

# How Automakers Can Enhance Customer Experience in the New Normal

While other industries have built highly engaging and hyper-personal customer experiences, the automotive industry, comparatively speaking, has fallen short. The accelerating convergence of automotive-specific and generic consumer technologies presents a huge untapped opportunity for automakers to build tomorrow's car-as-an-experience value proposition, even as the pandemic accelerates full-speed digitization across the board.

# Executive Summary

Customer experience is among the key defining factors that drive an automaker's success. Moreover, a superior experience keeps the customer coming back for more. Customers appear to value experiences more than the act of ownership. A dramatic change can be seen in the car-buying experience, which has shifted from a dealership-centered process to one that incorporates a number of digital touchpoints, thereby reducing the dependency on dealerships. While this is a progressive change, the car-buying journey is still largely linear. The insertion of digital interventions has opened a plethora of opportunities for overhauling and enhancing this experience, making it omnichannel, seamless and richer for buyers.

A case in point is the digitization of the car-buying and servicing journeys as a result of reduced customer foot traffic in dealerships in these socially distanced times. The auto industry has accelerated the digitization of most steps of the customer journey from researching and configuring the car, through online finance, home delivery, online service booking and contactless service (dropping off the car for service and picking up). But there are still many gaps that remain to be fulfilled from manufacturers and dealers in terms of making the customer experience more seamless. And the onus is on automotive original equipment manufacturers (OEMs) to facilitate this by being present where the customer is and then arming dealers with action-oriented insights based on the large volumes of customer journey data -- present but most times underutilized. Dealers, traditionally the face for the automaker, can intervene at the right moment and do what they do best (i.e., engage with the customer and drive conversions and focus on customer delight).

To illustrate how there are gaps within the auto industry compared to other industries, take the typical day of a millennial, living in an urban setting. They use Amazon for smooth e-commerce, payments and tracking. They often watch Netflix, which already knows their interests and makes that clear when they arrive online. They expect flawless service experience at an Apple store and shop for groceries on Instacart and receive them contactless from the comfort of their homes with the peace of mind of no-nonsense instant refunds.

In comparison, the car buying experience is inconsistent, non-transparent and, sadly, an ordeal. This is yet another reason that millennials refrain from owning automobiles, which is supported by studies that compare customer experience across industries and within the automotive industry. Automotive dealerships, and carmakers on the whole, have not fared well when it comes to delivering a pleasing customer experience, with auto dealers standing out among the bottom four in terms of customer experience.<sup>1</sup> In a world where organizations are striving to architect their processes to revolve around customers, automotive customer experience leaves a lot to be desired. A 2019 survey by Cox Automotive indicated that 61% of car buyers said their experience was the same or worse than the last time they bought a car. Car buyers also indicated that they are least satisfied with the length of the process at the dealerships and indicated the paperwork and negotiation as the most frustrating parts in the car-buying process.<sup>2</sup>

Forrester's CX 2020 report noted that even with accelerated digitization of the customer journey amid the COVID-19 pandemic, the impact on the ease, effectiveness and emotional attachment to the brand were small and inconsequential, with little to no improvement in automotive customer experience from 2019 to 2020.<sup>3</sup>

This presents an opportunity for improvement across the customer journey. This paper deconstructs the current experience from the customer's viewpoint throughout the shop-buy-own lifecycle, including inside-outside-around the car experience, to provide a persona-based framework that delivers moments of truth and enriched experiences across various touchpoints.

## The changing media for “moments of truth”

There are “moments of truth” that elevate the experience and act as decision points as the customer traverses through the car ownership lifecycle. The typical car ownership journey can be broken down into six stages, with each stage having the potential to deliver on a moment of truth for the customer, dealer and OEM.<sup>4</sup>

