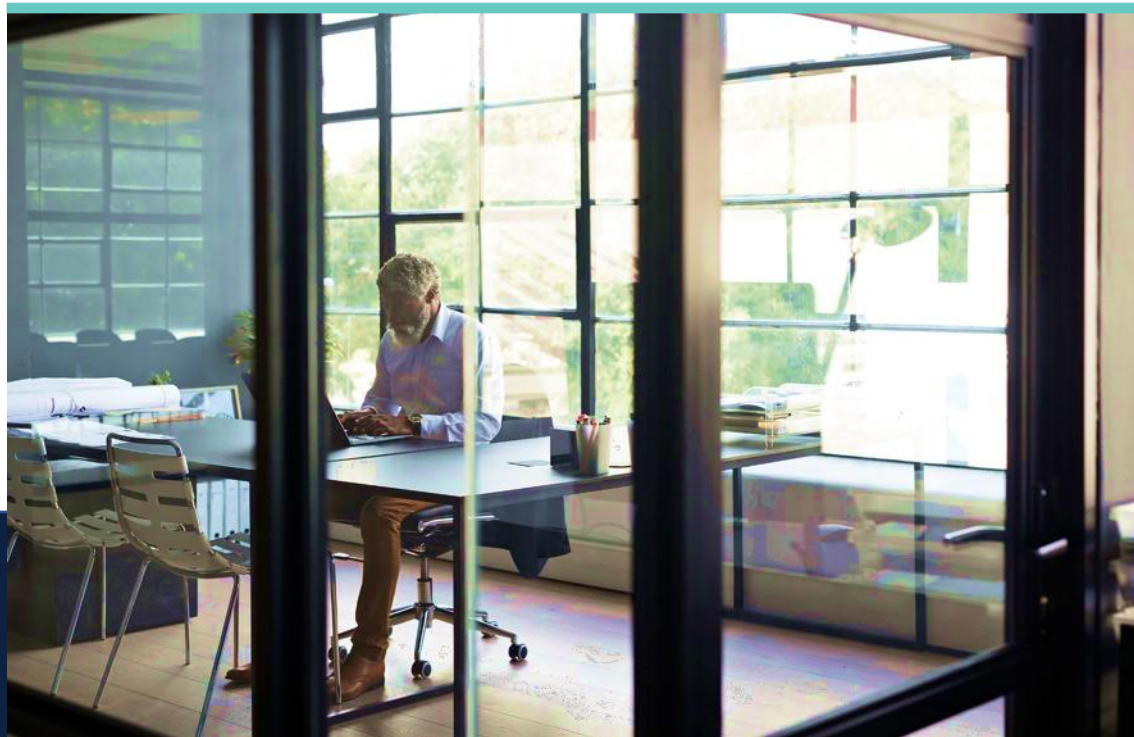


IN-PERSON CUSTOMER INTERACTION TRENDS

SUMMARY RESULTS



MAY 2025

EXECUTIVE SUMMARY

- We surveyed senior sales, product, technology, and customer experience leaders across industries such as financial services, retail, apparel, and technology to understand how they are improving in-person customer interactions through better scheduling, queue management, and customer insights.
- To understand how organizations are transforming in-person customer interactions, we asked about their top priorities and pain points. Leaders emphasized the need to unify the online-to-in-person journey and equip staff with deeper customer insights to drive satisfaction and loyalty.
- Empowering teams with robust data and improving conversion rates emerged as critical success factors, alongside closing gaps in scheduling, queue management, and event tech to deliver seamless, measurable in-person experiences.

WHO DID WE SURVEY?



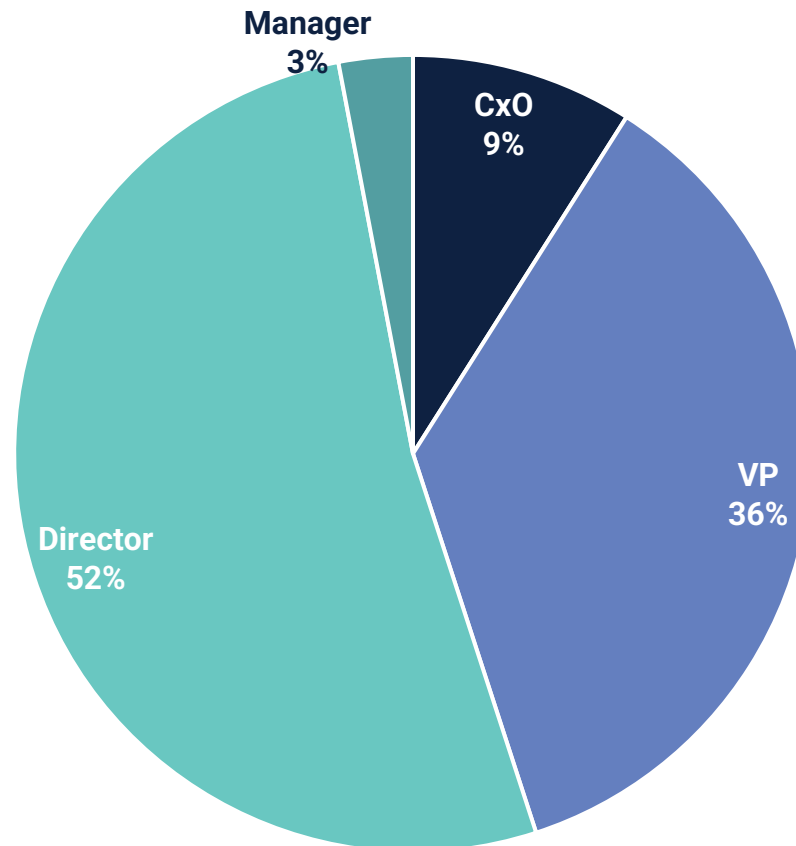
Between January and May 2025, Gatepoint Research invited selected executives to participate in a survey themed *In-person Customer Interaction Trends*.

