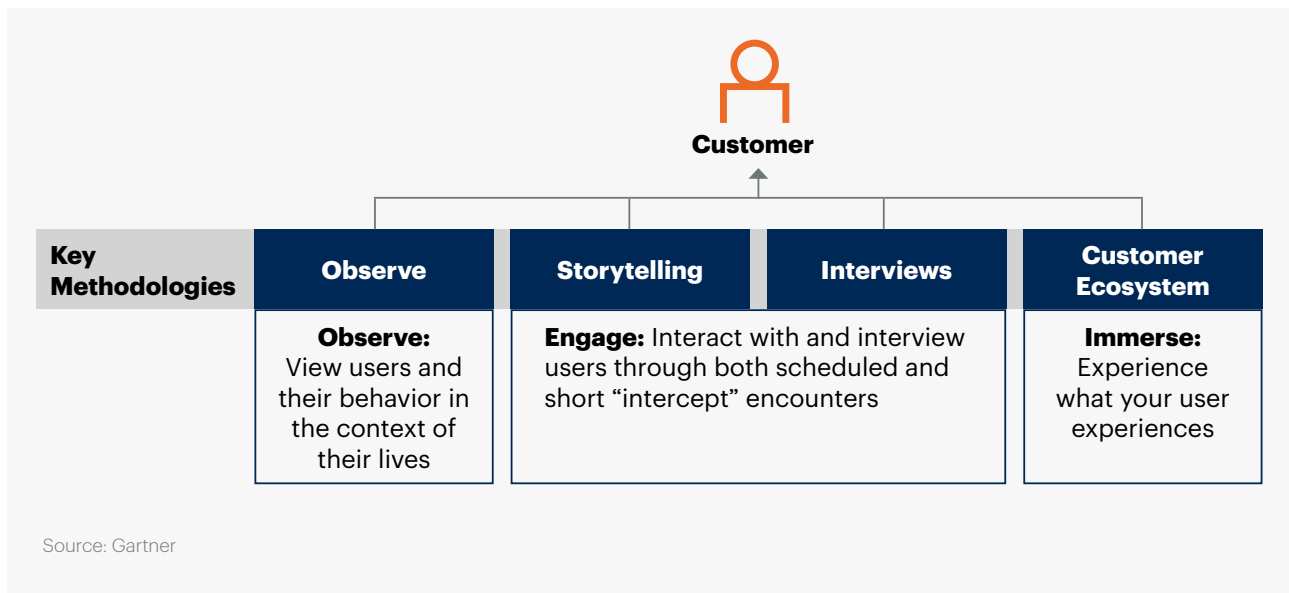
Key considerations for quality organizations to empathize more with their customers:

- Use technology to free up time for quality staff to gather sentiment analysis through direct customer engagement.
- Create opportunities for quality staff to build customer empathy through customer observation, engagement and immersion.
- Include assumptions around customer impact to Quality 4.0 strategy to ensure technology decisions' effects on humans aren't forgotten.

Empathy in Action:

Starbucks CEO Laxman Narasimhan recently committed to working in a Starbucks location as a barista once a month.¹⁶ This commitment to working on-site is to not only understand inefficiencies in current workflows, but to get closer to customers specifically to empathize with them. “To keep us close to the culture and our customers, as well as to our challenges and opportunities, I intend to continue working in stores for a half day each month,” Narasimhan said. Narasimhan is the latest example of gaining a real perspective of a customer’s experience through one-on-one contact and empathy.

Figure 6: Empathize — Gain a Deep Understanding of the Customer



Conclusion

While customer expectations are pushing quality organizations to react and respond today, they also have repercussions for the future. Though different organizations may need to account for different customer expectations and drivers, the approach that quality leaders can use to prepare works the same. Leaders must adopt a nuanced approach to their Quality 4.0 strategy.

To future-proof Quality 4.0 for shifting customer expectations, quality organizations must stop using secondhand customer data and acquire their own, start applying predictive sensing to customer needs and wants, and keep the human touch by working with customers one-on-one using empathy.

