

Critical Capabilities for Voice of the Customer

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Initiatives: [CRM Strategy and Customer Experience](#)

VoC application vendors have varying strengths in the capabilities that organizations of different sizes need to manage customer feedback. Application leaders can use this report to understand key vendors' capabilities, identify those aligned with their use cases and shortlist promising candidates.

This Critical Capabilities is related to other research:

[Magic Quadrant for Voice of the Customer](#)

[View All Magic Quadrants and Critical Capabilities](#)

Overview

Key Findings

- The voice of the customer (VoC) application market encompasses around 35 vendors that are able to collect, analyze and act on direct, indirect and inferred customer feedback. Of these, only 14 met the inclusion criteria for this research.
- Organizations have different levels of VoC maturity. Less mature teams tend to pursue lighter weight functionality, such as quick, self-service email, SMS and in-app surveying, combined with dashboard reporting and email notifications. More advanced teams need more complex capabilities, such as advanced case management, customer journey orchestration, advanced predictive and prescriptive analytics, and automated actions.
- There is a growing appetite among organizations to address all their enterprise VoC needs with a single solution. Vendors are responding to this trend by expanding their capabilities to meet broader demands across more use cases.

Recommendations

Application leaders responsible for CRM strategy and customer experience (CX) should:

- Scope their VoC needs by gathering business requirements and objectives from key stakeholders across the enterprise. These include colleagues from marketing, customer service, sales, digital commerce, customer success, IT, R&D and operations, and from external sources such as reference customers and product ratings and reviews.
- Create a vendor shortlist by identifying desired short- and long-term levels of VoC maturity, prioritizing stakeholder requirements and aligning stakeholder groups with the use cases in this research.
- Focus on adoption in a single department before expanding across the rest of the enterprise, involving secondary and tertiary departments in your evaluation, and monitor the program health (e.g., daily logins and actions executed) throughout.
- Integrate VoC with other business applications including CRM and user research applications to improve the overall CX.
- Ensure that the VoC investment does not cause unnecessary complication and another silo of customer data, and thus stifle creation of a single view of the customer, by working with data architects to determine an optimal customer data architecture.

What You Need to Know

More than 1,000 vendors globally offer some form of feedback capability, but the majority provide no more than simple email surveying of customers to collect direct feedback. Of these, only 100 or so show potential to move beyond their current scope and provide a comprehensive view of the VoC. Of these 100, Gartner sees around 35 leading the way, based on their vision and technology. Roughly half of these 35 vendors have annual revenue of under \$25 million and are not covered in this research. This research looks at the top 14 VoC application vendors and how their products compare in different use cases.

Business stakeholders want to move away from manual, disjointed and siloed departmental approaches to listening to and understanding customers, and toward a more integrated, automated and continuous approach to collection, analysis and action taking. As a result, Gartner is taking a greater number of inquiries about VoC applications than ever before. Application leaders can use this research to identify the most suitable of the top 14 VoC vendors for three specific use cases.

Gartner commonly observes the following departments using VoC applications to help them achieve their strategic customer goals: enterprise CX, marketing, customer service, customer insight, market research, customer success, operations, R&D, product development, sales, digital commerce, strategy, IT and HR. Depending on the scope of the VoC program, one or more of these departments will be involved in the vendor evaluation process. Enterprisewide CX initiatives should always involve multiple departments.

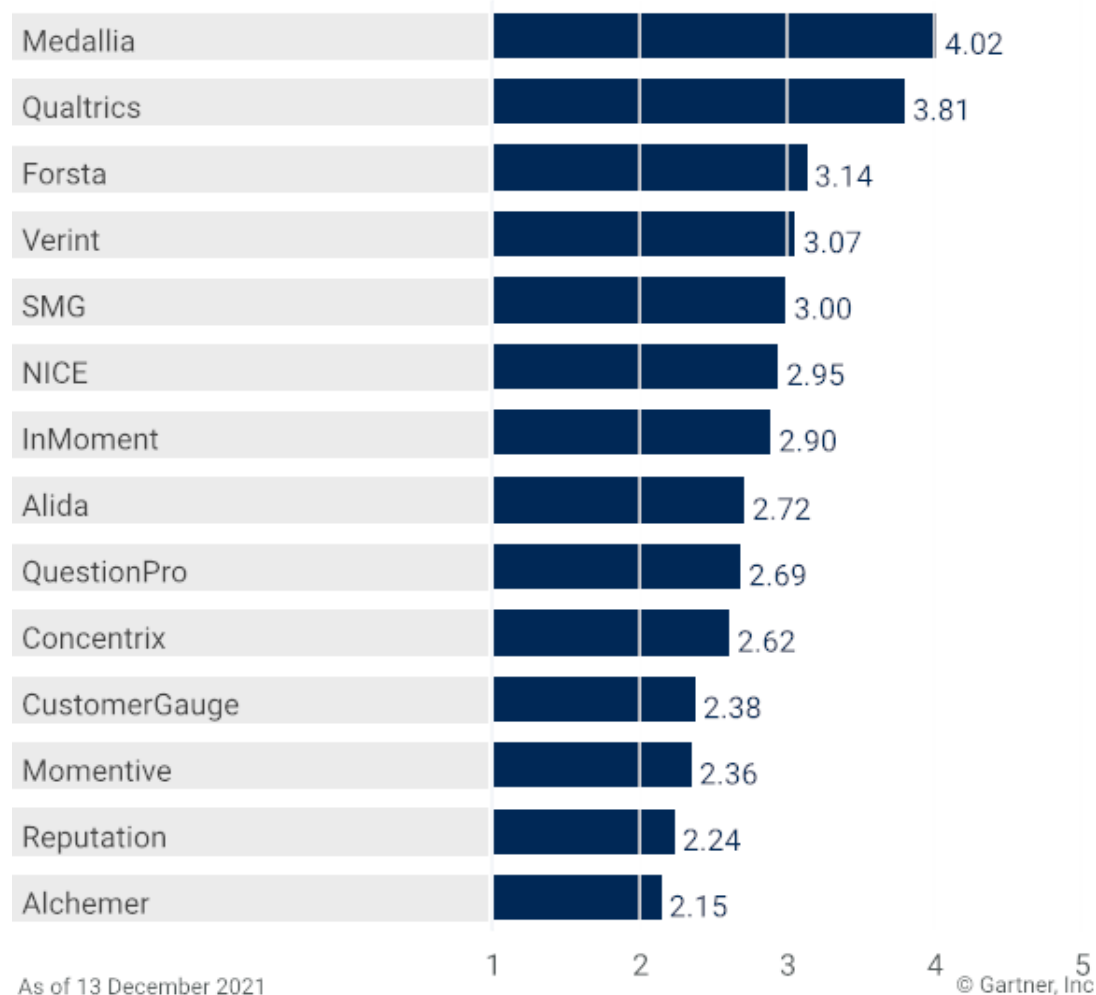
Gartner has aligned the critical capabilities and associated use cases in this research with the most common departments, organization sizes and business model types. Based on the emphasis of your VoC program (for example, you could be interested in what best suits a large B2C organization with a strong commitment to customer service) we strongly recommend that you adjust the weighting of the capabilities to better reflect your situation, rather than using the use case tables below without adjustment. To do this, click the “customize” button on the “interactive” version of the document and adjust the weightings of the capabilities within that use case. This will enable you to better assess the functional appropriateness of the vendors within this research.

