



dimension
data

accelerate
your ambition

20th anniversary edition

2017 Global Customer Experience Benchmarking Report

Digital crisis or redemption

The uncomfortable truth



2017

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About us

About Dimension Data

Dimension Data harnesses the transformative power of technology to help organisations achieve great things in the digital era. As a member of the NTT Group, we focus on digital infrastructure, hybrid cloud, workspaces for tomorrow, cybersecurity, and network as the platform. With a turnover of USD 7.5 billion and offices in 49 countries, we deliver services wherever our clients are, at every stage of their technology journey. Accelerate your ambition.

For more information, please visit www.dimensiondata.com



About Customer Experience (CX)

Customer experience (CX) forms part of Dimension Data's Customer Experience (CX) and Collaboration Business Unit and enables over 7 billion customer interactions a year. We have 35 years' experience in planning, designing, integrating, and managing contact centres for our clients globally.

Our consulting, professional, managed, and cloud contact centre services make complex customer engagement environments simple and effective, enabling organisations to differentiate and grow the value of their customer base.

Our omnichannel, workforce optimisation, and analytics solutions integrate the physical, digital, and contact centre worlds, enabling a seamless CX which creates organisational engagement and value.

For more information, please visit www.dimensiondatacx.com

About Merchants

Merchants – a Dimension Data company – is a leading customer management outsourcing solution provider specialising in business process outsourcing (BPO) that delivers customer experience (CX) and customer interactions. We focus on people, process, and technology to create exceptional CXs.

We are pioneers in the contact centre industry, with 35 years of experience in creating and managing contact centre operations around the world for blue chip clients. Our services and solutions are built on tried and trusted models, systems, and processes which are based on best practice standards.

We are passionate about people. Our ability to attract the best talent, coupled with our rich history of success and innovation across different industries around the world, is what differentiates us from our competitors.

For more information, please visit www.merchants.co.za



Introduction



Welcome!

I'm delighted to present the results of the 2017 Global Customer Experience (CX) Benchmarking Report.

First published in 1997, we mark the 20th anniversary of the benchmarking report this year with a very special and newly expanded edition. Our report has been reshaped to span all aspects of CX – including the contact centre, digital, back office, and physical site operations.

This comprehensive report is crammed full of insights and guidance and aims to be a single reference point for the latest best practice CX or customer experience approaches from across the globe.

Digital crisis or redemption – the uncomfortable truth!

The research shows that digital transformation is not a debate, but a necessity to compete. In every geography, across all industry verticals, what was once viewed as a competitive advantage has now become an act of survival. Relevance in the digital age requires connections with customers that not only include multiple channels, but the interconnection of those interactions. The report shows a stark realisation that CX providers want to move faster and those who do will truly redeem themselves.

The call to action is apparent: the time to act is now.

Celebrating 20 years of CX insights and trends, our Global CX Benchmarking Report tracks an industry's evolution over two decades.

The benchmarking report wouldn't have been possible without the record 1,351 participants who contributed to our research, providing insights into CX operations across 80 countries. The report contains more than 950 data points and over 90 charts, all with in-depth analysis, supporting context on why it matters, and recommendations towards best-practice performance.

Our Benchmarking Results Portal allows you to view data at ten different levels and to compare results by region, sector, size, provider, operation, contact and service type, alongside a newly introduced market positioning filter.

Benchmarking is only part of what we do. Dimension Data has market-leading abilities and experience in delivering CX, collaboration, and contact centre solutions in 49 countries. We combine the expertise of our CX and Collaboration Business Unit with Merchants' 35-year history in contact centre delivery to create conscious customer journeys with powerful interactions across all touch points.

The benchmarking research broadens Dimension Data's understanding of emerging trends and challenges. It helps us drive our product strategy and develop innovative solutions and services for our clients. It strengthens our position as experts in CX.

I'd like to express my gratitude to all the participants who provided their time and input to our research. Thanks also goes out to the 40 association groups supporting our efforts to inform and improve the CX industry. They help us broaden the reach of our research, improve awareness, and facilitate best practice learnings for their own membership base through the sharing of our research.

Enjoy the Report!

A handwritten signature in black ink, appearing to read 'Joe Manuele'.

Joe Manuele

Group Executive, CX and Collaboration

Executive summary

about the author

Andrew McNair



Head of Global Benchmarking, Dimension Data

Andrew is the editor of Dimension Data's Global Customer Experience Benchmarking Report, and holds overall responsibility - from research and publishing to the design. He possesses exceptional industry insight, and a wealth of strategic vision which he applies in his role as Head of Solutions. Andrew has over 20 years of consulting and operational experience in the CX industry.

Customer Experience – the uncomfortable truth

The digital dilemma in enterprises is deepening and organisations must choose a path between digital crisis, or redemption. This is the clear message from this year's Global Customer Experience (CX) Benchmarking Report.

There is a growing gap emerging between those committing to digitising their CX to the standards expected by modern/evolving customer types, versus those procrastinating on when and how to make their move. Fantastic levels of data can inform positive business change, but organisations frequently mishandle the opportunity by only focusing on parts of the story. The opportunity is massive, so needs to be the line of sight.

There is a growing gap emerging between those committing to digitising their CX to the standards expected by modern/evolving customer types, versus those procrastinating on when and how to make their move.

Reality out there...

The results indicate that the top factors driving digital transformation are to improve CX, closely followed by customer demands for digital. Over 84% can evidence revenue uplifts as a result of improved CX, and 79% report cost savings.

Yet, the reality is that organisations around the world are failing to implement effective digital strategies. Their customer experience solutions are now becoming disjointed, and digital is not displacing traditional phone interactions at the speed desired by customers.

Fewer than 10% of organisations polled, said that they had an optimised strategy for digital business in place, while over half (51%) reported they don't have any plan at all, or are at best in the process of developing one.

The absence of a connected digital strategy means that even when digital solutions are available, the customer is frequently not even aware of its existence.

To compound the situation, just 36% have appointed a board level executive responsible for all customer experiences. Organisational disconnects means digital solution functionality is not meeting customer requirements, with poorer than envisaged digital adoption levels.

The absence of a connected digital strategy means that even when digital solutions are available, the customer is frequently not even aware of its existence.

Organisations need a new approach...

The research indicates that just 67% of organisations are tracking customer journeys in some form, but of those, only 44% have automated processes available.

Connecting customer journeys is the second top factor to transforming CX in the next five years, but before implementing a digital strategy, organisations need to understand the patterns of their customer's journeys, and design and personalise them accordingly.

However, this cannot be achieved without understanding and harnessing mass data.

Connecting customer journeys is the second top factor to transforming CX in the next five years, but before implementing a digital strategy, organisations need to understand the patterns of their customer's journeys, and design and personalise them accordingly.

Analytics was voted the top factor that will transform customer experiences in the next five years, yet only 48% have customer analytic systems, and 36% possess big data analytic solutions. The research clearly indicates that organisations need to analyse, or fall behind their competitors.

In addition, CX robotics, in the form of automation, AI and IoT are creating a new reality, and demanding a new approach. Virtual assistant (chat bots) is voted the top channel growth focus for 2017, and IoT deployments are set to double. Emerging technologies are creating a platform for unprecedented efficiency opportunities – both in business and customer effort, and organisations need to develop or acquire new skills to support, and stay ahead of, the re-shaped environment.

Virtual assistant (chat bots) is voted the top channel growth focus for 2017, and IoT deployments are set to double.