Candidates from several industries were invited via email and 100 executives have participated to date.

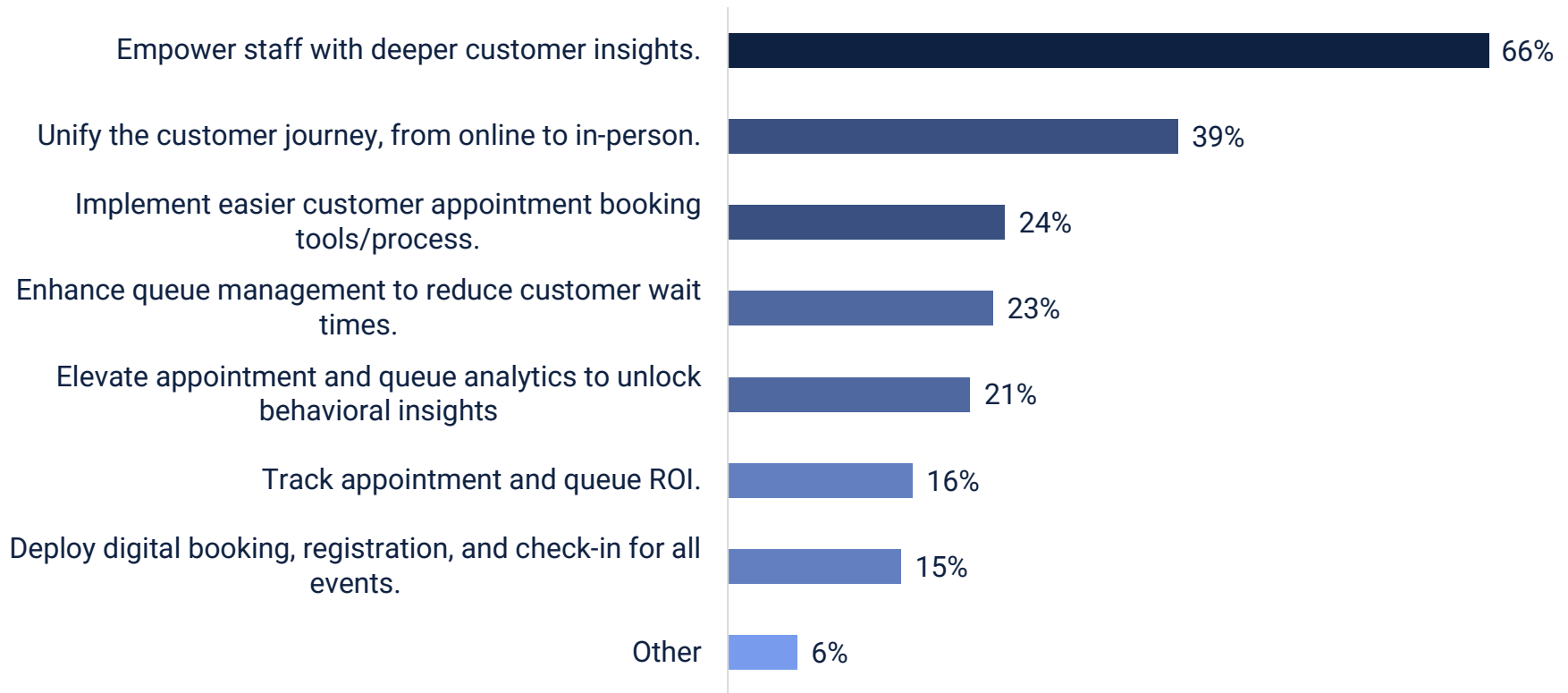
Management levels represented include: 45% who hold the title CxO or are VPs, 52% directors, 3% senior or department managers.

JOB LEVEL

97% of respondents to this survey hold executive or director-level positions in their organization.