Analysis

Critical Capabilities Use-Case Graphics

Vendors' Product Scores for Department Type Use Case

Product or Service Scores for Department Type

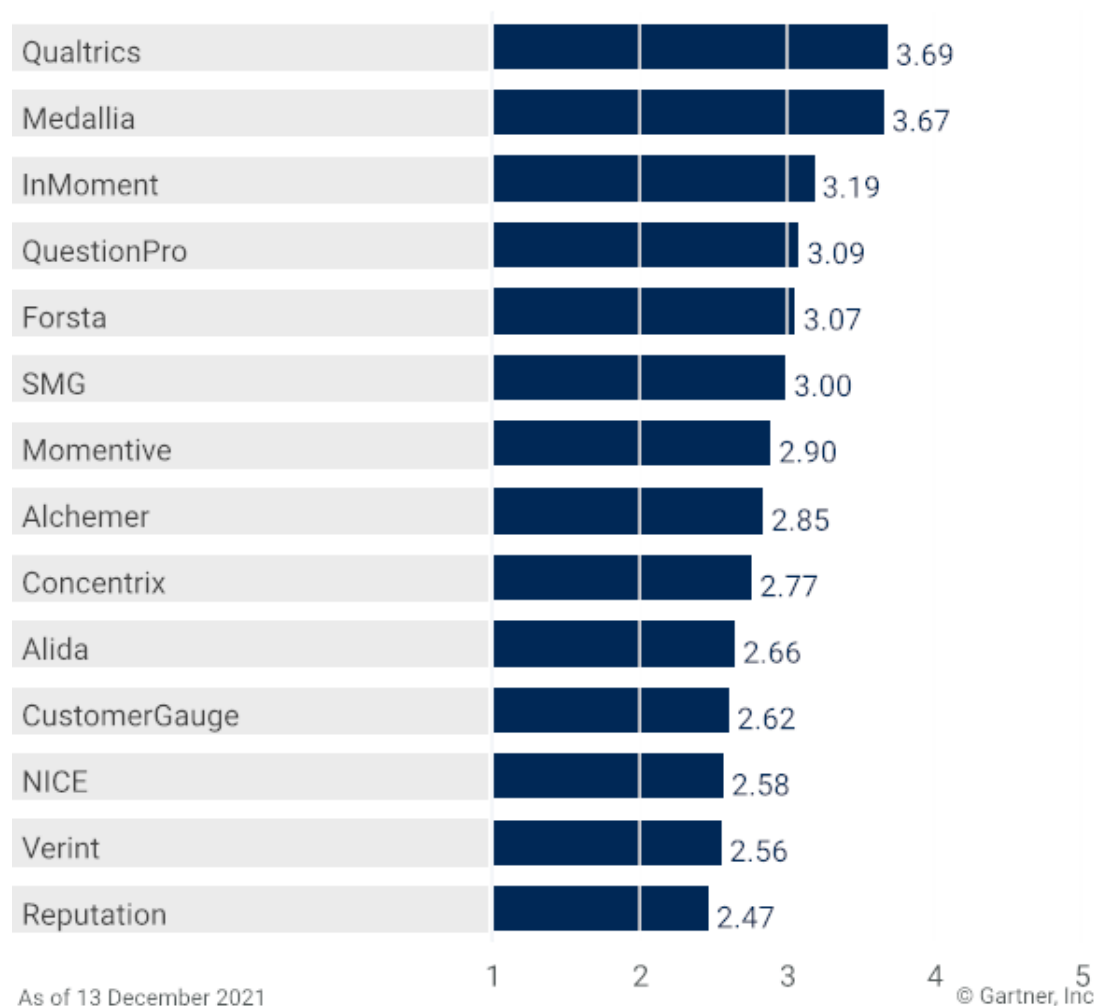


Gartner.

Source: Gartner (December 2021)