### Key moments of truth

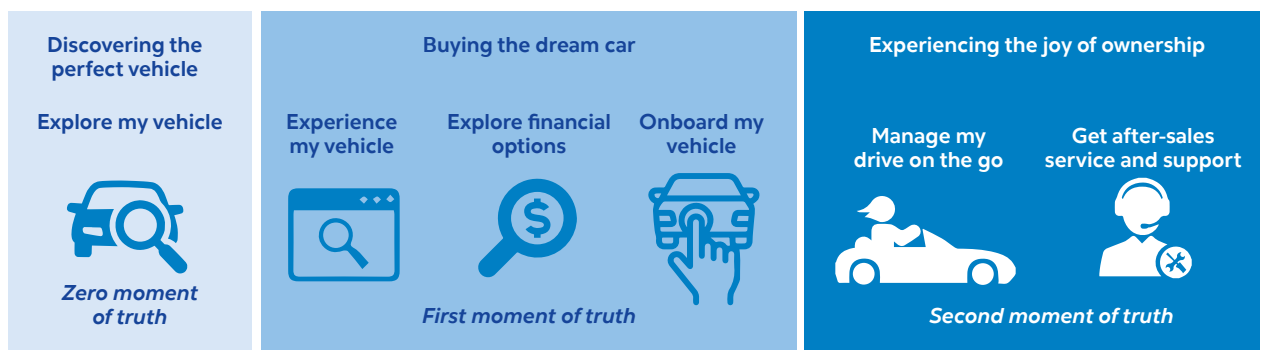


Figure 1

Digitization has impacted these stages of car ownership, differently and widely. In fact, according to a recent Google study, 92% of car buyers researched online before they made a purchase.<sup>5</sup> The COVID-19 crisis revealed that customers are willing to buy a vehicle online, even without a physical interface.<sup>6</sup> The Google study indicates that automakers have quickly shifted from offline-only transactions to digitization of the full vehicle-buying journey, with purchase and delivery processes also moving online.<sup>7</sup> The research points showcase that the “zero” moment of truth for a vast majority of customers has shifted online and the trend is here to stay.

Online experience is growing in importance as buyers are spending less time in-market. New buyers are going online for research, including third-party websites, blogs and testimonials such as TrueCar, Autobytel and Vroom (for used cars). In fact, more than one-third of car buyers research online and visit just one dealership before purchasing.<sup>8</sup> OEMs need a strong presence on third-party sites, as they are considered unbiased and objective sources to learn about a vehicle.

In a path-breaking change for the offline mode of customer connect, Audi worked with its digital partners to create the Audi VR Experience and Holoride for its e-tron electric vehicle (EV).<sup>9,10</sup> Two fully functional virtual reality concepts were used in dealerships, a shopping mall outlet, as well as the location of the customer’s choice. The aim: offer a realistic experience of an individually configured car, both from inside and out, extending the possibilities for the zero moment of truth beyond the physical realm.

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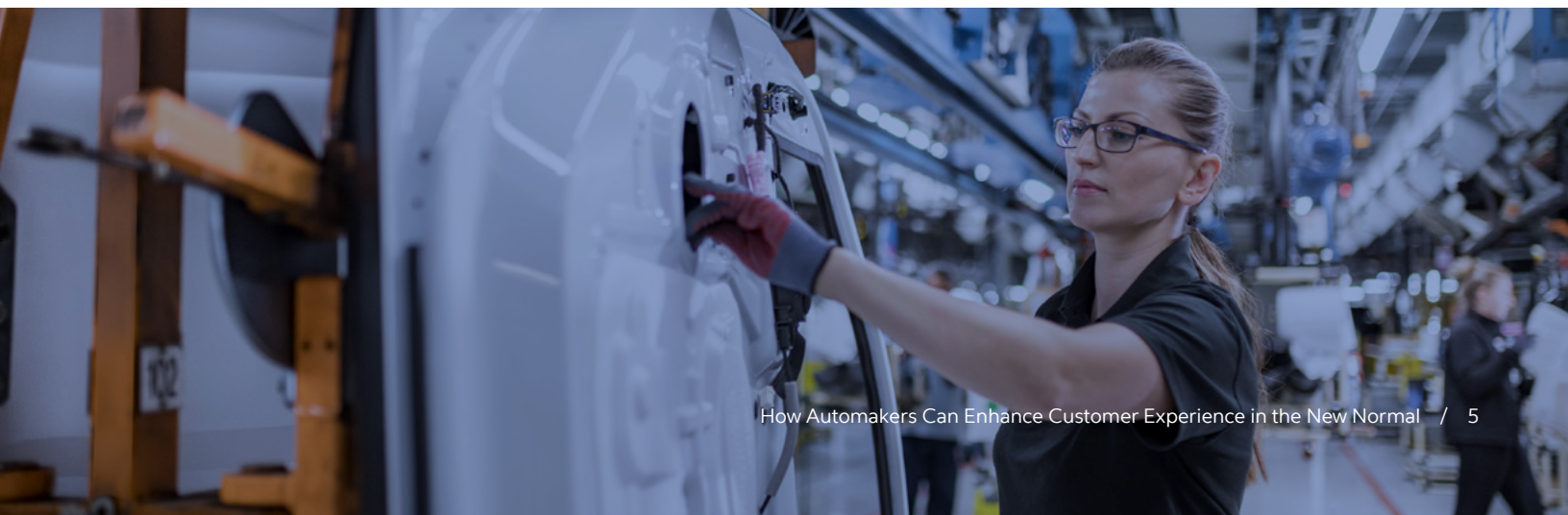
The push for personalized campaigns and discounts also requires connected digital touchpoints. Digital retail is best suited for transforming the most cumbersome part of the buying journey – knowing the incentives, finding the best deal and doing the paperwork to deliver the first moment of truth.