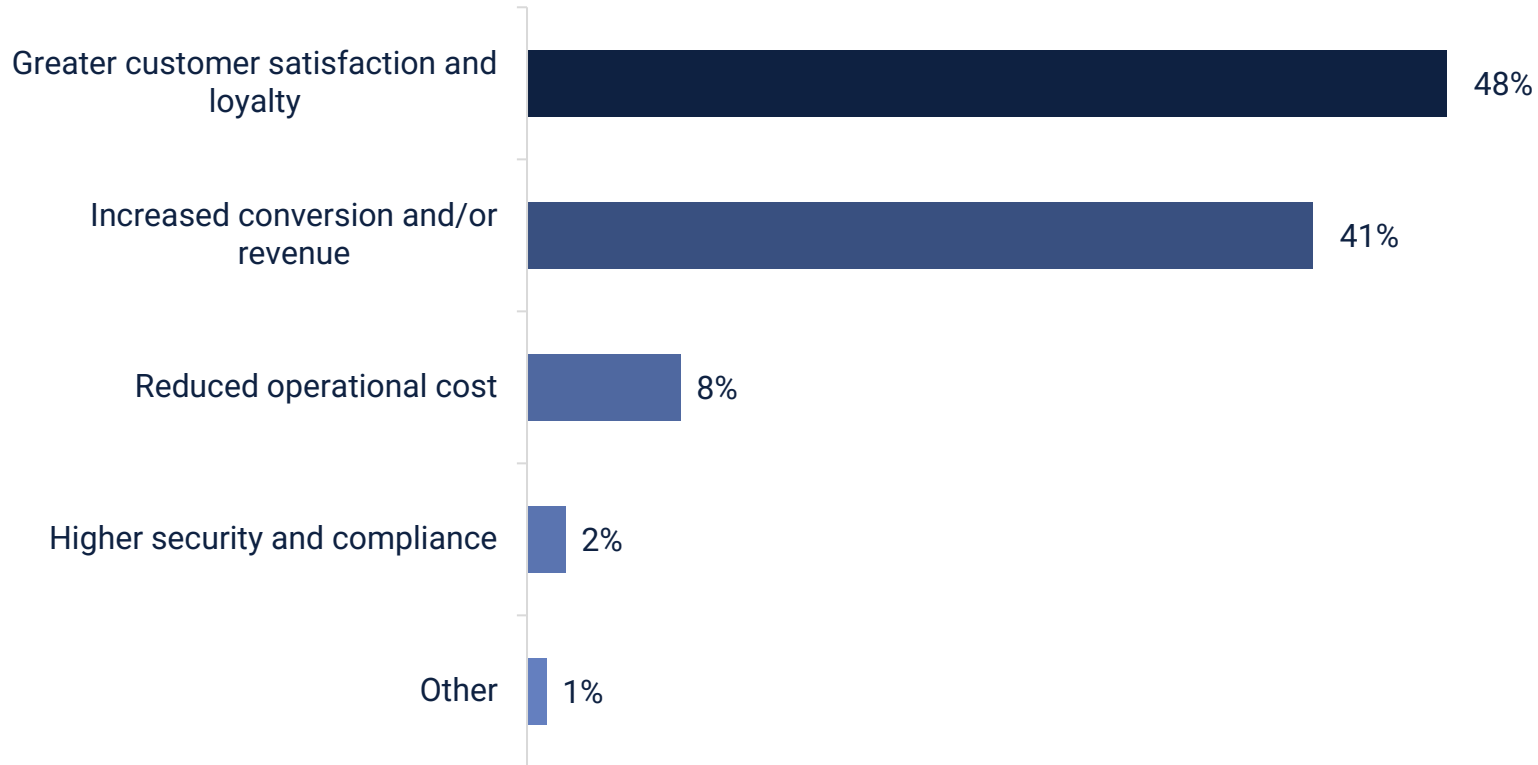


What customer-based initiatives are you planning in the next 12 months?



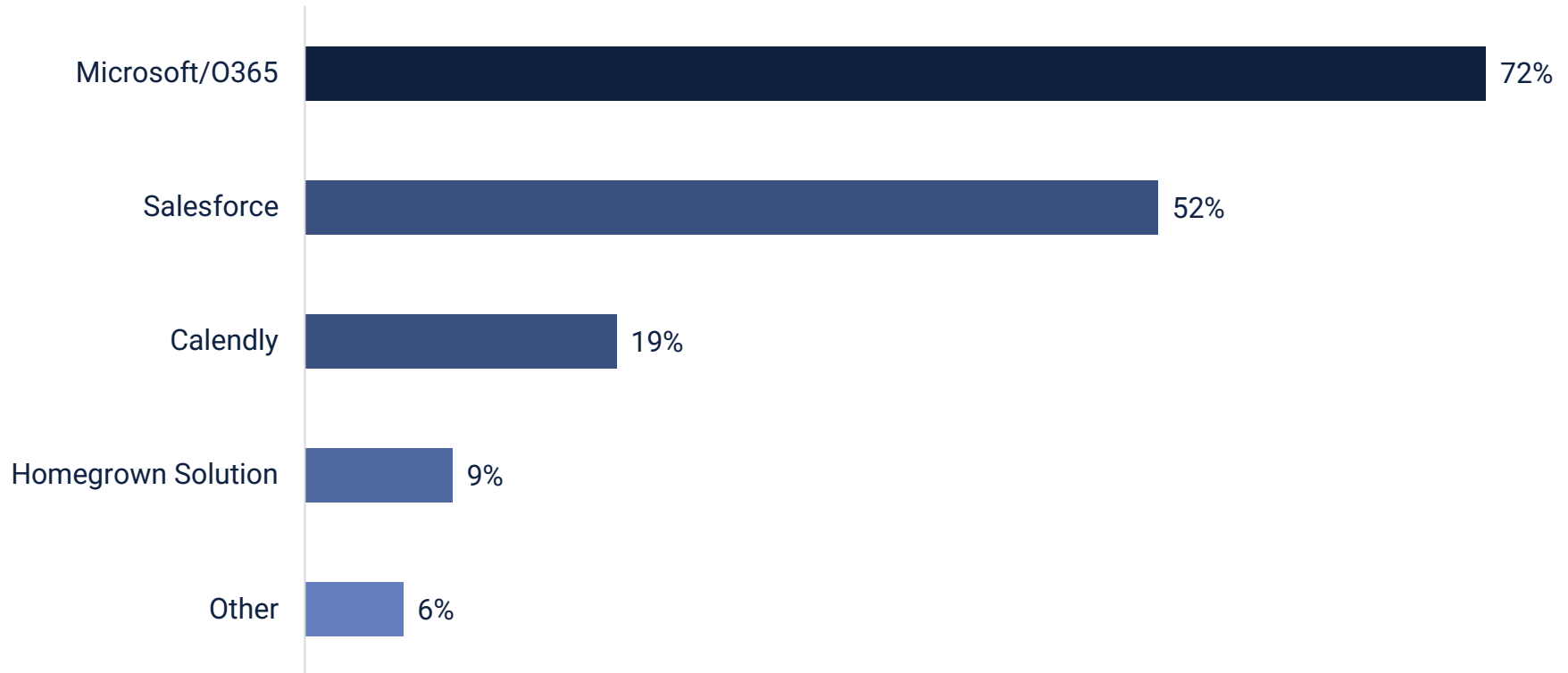
Surveyed organizations are focused on empowering their staff with deeper customer insights, say 66%. Many are also planning initiatives to unify the customer journey, from online to in-person (39%).