Vendors' Product Scores for Enterprise Size Use Case

Product or Service Scores for Enterprise Size

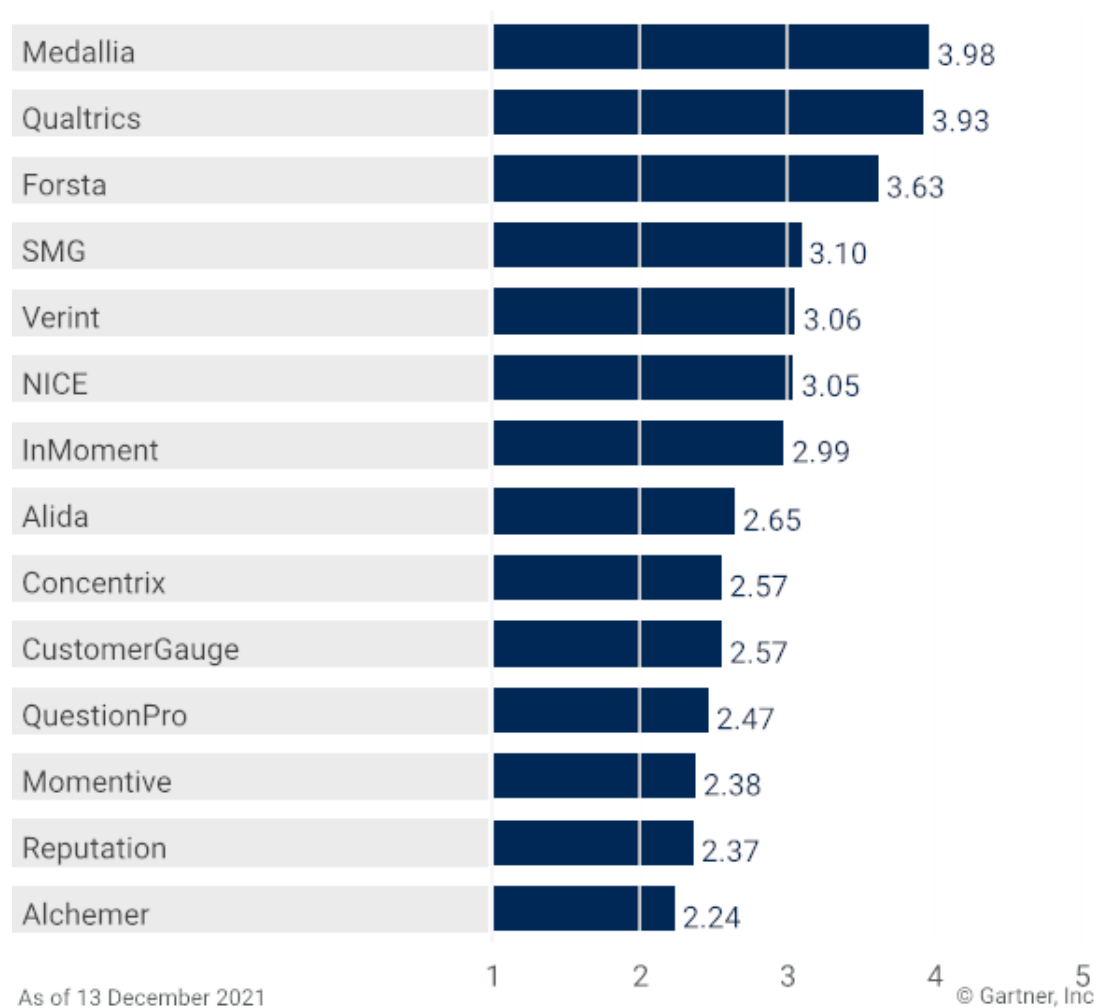


Gartner

Source: Gartner (December 2021)

Vendors' Product Scores for Business Model Use Case

Product or Service Scores for Business Model



Gartner

Source: Gartner (December 2021)

Vendors

Alchemer

Alchemer's VoC application, also named Alchemer, provides fast time to value because it is easy to configure, flexible and strong on self-service. The application is usually configured to a customer's specific use case needs across various departments.

In support of core VoC application functionality, Alchemer's strongest capability is its use of automated actions, for example, to trigger third-party application processes. It trails its competitors in the diversity of its indirect and inferred data types collected and the range of analytical types (e.g., speech, video, journeys, predictive) supported.

In support of the different department types, Alchemer rates best against competitors at enabling marketing departments, where it ranks in the top third primarily due to its solid support for marketing analytics capabilities. It also scores well for its support for on-site/frontline operations, where over 40% of Alchemer implementations take place, with frequent use of QR codes, kiosk surveys and out-of-the-box analytics by region and branch.

In support of the different enterprise sizes, Alchemer has the second-highest score for enabling midsize businesses compared with other VoC solutions evaluated. It has a low score for enabling large enterprises because it lacks functionality, such as support for complex program governance and program health management.

In support of different business models, Alchemer has midtable scores for all three (B2C, B2C and B2B2C) business models.

Alida

Alida's CXM platform blends an established customer research solution with a new, complementary VoC application built on the same architecture.

In support of core VoC application functionality, Alida's strongest capability is its use of analysis and insight compared with competitors because of its heritage in consumer research. However, it lacks advanced automated action capabilities and associated implementation experience.

In support of the different department types, Alida has the second-highest score in this evaluation in terms of enabling marketing departments. Its weakest comparative score is for its ability to enable customer service departments due to the absence of native support for functionality such as collection of feedback through chatbots, interactive voice response (IVR), call recording, speech analytics and agent coaching.

In support of different enterprise sizes, Alida is better at enabling large enterprises, for which it is ranked midtable. It is weaker in support of midsize businesses, for which it is ranked in the bottom third due to its lower investment in the commercialization of this segment.

In support of different business models, Alida places in the top third for its ability to support the B2B2C business model. Its customers tend to be large, brand-led B2C and B2B2C organizations in retail/consumer goods, high tech, financial services, media and healthcare industries. It is weakest in its functionality to support B2B business models such as complex account management data structures.

Concentrix

Concentrix's VoC application, ConcentrixCX, is functionally rich and has been developed for customers of the vendor's large, multichannel contact center business process outsourcing (BPO) and consulting services. It is well-positioned for all the core VoC functionality, but less so for departmental capabilities outside of customer service.

In support of core VoC application functionality, Concentrix places in the top third in this evaluation for both its data collection and automated action capabilities. It is ranked about midtable for its analytics and insight capabilities due its limited application of predictive and prescriptive analytics, and its reliance on professional services and third parties rather than self-service.

In support of the different department types, Concentrix is best at enabling customer service, for which it has the third-highest score, in part due to its ability to seamlessly blend VoC insight with customer service execution. It scores above average in support of the digital business capability, but ranks lower in its support of sales and on-site/frontline operations departments due to the company's focus.

In support of different enterprise sizes, Concentrix is far better at enabling large enterprises, for which it is in the top third of evaluated solutions. However, it has a low score for its support of midsize businesses as its BPO installed base is made up primarily of large enterprises.

In support of different business models, Concentrix has an above-average score for enabling B2C organizations, but low comparative scores for its support of B2B and B2B2C business models.

CustomerGauge

CustomerGauge's VoC application is primarily targeted at organizations looking to monetize their CX program by identifying account expansion opportunities.

CustomerGauge differentiates not through the variety of its VoC functionality, but through the depth of its investment in sales departmental and B2B business model capabilities.

In support of the three core VoC application capabilities, CustomerGauge scores better at data collection than analysis and insight, and automated action. However, it places in the bottom third of vendors for all three capabilities as a consequence of aligning its product investments to the needs of its intended market.

CustomerGauge has the highest score of the vendors assessed for enabling sales. Its application is tailored to helping revenue-responsible customer success managers, relationship managers and account managers. For example, it has invested in a B2B sales VoC methodology, an account-based data model structure and win/loss root cause analysis, rep engagement and sales conversion predictions. It is investing in benchmarking and infusing AI to help improve account retention, and to track and mitigate the absence of feedback from business customers. It is weaker in its support of the marketing, customer service and digital business department critical capabilities.

In support of different enterprise sizes, CustomerGauge scores about the same for enabling large enterprises and midsize businesses.

In support of different business models, CustomerGauge has the highest score in this evaluation for enabling B2B organizations, but the lowest for enabling B2C, and sits between the two in its support for B2B2C business models.

Forsta

Forsta's VoC application, Confirmit Horizons, is complemented by the 1Q21 merger with market research application vendor FocusVision. Forsta scores well across most critical capabilities, scoring in the top half for all but two.

In support of core VoC application functionality, Forsta is in the top third for its analytics and insight capabilities due to its historical focus on supporting market research agencies. This is boosted by the acquisition of Dapresy in 2020, which has delivered better data analysis and visualization functionality. It is also in the top half of evaluated vendors for both its data collection and automated action capabilities.

In support of the different department types, Forsta is the highest scoring vendor for enabling marketing departments. It is midtable for sales, customer service and digital, but in the bottom half for its support of on-site/frontline operations departments.

In support of different enterprise sizes, Forsta has midtable scores for enabling both large enterprises and midsize businesses. For large enterprises, Forsta has the longest expertise of evaluated vendors in dealing with complex hierarchical organizational environments and supporting cross-departmental program governance.