Relatively new entrants in the auto industry, such as Tesla and used car online platforms like Carvana, can sell cars directly without a dealership interface and thus have a head start on traditional automakers in defining a comprehensive experience for their customers. Traditional auto manufacturers with franchised dealers can't sell directly to customers; they rely on dealers to deliver purchase and ownership experience and, as such, haven't reaped the true benefits of consolidating and integrating all customer touchpoints.

Improving the sales experience is still actively sought by automakers, but vehicle usage, after-sales, or service experience (second moment of truth) is often ignored. The new paradigm of connected, autonomous, shared, electric (CASE) vehicles is sure to generate new economic opportunities in an otherwise slowing global industry, which is expected to fall more than 20% in 2020 and not expected to return to pre-pandemic levels before 2023.<sup>11</sup> However, legacy OEMs and dealerships will increasingly strive for a valuable customer interface in the after-sales service space.

Apart from the conventional sales and service process, there are avenues to augment the customer experience within the car to deliver the second moment of truth. A recent study states that when owners struggle to figure out how to use features, they do not develop a positive connection to the vehicle and the brand. Drivers should be equipped to get the most out of their vehicles by revealing advanced features and functionality in context when it matters most, using intelligent voice-enabled assistants or similar mechanisms.

Automakers must find ways to deliver on all three moments of truth for the customer. The car of today and tomorrow will not be sold as a product but as a lifestyle or an experience.<sup>12</sup> What they need is a well-connected, integrated, cohesive, intelligent, personalized, and omnichannel customer journey that unites the customer with the brand. Whether it's a new customer buying a new car, someone willing to trade in their vehicle or someone just looking for service, delivering unforgettable experiences should be the cornerstone of any company's strategy. In other words, automakers must strive to meet and exceed customer expectations by moving unnecessary manual steps of the ownership journey online and offering a compelling and comprehensive customer experience.



## Visualizing a comprehensive customer experience

The fundamentals of availability of touchpoints at each stage, the depth of interactions, and engagement offered to the customer set the foundation for a comprehensive customer experience.

The Customer Experience Pyramid provides a structured framework for advancing the customer journey.<sup>13</sup> The framework is vital for visualizing interaction through the customer's eyes – ensuring that the customer travels the journey seamlessly without losing identity or action throughout the process.