What do you consider the most important outcome for your in-person engagements?



Above all, in-person engagements should result in greater customer satisfaction and loyalty (48%) and increase conversion rates (41%).

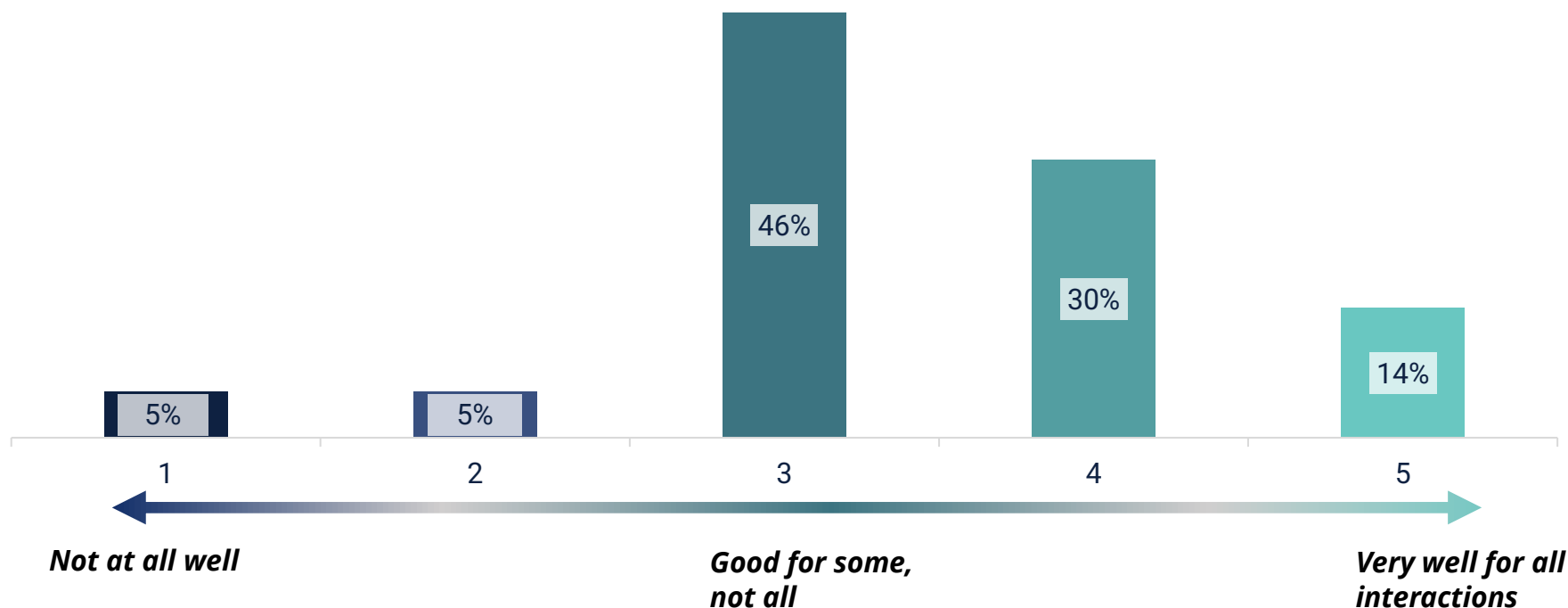
Which of these in-person solution providers do you currently use?



Microsoft/O365 is the most commonly used in-person provider, cited by 72%. Over half utilize Salesforce (52%).

How well does your appointment scheduling solution work for in-person customer interactions?

