

# trends shaping customer-centric organisations

expert conversations





# introduction

There is no doubt COVID challenged us to rethink many things — for the better. The same positive tendency is happening in the market research and customer insights industry. This trend doesn't come without challenges and struggles; however, businesses express the need and will to do things differently. Hopefully, these intentions will set the path ahead with well-paved foundations and a clear direction.

But let's take a step back, and analyse essential facts. Fundamentally, the critical business questions haven't changed over the years. Companies want to connect with their (prospect) customers by actively listening and understanding their needs. But that is not an easy task, considering customers' needs change and fluctuate all the time —regardless of COVID or any other external factor. When we look at it as an ever-changing, dynamic discipline, we can say customer understanding is continuously transforming.

So, the big question is, "how to make your customer-centric efforts a success story?". Many companies are still on a journey to reach the objectives and fully implement a customer-centric mindset throughout the organisation. For some, COVID has accelerated that journey. For others, they had to rethink their approach either because of decreased budgets or because traditional methodologies are not adequate anymore.



# a word from our CEO



Nicole Huyghe, founder and CEO at boobook

A handwritten signature in blue ink, appearing to read 'Nicole Huyghe', positioned below the portrait.

Today, due to the pandemic, we, as consumer and customer, have different needs and priorities.

During the last year, businesses faced many changes and questions. One thing in common is that they all shifted in the direction of customer-centricity, i.e., listening to the customer's voice.

Being the CEO of a business specialising in supporting organisations to learn how to listen to their customers, many times over the past 12 months, I often got the reactions "you must be in the right spot because businesses are eager to understand what customers need these days". Based on some great projects we did last year, from our perspective, businesses still invest in customer understanding — even more than in the past. But is this the case for most organisations? Is customer-centricity a key priority now? What if budgets are not there to invest in customer understanding?

To get a broader view of where customer-centricity stands today, I decided to interview eight senior marketing and customer insights leaders across a wide variety of sectors, both the ones that are doing well because of the pandemic, as well as those being impacted badly.

Before taking a look at the different topics and insights gathered, I must confess I thoroughly enjoyed doing these interviews, mostly because they didn't seem like interviews at all. All leaders passionately and openly talked about customer-centricity—their achievements, goals, struggles, and challenges. I barely had to ask any questions. It was clear that the topic was very close to their heart and a clear sign that customer-centricity is a top priority in many businesses.

# topics overview

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customer-centricity: in  
pursuit of ambitious goals**

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# the thought leaders

TRENDS SHAPING CUSTOMER-CENTRIC BRAND EXPERIENCES

## B2B SERVICES



Ruti Amal  
Group Head of Insights  
Sodexo

## CONSTRUCTION/DIY



Patrick Van Steelandt  
VP Strategy  
Niko

## TRAVEL



Louise Morgan  
Senior Director  
International Marketing  
Avis Budget Group

## FINANCE



Shirley Harding,  
Head of Market Research  
Standard Bank South Africa

## ENTERTAINMENT



Veronique Lubet  
Director of Customer Insights  
Disneyland Paris

## PHARMA



Kevin Schou  
Head of Insights & Analytics  
Takeda

## GAMING



Benoit Pourgaton  
Senior Marketing Director  
Gameloft

## MEDIA



Thijs Vanderhaegen  
Head of Insights  
VRT



the current state of customer-centricity

## in pursuit of ambitious goals

When asked how they would evaluate their company in terms of customer-centricity, i.e. how well is it embedded throughout the organisation, the immediate response I often got was "we are not there yet", *"probably behind on the others or not ahead of the pack"*.

There is the general belief that companies are behind on being truly custom centric compared to others. It shows that they feel there are still significant gaps to fill, and that customer-centricity is still not the core focus of the organisation, at least not in terms of implementation. Truly listening to the customers, i.e. a fully outside-in approach, is not an easy shift for many organisations. And the bigger the organisation, the more difficult it is to implement this across all departments.