### Guiding principles for a comprehensive customer experience

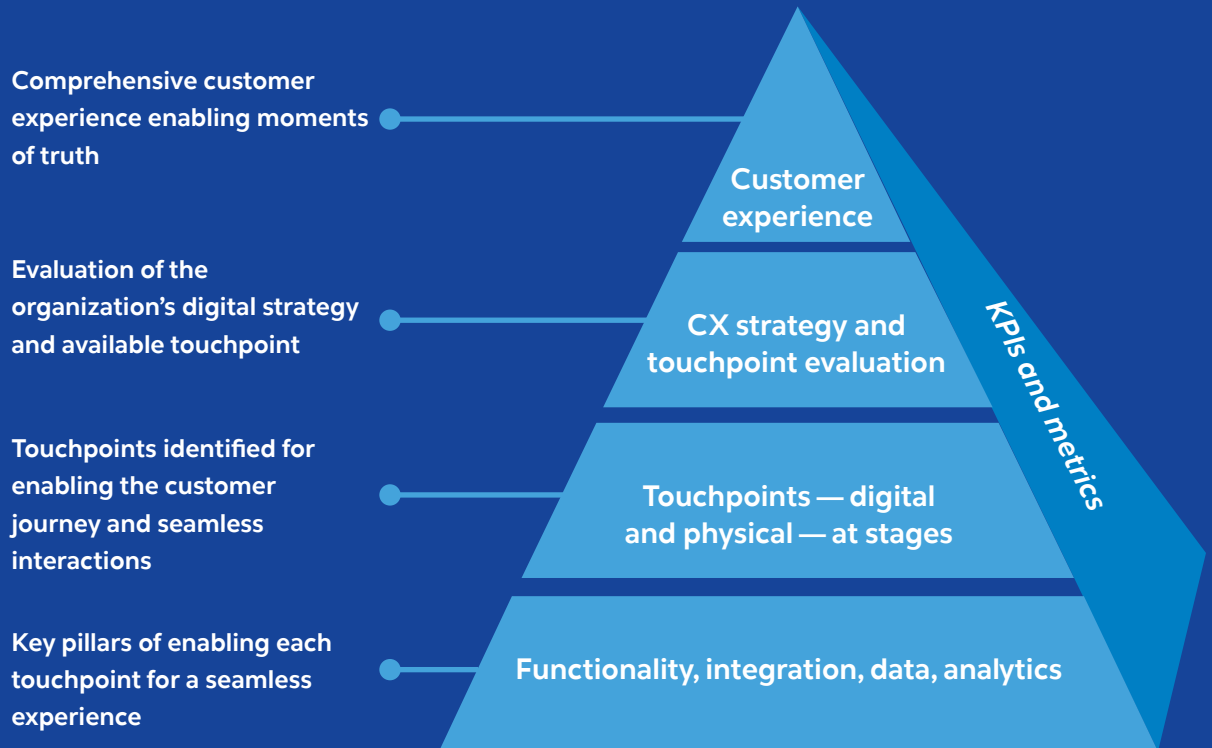


Figure 2

Physical touchpoints are generally considered more tangible ways of ensuring that a customer is introduced to new vehicle models. These include (and are not limited to) brochures, dealerships, test drives, marketing events, auto shows, service shops, contact centers, etc. Digital touchpoints, such as car configurators, online reviews, ownership applications, AR/VR guided digital dealerships, or virtual assistants, do not always have a tangible look and feel.

## Touchpoints across the customer journey

	Explore my vehicle	Experience my vehicle	Explore financial options	Onboard my vehicle	Manage my drive on the go	Get after-sales service and support
<b>DIGITAL</b>	 Third-party websites OE web portals Configurators	 Influencer mktg OE online content AR/VR app OE experience zone	 E-commerce portals OE configurators Third-party websites	 Ownership app	 Ownership app Virtual assistant	 OE website Ownership app DIFM portal
<b>PHYSICAL</b>	Dealership Auto shows Conventional marketing	Dealership test drive Rental car agencies Contact centers - test drives	Dealership Contact center	Dealership Contact center Owners' manual	Dealership Contact center	Dealership Contact center Service center

**Figure 3**

While these mechanisms look disparate, the onus is on the OEMs to seamlessly connect the physical world with digital touchpoints, so the customer journey is largely consistent and creates a delightfully new experience.

Customers can take any combination of physical or digital path, as they traverse each stage's discovering moments. Auto shoppers usually cannot distinguish between the dealer and the manufacturer touchpoints and most OEMs have been working diligently to improve sales and service at the dealer level through massive training and incentives/rewards programs based on customer satisfaction scores. Whichever stage the customer is in their journey, they need to have their questions answered according to their preferred touchpoint and it is in the best interests of OEMs to help customers with answers. Figure 4 depicts three sample user personas to try this with.

Take George, a military veteran. George is reliant on his preferred dealership for anything related to his vehicle. Another persona (Sarah) is a young, tech-savvy developer working at a software company. She lives in a smart house and enjoys the latest in technology. She relies on all digital channels for buying as well as servicing her car. John, on the other hand, is an 80s kid who not only likes using technology in most parts of his life but also enjoys the look and feel of all his major purchases. He uses a mixture of digital and physical channels for interacting with the car and the services associated with it.