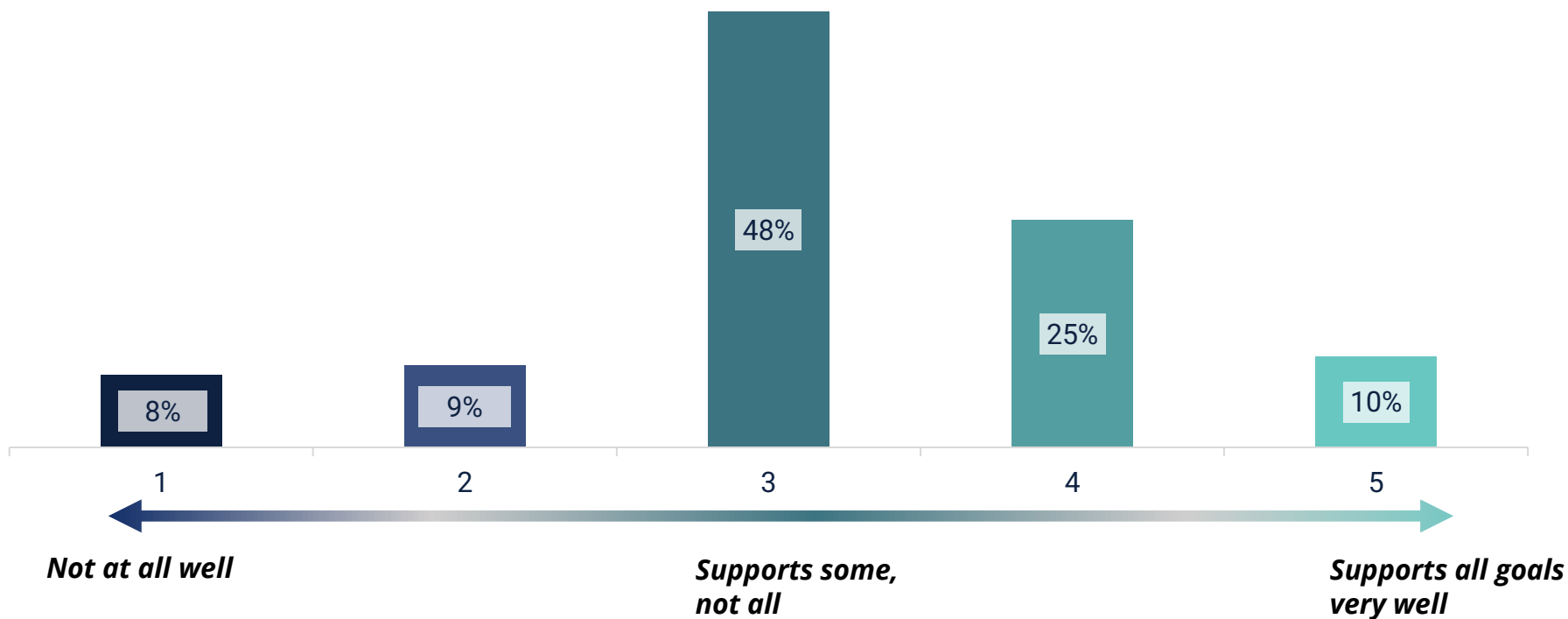
(Rate 1 to 5: 1 = Not at all well, 3 = Good for some, not all interaction types, 5 - Very well for all interactions)



There is room for improvement in meeting diverse customer needs. 46% say their scheduling tools work well for some, but not all, in-person interactions, while only 14% rate them as excellent.

How well does your queue management solution support in-person customer interactions?

(Rate 1 to 5: 1 = Not well at all, 3 = it supports some, not all objectives, 5 = supports all goals very well)



Nearly half report their queue solutions support some objectives but fall short on others, with just 10% saying they fully meet goals.

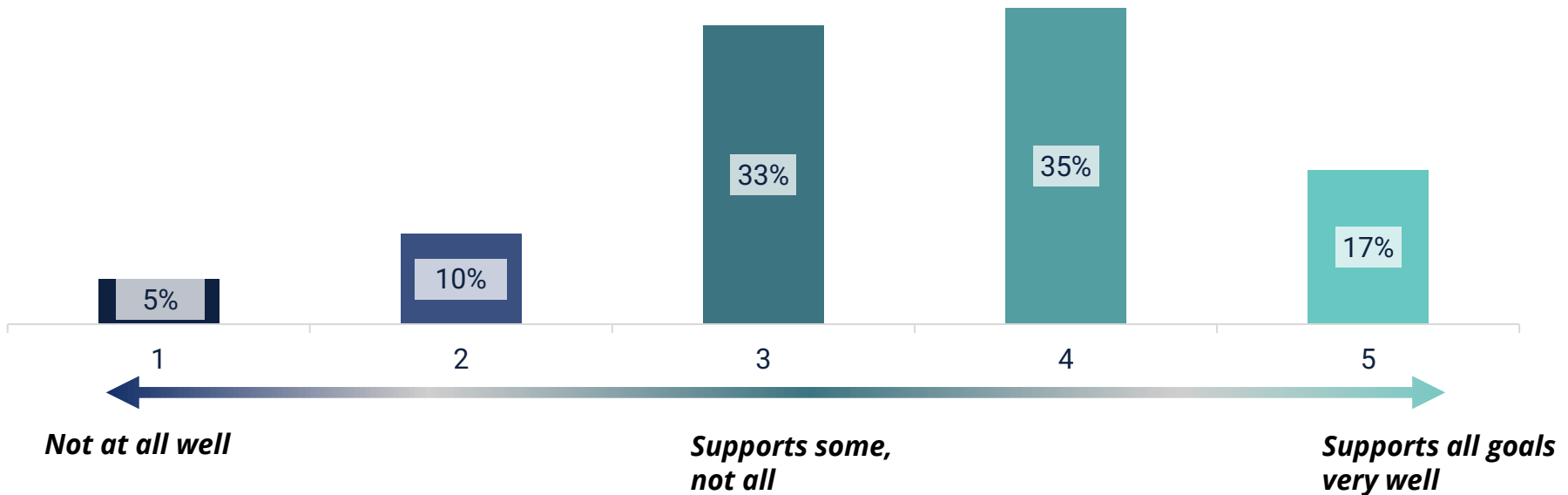
Summary Results | May 2025

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How well does your technology support in-person customer events?