# Q: how would you rate customer-centricity in your organisation?



Patrick Van Steelandt  
VP Strategy  
Niko

*The key challenge is moving from a "can do" mentality to a "needs-driven". We are still too much an engineering organisation.*



Shirley Harding,  
Head of Market Research Standard Bank  
South Africa

*Although customer-centricity has been part of our mission statement for many years, we are still working on adopting it entirely. We've moved from lip service to implementation but still have a long journey ahead.*



Kevin Schou  
Head of Insights & Analytics  
Takeda

*We are now catching up on a few of our competitors who are ahead of the pack. Building robust BI and forecasting platforms and generally making use of our data, and ideally in an automated way, is very high on our agenda now.*



# 02

TRENDS SHAPING CUSTOMER-CENTRIC BRAND EXPERIENCES



the impact of the pandemic

## being agile is more important than ever

A general consensus is that customer-centricity has always been important. Truly listening to customers, being responsive, and implementing “outside-in” thinking have been a priority for many years. The pandemic did not necessarily change this, but it did impact other business aspects.

## Q: how did COVID influenced customer-centricity in your organisation?



Patrick Van Steelandt  
VP Strategy  
Niko

*Customer understanding has always been crucial to make sure customers' needs are fulfilled, so they don't struggle with useless features. This topic is always relevant, and I don't see the increased need for customer-centricity due to COVID - at least not in our sector.*



Kevin Schou  
Head of Insights & Analytics  
Takeda

*Customer-centricity is only marginally more important than before. What has changed is not the importance, but how to be better at it!*



Ruti Amal  
Group Head of Insights  
Sodexo

*It has always been important! The pandemic just kicked our bum to move faster!*

# companies can be divided into three groups in terms of customer-centricity challenges:



sectors that have faced challenges

**Q: What are the new foundations and values?**

Examples:

- Travel (Avis)
- Entertainment (Disney)
- B2B services (Sodexo)



sectors that have gained customers

**Q: How can we turn new customers into loyal ones?**

Examples:

- Media (VRT)
- Gaming (Gameloft)
- Construction/DIY (Niko)



sectors accelerating digitalisation

**Q: How to act fast & rethink?**

Examples:

- Finance (Standard Bank, Columbia Threadneedle)
- Pharma (Takeda)



sectors that have faced challenges

## Q: what are the new fundamentals of life?

The businesses in this category have to rethink their offer, as their industries have been dramatically changed followed by a huge decrease in customers. Their main question is “How will the future look like?” and "How will customers' needs and behaviour change because of all of this?".

### revision of offering

Stability and routine, two big fundamentals of life have been attacked by the pandemic. There is a need to establish routines and new fundamentals. But, what are the new foundations?

For example, in the case of Sodexo, space (as in the work environment) is an important element of their offering, so it needs to be reinvented and revisited.

### agile and flexible approach

There is a shift happening towards a very flexible forecasting system. These forecasts can be reviewed every week based on external information. The forecasts can be linked to playbooks with different scenarios.

An agile and flexible approach also means reviewing customer behaviour continuously and regularly.

### moving from value to volume

Another consistent theme throughout the conversations, especially with those who saw their customer volume dramatically shrinking, is the move from volume to value. While before, the key KPI of many companies was volume, i.e. reaching as many customers as possible, this KPI has been replaced by value.

# sectors that have faced challenges

Q: how did the pandemic impact your organization?



Louise Morgan  
Senior Director  
International Marketing  
Avis Budget Group

As long as these new fundamentals don't become the norm, we can not predict the future - at least not yet. The world is still volatile. Instead, we rely on a very flexible forecasting system reviewed every week and based on government restrictions and behavioural signals we pick up from each market. The data signals are linked to playbooks which we have ready for different scenarios. It does require very agile and flexible thinking to be able to pick up on customer signals continuously.



Ruti Amal  
Group Head of Insights  
Sodexo

Many insights gathered over the past 20 years are not relevant anymore. Our industry needs to rethink business, as previously established structures have disappeared. E.g., before there was a clear divide between home and work space and time, but these are now very blurred. The workplace definition has changed, and we can't talk of a distinct work/life balance anymore. This means that the routine which has been so crucial for many people is changing shape and form.

sectors that have gained new customers

**Q: how can we turn new customers into loyal ones?**



Thijs Vanderhaegen  
Head of Insights  
VRT

The number of people watching the news online across several of our news channels has significantly increased, especially among millennials, otherwise a demanding audience to reach. Our question now is, "how can we make sure the consumers keep coming back?". And this is where data and customer insights come in. At VRT, we use data to recommend and personalise the offering, i.e. news relevant for the consumer. But we are cautious when making personal recommendations. We aim to propose a range of various interesting topics such that the public can form an opinion.