Leaders embrace CX...

The uncomfortable truth is that high performing companies that have committed to the opportunity created by the digital revolution, are outpacing established market leaders. The benchmark research highlights that top quartile organisations are performing up to ten times better than the typical standard.

It's now a fact that the world has formed a digital skin. Business, service, technology and commercial models have changed forever. Organisations are strategically challenged to keep pace with customer behaviour.

We've seen that digital transformation both accelerates opportunities and causes disruption. Pioneers of the digital age have reimagined business models and processes that have changed customer behaviour forever. If you want to ensure the future success of your organisation, you will need to make the right choices in your CX and digital strategies.

Pioneers of the digital age have reimagined business models and processes that have changed customer behaviour forever.

2017 Key findings

Digital crisis or redemption

The uncomfortable truth

1. Digital dominance

The world has formed a digital skin.

CX strategies are challenged to keep pace. Digital has not displaced traditional interaction

2. Conscious journeys

Journeys should be intuitive.

They must be connected and understood.

The uncomfortable truth

High-performing disruptors are outpacing established market leaders *by committing to the opportunity created by the digital revolution.*

81% of companies recognise CX as a competitive differentiator

CX is the no1 most important strategic performance measure

79% can evidence cost savings; 84% an uplift in revenue/profits

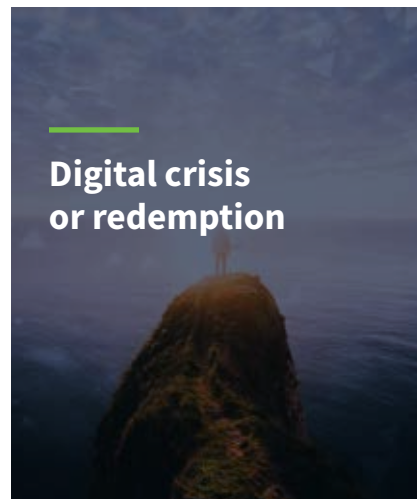
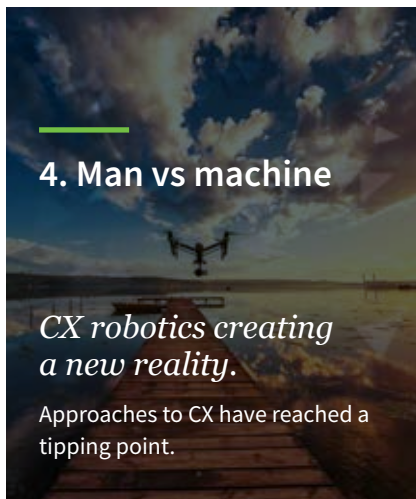
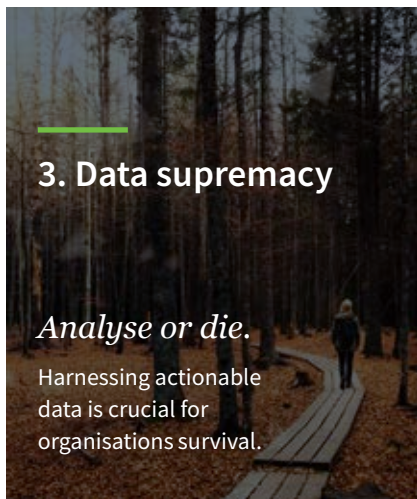
Organisational recognition of CX as a differentiator is evident. It's cited as the most important strategic performance measure, building customer trust and delivering tangible benefits on

Just 13% self-rate their CX delivery at 9/10 or better

Only 10% consider their digital business strategy to be optimised

36% don't have a single manager responsible for CX; Of those who do, just 36% are at board level

commercial performance, employee engagement and customer loyalty. However, disjointed strategies, disparate management and inconsistencies in approach are damaging customer experiences.




Key Findings

Conclusion

Digital dominance


The world has formed a digital skin. Business, service, technology and commercial models have changed forever. *Organisations are strategically challenged to keep pace with customer behaviour.*



9 channel choices the norm, will rise to 11 by 2018; CX no.1 driver for digital

70.7% forecast increases in assisted-service volumes; 78% a rise in fully automated contacts

Virtual assistant (Chat bots) top growth focus in 2017; IoT to double



Customer awareness of solution and functionality not meeting user needs top factors hindering digital transformation

Actual split of interactions falling short of desired model

Majority are not tracking cost per transactions on digital solutions

Customer demand for digital solutions has never been greater, yet digital interaction levels have fallen short of forecast. Management is being stretched by an ever-expanding channel suite to support new technologies that are being deployed as they evolve. Some

have optimised their digital strategy and are surging forward. Others are increasingly disjointed, and are focusing instead on fixing fragments of the customer experience – it's the entire journey that counts.

Conscious journeys

Seamless, proactive, reactive, connected, automated and analysed. Omnichannel is a priority but the customer *journey patterns need to be understood, designed and personalised.*



Connecting customer journeys 2nd top factor to transforming CX in next 5 years; 76% already have some channels connected

67% can now track customer journeys in some form, of those 44% have automated processes available



8% have all channels connected; just another 22% have most connected

58% channels are being managed in silos; *42% channel* data not actively shared between teams

72% fail to collect data to review and optimise journey patterns; 76% can't identify blockages in process that will impact CX

Understanding user behaviours, patterns and transaction value potential across each channel path is crucial. Organisations are struggling to track customer journeys that now frequently start on one channel, hit a few more and end elsewhere. Choice is crucial, but so is the functionality and consistency of experience. Most companies are prioritising omnichannel solutions, designed

specifically to connect the customer journey. However, those systems will only flourish if they are designed on solid process, validated by analytics and have robust review mechanisms that help identify problem hotspots and customer frustration points. Silo management is affecting the effort, and organisations need to ensure they are structured to facilitate the omnichannel vision.

Data supremacy

The importance of understanding and harnessing (mass) data is now critical to performance, the *number one trend to reshape the industry – analyse or die.*



Customer analytics was no2 factor towards positive improvement in last 5 years; it's been voted no1 for next 5 years

Top benefit (58%) of analytics is improving customer journey

42% can now offer customised CX



Only 48% have customer analytic systems; 36% possess big data analytic solutions

29% using analytics to inform channel/contact management strategy


Just 54% have agent analytics; *42%* of analytic systems don't meet current needs

The depth of the data that's available is unprecedented. Digital footprints are fueling the volume of mass data, which, to be effective, needs to be (where merited) transitioned into actionable micro-level personalisation. Customer analytics was the second top influencer of positive business change in the last five years. It's been elevated to being the single largest transformation tool in the

coming five years. The benefits of analytics are enormous, but many organisations are running blind, or with systems that can no longer cope with their needs. The message is simple: ensure that your data is founded on consistent, but open principles, and most of all, if it's used well, it will translate to performance supremacy.