(Rate 1 to 5: 1 = Not well at all, 3 = it supports some, not all objectives, 5 = supports all goals very well)



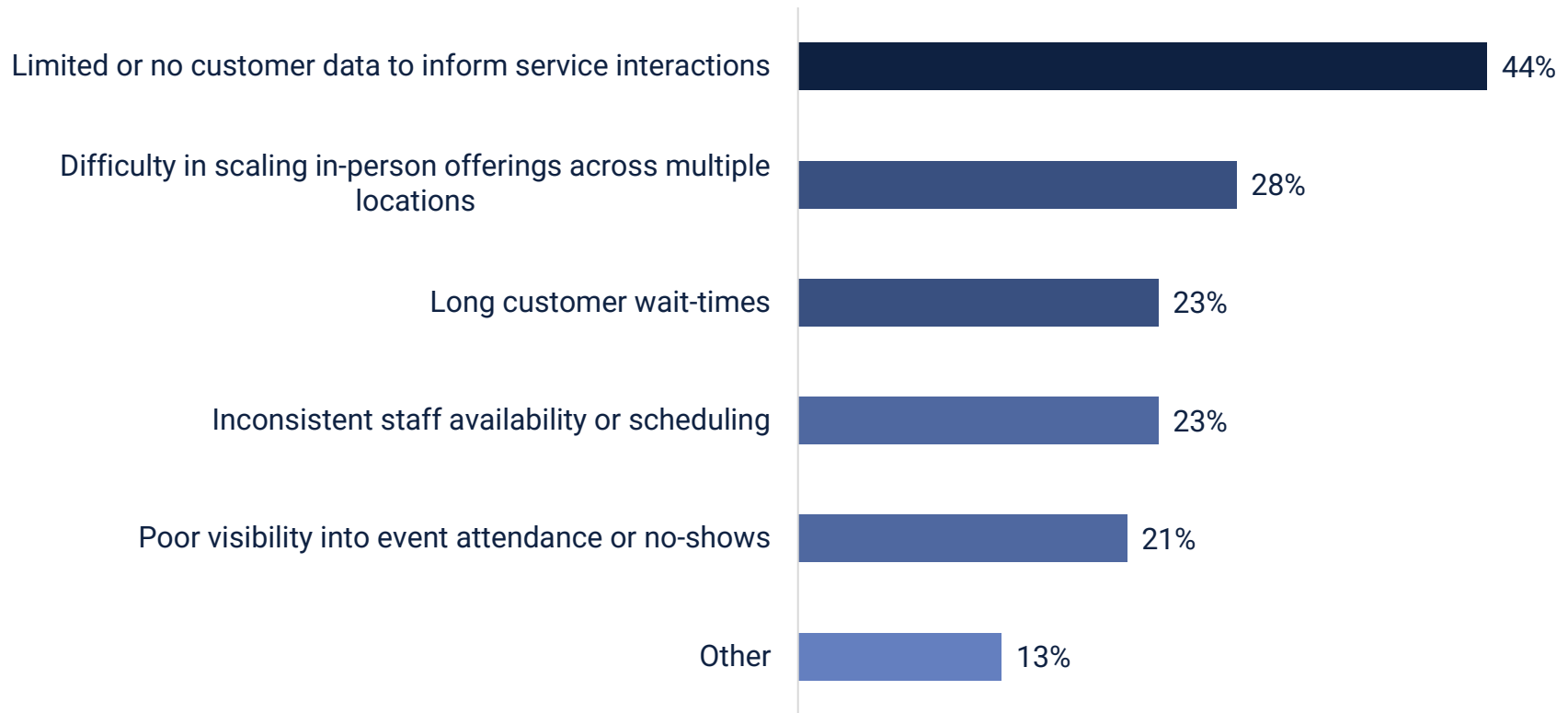
Many are seeing success with their technology supporting in-person customer events. 35% rate it as strong and 17% as excellent, but many are still navigating gaps with 48% describe their event tech as only partly or not at all effective.