In support of different business models, Forsta has the highest score of all vendors for enabling B2B2C organizations. This is partly because it has the highest percentage of its VoC programs in this model type, but also because it supports multiple B2B2C partner/agent/dealer/channel hierarchy structures, including dynamic hierarchy creation based on ingested data. This is ideal for organizations with multiple (insourced and outsourced) locations and no direct access to partner/reseller systems. Forsta's scores for its support of both B2C and B2B business models are the fourth highest in this evaluation.

InMoment

InMoment's Experience Improvement (XI) platform is offered as part of an integrated offering that focuses on blending services and software.

In support of core VoC application functionality, InMoment is in the top half of evaluated vendors for both its data collection and analytics and insight capabilities. It has the third-highest score for its automated action capabilities, in part because of its investment in delivering real-time analytics, alerts and predictive reporting.

In support of the different department types, InMoment is placed sixth for the customer service and digital business capabilities. For example, in customer service, it supports the detection of customer journey anomalies and presents this to agents to help them in interactions. In the digital business capability, it has added in-app feedback through its acquisition of specialist Wootric in 2020. InMoment ranks lower for its support of marketing, on-site/frontline operations and sales departments.

In support of different enterprise sizes, InMoment scores third highest for enabling large enterprises, with a midtable score for enabling midsize businesses.

In support of different business models, InMoment has the third-highest score for enabling B2C organizations, for which it has the highest percentage of its customers' VoC programs relative to competitors. InMoment has a high percentage of its customers in the retail, travel and hospitality, automotive, banking, insurance and high-tech sectors. It scores in the top half for its support of B2B2C business models, but in the bottom half for B2B.

Note: The 3Q21 acquisition of Lexalytics was too late to be included in this assessment.

Medallia

Medallia's Experience Cloud product scores well across all the use cases in this report.

In support of core VoC application functionality, Medallia is strong in all aspects. It has the highest score relative to its competitors for both its analytics and insight and automated action capabilities, and the second-highest score for its data collection capabilities. It has a strong ability to operationalize the VoC and measure the business value achieved.

In support of the different department types, Medallia is in the top third of vendors for all departments and is one of the best suited applications for multidepartmental programs, where its functional breadth is of high value. Its average number of participating departments per project is higher than its peers. It is comparatively best at enabling digital business capabilities (in part due to its Decibel acquisition for session replay) and scores second highest for its support of on-site/frontline operations departments.

In support of different enterprise sizes, Medallia is far better at enabling large enterprises, receiving the highest score in this evaluation, but it also ranks in the top half for its support of midsize businesses. Medallia initially targeted large organizations looking to drive CX transformation across the entire enterprise due to its proven ability to govern CX in complex organizations. It has recently expanded its focus to include ambitious midsize organizations with prepackaged and templated solutions.

In support of different business models, Medallia has the highest scores in enabling B2C organizations, and places third in its support of B2B and second for B2B2C business models.

Momentive

Momentive's GetFeedback CX product is an application that runs natively on Salesforce but also supports integrations with Adobe, Google, Jira and Slack.

In support of core VoC application functionality, Momentive's best score is for data collection, but is low scoring compared to competitors for both the analytics and insight and automated action capabilities. Momentive lacks many types of indirect and inferred data collection and has a comparatively limited selection of analysis types.

In support of the different department types, Momentive is best at enabling sales and digital business capabilities, where it ranks in the top third of evaluated solutions. For example, it allows customers visiting a website or web-based products to select specific UI components, text or anything else they can see on the screen, in order to leave specific feedback automatically tagged to that section of the digital experience. Its lowest score is for enabling on-site/frontline operations.

In support of the different enterprise sizes, Momentive has the third-highest score for enabling midsize business, but the second-lowest score for enabling large enterprises because it lacks functionality in several areas, such as complex program governance.

In support of different business models, Momentive places in the top third for B2B business models, but has a low ranking in this evaluation for B2C and B2B2C business models.

Note: In 4Q21, Zendesk announced a definitive agreement to acquire Momentive. The transaction is expected to close in 1H22 and was not included in this assessment.

NICE

NICE CXone technologies, combined with the acquired Satmetrix VoC solution, mean NICE is well-positioned for all the core VoC functionality, but less so for departmental capabilities outside of customer service.

In support of core VoC application functionality, NICE is strong in all aspects. It has the third-highest score for its analytics and insight capabilities, in part due to its expertise in speech and text analytics, and the fourth-highest score for its data collection and automated action capabilities. NICE is notable for its sophisticated journey-based UX.

In support of the different department types, NICE has the highest score in this evaluation for customer service, due to its ability to recommend targeted actions at all levels of a customer service department, from agent to supervisor to manager. Tasks like adding an agent's photograph to a postcall survey and communicating and completing actions, such as asking whether a customer would like someone to call them back, are standard functions. It places fifth highest for digital-business-specific capabilities. The company has thousands of customers using its complementary contact center as a service (CCaaS) and workforce engagement management capabilities. For marketing, sales and on-site/frontline operations capabilities, NICE is in the bottom third of vendors as it lacks the associated use-case-specific functionality and referenceable customers.

In support of different enterprise sizes, NICE is better at enabling large enterprises, for which it places midtable relative to competitors. It is less well-suited to the needs of midsize companies due to its application's complexity and cost.

In support of different business models, NICE ranks midtable for B2C, B2B and B2B2C business models.

Qualtrics

Qualtrics' XM platform is well-positioned for all use cases and is particularly well-suited to environments that leverage its complementary employee, partner and brand experience products.

In support of core VoC application functionality, Qualtrics is strong in all aspects. It has the highest score in this evaluation for its data collection capabilities because it offers the deepest functionality for collecting both structured and unstructured customer feedback and operational data. It has the second-highest score for both its analytics and insight and automated action capabilities.

In support of the different department types, Qualtrics is in the top three vendors for all the different department-specific capabilities, except for customer service where it ranks fifth. The recent acquisition of leading text analytics vendor Clarabridge will help elevate this score moving forward, as it is historically strong in this department. Qualtrics is one of the best-suited vendors for multidepartmental programs, where its functional breadth and implementation experience, especially through partners, is of high value.

In support of different enterprise sizes, Qualtrics is better suited to enabling large enterprises, reflected in a score that is second highest among evaluated vendors. However, it still ranks fourth in its support of midsize businesses. Qualtrics initially targeted midsize organizations with prepackaged and templated solutions, but has since expanded to also focus on driving CX transformation across enterprise organizations.

In support of different business models, Qualtrics has the second-highest scores in enabling B2B, B2C and B2B2C business models.

Note: In 3Q21, Qualtrics announced definitive agreements to acquire Clarabridge (now completed) and Usermind, but these were too late to be included in this assessment.

QuestionPro

QuestionPro's Customer Experience Management Platform is a blend of VoC with qualitative customer research functionality aimed at midsize businesses seeking value for money. It has functionality that is seen in much more expensive offerings.

In support of core VoC application functionality, QuestionPro is strongest in its use of automated action. It is weaker than most of its evaluated competitors in its range of analytics and insight capabilities, where it lacks areas of analysis such as IVR, video, geospatial, and predictive and prescriptive analytics.

