

# What 10,000 Customers Reveal **About Growth in Advanced Manufacturing**

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# The Largest CX Study in Advanced Manufacturing

**Methodology** | All participants sent identical surveys on the same day to their direct customers, creating a consistent, unbiased view of the advanced manufacturing landscape.

## YEAR 3 | AMCX CUSTOMER EXPERIENCE BENCHMARK SURVEY

**9,928**

**Customer responses  
worldwide | 2025**



**17**

**Participating  
organizations**



*Due to changes in the respondent mix, this report focuses on current year insights rather than year over year comparisons.*

SECTION **1**

# **C-Suite Executives Focus on Growth**

**They can't spend NPS points.**

# What the C-Suite **is Really** Prioritizing

Over the past year, Jim interviewed 34 CEOs and their C-Suite leaders across industries. One consistent theme stood out: Topics about customers rarely rise to the top of the agenda unless they're tied to growth, operational performance, or financial outcomes.

## **Growth is Top Priority**

In a Gartner study, 62% of CEOs cited growth as their top priority, the highest level in years.\*

## **CX Must Drive Growth**

Unless clearly supporting growth, efficiency, or margin; customer priorities rank outside top concerns.

## **Focus on Behaviors**

Executives focus on what customers do, not on what they say.



## **CX Must Connect to Financial Results**

CX gains traction when it links  
**Operations → Sentiment → Behaviors → Outcomes**

\*<https://www.gartner.com/en/newsroom/press-releases/2024-05-22-gartner-ceo-survey-finds-growth-is-the-top-business-priority-for-2024--reaching-highest-level-in-10-years>



## A-HA MOMENT

**The disconnect isn't that leaders don't care about customers — it's that CX isn't framed as a driver of decisions, operations, and dollars.**

# The Growth Chain™

## Connecting CX to Results

This framework illustrates how customer experience creates leading indicators that directly translate into tangible business outcomes.





## A-HA MOMENT

**By understanding and optimizing each link in this chain, companies can **DRIVE GROWTH** through increased Share of Wallet.**