Summary Results | May 2025

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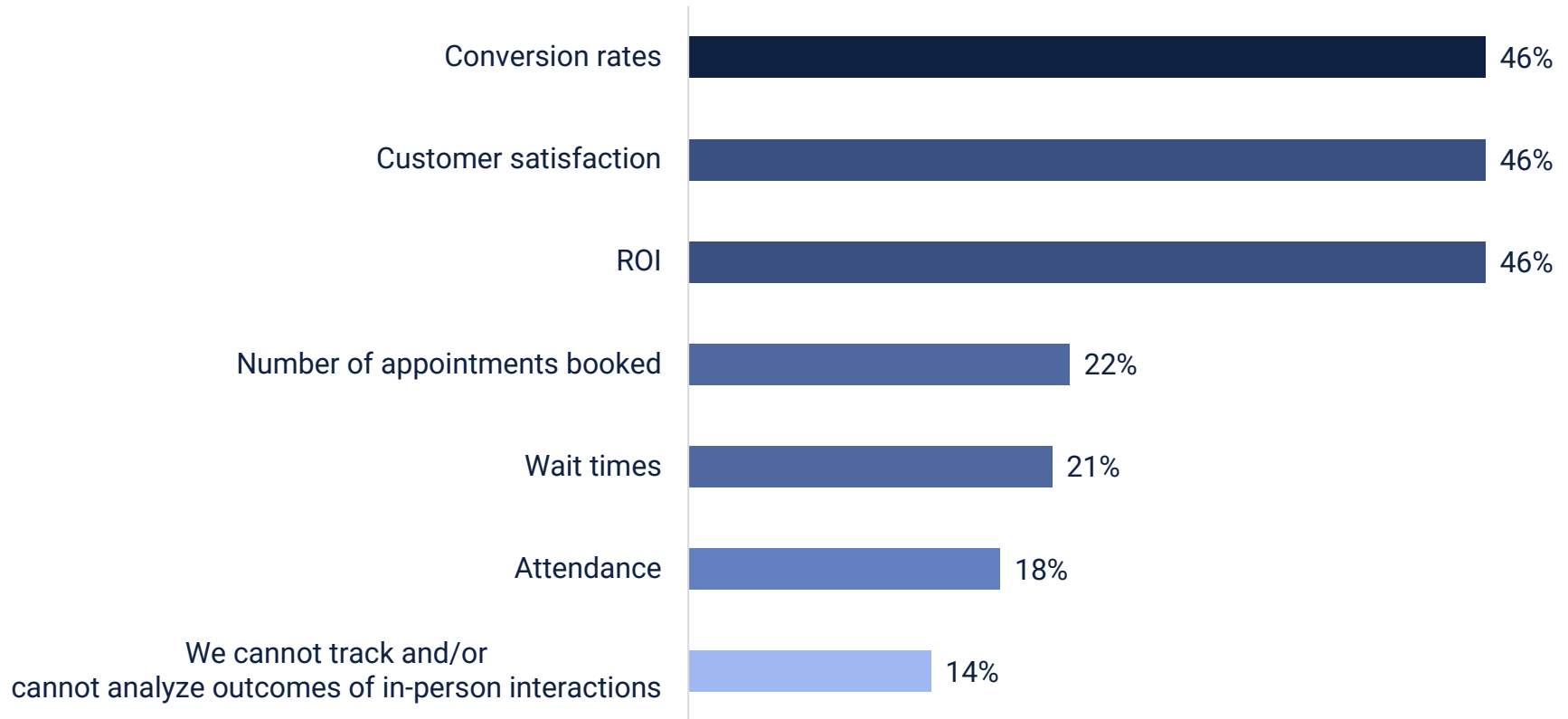
Do you experience any of these common challenges with your in-person interactions?



While all of these challenges are common for at least a fifth, respondents most often encounter limited or no customer data to inform service interactions (44%) when they are in-person with clients or customers.

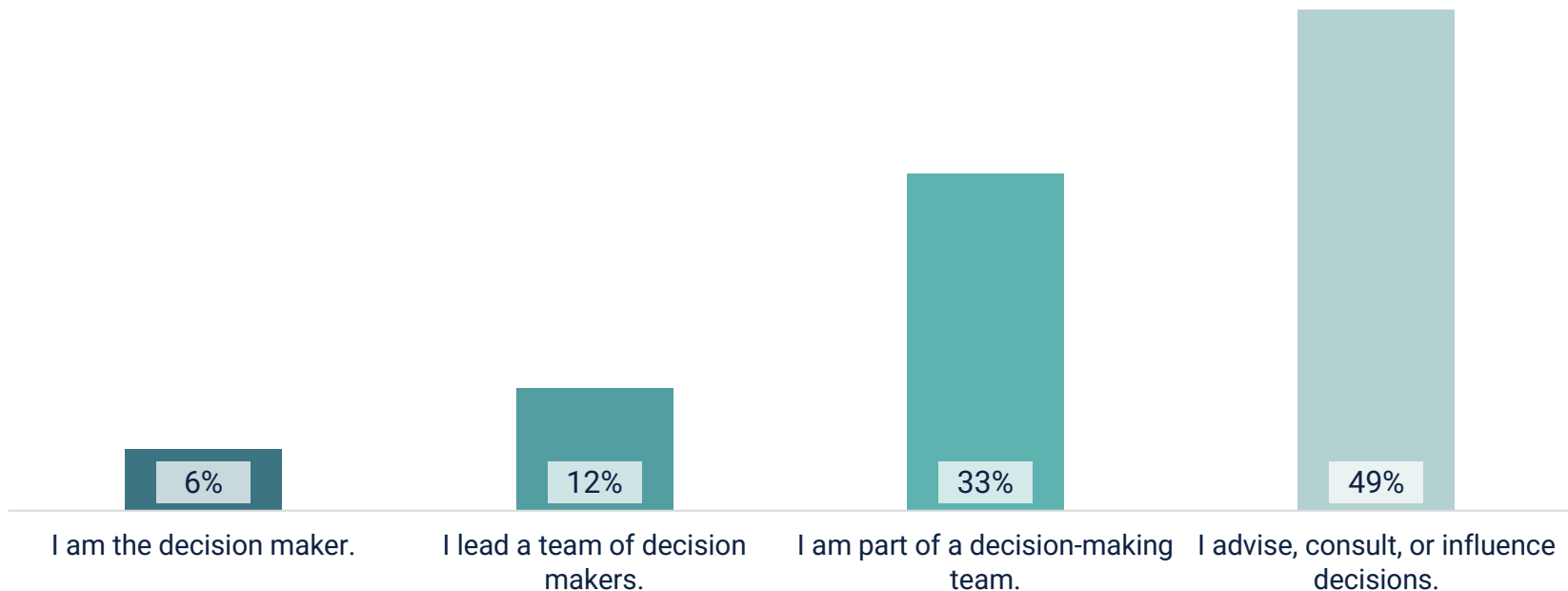
Summary Results | May 2025

What do you wish you could track in detail to analyze in-person interactions, including events?