In support of the different department types, QuestionPro has the fourth-highest score for sales and fifth-highest score for its ability to support marketing capabilities. It does well because of its complementary customer insight community that enables organizations to recruit and manage their customers for co-creation and product roadmap feedback. It places midtable for customer service and on-site/frontline operations departments and in the bottom third of vendors for enabling digital business capabilities.

In support of the different enterprise sizes, QuestionPro has the highest score in this evaluation for enabling midsize businesses. It has the third-lowest score for enabling large enterprises because it lacks experience in implementing multidepartmental VoC programs. Over 90% of customers have typically three or fewer participating departments – the most common of which are business intelligence, marketing and enterprise CX.

In support of different business models, QuestionPro scores midtable for B2B and places in the bottom third of vendors for its support for B2C and B2B2C.

Reputation

Reputation's Reputation Experience Management (RXM) platform blends consumer ratings and reviews, social listening and surveying functionality as part of an integrated VoC offering that differentiates itself based on how it can help enhance online reputation.

In support of the core VoC application functionality, Reputation does best in analytics and insight capabilities due to its strong text analytics. Reputation trails competitors in the diversity of survey and inferred data sources supported and its ability to operationalize through role-based personalization and autoloops.

In support of the different department types, Reputation is best at enabling on-site/frontline operations capabilities, where it ranks fourth highest in this evaluation, and in its support of digital business capabilities, where it ranks in the top half of vendors. Its lowest scores are for its support of sales (where, for example, it supports retail and automotive dealership sales roles rather than customer success or account management roles in other industries) and customer service (where for example it lacks employee coaching).

In support of the different enterprise sizes, Reputation scores higher for enabling large enterprises with multiple locations than for supporting midsize businesses. It does, however, place midtable for the midsize enterprise due to its investment in enabling self-service so that employees can adapt it to their needs without IT involvement.

In support of different business models, Reputation places sixth for B2B2C business models and midtable for B2C. Reputation focuses on B2B2C and B2C multilocation-based, brand-sensitive industry sectors — primarily automotive, healthcare and hospitality. It ranks low for B2B business models relative to other evaluated vendors.

SMG

SMG's smg360 application is well-suited to enterprises in location-based industries such as restaurants, retail stores, branches and hotels, seeking a custom-built UX and functionality tailored by in-house professional services to meet their specific needs.

In support of core VoC application functionality, SMG places midtable in this evaluation in all three capabilities — data collection, analysis and insight, and automated action.

In support of the different department types, it ranks highest of all vendors at enabling on-site/frontline VoC operations. It ranks midtable in its support of digital business, marketing and customer service department capabilities, but lower in its support for sales departments.

In support of the different enterprise sizes, SMG scores well for enabling large enterprises because its solution is designed to accommodate the needs of organizations with complex hierarchies and spread across multiple physical and digital locations. It is weaker in its support for midsize businesses, although it is investing in improved support for self-service.

In support of different business models, SMG has the fourth-highest score for B2B2C and fifth highest for B2C where it makes good use of social analytics applied to ratings and reviews. It also has a complementary industry benchmarking of metrics such as Net Promoter Score (NPS) and customer satisfaction (CSAT). It ranks lower for B2B due to the primary industries it serves.

Verint

Verint's Experience Management (XM) platform is well-positioned for all core VoC functionality, but less proven for departmental capabilities outside of customer service and digital business.

In support of core VoC application functionality, Verint is strong in all aspects, although it continues to bring acquired solutions into a common platform. It has the third-highest score in this evaluation for data collection and is fourth highest for analytics and insight, in part due to its expertise in speech and text analytics. It also ranks in the top third for its automated action capabilities.

In support of the different department types, Verint has the second-highest score for both the customer service and digital business capabilities, and is well-suited to environments in which it can draw on other applications in its portfolio to influence service processes and agent actions. The company has thousands of customers using its complementary customer engagement center and workforce engagement management capabilities. For marketing departments, it is midtable. For sales and on-site/frontline operations, it is in the bottom third of vendors, in part due a lack of specialist functionality such as customer success management and native support for QR codes, kiosks, and ratings and reviews beyond in-location applications.

In support of different enterprise sizes, Verint is better at enabling large enterprises, for which it places midtable in this evaluation, in part due to missing some enterprise governance capabilities. It is ranked low in its support of midsize businesses, where it is currently less well-suited due to its application's complexity and cost.

In support of different business models, Verint places midtable for B2C, B2B and B2B2C business models.

Context

In the long term, Gartner expects product differentiation within the VoC application market to stem from six areas of investment by vendors:

- **Reporting and analytics:** Today, it is common to see simple reports on customer satisfaction or NPS by channel (for example, SMS, paper, IVR or voice) or location (for example, web, call center, store, branch or airport). The market is evolving to encompass correlation, regression and root cause analysis. The most advanced vendors are introducing analytical capabilities that can predict future behavior, such as the likelihood of a customer churning or becoming an advocate. The most advanced are also providing prescriptive analytics with recommended next best actions based on AI predictions. We expect that these vendors will also add psychographic and emotion analysis, such as recommendations for the use of specific terminology and verbiage during a conversation.

- **Automated action:** The ability to trigger an alert or workflow based on a simple business rule is standard today. However, leading VoC applications are adding more advanced workflow and case management functionality (beyond integration with third-party CRM applications) in order to replicate what could be obtained from a best-of-breed case management solution. Increasingly, VoC applications will be able to perform real-time or near-real-time calculations on event-related or behavioral inferred VoC data, such as the number of store visits, the onboarding process or the number of product returns. These calculations will trigger actions — such as sending a reminder, alerting an employee to call a customer back, triggering a product recall or redesign, issuing a voucher or canceling a campaign. These actions will require integration to a broad range of third-party applications and the ability to drive processes within them without the need for human intervention. These are being referred to as autoloop or zero-touch actions. They will become more influential in experience delivery and journey orchestration, and complement other customer-facing systems. These actions will be determined by organizational CX objectives that are set within the VoC solution and used to cascade tasks as and when merited. CX metrics will feed into these objectives to track CX execution.
- **Customer journeys:** An important aspect of a holistic VoC solution is the ability to track a customer migrating from one interaction mode to another (for example, from website to contact center), and to understand the associated experience by connecting associated data sources. At the moment, some vendors that claim to support customer journeys usually only have the ability to collect survey data from each interaction channel in order to extract customer-journey-related insights (such as verbatim comments in an email survey about a web navigation problem). Leading-edge vendors can now link this siloed survey VoC data to the associated operational data, such as clickstreams, call wait times and IVR pathways. We have begun to see vendors develop or acquire full-blown customer journey analytics and orchestration to connect and visualize operational data (see [Market Guide for Customer Journey Analytics](#)). We also expect them subsequently to provide additional context by aligning and overlaying this data with the associated VoC data (such as a tweet referring to a call wait time or a verbatim survey comment linked to the product return process). A VoC application's administrative management environment, where feedback activities are created and assigned, is also increasingly aligned to the customer journey.