## A persona-based approach to customer journey mapping

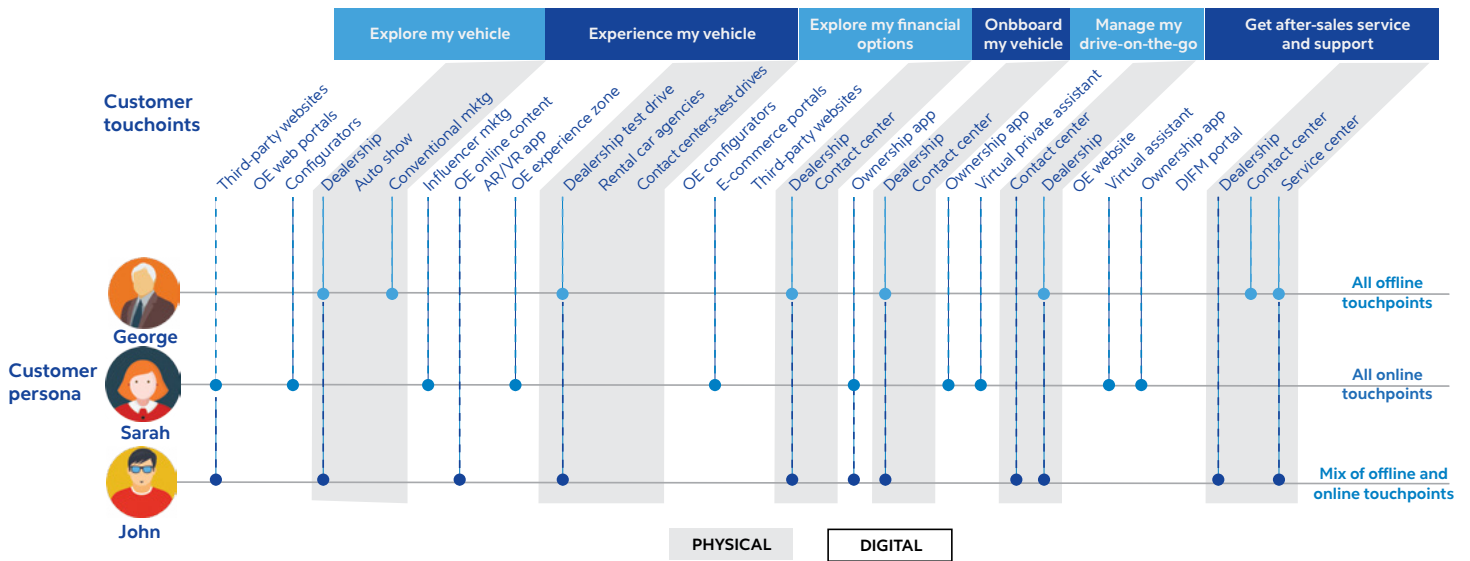


Figure 4

The automaker here, in partnership with third-party sites, could arm its channels with digital marketing tools and actionable intelligence by integrating multiple data sources that will help the dealer understand the needs of customers based on their behaviors and suggest next best actions/directions. The larger data set availability that dealers generally do not possess would allow OEMs to generate and provide these insights to the dealerships.

As an illustration of the above point, consider a recalled part to be replaced in Sarah's car. This could trigger a part replacement alert that would be passed to her virtual assistant, which could book an online pickup of her car and delivery of a sanitized replacement car from the dealer, with inputs from Sarah's calendars and commute route and access to nearby dealerships' parts inventory.

The touchpoint choices and the experience offered are foundational to an OEM's relationship with the key personas. Any inefficiency or disconnect in the relationship can distort the customer experience, which potentially could have been a moment of truth for the customer.

Be aware: There could be numerous personas, each with different behavior characteristics, across the journey moments. Therefore, an OEM's best play is to work with dealers to provide a consistent and coherent online and in-store experience, throughout the stages and touchpoints, that ties everything together and results in a delightful customer journey. Depending on their digital strategy, OEMs can pick the platforms, tools and processes that are best suited in terms of cost and derived value.



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## An approach to customer experience diagnostics

Given the pace of industry change, and the way that customers respond, it is vital for OEMs to continuously evaluate and evolve their current systems and processes that impact the customer experience. We recommend that OEMs inculcate a continuous diagnostics process that is centered on assessing their readiness in meeting and exceeding customer expectations across the organization.

The approach should focus on evaluating business process, practices, systems integration, technology adoption and agility, while benchmarking against best-in-class digital capabilities. The first step should be to gather inputs from company executives and customers, layering them with priorities based on the company's digital strategy and evolve an action plan.

The approach should broadly comprise the following steps:

- I Evaluate the existing customer experience.** Company executives should provide their responses to a variety of questions targeting the different stages of the customer journey. This facilitates an as-is assessment of the current state of the organization's process and systems. The identification of strengths and weaknesses for each of the touchpoints should be based on a structured assessment with respect to four dimensions and levels of maturity (as depicted in Figure 5).
- I Assign priorities.** This needs to be applied to each touchpoint with respect to the most important user persona. The next step should be to overlay the organization's digital strategy on top of the evaluation completed in the first step. This provides a level of importance to each customer touchpoint, depending on the OEM's focus, future plans, expenditure and directives from executive management.
- I Establish outcomes for each touchpoint across the customer journey.** This step should consider the current standing of the OEM at each step of the customer journey and ensure that the organization understands the touchpoints to act on, reassess, monitor or continue using.
- I Create an actionable roadmap.** The outcomes of the assessment should be cross-referenced with industry best-in-class measures, which enables a suitable roadmap to be unfurled and applied. One suggestion: Take inspiration from complementary industries, as well as examples from players in other industries, which typically provide a great customer experience.
- I Seek feedback and then reassess.** This should be a repetitive exercise to keep the organization updated and working together to continuously exceed customer expectations. Each re-evaluation must incorporate the latest industry trends and enable suitable course corrections on the road to customer experience excellence.