Man vs machine


CX robotics in the form of automation, AI and IoT are creating a new reality, demanding a new approach. *Human cost and productivity is challenged as these capabilities improve.*



Top 5 channel focus areas:

1. *Virtual assistant (chat bots)*
2. *Instant messaging (incl. web chat)*
3. *Mobile apps*
4. *Video chat*
5. *IoT*

Phone volumes have dropped by 17% since 2015



Transaction complexity contributing to absenteeism levels double that in 1997

Agent average length of service
28 months


First contact resolution, on digital paths lagging phone, 56% say phone volumes will drop further through end 2018

The 2016 benchmarking report was framed around the theme of 'Digital needs a human touch'. In other words, digital needs design, ownership and, especially, a human touch to be effective. As channel options have grown, complexity has increased too. It's created a stretch (that is yet to be overcome) where there's a lack of management fundamentals once commonplace in traditional service centres. Operations are being asked to deliver expert

solutions that they've only just started learning as they go. Agents are handling the fallout and being asked to resolve what are increasingly complex customer escalations. Organisations need to ensure that their new digital systems are supported from design, through to deployment and operational practice and review, to remedy service issues, and to not becoming a part of the problem. The process is ongoing, so agility of the approach is essential.

Digital crisis or redemption?

Pioneers of the digital age have reimagined business models and processes that have changed customer behaviour forever. *The choices you make in your CX and digital strategies will define the future success of your organisation.*



Intelligence powering new strategies, capability, and operating model evolution

Top quartile performances evidencing 'art of the possible'

Investment on technology and facility rises, as percentage of budget spend on human resource drops



Measure
Disparate management the biggest threat to omnichannel

Quality controls on digital up 49% since 2016, but still way behind more established phone

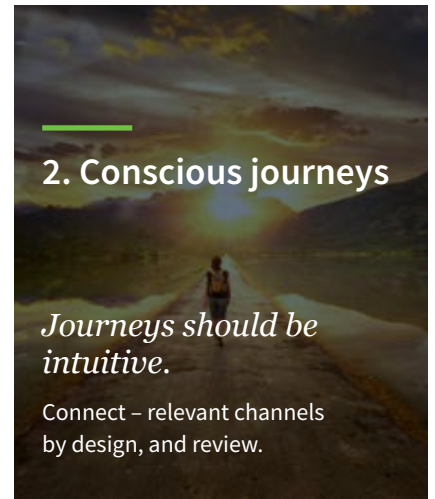
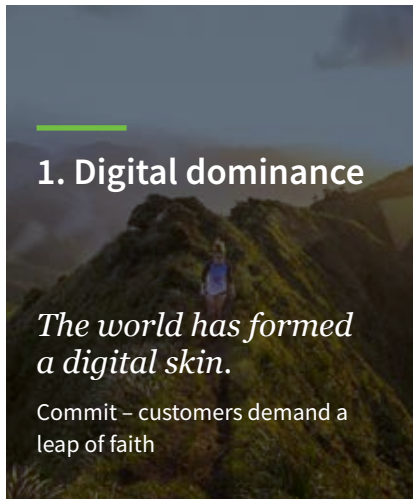
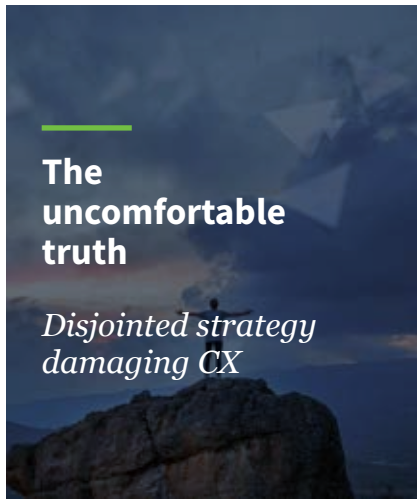
Less than half of operations are fully involved in design of technology systems

Digital is only as good as the CX strategy it serves - the way it's designed, it's integrated technology enablement, and the actionable data analytics used to validate the paths taken. Organisations need to create an environment where displacement of legacy processes, assets and operations are seen as a natural transition, and not a threat. Only then will established organisations remain relevant and competitive. It becomes a real crisis or redemption issue, dependent

on whether organisations have a clear strategy and can harness capabilities in a holistic designed manner. Layering on automation to poor processes and siloed functions will fuel increased fragmentation, increase costs and widen inability to compete. At the same time, silo management, limited or no omnichannel capability, and a poor perspective of performance outcomes, will also impact the sustainability of a business.

We say...

Digital crisis or redemption



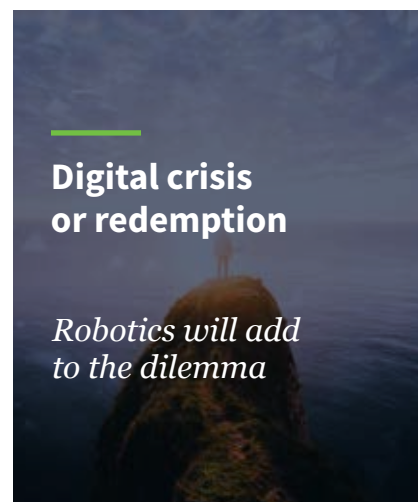
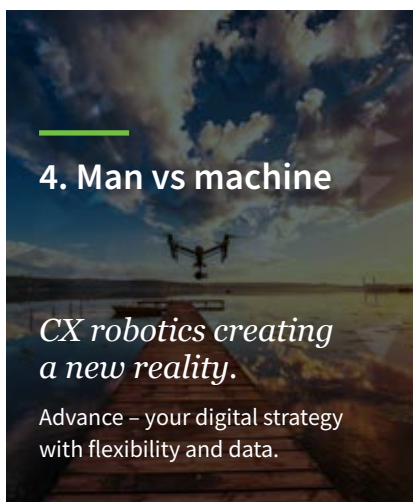
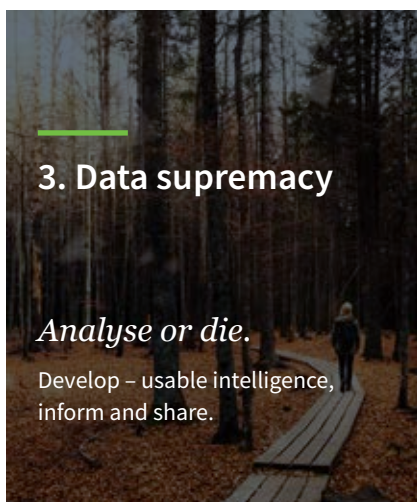
Introduction

Key Findings

The 2017 benchmarking report includes information on all aspects of CX in the organisation and everything decision-makers need to know to make informed decisions about their digital transformation journeys. Read a synopsis of the findings of each chapter below:

Strategy. CX is crucial to organisational strategy. Why? CX is proven to increase customer loyalty, commercial performance and employee engagement. CX enables transformation. It's recognised as a market differentiator for most. Organisations and customers alike are embracing digital capability, yet the transformation and challenge to provide great CX is becoming more complicated.

Disparate systems are a challenge, and disparate management are a threat. Omnichannel solutions are deemed critical, yet most organisations struggle to optimise their strategy for digital, if it even exists. It's causing CX to become disjointed. CX transformation needs a strategy. Connected CX journeys need design. Robotics is a reality and the speed of change means future proofing your technology, and your approach on the human touch.



Key Findings

Conclusion

CX. There's an overwhelming appreciation from organisations on the importance of CX. Establishing trust is the leading driver of CX, followed by the matching of service experiences to brand values. More than eight in 10 companies recognise CX as a differentiator, and it's the number one indicator of strategic performance. It drives revenues, is proven to reduce costs and even adds to employee engagement levels, yet just one third of operations rate their own services at a level of eight out of 10 or better.

CX delivery is being damaged by a lack of process management, particularly across the expanding choice of digital pathways. Personalisation, intelligent automation and the ability to connect customer journeys powered by intelligence from analytics, will do most to reshape CX capabilities in the next five years. CX has to adapt by committing to the opportunity created by the digital revolution.