# The Growth Gap. What's Standing in the Way?

**81%**

Satisfied

Satisfaction  
is high

**27%**

Plan to grow

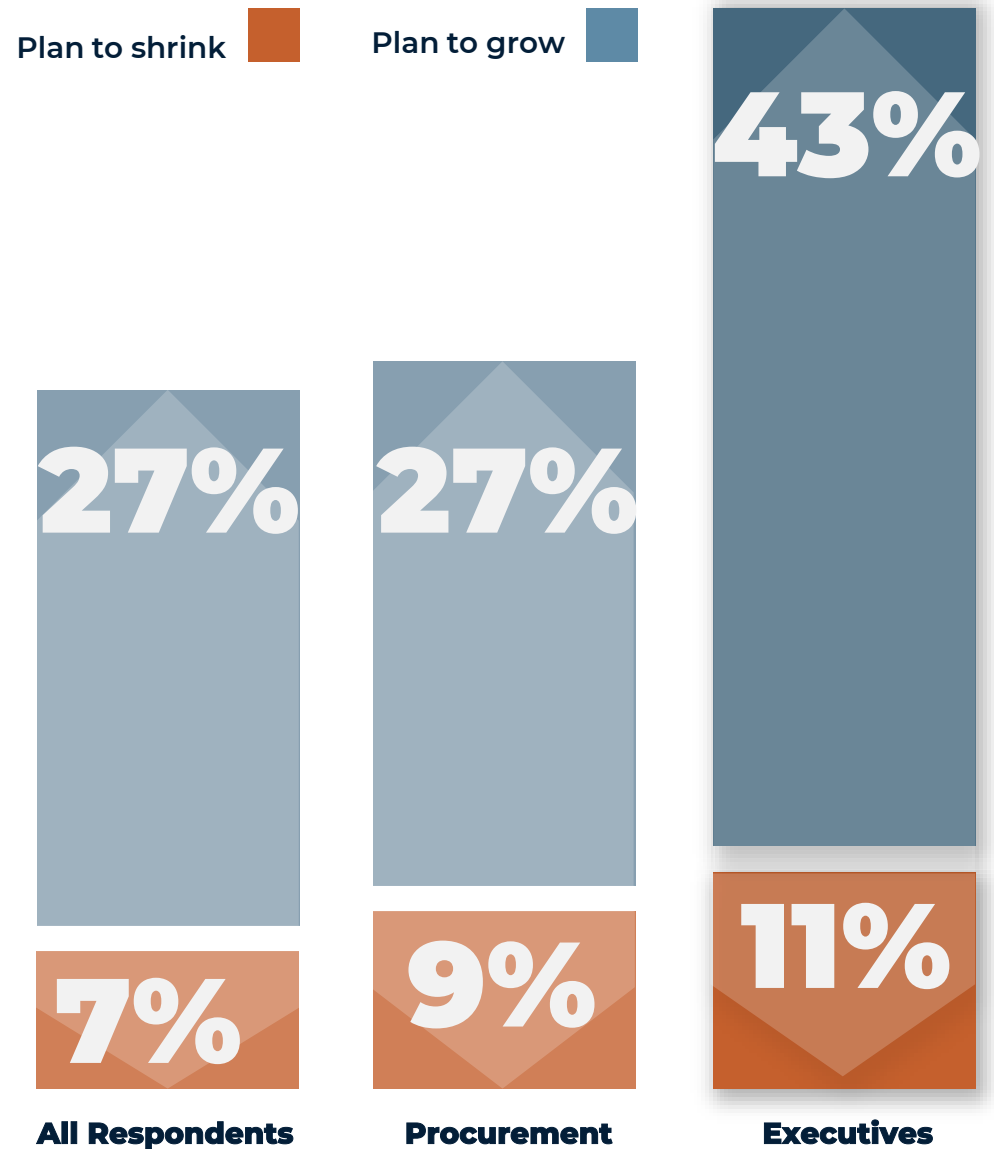
Growth intent  
is not

# Growth Planning by Role

Executives have the greatest authority—and the fastest trigger finger. Win their confidence, and growth accelerates. Lose it, and spending contracts.

This is important because executives have the greatest authority, particularly in discussions about expansion. Win their confidence, and growth accelerates. Lose it, and spending contracts.

**Executives are the most volatile. They are more likely to plan to grow—and to shrink.**



# Connecting Growth Intent to Financial Outcomes

## Global B2B Chemical Distributor

### THE QUESTION

When customers say they plan to grow, maintain, or shrink their business with you, does it actually happen?

To find out, the company matched AMCX growth intent responses against the trailing 12 months of actual financial performance.

### THE FINDINGS

Across the board, approximately two-thirds of customers who said they would grow actually did—a meaningful signal above chance.

But the real surprise was on the other end: many customers who said they **would maintain** their business **actually shrank**. With hundreds of active “maintain” accounts, only a handful stayed flat. The rest declined.

# Connecting Growth Intent to Financial Outcomes

## Global B2B Chemical Distributor

### KEY FINDINGS

1

#### **Growth Intent Converts**

About two-thirds of customers who say they will grow actually do, whereas many of those who say they will maintain actually shrink.

2

#### **“Maintain” is a Warning**

“Maintain” almost never means flat. Across hundreds of active accounts, most customers who said they’d maintain actually declined.

3

#### **Stickier Products— Stronger Signal**

Growth intent converted more reliably for specialty products than for commodities, where price competition erodes when stated loyalty.

4

#### **From Insight to Sales Action**

The company built segmented playbooks and “next best action” prompts for sales teams, flagging growth-intent gaps before customer calls.

**“When a customer says they are going to maintain, that’s not a sign you are safe — it’s an early warning. Maintain almost never means flat.”**