Businesses that see sales going up are in a much better position. However, they are also facing a significant challenge to maintain the level of sales. Companies are aware there can be a significant drop in volume once things go back to normal. Their questions are "Will consumers continue consuming a lot of media, play games, renovate their house?" and "How can they keep interest levels high?".



Benoit Pourgaton  
Senior Marketing Director  
Gameloft

The video gaming industry has gone through significant changes because of COVID, especially regarding more (new) gamers and playing longer (more playtime). Furthermore, gaming has become more than gaming; it is replacing some social interactions (e.g. games hosting concerts and turning into virtual music venues). However, we ask ourselves, "how do we keep these players?" and "will this trend stay, and how will it develop further?". To keep track, we conduct more regular researches and look at continuously refreshing our customer insights; for instance, we're updating our customer segmentation to detect and better understand shifts in motivations and attitudes.



## sectors accelerating digitalisation

### Q: How can we act fast and rethink current business models?

Being present online is a given for any professional organisation today. Companies need to gather customers' data to understand them better. Without proper digitalisation, companies will lose a lot of valuable customers and data. The critical question isn't anymore if we should use data and implement a digital strategy, but rather "How is data used and how it can help us optimise digitalisation processes?".

#### from hype to necessity

There are clear parallels between digitalisation and big data. Both have gone through a big hype, with many buzzwords, while very few people understood its essence. The hype has shifted, and companies realise both big data and digitalisation are equally essential business components. We need data to understand our customers and optimise the relationship we have with them, and the same applies to digitalisation.

#### ever-changing business models

Is digitalisation only about technology and tools? The competitive landscape is changing as well. Who are the competitors of banks and car manufacturers? The real competitors today are Paypal, Google, Alibaba, Amazon, etc. Business models are changing, regardless of COVID. If businesses want to be relevant, they need to know and understand what the customer wants and how much they want to adapt to this evolution.

#### communication is key

For some companies, the biggest challenge since the pandemic has been optimising content, which translated into a significant need to listen to clients in terms of the level of detail, format and frequency. In the case of Columbia Threadneedle, after the pandemic hit, their clients were desperate for information. Their marketing team had a crucial role in making sure content and communication styles were updated, fast and truthfully.