Analytics. It has again been voted as the top factor that will change the customer experience industry. Yet, many organisations only look at superficial data to determine how to make improvements in service offerings. Without a strong practice focused on collection and analytics of data, it's impossible for an organisation to deliver personalised experiences to customers.

Also, without centralised sources of data, analytics can be difficult. Data management and systems integration are major challenges to implementing analytics, as well as a lack of communication within the organisation to drive customer experience improvements.

Digital. CX and customer demand for digital are the top considerations for driving digital channel strategies. Yet digital uptake levels are behind forecast. They are slowed by solution functionality that's not meeting customer needs and poor marketing of the solution existence. CX is core to digital transformation, and digitally-relevant businesses are focusing on aligning system user experiences, both internally and externally to drive positive disruption.

This means not only changing the CX with a new application or with improved customer service, but re-arranging the entire organisation to become more agile and responsive to customer needs. Innovation is key, and organisations need to build an internal competency that enables them to continuously adapt and thrive through explorative innovation and prototyping. The development of this competency starts with strong leadership and an innovative culture, which in turn best serves customer needs.

Operations. Productivity and the human cost of CX are being challenged as automated solutions improve. There's evidence of a clear breakdown between the strategic relevance of CX and operational management techniques, as complexity and commercial pressures increase. Productivity has replaced first contact resolution as the top operational focus. CX performance, the top strategic performance indicator, drops to third top priority.

The benchmarking results highlight significant inconsistency in operational process between new digital and traditional CX channels. Ease of resolution is what counts most to the customer, but cross-channel delivery is inconsistent, and overall, performance levels are falling short. Operational structures and design need to go digital if they are to keep up with evolving customer demands.

Ease of resolution is what counts most to the customer, but cross-channel delivery is inconsistent, and overall, performance levels are falling short.

Efficiency. Organisations struggle between a strategic desire to evolve and a silo management operating model that hinders digital and workforce optimisation. Efficiency levels are further challenged by the absence or inconsistent use of core support technologies (service efficiency systems are not being utilised to their full potential). Although complexity levels are growing and cost pressures are returning, some organisations are operating without knowledge and workforce management systems.

Agent analytics and a surge in e-learning techniques have emerged as 2017's top optimisation priorities. Employee skills and experiences are now a premium. Yet, agent absenteeism is twice that of management, and has doubled since our first report 20 years ago. Emerging technologies are creating a platform for unprecedented efficiency opportunities – both in business and customer effort. However, resources will need new skills, and operating models need to be structured to support the re-shaped environment.

Technology. It was voted as the number one enabler to positively transform CX services in the last five years. Yet, over a quarter of organisations say that their technology systems are failing to meet their current needs. Omnichannel solutions that integrate enterprise systems and connect customer journeys is the top technology trend for 2017, but nearly seven in 10 organisations currently have none, or very few, channels connected. The ability to customise has emerged as a new top focus, and analytics is cited as the top factor to reshape CX in the next five years.

Cloud continues to grow as a model in public, private and hybrid forms. Over eight in 10 existing users say cloud has provided access to new functionality, with future proofing a key benefit. Significantly, three quarters of users also say cloud enables omnichannel capability via integrated platforms. Robotics will add to the dilemma, and technology strategies need to evolve and become agile in connecting growing enterprise requirements. Thinking of CX technology as a connected element in a holistic enterprise IT ecosystem and overcoming traditional work splits between business and IT adopting new concepts as swarming, will be key for success.

about the global customer experience benchmarking report

A comprehensive, global research study ...

Frequently cited by industry analysts and quoted by the media, Dimension Data's Global Customer Experience Benchmarking Report is widely acknowledged as the most useful, authoritative, and comprehensive report of its kind. It's designed to provide a single point of reference on key aspects affecting customer interaction management within today's CX industry. We believe it's the most extensive global overview of its type.

... based on relevant research

Our Report is based on research conducted via a comprehensive survey. We refresh the survey each year to ensure we're capturing the information that's most relevant to our industry and its future.

... offering analysis and recommendations

We go beyond other reports of this type. We highlight key trends and comment on the business impact, we also offer guidance on how to achieve best practice results. This Report will provide you with the latest research findings, thought leadership insights from subject matter experts, hot topic quick tips, and infographic overviews. Result data is provided via chart or table content, each supplemented by structured commentary. For each research item, we:

- provide detailed research analysis
- present recommendations on next steps to accelerate your journey and optimise your CX solutions
- summarise the key highlights

Our online *Benchmark Results Portal* complements the Report and allows you to view all of the data at ten levels (including region and sector), export content, and build your own bespoke presentations.

You can *access the portal here*:

<https://dimensiondata.2017cxbenchmark.com/portal/?trg=GCXBR>

About the 2017 Global CX Benchmarking Report

950+ data points 90+ analysis charts



Over **20** new questions
Research study broadened to span
entire CX spectrum



Annual Research study celebrating
20 years of CX insights and trends



View data at 10 levels including: geography, size, sector, brand, positioning, service, contact and provider type



analysis with *context* and
recommendations on best practices



Supported by over **40** of the
world's leading industry groups
and associations

01

Strategy

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Strategy





CX is crucial – 70.9% of boardrooms recognise CX as their most important strategic performance measure.
Why? CX is proven to increase customer loyalty + commercial performance + employee engagement.
And 81.4% recognise CX as a competitive differentiator.

CX is transforming

Top factors enabling positive change during the last 5 years:

-  **#1** Access to new technology (e.g. cloud solutions)
-  **#2** Analytics and business intelligence
-  **#3** CX-led strategies
-  **#4** Operating models/multiskilling
-  **#5** Digital

Future strategy – CX services evolve





-  Virtual Assistant (Chat bots): from **13.3% to 46.0%**
-  Chat (Instant messaging): from **52.4% to 84.7%**
-  Proactive automation: from **33.7% to 65.6%**
-  Mobile apps: from **56.2% to 82.7%**

Providing 'great' CX gets more complicated

Average of 11 channels for most by 2018
BUT **disparate systems** are a challenge




- 8.4%** have **All** channels connected
- 21.9%** have **Most** channels connected
- 45.8%** have **A few** channels connected
- 23.9%** have **No** channels connected

Strategies for digital business do not deliver

-  **9.5%** Optimised
-  **31.1%** Delivering
-  **50.7%** Being developed/No Strategy
-  **8.7%** Separate strategy for each contact channel

CX experiences are becoming disjointed.
Technology is there to **create excellence**...

Disparate management is a threat to CX strategies

-  **58.5%** of channels are managed in silos
-  **36.2%** have no consistency in how channels are configured
-  **44.3%** think it's all too difficult

We say

- **CX transformation** needs a strategy
- **Connected CX journeys** need design
- **Speed of change** means solutions need to be future proofed

Robotics is set to create a whole new reality

**Talk to
Dimension Data
today.**

Strategy. CX is crucial to organisational strategy. Why? CX is proven to increase customer loyalty, commercial performance and employee engagement. CX enables transformation. It's recognised as a market differentiator for most. Organisations and customers alike are embracing digital capability, yet the transformation and challenge to provide great CX is becoming more complicated.