**VP CX & Commercial Operations Leader**

Global B2B Chemical Distributor

SECTION **3**

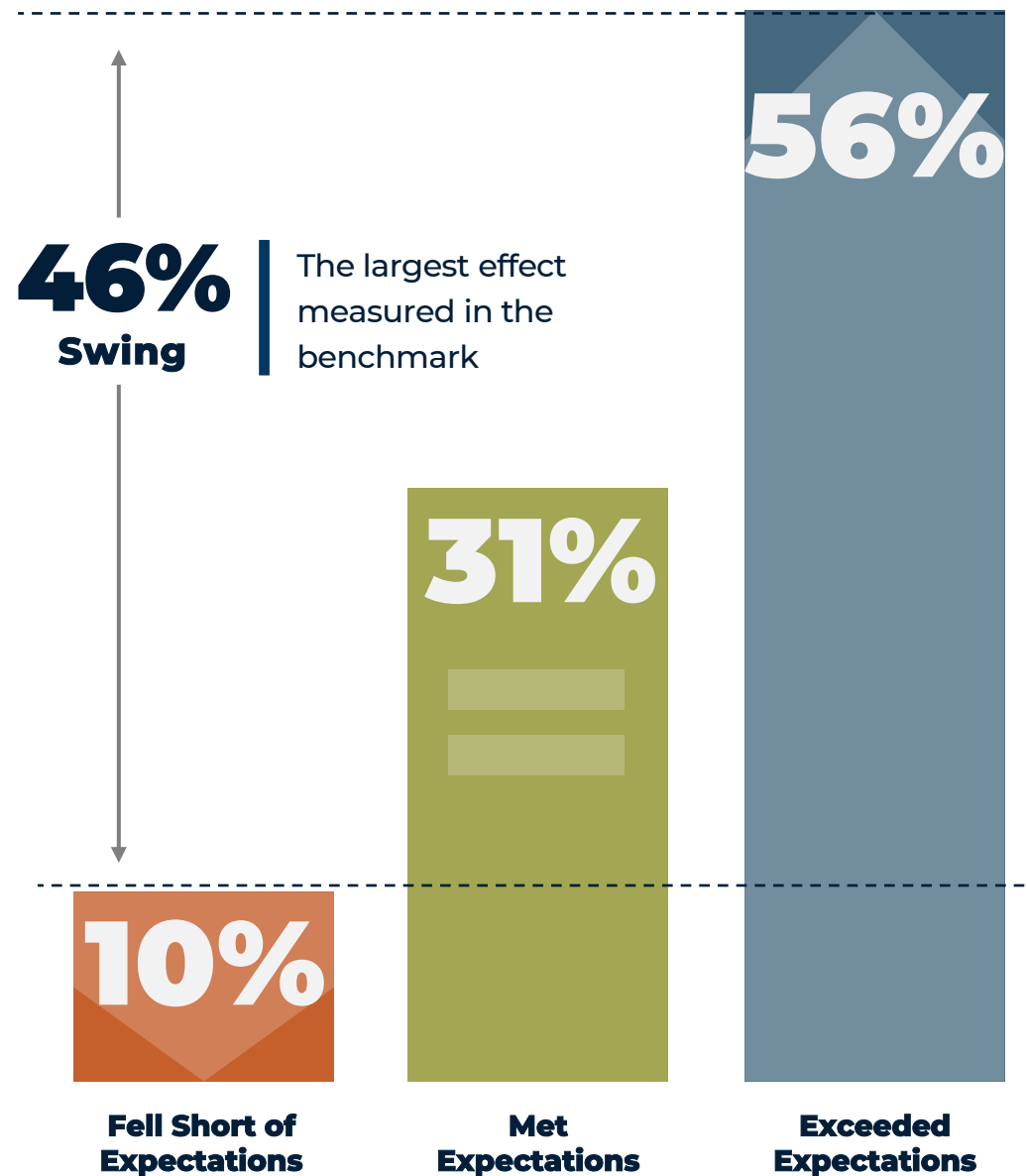
# **Feeling Valued** **The # 1 Growth Driver**

**Not product quality. Not price. The emotional experience of being treated like an important customer.**

# Feeling Valued Drives Growth

The one question that best predicted growth wasn't what most executives focus on. It wasn't supplier reliability, pricing, or product quality. It was whether customers felt valued by their supplier.

**Executives who felt valued beyond expectations were 5x more likely to say they will grow their relationship.**



# The Top Three Growth Drivers Are All Relationship Signals

**Not product. Not price. Not specs.**

**1**

## **Feeling Valued**

Being treated as an important customer

**2**

## **Account Relationship**

Ongoing interactions with representatives

**3**

## **Buying Process**

Offering solutions and agreeing to contracts

### **Relationships Matter**

This has major implications for AI-first interactions. Automating away the human relationship may reduce the signals executives use to decide whether they're truly valued.