## Q: how did the pandemic impact your work and your organisation?



Shirley Harding,  
Head of Market Research  
Standard Bank South Africa

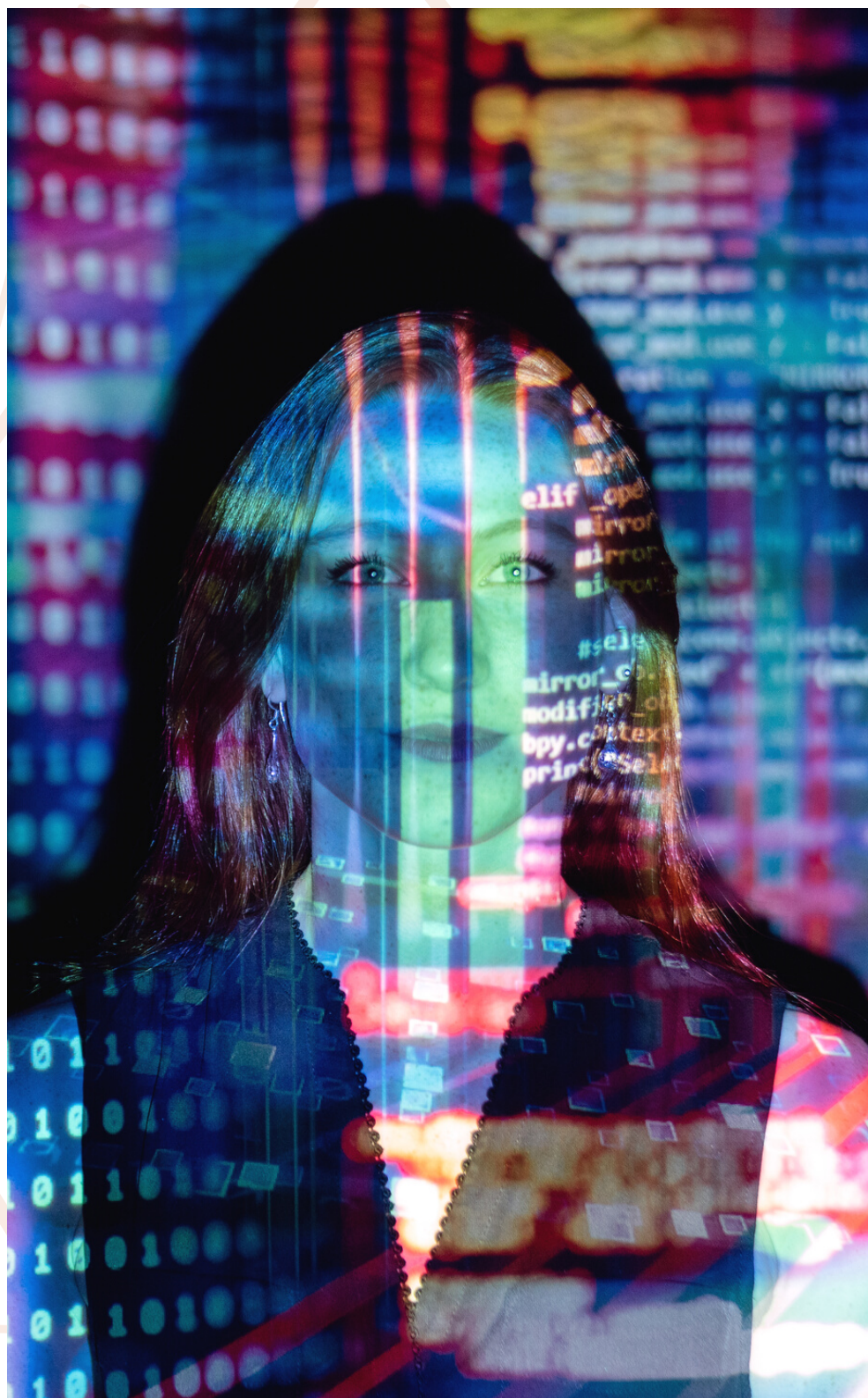
COVID has accelerated the digital transformation. We also see a quick shift from cash transactions, meaning technology and tools have to follow quickly! Here is where customer understanding comes in again. It is relatively easy to develop all kinds of apps, but it's crucial to create a tool people will use and think through all the features from the user perspective.



Kevin Schou  
Head of Insights & Analytics  
Takeda

The biggest acceleration in digitalisation happened for our customers. Doctors and specialist consultants have always preferred traditional F2F relationships. Moving our clients to digital was a slow process; however, the pandemic completely changed this! Our digital communication strategy, consisting of automated and manual push communication activities, is well accepted and working now.





## the new concept of data **data needs to work harder**

For a few years, we have been talking about big data, i.e. all the information we can access. Many companies have been facing the problem of analysing this data in terms of skills, technology, and resources. But the data most often has been there, either as it was internally captured, through primary research or available through third-party sources. A positive thing emerging from the pandemic is the creativity that companies apply when thinking about data and the questions it needs to respond to. As with any change, the crisis forced businesses to review the abundance of tools, the quality of data, and necessary budgets.

Given the change in customer and consumer fundamentals, the need for new primary and proprietary research is still crucial - even more so than before. However, current budgets do not always enable this shift, especially for those sectors struggling most.