Disparate systems are a challenge, and disparate management are a threat. Omnichannel solutions are deemed critical, yet most organisations struggle to optimise their strategy for digital, if it even exists. It's causing CX to become disjointed. CX transformation needs a strategy. Connected CX journeys need design. Robotics is a reality and the speed of change means future proofing your technology, and your approach to on the human touch.

about the author

Robert Allman



Group Senior Vice President, CX and Collaboration, Dimension Data

Robert is motivated to drive CX innovation and best practices within the contact centre environment and beyond. He joined Dimension Data in 1994, and has performed roles in Australia and South Africa, and he has also worked for Merchants, Dimension Data's contact centre subsidiary, in the United Kingdom. Robert has more than 20 years of experience in contact centres and ICT.

Questions and answers with *Robert Allman*

1. What does digital domination mean to the organisational strategy?

The world has formed a digital skin. Business, services, technologies and commercial models have changed forever. Organisations are strategically challenged to keep pace with customer behaviour.

Organisations are witnessing disruptive innovators entering the market and reimagining ways of doing business. They surf the wave of the digital opportunity, change the industry, customer expectation and subsequent behaviours.

CX strategy needs to be based around acquisition, growth, retention, repeat business and firm cost reduction metrics. Digital capabilities provide organisations with the opportunity to provide greater choice, ease and productivity.

Successful digital transformation will only be delivered by a strategy that re-engineers how processes, people, technology and the organisation can be mobilised in an aggressive customer, change-orientated manner. One of the key focuses of a successful digital strategy must be the displacement of legacy methods of working and the associated costs.

The height of the bar has been set by blue sky thinkers within green field organisations, where the competitive benefits of legacy and incumbency have a rapidly shortening runway.

2. The 2017 report is titled, 'CX - an uncomfortable truth'. Tell me more?

44.3% of organisations think CX is all too difficult.

It's all about aspirational strategic intent versus competing operational capabilities and execution. Strategic line of sight through the organisation is required. However, transformation is recognised, understood and executed by few organisations.

It's clear from organisations' responses this year that there are leaders and laggards. 9.5% of organisations state they have an optimised digital strategy, 60% do not have a digital strategy in place.

Organisations state that customer experience, customer journeys, omnichannel, data analytics and digital are high priorities. However, this is typically translating into disjointed initiatives that will not deliver the intended outcomes. 21.9% of organisations have most channels connected which is significantly lower than organisations forecasted last year. 58.5% of channels are managed in silos, which translates into a belief that an isolated channel strategy will deliver great CX.

Growth in interactions, complexity and cost is not sustainable. Businesses born with a digital DNA experience alternate challenges. Digital displacement of legacy processes, assets and operations have to take place for established organisations to remain relevant and competitive.

3. What are organisations doing to refresh their CX strategy?

CX is the top performance measure at board level, where the value of CX is being linked to profitability, revenue increases and operational cost reduction. Organisations are challenged to effectively cascade strategic intent into digital, contact centre and physical customer execution that drives change in CX outcomes.

Organisations are focusing strategic transformation on self-service solutions, data analytics, by targeting operating model changes, changing staff skill sets, as well as cost reduction. They do this through the reduction of the organisations' physical footprint and people costs.

4. Automation, robotics, IoT, are we heading to a new era of CX business?

Yes, with a no. The world has formed a digital skin, as IoT's long-term explosive growth gathers pace. Artificial intelligence is hardening and its practical use is maturing. The application of machine-based learning within a CX context adds real value and can provide profound returns.

Automation is as good as the CX strategy it serves and its design. It then needs enabled through integrated technology and a data management capability that informs.

However, this becomes a real crisis or redemption issue: the benefits will be reshaped for organisations that have a clear strategy and can harness capabilities in a holistically designed manner. Organisations that are operating in functional silos with no digital strategy and omnichannel capability, and with a poor perspective of their self-assisted and people-service strategy, run a high risk of increased fragmentation. In addition, there are increased costs, greater churn, and lower repeat business as they try to layer on automation to poor processes and siloed operations.

Robotics, automation and IoT are silver bullets in the right hands.

5. What other innovation trends do you see now, and expect going forward?

Innovative disruption of different industry verticals will continue to gather pace on a vertical-by-vertical basis. Core business models will be challenged within the next period. CX is the moment of truth in terms of customer acquisition and adoption of new models. Customer journey mapping and underpinning processes will translate these capabilities to long-term customer acquisition and repeat business.

The value of CX grows strategically, with an increasing number of organisations attaching a fiscal value to this strategic competence. The value of aggregated personal data grows. The growth of automated concierge services gather pace in people's personal lives.

The culmination of these factors will see growth in new 'currencies' of customer value and the increasing success of organisations that are digitally enabled enough to participate in concierge-sourced 'digital consortiums'.

6. For some, digital disruption seems to be a massive threat; how should established organisations prepare?

Established organisations need to understand what innovative CX looks like for their customers, how it translates into operations, and how technology is an enabler. A clear strategy is required that connects all areas, delivers tangible returns and retires legacy processes, systems and assets.

Organisations need to benchmark and look for innovation outside of their vertical markets. This is where customers, with preconceptions on the brand value, build expectation of organisational engagement.

A line of sight strategy is required that has clear owners, and that is effectively communicated. The absence of a connected digital strategy means that even when digital solutions are available, the customer is frequently not even aware of their existence.

7. What impact does data and analytics have on CX strategic differentiation?

The last three years' benchmarking reports have witnessed participants stating that data analytics is the key trend that will reshape industry. I agree, with the caveat that the insights created by analytics should ideate, shape, form, inform and enrich the value of customer engagement that takes place.

Organisational structure needs to be in place for a business to execute a successful data and analytics strategy integration of function, process and measurement. The cornerstone of a CX strategy is to realise that knowledge is power considering data sources that are ever growing. Informed proactive integrated customer management will win versus reactive, silos of customer experience.

8. What are the common mistakes organisations are making regarding transformation?

A common mistake is that a lack of a proper strategy and poor application means customer expectations are not being met. Organisations focus on resolving the gap between current and targeted CX and customer expectation – and digital is a servant to these objectives.

Other mistakes include a lack of single board-level ownership, no plans in place, complacency about maintaining the status quo and trying to affect change across legacy organisational structures.

Finally, some organisations also do not have a CX strategy in place that is commonly understood, communicated and accessible, both internally and externally.

9. How can organisations ensure that digital facilitates CX redemption, not a crisis? (from a strategic-positioning perspective?)

Pioneers of the digital age have reimagined business models and processes that have changed customer behaviour forever. The choices you make in your CX and digital strategies will define the future success of your organisation.

Emerging CX robotics are creating a new reality. Virtual assistants (chat bots) are voted the top channel growth focus for 2017, and IoT deployments are set to double. It demands a new approach.

What functions do these new capabilities play? What will be required to stop, start and continue from a people, process, information, technology and operations strategy? Identifying key processes and ensuring that correct capabilities and structures are in place to enable agile transformation will accelerate organisational change and return.

Areas of function must be eliminated as effectively as new functions are put in place. This is to ensure that new processes are genuinely transformative, and have been designed effectively in order to retire legacy technologies and optimise through rationalisation.

Pioneers of the digital age have reimagined business models and processes that have changed customer behaviour forever. The choices you make in your CX and digital strategies will define the future success of your organisation.

Read on for the global results and analysis.