- **Industry specialisms:** As solutions mature, they will increasingly be configured out of the box with industry-tailored dashboards, workflows, relevant operational integrations supporting specialist services, and benchmarking capabilities. In the retail sector, for example, specialism would involve collecting feedback through the point of sale, creating notifications to the store manager before a customer leaves the store, and providing reports at store, department, employee and till level. Role-based UXs will be designed for a range of roles across an organization, from chief marketing officer to vice president of customer service, as well as for more centralized roles like vice president of CX and chief customer officer.
- **Employee experience (EX):** Better managing the employee experience to drive employee engagement and loyalty is a hot topic. This is, in part, accelerated by the pandemic, the increase in working from home, and the desire for a better work-life balance for employees. Employees (both frontline and back office) can have a dramatic impact on the customer experience. The concept of aligning CX and EX (sometimes referred to as Total Experience) is not new. But it is currently undergoing an upswing in interest and investment within organizations that already have a foundation of commitment and investment in EX and CX. All leading VoC vendors are investing in deeper EX capabilities and delivering incremental value from their alignment.
- **Market and user research:** VoC applications are focused initially on one research methodology – surveys. However, they are expanding into other user and market research methodologies such as focus groups, A/B testing, session replays, video diaries, user testing, expert interviews and ethnographic studies. This allows them to understand customer opinion more fully and have greater influence over strategic decision making. We expect VoC applications to increasingly differentiate on the basis of their support for a far wider range of research methodologies going forward.

Product/Service Class Definition

VoC applications are used for managing customer feedback from direct sources (such as surveys), indirect sources (such as social media) and inferred sources (such as operational or transactional activities). These applications integrate feedback collection, analysis and action-related capabilities into a single interconnected platform, in order to help organizations understand and improve CX.

Critical Capabilities Definition

Each product that met our inclusion criteria was evaluated in relation to the critical capabilities using a scale of 1.0 (low) to 5.0 (high).

Data Collection

The ability to capture all forms of customer feedback spanning direct, indirect and inferred information sources.

Support for VoC data collection requires the ability to:

- Listen to the direct VoC through surveys using at least the following channels: web, mobile, voice, SMS, social media and email.
- Ingest social media data and other voice and text-based forms of indirect feedback.
- Ingest associated operational and transactional journey data, such as clickstreams, call wait times and IVR pathways, to derive inferred feedback.

Analysis and Insight

The ability to analyze and derive insight from a diverse set of structured and unstructured feedback datasets using a variety of analytical and visualization techniques.

Support for VoC data analysis and insight requires the ability to:

- Provide role-based dashboards and reports.
- Convert data into insights through the use of multiple types of analysis, such as correlation, regression and root cause analysis.
- Predict future behavior, such as the likelihood of a customer churning or becoming an advocate.
- Prescribe the appropriate course of action to optimize business value.
- Map, visualize and derive insights from analysis of customer journeys.

Automated Action

The ability to provide alerts, workflow, case management and other forms of automated actions in response to customer feedback.

Support for VoC automated action requires the ability to support:

- Inner loop (typically rule-based involving human intervention focused on an individual employee action that takes minutes to hours to enact).

- Outer loop (typically root-cause-driven, cross-departmental projects that take anything from days to years to analyze and enact).
- Autoloop or zero-touch (typically the automated triggering of another application involving no human intervention that takes seconds to minutes to enact), such as sending a reminder, stopping new orders from being placed, triggering a product recall, or canceling a campaign.

Enabling Customer Service

The ability to support a customer-service-focused CX program through prebuilt integrations, tailored analysis, metrics and reports, and support for customer service processes.

Support for customer service requires the ability to:

- Provide prebuilt adapters for integration with core customer service operational systems, such as IVR, CCaaS, customer engagement center and workforce engagement management systems.
- Provide prebuilt, tailored analysis, metrics and reports for customer service roles ranging from vice president of service to customer service representative.
- Leverage the diverse set of voice, text and video customer interaction data types used within customer service.
- Provide easy setup and maintenance of the application and of workflows to enable support for customer service processes, such as customer callback, agent training assignment and automated customer issue resolution.

Enabling Sales

The ability to support a sales-focused CX program through prebuilt integration, tailored analysis, metrics and reports, and support for sales and success management processes.

Support for sales requires the ability to:

- Provide prebuilt adapters for integration with core sales operational systems, such as sales force automation, territory management and customer success management applications.

- Provide prebuilt, tailored analysis, metrics and reports for sales and customer success roles.
- Provide easy setup and maintenance of the application and of workflows to enable support for sales and customer success processes, such as prediction of customer churn and identification of new upselling opportunities.
- Provide a voice of the employee (VoE) capability for account team surveying to glean their individual perspectives on the customer relationship after meetings and at regular intervals.

Enabling Marketing

The ability to support a marketing-focused CX program through prebuilt integration, analysis, metrics and reports, and support for marketing processes.

Support for marketing requires the ability to:

- Have prebuilt adapters for integration with core marketing applications, such as campaign management, web content management, customer data, marketing analytics, customer portal and digital experience platforms.
- Provide easy setup and maintenance of the application and of workflows to enable support for marketing processes such as campaign management, lead management, influencer relations, and loyalty management.
- Provide support for associated marketing activities that make use of VoC data such as UX design and brand management.
- Provide prebuilt, tailored analysis, metrics and reports for marketing roles ranging from social media marketing, customer segment analysts, through to campaign managers.

Enabling Digital Business

The ability to support businesses where the VoC initiative focuses primarily on feedback related to the digital experience provided through websites, portals and mobile apps.

Support for digitally-focused customer interactions requires the ability to:

- Provide prebuilt adapters for integration with core digital applications, such as websites, content management applications, mobile apps, digital commerce, portals, digital experience platforms, and session replay.
- Provide prebuilt, tailored analysis, metrics and reports for digital interactions, linked to topics such as ease of site navigation, content appropriateness, refresh speed and cart abandonment.
- Support the main third-party online rating and review sites with ability to reroute customers to these based on the feedback they provide.

Enabling On-Site Operations

The ability to support an on-site focused CX program through prebuilt integration, tailored analysis, metrics and reports, and support for specific frontline processes.

Support for frontline/in-store/branch operations requires the ability to:

- Provide prebuilt adapters for integration with core on-site operational systems, such as point-of-sale applications and staffing rotas.
- Provide prebuilt, tailored analysis, metrics and reports for on-site operations, such as NPS by store and region.
- Provide tailored workflows to support frontline processes such as staff scheduling and training.
- Provide VoE capabilities to capture feedback from frontline employees linked to customers, other employees and operations.
- Provide the ability to synchronize with, and make use of existing, store, branch and HQ hierarchical structures maintained in LDAP and HR applications.