## Q: how to tackle customer insights project with no budget?



Louise Morgan  
Senior Director  
International Marketing  
Avis Budget Group

We've become very creative in continuously looking for customer insights. I've been surprised by the amount of timely information related to the pandemic – insight reports, views of opinion leaders in the industry, publications - that is out there, available for free! Next to this, we use cost-efficient in-house tools to analyse patterns in search terms on the internet and our own websites and apps. That gives us an indication of consumer confidence and possible future travel patterns. On top of this, we also closely follow the vaccination progress across the different countries, as this impacts future travel behaviour. We also revise existing insights from previous research. Though not all is still relevant, those related to future products, such as, e.g. shared mobility, have proven essential now.



connecting with customers in the  
pandemic world

## a synthesis of MR and other data is the future

Customer centricity means listening to the customer by capturing transactions and online behaviour, typically embodied by sales or digital data. Or it can mean by talking to customers via primary research, of which there are many alternatives, from F2F ethnographic research to online quant surveys.

Over the last decades, the major shift was from telephone to online research while performing the qualitative research F2F. The latter shifted to online since the pandemic.

# research tendencies

smart, agile, and flexible

## continous and fast research

There is a clear preference for frequent short bursts of listening over few in-depth or long tracking studies. Though this combination has been mentioned for a while already, the urgency is much bigger now, as organisations realise that both are essential to get the best insight.

Both behavioural and primary research data are essential to capture how people behave, why they behave in a certain way and what their future preferences and needs are. One data view cannot give sufficient insights into the past and future.

## several data sources

To get a broad customer view, a combination of digital and primary research data is mandatory. Ideally, also including implicit research based on behavioural economics.



## Q: what methods do you apply when listening to your customers?



Benoit Pourgaton  
Senior Marketing Director  
Gameloft

COVID accelerated the need for additional consumer insight, and more importantly, for tools/data that are reactive and adaptive. There is a need for insights that can help us to react to quick changes. We're lucky to operate with products (games) that are 100% digital and online, so we can set up and run user surveys directly in the games. For qualitative research, we use online interviews and insight communities way more than before, with very satisfactory results. We're now further experimenting with new tools and methodologies.



Ruti Amal  
Group Head of Insights  
Sodexo

Consumer behaviour trackers, though typically very boring, are very much needed now. However, they will only regain success if they are light, agile and flexible. I would refer to them as intelligent, 'smart trackers'. Smart, meaning we can employ them when needed to identify which behaviour is temporary or permanent and, most importantly, capture the situational context, including emotions.

## Q: what methods do you apply when listening to your customers?



Thijs Vanderhaegen  
Head of Insights  
VRT

*Customer-centric decisions are based on four factors: market research data, behavioural data, experience and gut feel. Digital data is fast and allows for microanalysis on a specific brand. Hence, different teams often use it as they often have the first view of the data. Market research data goes much broader, i.e. to the total market and therefore serves another purpose.*



Veronique Luber  
Director of Customer  
Insights Disneyland Paris

*There is a big difference between people's intention and their actual behaviour. While market research will often overestimate intention, this gap is much wider now as consumers don't have a good grasp of the unpredictable future. As a result, the classic market research tools are not sufficient anymore to answer all customer questions. We rely on third-party behavioural data much more than before; for example, Google Analytics has become an essential tool for listening to customers.*



the (re)definition of customer insights

# decentralisation and data democratisation

Over the last decade, organisations are more and more focused on building their expertise in customer understanding, driven by cost and the abundance of inexpensive DIY tools. This trend only shows how vital customer-centricity has become. But how far are companies on this journey? Are they striving to have all expertise in house? If so, what is still lacking? And more importantly, what role should the customer insight providers play in the future?

The journey toward customer-centric organisation needs guidance, support and evolution to ensure the expertise is also correctly spread and understood. Every customer insights team, both within organisations and consultancy companies, has an essential role.



## Q: will customer-centricity become internal expertise and how do you see it evolving?



Thijs Vanderhaegen,  
Head of Insights  
VRT

Passive, digital data enables each department to do their research and data analysis at micro-level analysis. I refer to it as data democratisation, which is a need, a request, a necessity, and a challenge.

You feel that many colleagues across the VRT are eager to include data insights into their decision-making process. Because data is readily available to them, and they feel the need. This is a remarkable evolution that we can only cheer on! However, not everyone is an expert on interpreting the numbers, so there is always the risk that we will pull the wrong insights from the data.