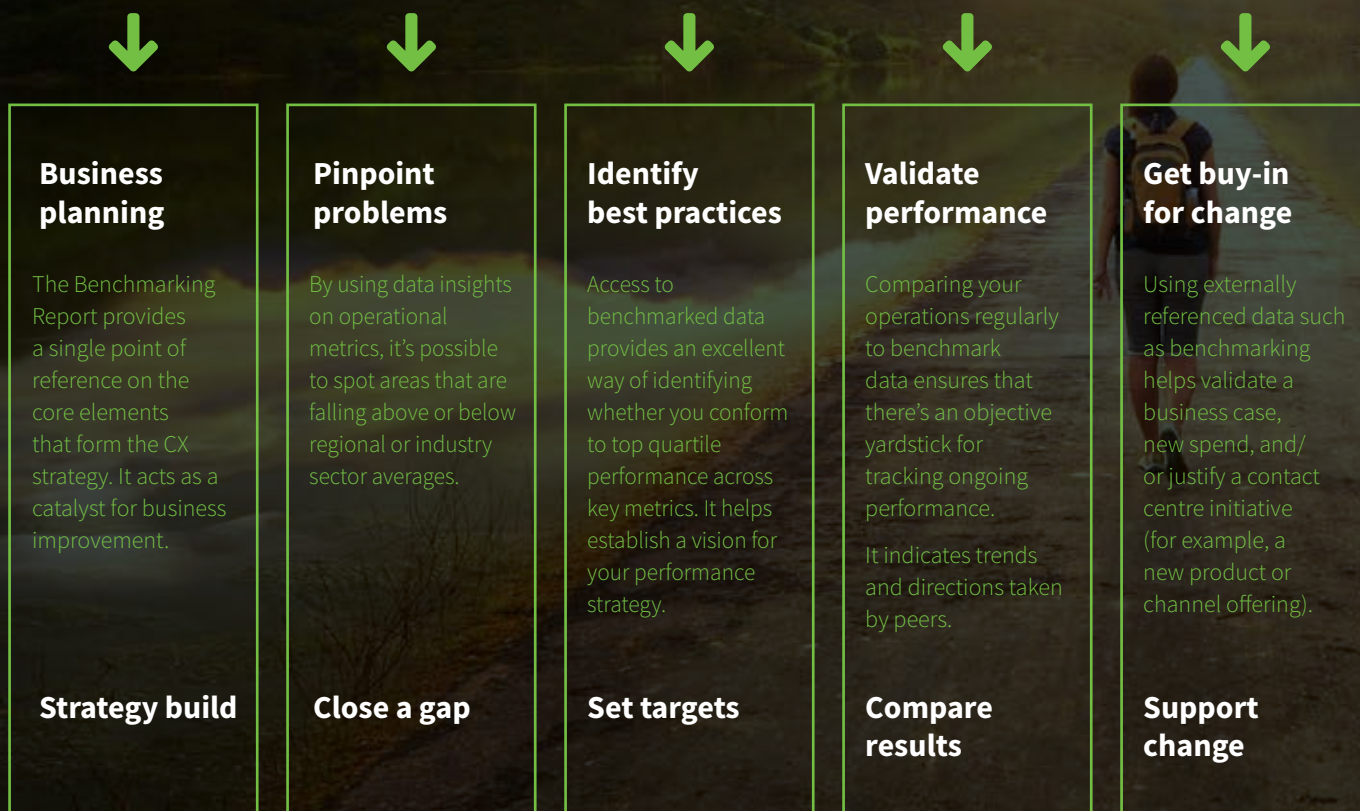
Compare your organisation's performance and results to a more specific benchmark by visiting our online benchmarking portal:
<https://dimensiondata.2017cxbenchmark.com/portal/?trg=GCXBR>

Why Benchmarking?

Benchmarking provides a vitally important reference point. It helps organisations gain insight into future trends, the ways in which their customers are likely to behave, and the performance levels they need to attain or aspire to. But it's also more than that...

Here are five ways in which customer experience benchmarking can help transform your performance and improve your customer and employee experience:

Benchmarking Report research and insights



Solutions

Services supported

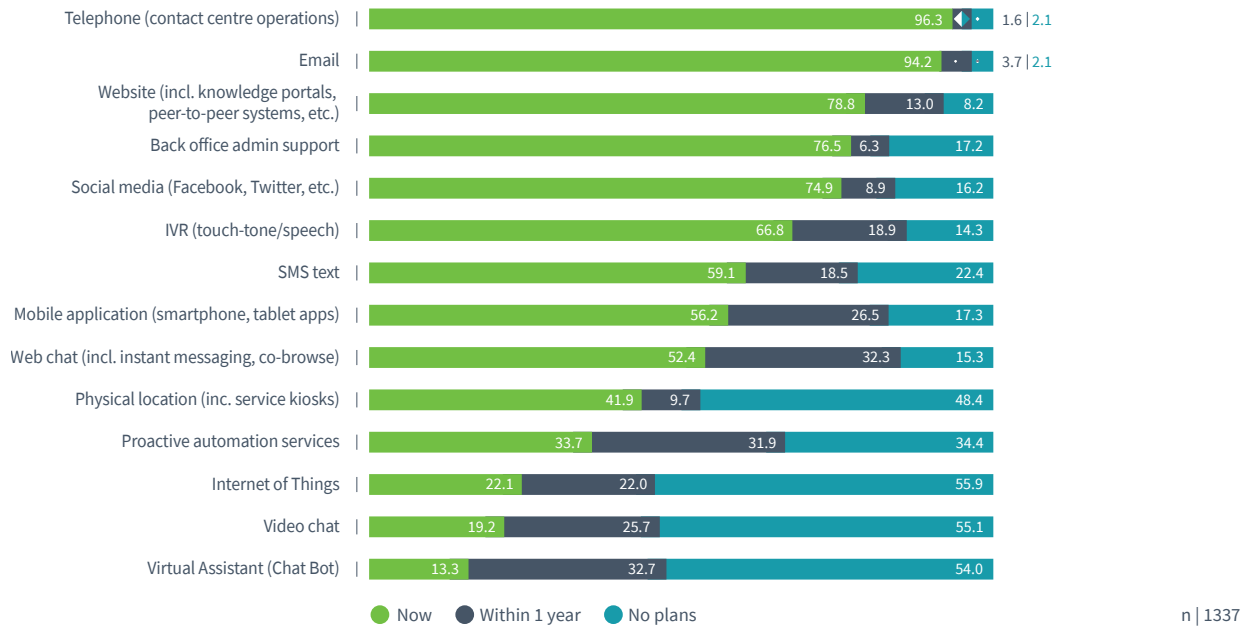


Figure 1.1: What services can your organisation support, now and in the future?

Average of nine channel choices now the norm, *it'll soon rise to 11.*

Virtual assistant (chat bots) provide largest area for growth; IoT surging in *tandem with proactive automation services.*

Key findings

This chart evidences a wide spread of channel choices now offered by CX providers, and expected by service consumers. The majority of customers can now enjoy a selection of nine channel choices to engage with CX organisations. It will rise to eleven by the end of 2017.

It's clear that the industry has started to look beyond digital and is seeking to craft increasingly automated solution options. However, video is receiving good attention too, and highlights in certain circumstances the need for a human touch. Percentage wise, the top four areas that will grow most in the next year are: virtual assistant (chat bot), video, IoT, and proactive automation.

Mobile-enabled website functionality is increasing, and the 60.6% growth witnessed in 2016 (to 41.6%) has risen by a further 35.1%. This momentum will see more than four in five operators (82.7%) offer smart app services within the next year.