# The dimensions of digital maturity

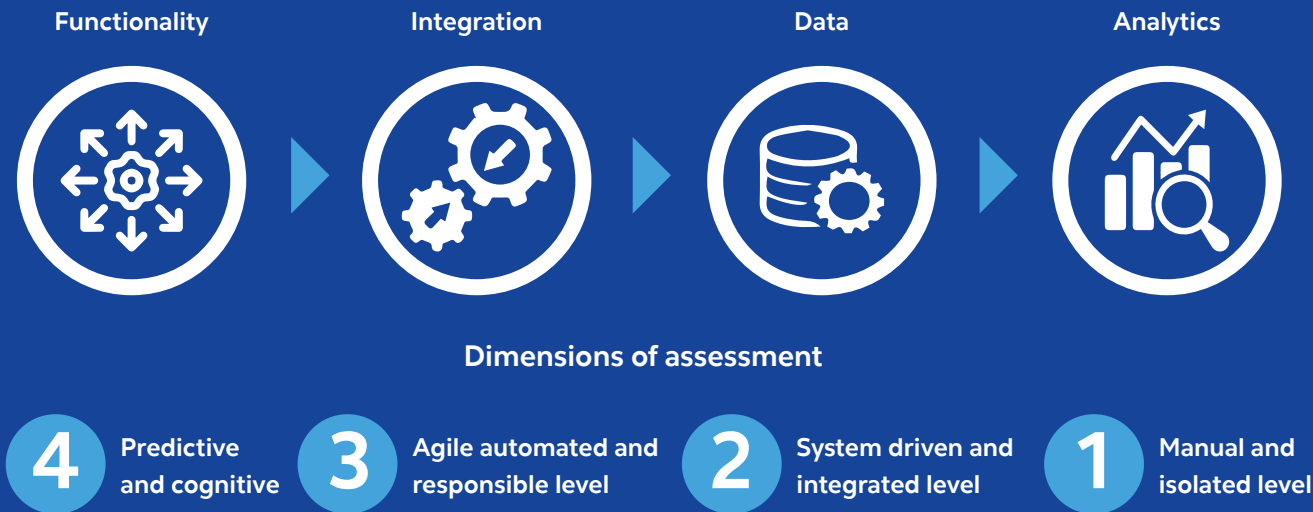


Figure 5

# Creator-produced (non brand-created) videos compared to brand-created ones

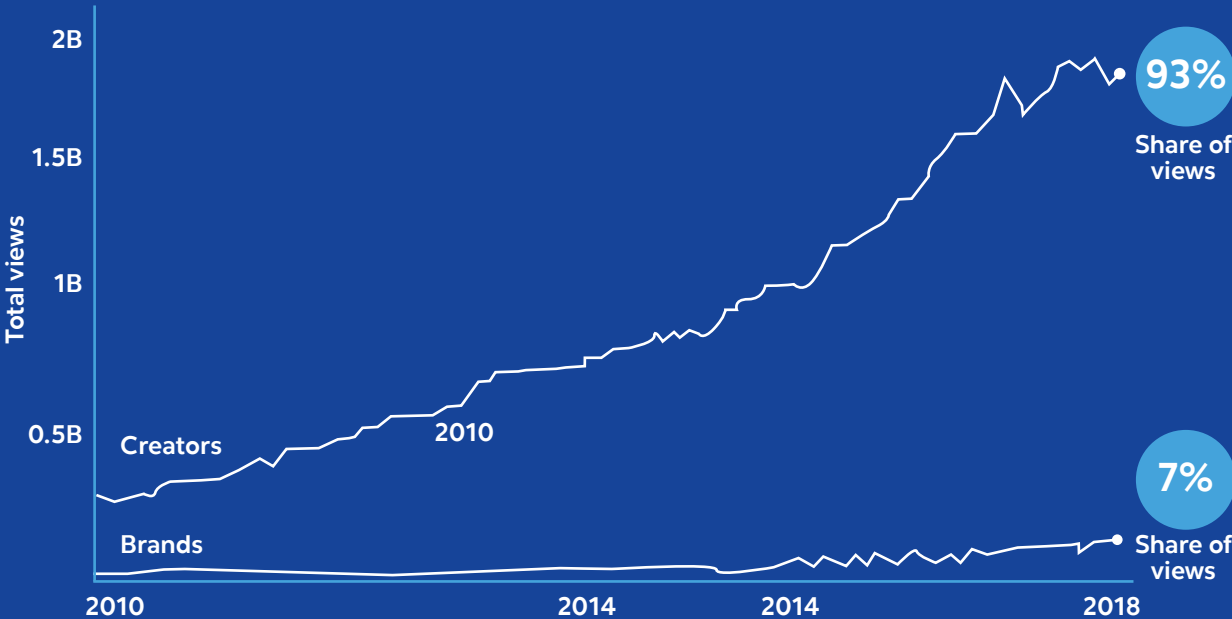


Figure 6

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## Looking Ahead

It's a proven fact that if customers are given a great experience, they tend to come back for more. A recent survey by CDK Global revealed that 56% of car shoppers would buy more cars if the process was made easier; 72% said that they would visit dealerships more often if the buying process was improved.<sup>14</sup> This survey also noted that auto sales could increase approximately 25% if the retail experience was improved. Several similar examples are available not only in automotive but also in other competing industries.