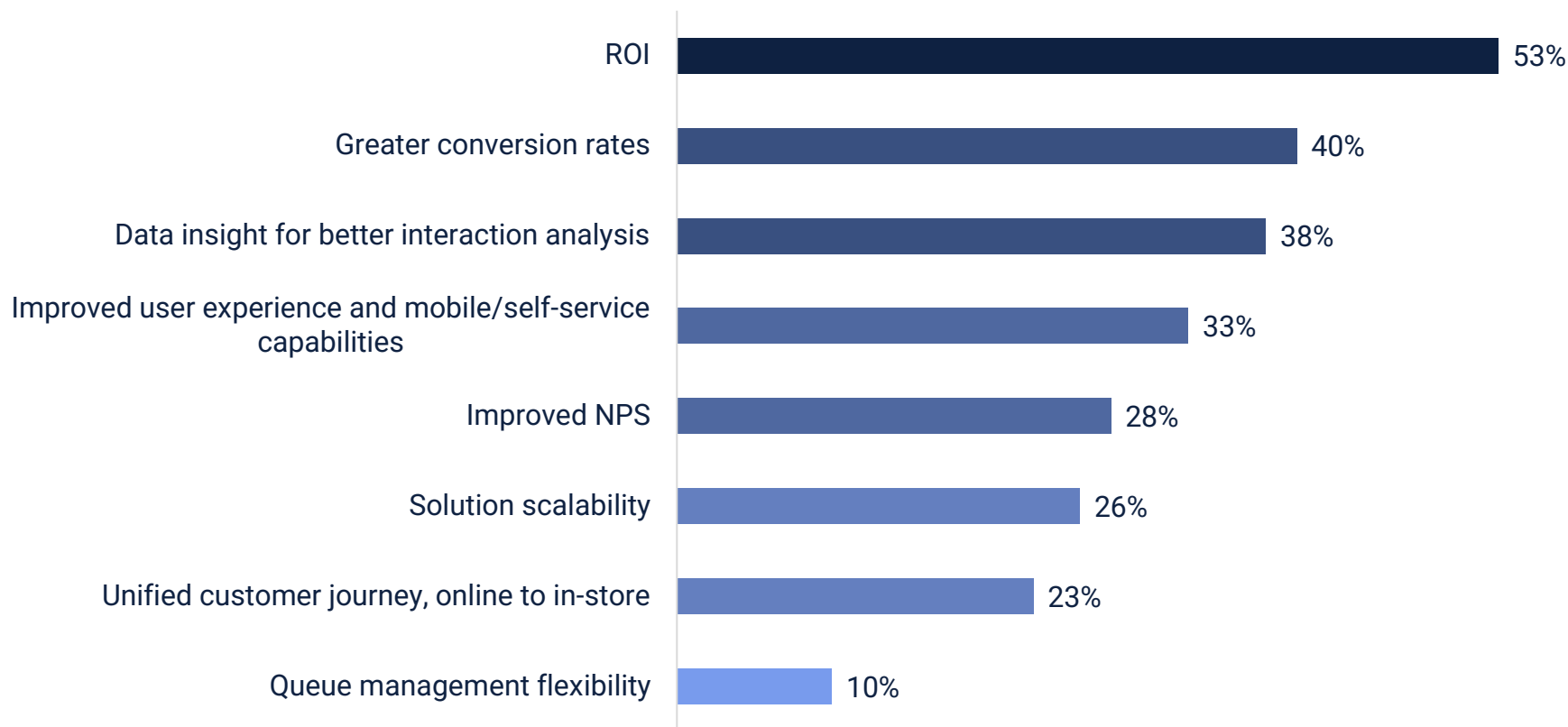
Organizations want to be able to track conversion rates, customer satisfaction, and ROI to analyze in-person interactions, including events.

How are you primarily involved in customer interaction technology decisions?



Nearly half of those surveyed have influence in customer technology decisions, a third are on the team that makes decisions, and 18% are either the decision maker or lead the team that decides.

What projected outcomes would prompt stakeholders to evaluate new customer in-person interaction technology?



Stakeholders want to see return on investment (53%) when evaluating new in-person interaction technology. Greater conversion rates (40%) and data insights for better analysis (38%) are strong influencing factors as well.

Summary Results | May 2025



About the Company

JRNI delivers a unified in-person interaction platform that turns everyday customer touchpoints into memorable engagements. Their solution seamlessly integrates appointments, queue management, and event experiences, all backed by real-time analytics to gauge performance. By weaving data insights throughout every solution, JRNI empowers staff to focus on genuine human connection, measurably enhancing loyalty and ROI—so your brand stands out with face-to-face service in an increasingly digital world.

[Learn more at jrni.com](https://jrni.com)