Why it matters: The growth in the number of channels offered, or in the process of being offered, means that organisations are now tuned into providing customers' choices on their terms. The growth and focus on proactive focused channels show that organisations are now re-engineering processes and thinking through customer journeys.

In 2013, the majority of service providers supported just five contact channels.

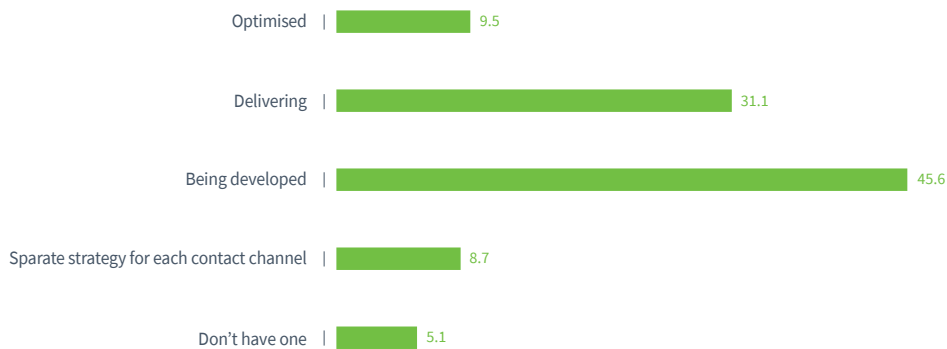
Accelerate your journey

Basic: Ensure you have a clearly articulated single truth element for your CX strategy. It must identify the future channel management and solution roadmap for current and future state interaction landscapes, including emergent automated channel options.

Intermediate: Create a detailed omnichannel optimisation plan 'tailored' to your organisation's needs. Create the plan around two core precepts: base it on releasing mutual value to customers and the organisation alike via a clear process of evaluation, and ensure that canvassed insight of customer expectation has been balanced against any business perception of their requirements.

Advanced: To differentiate, maintain channel optimisation roadmaps, that includes detailed testing and adoption planning for customers and employees alike.

Digital business strategy



n | 1349

Figure 1.2: How would you describe your company's strategy for digital business?

Less than 10% consider their digital business strategy to be optimised.

51% are at best in the process of developing the company's strategy for digital business.

Key findings

Companies are struggling to formulate their vision and associated plans to deliver robust objectives for their evolving digital business needs. Just 40.6% of the organisations surveyed have strategies in place for digital business that they deem to be delivering, or better. 45.6% are still developing their plan, and almost one in ten (8.7%) persists in approaching each channel in silos.

Maturity levels related to strategies for digital business vary quite significantly across the industry. At the top end, one fifth of technology sector organisations consider their strategy for digital business to be in an 'optimised' state, while the fast-moving travel and transportation market rated their optimised maturity levels at zero.

Development levels are best within more recently established digital disrupter business types. Surprisingly, and perhaps due to proliferation of silo-based channel approaches, multi-channel operators lag behind physical site providers as far as structuring a robust vision of their evolving digital state.

Why it matters: 'Go digital or die', was a digital prophecy that transpired from the 2014 benchmarking report. Today, just a minority of organisations have aligned and are executing, whilst the majority of those polled are part of organisations that have not mobilised and face competitive digital disruption.

Accelerate your journey

Basic: Your organisation recognises the importance of deploying digital channels, however, they're adjunct to core systems and broader CX strategy. It's critical that digital channel development aligns to and is complimentary to your overall CX approach. Start by identifying the current and future digital experience capability of your organisation.

Intermediate: Digital interactions need to deliver not just a mechanism for your organisation to reduce traditional contacts, it must provide continuity of CX across connected journeys and interactions. This requires a cross-functional perspective to achieve a consistent approach to digital experience design.

Advanced: Providing value to the customer whilst realising the organisations' aspirations, and tracking of how they are performing, must be embedded from the outset. Use analytics to provide predictive and personalised automation via digital channels. Also, ensure that where analytics shows additional or follow-up contact back into traditional channels, you mitigate and adapt the process.



In 2008, 43.1% had a strategy to reduce cross-channel cost to serve. Five years later just 4.1% said their self-service options were ahead of the competition

Single vs multiple *skills/channels*

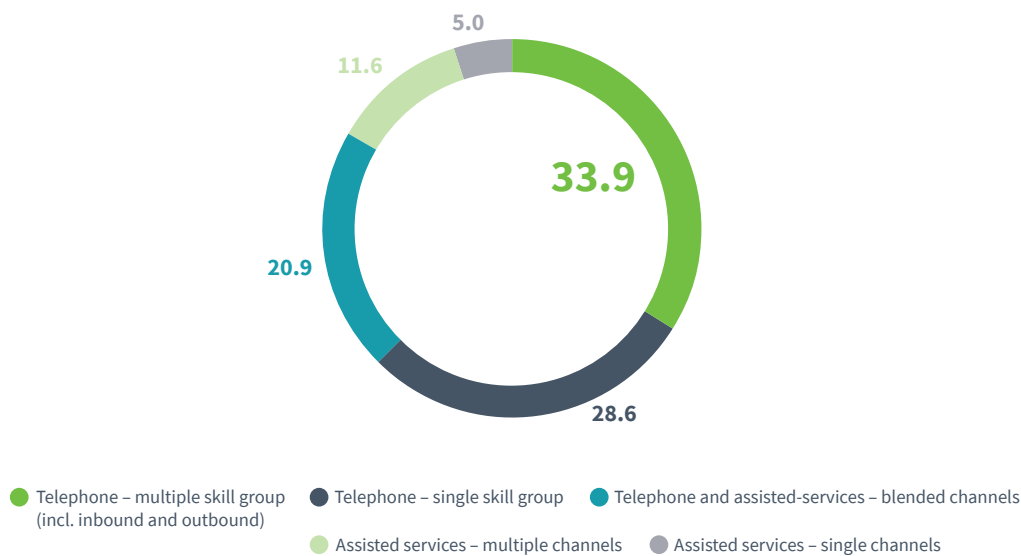


Figure 1.3: What percentage of your agents is dedicated to single versus multiple skills/ channel(s)?

66% of agents are *multi-skilled across activity types*.

38% of agents now provide some form of *assisted-service support*.

Key findings

As customer interactions span across a growing spread of contact channels, organisations are adopting a wide variety of models, based upon what best fits their own contact management mix. Whilst there is no approach that fits all, there are some examples around commonality of approaches that should be considered when devising company-specific models.

The majority of CX agents, (62.5% in 2017 versus 68.3% last year) remain dedicated to telephone. They're most likely to be cross-skilled to handle multiple transaction types e.g. general service alongside technical support.

More tellingly, particularly around the continued path towards digitally dominated CX, 37.5% of agents are now performing some form of assisted service (e.g. email, web chat etc.). This represents an 18% upward swing from the 31.7% of agents who supported assisted digital a year ago.

Of those agents supporting assisted-service channels, 13.3% will provide CX on a single channel, with the remainder assisting customers across a variety of contact channel paths.

Why it matters: The skill of agents reflects the maturity of an organisation's channel and processes. The requirement to provide support to a wider scope and greater number of complex processes and function will grow. This will increasingly place pressure on sourcing talent with the capability to work across functions and channels.

Ten years ago, 18.0% of agents were skilled across different contact channels, today it's 32.5%.