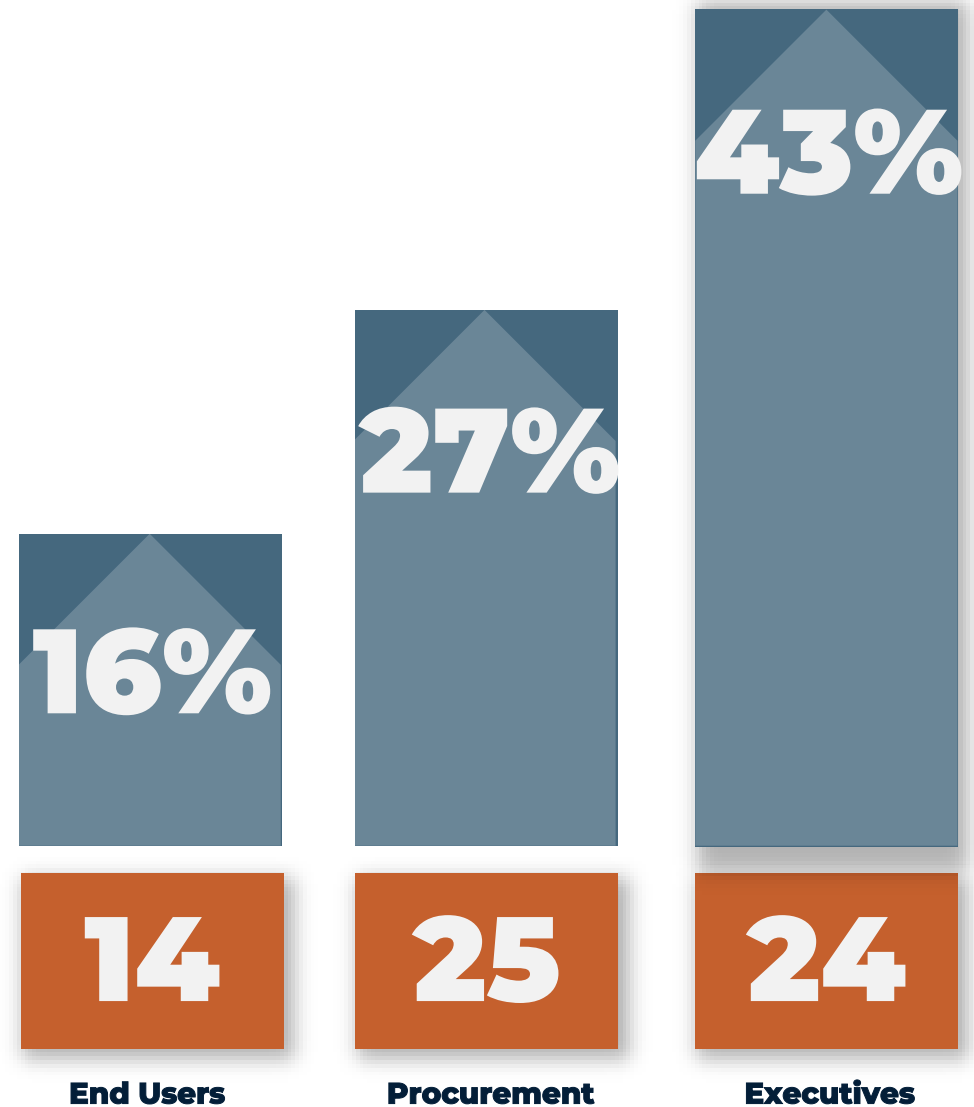
# NPS Does Not Predict Growth

While it's a common benchmark, our study did not find that NPS predicted growth.

**20**  
Overall NPS

**Executives are looking for leading indicators of growth. NPS isn't one.**

NPS  Plan to grow 



**“NPS is a lagging indicator, showing what you’ve done in the past. Emotions are a leading indicator, showing your executive what to expect in the future.”**