Many automotive OEMs have already started taking the right steps to improve the customer experience to tap this potential of increased revenue. Ford, for example, through its digital channels, is helping Mach-E customers get answers to their shopping questions such as understanding the potential benefits of owning an electric vehicle, charging networks along customers' routes and home-charging solutions. It is also enabling customers to pay a direct deposit and reserve the car online and is sharing recommended pricing with customers and dealers to simplify the purchase experience.<sup>15</sup>

Ford is giving customers the flexibility to add faster charging solutions to orders and finance such solutions with the vehicle, or purchase through the dealer or online at FordParts.com. It has also paired up with Amazon to install these solutions at the customer's home.<sup>16</sup> Ford is also simplifying the onboarding experience by letting Mach-E customers personalize their ordered car by creating their profile and setting their preferences -- such as charging locations, climate control, etc. -- from the comfort of their homes on Ford's apps and websites, and be ready before the actual delivery of the vehicle.<sup>17</sup>

Toyota, through its SmartPath technology, is aiming to give its customers greater control by integrating the user experience across Toyota's websites, dealers' websites and physical dealer locations. Customers can choose the path that works for them -- purchase entirely online with a digital appointment with a dealer, or starting the process online, saving their preferences and options and then resuming the process at a physical dealership. Toyota is also striving for customers to gain increased transparency into current inventory and real-time pricing; this enables dealers to better serve customers by learning about their journey, and the preferences and options saved online, and better sell their inventory.<sup>18</sup> Not only does it save time for dealers, but it also lets them focus on the basics: selling and focusing on a better customer experience.

If we look at other industries, Disney is one such brand that offers a truly cohesive customer experience. It has carefully crafted offline and digital touchpoints to meet and exceed all customer expectations. From the company website to its brand-decorated credit cards, apparel, and visiting Disneyland in person, Disney offers an impressive example of a cohesive customer experience that all brands should emulate. The My Disney Experience mobile app is consistently rated at 4.6-plus (out of 5) in personalized user experience and provides all the information and reservation facilities that anyone can expect.<sup>19</sup>

Hilton, another example, furnishes a seamless omnichannel experience. It achieved an American Customer Satisfaction Index (ASCI) score of 80, tied for the best among hotels. While Hilton has an innovative history (it was the first hotel to put TV in rooms, introduce room service, etc.), it is making use of technology to provide innovative features for customers such as unlocking rooms with smartphones as well as hyper-connected room, which remember customers' preferences each time they check-in.<sup>20,21</sup>

From our industry experience, the following factors are critical.

- I Focus on the basics.** Take a human-centered approach to car shopping and technology adoption. There is a formula for getting customer experience right, and it starts with fundamentals. The right culture, new ways of working and an empowered workforce form the basis for revenue opportunities that the industry has traditionally missed. If done right, digital technologies can help reinforce this formula for creating phenomenal customer experiences. Approximately 82% of top-performing companies are paying close attention to the human experience of digital and tech.<sup>22</sup>
- I Be where the customer is.** Digital content today plays an important role in buyer consideration. Influencer marketing is at an all-time high and serves as an entry point for building relationships for OEMs. The leads and the interest generated need to be nurtured using the appropriate digital tools. As seen in Figure 6, creator-produced videos (non brand-created videos) get significantly more engagement than brand-created ones.<sup>23</sup> OEMs can partner with these creators as well as produce more engaging digital content to engage consumers and creators in products.
- I Augment the physical touchpoint experience.** The automotive retail buying experience falls apart once the customer leaves the digital space and walks into a dealership because customers have to start all over: from conveying their wants and needs to checking their configured options in stock. Customers often end up frustrated, realizing that online vehicle configurators were not integrated with dealer inventories; the ideal vehicle isn't always sitting in the local dealer's inventory -- and it may not have even been manufactured. The buying process is usually dated, which forces buyers to waste time and effort that they would rather spend elsewhere. Information about customers allows brands and retailers to create a curated shopping experience that will make the experience far more convenient for shoppers. Delivering omnichannel digital campaigns across the web, social media, email, in-app, SMS texting, etc., can help bind together the overall brand experience.
- I Expand the omnichannel selling experience, online.** Online automotive retailing is still a small percentage of total car sales. This means that there is tremendous potential to grow. Frost and Sullivan has suggested that as many as 1.3 million vehicles could be purchased online by consumers by 2035.<sup>24</sup> In fact, 49% of consumers are already willing to buy a new vehicle entirely online.<sup>25</sup>

Companies such as Tesla Inc., Rivian Automotive and Porsche North America are already selling cars directly to customers through digital channels. Traditional automakers that operate in a franchised-based model with their dealers have made and continue to make significant efforts and progress toward e-commerce based selling but are constrained by the dealer network's sales and service interface. Dealers lack required state-of-the-art digital tools; third parties are bridging the gap for the time being but OEMs will have to take on the onus by investing in these digital tools to capture data at every step of the customer lifecycle and share those insights with dealers to enable better selling and customer experiences.