Enabling Large Enterprise

The ability to support the needs of a large enterprisewide CX program where there is a high degree of complexity spanning numerous departments.

Support for a large CX program requires the ability to:

- Provide an architecture that can scale to over 100,000 daily users.

- Provide easy administration, governance and associated workflows, authorizations and entitlements needed to support the full operationalization of VoC across all participating departments.
- Provide a centralized view of CX program value for key stakeholders, including those involved in marketing, customer service, sales, customer success, operations, HR and supply chain.
- Calculate and demonstrate the delivery of cross-departmental VoC program health.

Enabling Midsize Business

The ability to provide an easy-to-use, cost-effective solution tailored to the needs of midsize businesses with 25 to 500 users and limited financial resources.

Support for midsize organizations requires the ability to:

- Provide an application with functionality tailored to organizations with fewer support resources and potentially less sophisticated functional requirements.
- Seamlessly mask unnecessary functions, workflows, menus, lists and tasks to ensure appropriateness and ease of use.
- Offer a simplified pricing model and pricing aligned to the constrained budget of a midsize organization.
- Support a fully self-service deployment (without the need for assistance from professional services) where the application is easy for users to install, configure, manage, update and use.
- Offer optional tailored services packages to help accelerate program maturity and business value.

Enabling B2C

The ability to meet the specific needs of a B2C-oriented organization, where there is typically a high volume of one-to-one customer relationships.

Support for B2C requires:

- The ability to provide an innovative and engaging experience when asking for feedback, such as through support of chatbots, consumer messaging applications, in-app surveys or video capture.
- Emphasis on indirect feedback from customer interactions and, in particular, social media.
- Integration with market research and user research applications and data sources.

Enabling B2B

The ability to meet the specific needs of a B2B-oriented organization, where there is typically a smaller volume of one-to-many customer relationships.

Support for B2B requires the ability to:

- Support a one-to-many hierarchical organizational structure.
- Deliver personalized event and relationship surveys to different roles within the customer organization.
- Support face-to-face interviewing.
- Feedback on project life cycle stages through automated surveys and collection of relevant operational data.
- Support VoE, where key employees at each project life cycle stage (e.g., design specification or postimplementation) can be surveyed.
- Roll data up to the account level (versus contact level).

Enabling B2B2C

The ability to meet the needs of a B2B2C-oriented organization, where there is the complexity of having a relationship with both customers and consumers.

Support for B2B2C requires the ability to:

- Collect customer feedback from partners, brokers, resellers, agents, distributors as per a one-to-many B2B VoC implementation.
- Accommodate the nuances of consumer feedback collection where there is limited contact data and ability to engage directly.

- Address specific additional B2B2C functionality, such as the sharing of consumer feedback directly with the business partner and potentially providing the business partner with an interface to run their own VoC program.
- Support external organizational models and partner structures with associated licensing and security to limit access rights.

Use Cases

Department Type

This use case is intended to meet the needs of a departmentally-oriented VoC implementation.

It should be customized to align with one or more of the following departments that commonly use VoC applications: customer service, marketing, sales, frontline operations, and digital operations/commerce.

Enterprise Size

This use case is intended to meet the needs of different sizes of VoC implementation.

It should be customized to the size of the organization (midsize or large) in order to accommodate different levels of organizational complexity, user numbers and the range of participating departments.

Business Model

This use case is intended to meet the needs of an organization's specific business model.

It should be customized to ensure the requirements of the VoC implementation align with the organization's go-to-market approach spanning one or more of B2C, B2B or B2B2C.

Vendors Added and Dropped

Added

- Reputation

Dropped

- Questback
- Upland

Inclusion Criteria

This Critical Capabilities report uses the same inclusion criteria as its companion [Magic Quadrant for Voice of the Customer](#).

Table 1: Weighting for Critical Capabilities in Use Cases

(Enlarged table in Appendix)

<i>Critical Capabilities</i> ↓	<i>Department Type</i> ↓	<i>Enterprise Size</i> ↓	<i>Business Model</i> ↓
Data Collection	8%	6%	8%
Analysis and Insight	8%	7%	8%
Automated Action	9%	7%	9%
Enabling Customer Service	15%	0%	0%
Enabling Sales	15%	0%	0%
Enabling Marketing	15%	0%	0%
Enabling Digital Business	15%	0%	0%
Enabling On-Site Operations	15%	0%	0%
Enabling Large Enterprise	0%	40%	0%
Enabling Midsize Business	0%	40%	0%
Enabling B2C	0%	0%	25%
Enabling B2B	0%	0%	25%
Enabling B2B2C	0%	0%	25%
As of 13 December 2021			

Source: Gartner (December 2021)

This methodology requires analysts to identify the critical capabilities for a class of products/services. Each capability is then weighted in terms of its relative importance for specific product/service use cases.

Each of the products/services that meet our inclusion criteria has been evaluated on the critical capabilities on a scale from 1.0 to 5.0.

Critical Capabilities Rating

Table 2: Product/Service Rating on Critical Capabilities

(Enlarged table in Appendix)

Critical Capabilities	Alchemer	Alida	Concentrix	CustomerGauge	Forsta	InMoment	Medallia	Momentive	NICE	Qualtrics	QuestionPro	Reputation	SMG	Verint
Data Collection	2.5	3.1	3.7	2.9	3.4	3.5	4.1	2.6	3.9	4.2	2.8	2.4	3.0	4.0
Analysis and Insight	2.2	3.1	2.9	2.6	3.5	3.4	4.2	2.0	3.7	4.1	2.4	2.3	3.0	3.6
Automated Action	2.7	2.5	3.2	2.6	3.1	3.7	4.1	2.3	3.5	3.8	2.8	2.4	3.0	3.3
Enabling Customer Service	1.2	1.3	4.1	1.4	3.6	3.7	4.0	1.9	4.4	3.8	2.4	1.1	3.1	4.2
Enabling Sales	2.1	2.4	1.0	4.4	2.5	1.7	3.7	2.9	1.6	4.0	3.1	1.1	1.2	1.5
Enabling Marketing	3.0	4.2	2.3	2.0	4.3	2.9	4.0	2.1	2.4	4.1	3.5	2.8	3.2	3.1
Enabling Digital Business	1.1	3.4	3.4	1.3	3.1	3.3	4.4	3.6	3.5	3.7	2.4	3.0	3.2	3.9
Enabling On-Site Operations	2.8	2.0	1.2	2.3	1.9	1.8	3.8	1.4	1.6	3.1	2.1	3.0	4.3	1.7
Enabling Large Enterprise	1.9	3.2	3.8	3.0	3.4	3.9	4.1	2.2	2.7	4.0	2.3	2.6	3.5	2.8
Enabling Midsize Business	4.0	2.0	1.5	2.2	2.6	2.3	3.0	3.9	1.9	3.2	4.1	2.4	2.5	1.8
Enabling B2C	2.6	3.1	3.5	1.0	3.8	4.0	4.4	2.3	3.4	4.2	2.9	3.2	3.7	3.3
Enabling B2B	2.4	2.1	1.7	4.3	3.8	2.5	3.9	3.2	3.0	4.0	2.9	1.5	2.3	3.1
Enabling B2B2C	1.5	2.5	1.8	2.3	3.6	1.9	3.5	1.7	2.1	3.5	1.4	2.4	3.4	2.2
As of 13 December 2021														

Source: Gartner (December 2021)

Table 3 shows the product/service scores for each use case. The scores, which are generated by multiplying the use-case weightings by the product/service ratings, summarize how well the critical capabilities are met for each use case.