Apart from providing a strategic focus across the different brands, the customer insights team offers guidance and makes sure that data is readily available in a format that is inspiring and easy to interpret correctly.



Veronique Luber  
Director of Customer  
Insights Disneyland Paris

It all starts with speaking the same language, such as using the same definitions and consistent data governance. The appointment of a data director since last year has been a great help! It is excellent that data is more used than before, but how can we make sure that everyone is aware of what's learned and apply the insights throughout the organisation?

It is not always evident to connect to the different teams and pull the additional insights together, insights we should benefit from immensely.

Spreading expertise shouldn't mean fragmenting insights. I'm sure we'll get there, but we have a journey ahead of us to professionalise data democratisation.

## Q: will customer-centricity become an internal expertise?



Benoit Pourgaton  
Senior Marketing Director  
Gameloft

A central CMI team has several roles. First of all, we have a more strategic position as we focus on customer understanding across the different platforms and units. Our focus is rather holistic versus specific and tactical. Another role is to educate business units on different data views when to use what, how, and how it all fits together. And even though data democratisation is a big thing at Gameloft, as 95% of our player behaviour data is being analysed by the product teams, CMI still plays a significant role in further enhancing customer-centricity. As said before, different customer views are needed to understand the gamer fully. Every CMI team's ambition should be closing the gap between the need and the solution, i.e. making the solution reactive and results orientated.



Ruti Amal  
Group Head of Insights  
Sodexo

Even though there is data democratisation, the customer insights team still needs to develop their function/role as a structured organisation. That means finding the right people, skills, vision and money, and ultimately moving to an internal consultancy and thought leadership team with a solid and clear vision. We need people with the right skills to make sense of data and share the knowledge. Not all insight providers deliver valuable insights. Only a few truly understand the art of providing wisdom.

# Q: will customer-centricity become an internal expertise?



Patrick Van Steelandt, VP  
Strategy, Niko

The belief is there, but it's not always seen as the priority. Our engineering hat is still too much stuck on our head, even though we know that customers' needs are not always in line with what we can produce. It is a mental shift that seems to be challenging to overcome, especially for a company with many engineers. The fact that we don't have a centralised customer insight team doesn't help either.



Kevin Schou  
Head of Insights & Analytics  
Takeda

Customer-centricity will only be at its best by having the right people on the right seats. And by having global IT department on board!



# our role as service providers

Q: how can we support organisations while their structures and business models are changing?

Our industry will evolve into two directions: service providers will either be data collectors/platform providers or strategic storytellers. External views on customers will always be required and organisations cannot always get to this easily. That's where data collectors do come in.

On the other hand, expertise in interpreting and translating data into strategic insights is even more in demand. Especially now that more stakeholders are involved, often they will require customer understanding expertise. That's where strategic storytellers do come in.

05

# 06

TRENDS SHAPING CUSTOMER-CENTRIC BRAND EXPERIENCES



the role of technology

## digital tools are just a part of the puzzle

When it comes to AI & machine learning, most experts avoided the buzzword "big data", meaning the hype is slowly subsiding. Companies haven't fully adopted new ways of using data, meaning the road is still long for many organisations to make full use of their data and move from descriptive to predictive and prescriptive. While technology excels fast forward, we are overwhelmed with many basic and advanced tools. Those tools that focus on visualisation and reporting, like Tableau or PowerBI, are widely used, while the AI tools are following this trend very slowly.

Many of these platforms claim the same benefits: "Fast, visual and easy to use by non-data scientists". So how come they are not entirely accepted and implemented within the organisations yet?

## Q: where does your organisation stand regarding the AI and machine learning tools?



Ruti Amal  
Group Head of Insights  
Sodexo

We all need to move fast, but that doesn't mean that tools are the correct answer. I would almost say, the quicker a tool can provide "insights", the less valuable they will be. Technology has made steps forward in many ways, but they are still not succeeding in making sense of data. I get annoyed when technology is sold as insights creators because it's not. It can't be. Tools are a starting point. But humans are needed to distil, translate, act and take risks.

Generating insights from data requires many hours of Human Intelligence, and those selling technology and analytics make big over-promises or confuse insights with information.