**Jim Tincer**

Founder, Heart of the Customer

SECTION **4**

# Issues Don't Kill Growth Poor Resolution Does

**Nearly 80% of respondents experienced an issue.**

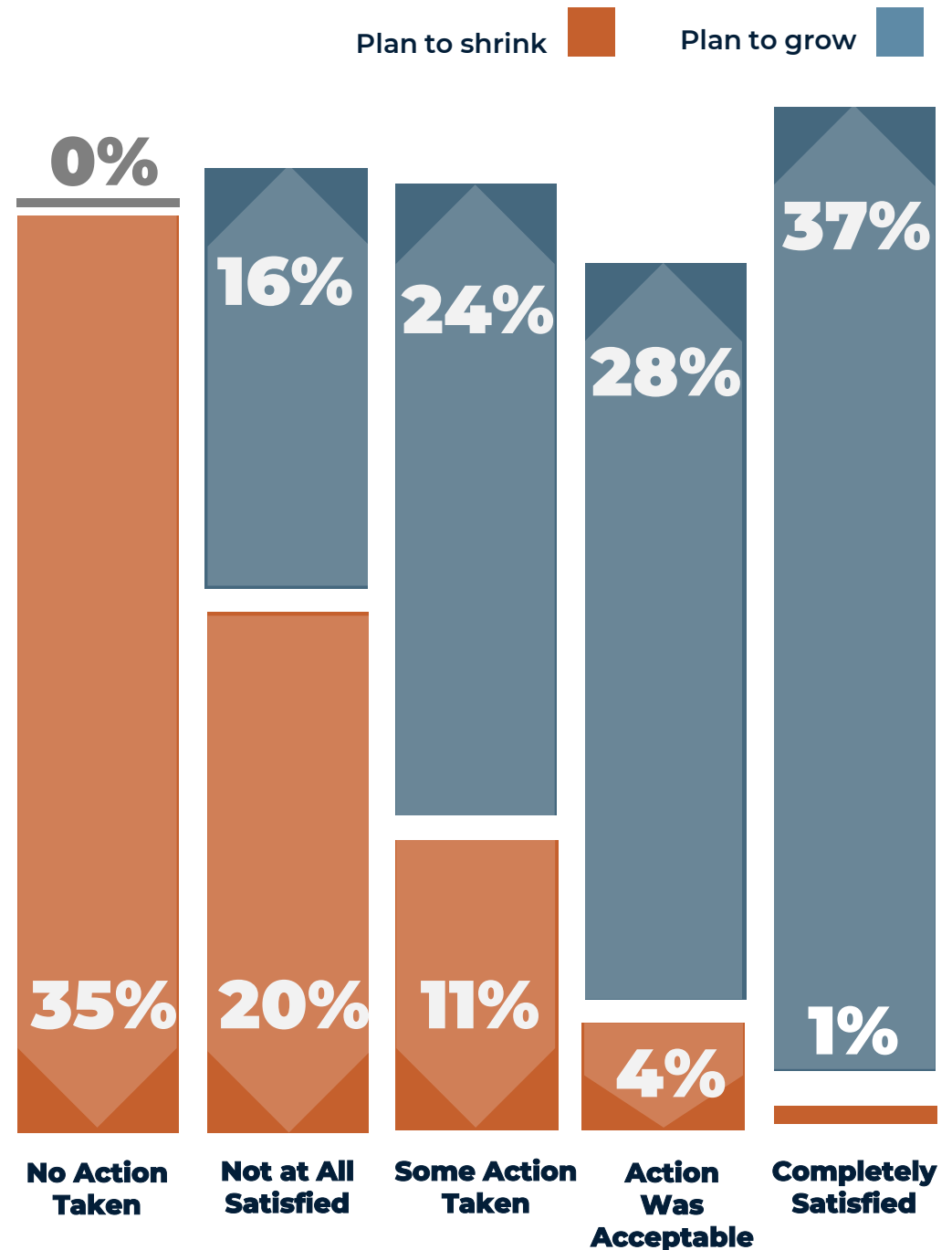
# Resolution Quality Impacts Growth

Most respondents had an issue with their supplier, and it didn't impact their plans to grow. But when the issue isn't resolved? A different story.

**Completely satisfied with issue resolution: 1% shrink**

**Not at all satisfied with issue resolution: 35% shrink**

- I was not at all satisfied because no action was taken
- I was not at all satisfied with the action taken
- I was not completely satisfied, but some action was taken
- I was not completely satisfied, but the action taken was acceptable
- I was completely satisfied





## A-HA MOMENT

**“Somewhat satisfied” customers behave more like dissatisfied customers than fully satisfied ones. Partial fixes aren’t enough.**

**“Actions speak louder than words. Listening to customers is obviously good, however, resolving an issue, no matter how small, is the actual solution to the problem.”**

**Survey Respondent**

SECTION **5**

# What this means for you

**Three actions every manufacturer should take.**

# The Three Critical Actions

## Create LEADing Indicators

This study ever creates a compelling case for change. Customer experience measurement can create the leading indicators executives are looking for—but only when placed in the context of the overall business ecosystem.