Evidence

Research Methodology for Stop/Start/Keep Actions. To arrive at a digestible, actionable set of actions quality leaders should take, our team performed an analysis of how CQI's eight principles of Quality 4.0 relate to each of the seven drivers of customer expectations outlined above. This exercise generated a series of linkages, which included additional challenges, actions quality leaders should take and things they should consider. We then distilled the various linkages into three key actions quality leaders should take to capitalize on implementing their Quality 4.0 strategies to meet expanding customer expectations.

¹ 2022 Gartner Quality Professionals on Understanding Customer Expectations Survey.

From April through July 2022, Gartner Quality Research sent invitations to complete an online survey to its community members, Gartner clients and a wider group of practitioners in quality globally. We received 50 completed responses during the survey period spread across multiple industries, including manufacturing (n = 20), technology and telecom (n = 10), life sciences (n = 8), transportation (n = 3), healthcare (n = 1), banking, finance and insurance (n = 1), and others (n = 7). Forty-two participating organizations had annual enterprise revenue of at least \$1 billion, and 44 respondents were director level or above (vice president, other senior executive or head of function [SVP, EVP]). Additionally, 28 respondents primarily worked from North America, 21 from EMEA and one from Asia/Pacific. Disclaimer: Results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

² [As Customer Problems Hit a Record High, More People Seek 'Revenge,'](#) The Wall Street Journal.

³ [Insteon's troubles are a smart home tale as old as time,](#) The Verge.

⁴ [Meta Fined \\$1.3 Billion for Violating E.U. Data Privacy Rules,](#) The New York Times.

⁵ [My Support,](#) Apple.com.

⁶ [As TikTok continues its social media reign, how does it affect shopping trends?,](#) News10 ABC.

⁷ [Shipping, Return & Exchange Policies,](#) Zappos.com.

⁸ [If you cancel a vacation rental due to COVID-19, can you get a refund?,](#) WCNC.com.

⁹ [Brand Page: Airbnb,](#) Comparably.

¹⁰ [Brand Page: Vrbo,](#) Comparably.

¹¹ [What matters about Matter, the new smart home standard,](#) The Verge

¹² [Quality 4.0,](#) The Chartered Quality Institute.

¹³ 2021 Gartner Quality Emerging Technology Roadmap Survey. This survey was conducted to understand how quality leaders are investing in and adding emerging technologies to their product roadmaps. It transcends technology vendors and industry consultants to help quality leaders make investment decisions by comparing their technology adoption level with that of their peers. The study was conducted online from February through April 2021, with responses from 222 quality leaders. Respondents were from organizations with at least \$500 million in annual enterprise revenue and ranged from midlevel managers to CEOs. Respondents were further screened for the organization's primary industry and size of the business, and their primary role in product/portfolio responsibilities. Disclaimer: Results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

¹⁴ [Volvo Cars to harness real-time data from customer cars to set new safety standards,](#) Volvo Cars Global Newsroom.

¹⁵ [Big Data at Volvo: Predictive, Machine-Learning-Enabled Analytics Across Petabyte-Scale Datasets,](#) Forbes.

¹⁶ [Starbucks's New CEO Trained as Barista to Prepare for Role,](#) The Wall Street Journal.

About CQI

Who we are

The CQI is the global professional body for experts in improving product, project and service quality. For more than 100 years, we've been championing organisational excellence by setting professional standards for quality management in the U.K. and globally. We define and lead the quality profession, setting standards for its capability and scope through The Profession Map. We encompass the whole quality community, including quality management professionals and management systems auditors.

Our mission

As a registered charity with a Royal Charter, our mission is to champion quality management for the benefit of society.

Ever since we were founded in 1919 as a technical inspection association, we've stayed true to the same fundamental mission: to improve the ability of organisations to deliver the very best for consumers and stakeholders. We're committed to developing and championing ways of improving the value of products, projects and services. This value helps organisations to be more competitive and achieve better results. It also contributes to a better quality of life for society.

Our vision

Our vision is a world in which organisations of all types and sizes thrive by providing outstanding value for customers, stakeholders and society.

Our values

Inclusion – We respect and value everyone, support each other to do our best, and collaborate to make a difference to society.

Integrity – We act ethically, make decisions in the best interests of our stakeholders, and take ownership for our actions.

Innovation – We invite new ways of thinking that challenge the status quo, help us to remain relevant and ensure we continuously improve.

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