Shirley Harding  
Head of Market Research  
Standard Bank South Africa

Through the use of Salesforce, we are making excellent steps forward. We are moving from data storage and record keeping to a proactive and personal customer approach. But what's important here is that we combine the power of the tools with our expertise in customer understanding.





thriving as a customer-centric organisation

## invest, disrupt, and act fast

In conclusion, there is no doubt that customer-centricity is getting more and more attention these days, even though it has always been important. Most companies are on a journey to integrate it fully into their operations and bring it to the core of many decisions. But the question that arises is: "Which organisations will be the most successful on this journey?".

# Q: what companies will survive the change and thrive?



Ruti Amal  
Group Head of Insights  
Sodexo

The organisations with an adequate level of investments, especially in proprietary research, acting fast on the insights, and daring to make disruptive changes will be the winners of the future.



Veronique Luber  
Director of Customer Insights  
Disneyland Paris

The biggest challenge we have now is prioritising longer-term versus short term revenue. All focus is on revenue coming in, but a long-term customer vision is equally important for long-term success. The reality, however, pushes us to park this, and this is a real shame.

# ● closing remarks

Through conversations with experts, many fascinating insights emerged. While it was interesting to hear each person's viewpoint and experience, our goal was to discover the red thread that connects the dots between different companies and their sectors.

Many things have changed since the pandemic, both in our personal lives and at a business level. Hence, it's understandable that we, as consumer and customer, have different needs, but what are the changes in our conditions exactly? Will this change be permanent, or will it be "back to normal", or should we say "back as it was before". These questions have been raised so often since the pandemic hit us, and they all lead to customer-centricity.

COVID also highlighted one of the main issues in customer insights: having lots of data isn't sufficient. At the end of the day, what counts is understanding the data, its application, and how to extract valuable insights.

Listening to customers and extracting the correct insights can be achieved through different methods. An excellent example of the customer-centricity journey is "data democratisation", a critical topic mentioned many times throughout the sessions. Data democratisation, redefining the role of customer insights, applying necessary technologies, and being agile are common topics for each business, regardless of the industry.

In conclusion, many companies are taking a step forward to embed customer-centricity, or at least they are striving to achieve a better consolidation of data and insight. However, the journey to customer-centric business is challenging, meaning it needs proper guidance, support and knowledge to ensure the expertise is also correctly communicated and understood throughout all the departments.

Every customer insights team, both within organisations and consultancy companies, has an essential role. We should see each other as collaborators in pursuing customer-centric success stories with joint forces.



## Q: what habit did you develop in the previous year that positively influenced your life and well-being?



Benoit Pourgaton  
Senior Marketing Director  
Gameloft

My immediate environment certainly dictated the new habits, i.e. living in a big city, but I would say: walking & exercising more. Avoiding public transportation for a long time encouraged me to walk more and explore different neighbourhoods. I realised I often overlooked other parts of the city. I ended up liking it a lot. With Parisian parks being closed during the strictest lockdown phase, I also developed new routines to exercise – more regularly and without the need to wait for the next outdoor running session to come anymore. I hope I'll be able to keep up with these habits!.



Kevin Schou  
Head of Insights & Analytics  
Takeda

Towards the end of 2020, I decided the only way to reliably get vigorous exercise is to make it a daily habit – no excuses! After more than 100 consecutive days, it's now part of my daily routine. It's great for stress relief, and I'm finally getting healthier – the first six months of the pandemic were not good for my fitness!

# Q: what habit did you develop in the previous year that positively influenced your life and well-being?



Thijs Vanderhaegen  
Head of Insights  
VRT

*At least once a week I try to drop and/or pick up my daughter at nursery.*



Shirley Harding  
Head of Market Research  
Standard Bank South Africa

*I have tried to ensure I spend a little time outdoors every day – even if its just a quick walk in the garden.*



Patrick Van Steelandt  
VP Strategy  
Niko

*I realised that we are often too short-sighted and focused on the short-term. This has led me to develop even more of a helicopter view of what I'm doing and trying to achieve.*

# Questions?

We'd love to help!

Reach out to us at  
[info@boobook.world](mailto:info@boobook.world)