### 1 Create Leading Indicators

Connect experience data with behavioral and financial data to build the CX Chain of Value. Executive want to know not just how customers feel, but what those experiences predict.

Your operations create an emotional response in your customers, leading them to feel valued (or not). This changes their behavior, which in turn affects your financial outcomes.

**THE GROWTH CHAIN™ shows how your company's actions lead to—or destroy—the share of your customer's wallets.**



**Levers**  
Operational  
Touchpoints



**Emotions**  
Customer  
Sentiment



**Actions**  
Customer  
Behaviors



**Dollars**  
Financial  
Results

# The Three Critical Actions

## Measure Emotions

Done right, emotions aren't a "soft" measurement. In fact, research has shown that in B2B relationships specifically, customers' emotions are the best predictors of their behaviors.

### 2 Measure Emotions

Feeling valued produced a 46-point swing in growth intent—yet most manufacturers don't measure it. Add trust, confidence, and feeling valued to your surveys.

Manufacturers have discovered that confidence, feeling supported, being a trusted partner, and even enjoyability are strong predictors of customers' future spending.

**THE GROWTH CHAIN™ shows how your company's actions lead to—or destroy—the share of your customer's wallets.**



# The Three Critical Actions

## Resolve Issues Completely

When operations go awry, no survey is needed—you know customers are frustrated. Yet not every customer responds to your service recovery the same way. Close the loop with your customers to ensure that they are completely satisfied – that alone will drive strong growth.

### 3 Resolve Issues Completely

Partial resolutions behave like no resolution. Organizations must fully close the loop—and reopen cases if problems persist.

One manufacturer found that customers who had a product issue spent 10% less in the next year. By focusing on faster issue resolution, they decreased that to 1%.

**THE GROWTH CHAIN™ shows how your company's actions lead to—or destroy—the share of your customer's wallets.**



# From Zero to CX Backbone

## A Global Medical Device Manufacturer in Europe

### THE SITUATION

When a new CX Director took the role, they searched for the voice of the customer—and found nothing.

No systematic feedback for two to three years. They needed a baseline, and AMCX became that foundation.

### THE APPROACH

They used AMCX as the backbone survey, targeting two strategic customer segments.

Then they layered four additional methods—persona deep dives, brand NPS, academic research, and direct outreach—to build a comprehensive baseline. AMCX remains the guiding survey going forward.



SEGMENTS



METHODS

# From Zero to CX Backbone

## A Global Medical Device Manufacturer in Europe

### FOUR KEY DISCOVERIES

1

#### **Trust is the Differentiator**

Emotions data confirmed trust as the most critical asset—validating what the field sensed.

2

#### **Exposed a Blind Spot**

Results revealed eroding trust among non-clinical decision-makers—a gap the commercial team hadn't seen.

3

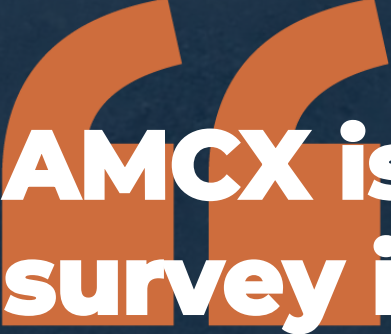
#### **Sparked Growth Conversation**

Now partnering across commercial and supply chain to connect CX data to share of wallet.

4

#### **Drove Cultural Change**

Shifted leadership beyond sales metrics to customer-centric KPIs—bridging clinical and non-clinical relationships.



**AMCX is the backbone of our survey initiatives. It gave us the baseline we needed — and showed us what we were missing.**

**CX Director**

Global medical device manufacturer

**“Executives pursue growth and are looking for leading indicators. The AMCX approach shows companies how to connect operations, sentiment, and behaviors to the outcomes that matter.”**



**Riccardo Porta**

Global Head of Supply Chain, Health & Pharma Solutions, Roquette

## About the AMC Consortium

An independent consortium of manufacturers and distributors focused on improving business results through superior customer experience (CX). Participation is free, and results are anonymized.

## About Heart of the Customer

A customer experience management consultancy focused on helping B2B enterprises implement CX strategies that drive competitive advantage.

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