Table 3: Product Score in Use Cases

(Enlarged table in Appendix)

Use Cases	Alchemer	Alida	Concentrix	CustomerGauge	Forsta	InMoment	Medallia	Momentive	NICE	Qualtrics	QuestionPro	Reputation	SMG	Verint
Department Type	2.15	2.72	2.62	2.38	3.14	2.90	4.02	2.36	2.95	3.81	2.69	2.24	3.00	3.07
Enterprise Size	2.85	2.66	2.77	2.62	3.07	3.19	3.67	2.90	2.58	3.69	3.09	2.47	3.00	2.56
Business Model	2.24	2.65	2.57	2.57	3.63	2.99	3.98	2.38	3.05	3.93	2.47	2.37	3.10	3.06
As of 13 December 2021														

Source: Gartner (December 2021)

To determine an overall score for each product/service in the use cases, multiply the ratings in Table 2 by the weightings shown in Table 1.

Critical Capabilities Methodology

This methodology requires analysts to identify the critical capabilities for a class of products or services. Each capability is then weighted in terms of its relative importance for specific product or service use cases. Next, products/services are rated in terms of how well they achieve each of the critical capabilities. A score that summarizes how well they meet the critical capabilities for each use case is then calculated for each product/service.

"Critical capabilities" are attributes that differentiate products/services in a class in terms of their quality and performance. Gartner recommends that users consider the set of critical capabilities as some of the most important criteria for acquisition decisions.

In defining the product/service category for evaluation, the analyst first identifies the leading uses for the products/services in this market. What needs are end-users looking to fulfill, when considering products/services in this market? Use cases should match common client deployment scenarios. These distinct client scenarios define the Use Cases.

The analyst then identifies the critical capabilities. These capabilities are generalized groups of features commonly required by this class of products/services. Each capability is assigned a level of importance in fulfilling that particular need; some sets of features are more important than others, depending on the use case being evaluated.

Each vendor's product or service is evaluated in terms of how well it delivers each capability, on a five-point scale. These ratings are displayed side-by-side for all vendors, allowing easy comparisons between the different sets of features.

Ratings and summary scores range from 1.0 to 5.0:

1 = Poor or Absent: most or all defined requirements for a capability are not achieved

2 = Fair: some requirements are not achieved

3 = Good: meets requirements

4 = Excellent: meets or exceeds some requirements

5 = Outstanding: significantly exceeds requirements

To determine an overall score for each product in the use cases, the product ratings are multiplied by the weightings to come up with the product score in use cases.

The critical capabilities Gartner has selected do not represent all capabilities for any product; therefore, may not represent those most important for a specific use situation or business objective. Clients should use a critical capabilities analysis as one of several sources of input about a product before making a product/service decision.

Document Revision History

[Critical Capabilities for Voice of the Customer - 25 January 2021](#)

Recommended by the Authors

Some documents may not be available as part of your current Gartner subscription.

[How Products and Services Are Evaluated in Gartner Critical Capabilities](#)

[Magic Quadrant for Voice of the Customer](#)

[How to Operationalize Your Voice-of-the-Customer Program](#)

[How to Develop a Hierarchy of Criteria for Voice-of-the-Customer Vendor Selection](#)

[How to Find the Key Differences Between Leading Voice-of-the-Customer Applications](#)

[Market Guide for Customer Journey Analytics](#)

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Enabling On-Site Operations	15%	0%	0%
Enabling Large Enterprise	0%	40%	0%
Enabling Midsize Business	0%	40%	0%
Enabling B2C	0%	0%	25%
Enabling B2B	0%	0%	25%
Enabling B2B2C	0%	0%	25%
As of 13 December 2021			

Source: Gartner (December 2021)

Table 2: Product/Service Rating on Critical Capabilities

<i>Critical Capabilities</i>	<i>Alchemer</i>	<i>Alida</i>	<i>Concentrix</i>	<i>CustomerGauge</i>	<i>Forsta</i>	<i>InMoment</i>	<i>Medallia</i>	<i>Momentive</i>	<i>NICE</i>	<i>Qualtrics</i>	<i>QuestionPro</i>	<i>Reputation</i>	<i>SMG</i>	<i>Verint</i>
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Enabling Sales	2.1	2.4	1.0	4.4	2.5	1.7	3.7	2.9	1.6	4.0	3.1	1.1	1.2	1.5
Enabling Marketing	3.0	4.2	2.3	2.0	4.3	2.9	4.0	2.1	2.4	4.1	3.5	2.8	3.2	3.1

<i>Critical Capabilities</i>	<i>Alchemer</i>	<i>Alida</i>	<i>Concentrix</i>	<i>CustomerGauge</i>	<i>Forsta</i>	<i>InMoment</i>	<i>Medallia</i>	<i>Momentive</i>	<i>NICE</i>	<i>Qualtrics</i>	<i>QuestionPro</i>	<i>Reputation</i>	<i>SMG</i>	<i>Verint</i>
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Enabling Large Enterprise	1.9	3.2	3.8	3.0	3.4	3.9	4.1	2.2	2.7	4.0	2.3	2.6	3.5	2.8
Enabling Midsize Business	4.0	2.0	1.5	2.2	2.6	2.3	3.0	3.9	1.9	3.2	4.1	2.4	2.5	1.8
Enabling B2C	2.6	3.1	3.5	1.0	3.8	4.0	4.4	2.3	3.4	4.2	2.9	3.2	3.7	3.3
Enabling B2B	2.4	2.1	1.7	4.3	3.8	2.5	3.9	3.2	3.0	4.0	2.9	1.5	2.3	3.1
Enabling B2B2C	1.5	2.5	1.8	2.3	3.6	1.9	3.5	1.7	2.1	3.5	1.4	2.4	3.4	2.2
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<i>Use Cases</i>	<i>Alchemer</i>	<i>Alida</i>	<i>Concentrix</i>	<i>CustomerGauge</i>	<i>Forsta</i>	<i>InMoment</i>	<i>Medallia</i>	<i>Momentive</i>	<i>NICE</i>	<i>Qualtrics</i>	<i>QuestionPro</i>	<i>Reputation</i>	<i>SMG</i>	<i>Verint</i>
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Enterprise Size	2.85	2.66	2.77	2.62	3.07	3.19	3.67	2.90	2.58	3.69	3.09	2.47	3.00	2.56
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