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OEMs will need to focus on e-commerce and work with dealers on evolving toward the next set of dealer agreements to support the e-commerce journey.

**I Enhance/integrate the in-car and around-the-car experiences.** Modern customers spend a good deal of time in cars. Hence, the in-vehicle experience should be as pleasant as possible. As noted above, today's car (as well as tomorrow's) should be sold as an experience.<sup>26</sup> Ownership apps and services tend to bridge the gap between customer expectations, OEM services and the mobility ecosystem. These applications and services become even more important for EV customers, as they can manage and control many aspects of their vehicle from their devices, which would otherwise be a chore. Many customers cite multiple concerns when owning an EV, such as charging infrastructure and after-sales support along with cost and range anxiety. A typical EV customer expects a well-rounded ownership experience that addresses such concerns. Customers want a connected, intelligent and easy-to-use ownership application, which can address all major aspects of the customer journey while inside, outside and around the car.

**I Achieve outstanding levels of customer service.** OEMs should invest time and money to achieve best-in-class customer relationship management (CRM) processes, tools and usage across the touchpoints. Integrated CRM processes naturally uplift the touchpoint experience through personalization. The industry should take advantage of automation for service experiences such as online service booking, pricing and billing concerns, etc., but make sure that customers have a human connection when needed. A leading OEM has greatly improved customer experience by appointing a single point of contact for a customer, every time he or she calls, in which the same agent is responsible for ensuring end-to-end resolution. The same could be said of actual physical car service. Traditionally, most OEMs have struggled in this area, as many customers often perceive car service as time consuming, opaque and expensive.

In fact, a Cox study revealed that 77% of customers believe that the dealerships will overcharge them, which makes it the top reason for not returning to a dealer for future needs, including service.<sup>27</sup> This should become the first avenue of change when targeting a seamless customer journey, since customers consider the service experience to be even more influential than the last buying experience when purchasing their next car.<sup>28</sup> Making changes to the after-sales service experience should therefore be one of the key areas of focus.

**I Embrace customer-centricity.** Organizations such as Amazon, USAA and other customer experience leaders have specialist groups and centers of excellence (CoE) that cut across their business functions or have partnered with other companies to help them tie together the physical and digital customer experience. These CoE oversee multiple projects, leverage synergies and create efficiencies. They have been able to prioritize customer expectations across teams, as well as delight the customer with a hassle-free experience. Case in point: Boston Scientific pushed decision-making closer to customers and markets and introduced small Agile, cross-functional and customer-focused teams and gave them full autonomy, breaking down silos and paving the way for customer centricity and success.<sup>29</sup> Auto OEMs should derive deep inspiration from these customer experience leaders.

The customer of today and of tomorrow will demand more from their car, and will value the overall experience more than just the ownership. Successful automakers will need to define their business processes, much in line with these changing demands, and inculcate a customer-centric culture across the organization. A technology-focused strategy that combines digital integration and cultural alignment can help OEMs stay ahead of the customer experience curve.

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## Digital Operations

Cognizant Digital Operations helps clients re-engineer, digitize, manage and operate their most essential business processes, lowering operating costs, improving user experiences, and delivering better outcomes and topline growth. Across the practice, we are creating automated, data-driven platforms and industry utilities. We help clients run better by applying traditional optimization levers, and we help them run differently by creating competitive advantage through making their processes digital-ready, which often leads to more effective operating models and corresponding topline revenue growth. Visit us at [cognizant.com/cognizant-digital-operations](https://cognizant.com/cognizant-digital-operations).

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## About Cognizant

Cognizant (Nasdaq-100: CTSH) is one of the world's leading professional services companies, transforming clients' business, operating and technology models for the digital era. Our unique industry-based, consultative approach helps clients envision, build and run more innovative and efficient businesses. Headquartered in the U.S., Cognizant is ranked 194 on the Fortune 500 and is consistently listed among the most admired companies in the world. Learn how Cognizant helps clients lead with digital at [www.cognizant.com](https://www.cognizant.com) or follow us [@Cognizant](https://twitter.com/Cognizant).

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