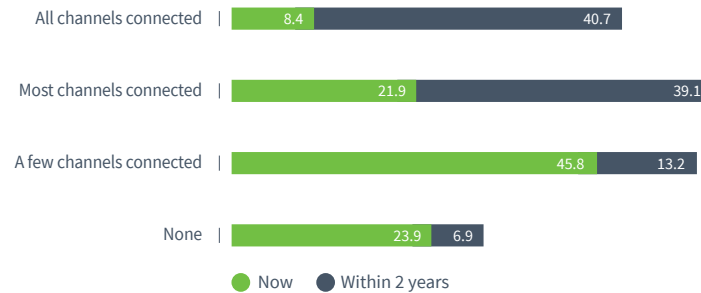
Accelerate your journey

Basic: Supporting agent handling of varying and complex call types is a challenge. Recognising this, and utilise new recruitment profiling, additional learning development techniques and performance management frameworks to facilitate the evolution of your workforce.

Intermediate: Successfully managing human capital to handle calls and assisted service such as web chat and email, means adapting workforce management techniques. Providing enhanced measurement and improvement tools will support your changing operational environments.

Advanced: The real key to releasing multi-skilled agent contact handling is to ensure that they're provided with the right supporting tools and integrated technologies. They need to be empowered with the required context and content to provide relevant, value-based consistent experiences.

Omnichannel *strategy*



n | 945

Figure 1.4: How many of your contact channels are covered by an omnichannel (connected customer journey) strategy?

41% now have, or are striving towards, a full omnichannel strategy.
70% currently have no or very few channels connected.

Key findings

It's becoming harder and more complex to connect all contact channels. Every year sees an increase in the number of channels offered. Encouragingly, almost one third (30.3%) of organisations cover all, or most of their channel choices, with an omnichannel strategy that connects customer journeys spanning a multitude of service touchpoints. Compare this to 22.4% claiming full integration in 2016.

The benefits of CX created by omnichannel, is well-acknowledged by the research sample. Omnichannel remains on the horizon and is scheduled for deployment for 49.5% of the sample within the next two years.

At the other end of the spectrum, 23.9% of companies operate today with no omnichannel capability whatsoever, although this number will drop to just 6.9% by the end of 2018. As with previous years, there are variances on approaches at a regional level, and much more inconsistency at a sector level. Leisure and hospitality (including sport) operations are performing best.

Why it matters: The customer journey map determines which channels need to be integrated (not all depending on the interaction). However, as the number of channels grow to nine on average, if these are not connected optimally, then cost and dissatisfaction will grow and CX and organisational growth metrics will diminish.

Accelerate your journey

Basic: Many organisations face the challenge of developing an omnichannel approach that's relevant to their own organisation. It's important to establish a clear strategy that is relevant to your organisation and customers.

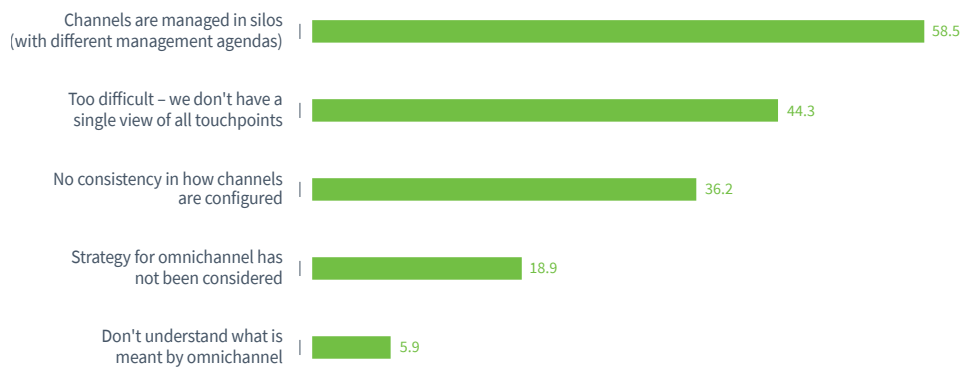
Intermediate: To truly optimise your organisation's channel strategy, it's important to evaluate the value of connecting channels and individual interaction types, based upon business and customer requirements. This will enable you to establish business benefits and prioritise initiatives based upon mutual value recognition.

Advanced: Use strong deployment and adoption planning to ensure controlled, seamless and frictionless journeys are attainable. Use analytics to monitor effectiveness, whilst remaining adaptive when developing an omnichannel environment.



In 2013, omnichannel first appeared in the benchmarking report, and would go on to become one of today's top business visions.

Omnichannel strategy challenges



n | 1110

Figure 1.5: What are the top challenges for establishing a full omnichannel strategy?

Disparate management is the *biggest threat to omnichannel*.

A third cite inconsistency in design as a key challenge, and approaching half (44%) say it's 'just too hard'.

Key findings

Organisations understand the CX benefits created by an omnichannel approach and they believe in the value CX presents to the organisational objectives. Yet so many still struggle to deliver on areas receiving so much attention. The biggest blockage point is caused by the 58.5% of organisations who are managing their contact channels via individual silos.

Design, build and review processes (as evidenced in figure 2.7 and 7.7 of our review) are also a significant threat to ease of resolution and frictionless customer journeys facilitated by omnichannel system strategies. Over one third (36.2%) of CX operations highlight an absence of consistency in how channels are configured, indicating flaws in the project implementation phase - even prior to live deployments.

Omnichannel solutions may not be necessary for every type of provider, although such scenarios are likely to be an exception. 44.3% of organisations simply state that it's too difficult, and may need some help on how to overcome what may not be a sustainable position.

Why it matters: The role and value of omnichannel enablement is strategically well understood by organisations. The results show that management of channels by siloes stops visibility, management control, focus, education and enrolment in a broader CX strategy. Organisational change is required, which is an uncomfortable truth.

Accelerate your journey

Basic: The first challenge as already mentioned is ensuring that an organisation has its own clearly defined 'single truth' of what omnichannel optimisation means, and is able to articulate this across the entire business to ensure consistent thinking.

Intermediate: Adapting traditional organisational silo-based structures to mitigate functional inconsistency and friction is something that many organisations are struggling to achieve even though they recognise the barriers it causes to CX. Designing and delivering in a function-based approach often leads to delivering a fractured experience, rather than creating a seamless and consistent customer experience.

Advanced: With a clear omnichannel definition and defined cross-functional collaboration and ownership, organisations that are succeeding in omnichannel have a clear set of design principles and maximise the use of customer journey mapping. At the same time, they maintain clear tracking and measurement of actionable insight at all points in these journeys to remain adaptive and innovative.

Top strategic performance *measures*



n | 1345

Figure 1.6: What are the top three performance measurements according to your company's board or executive team?

CX remains a top strategic measurement for organisational performance, and is voted so by more than twice that of any other metric.

The migration of traffic to automated or digital services is permeated by service benchmarks being accomplished, as opposed to cost savings.

Key findings

CX performance has firmly cemented itself by some margin, and for the fifth year in succession, as the top most important performance indicator for boardroom and/or executive teams. It's a consistent theme across every region, sector, operation size or type. There's just one exception: sales revenues and profits relegate CX to second place when viewing sales-only 'service-type' operations.

Customer advocacy or loyalty (e.g. net promoter score) has jumped a couple of positions and established itself as the third most important executive level KPI. This wider consideration of the end-to-end customer experience and business value pertaining to the interaction, has led to first contact resolution dropping from second place last year to fourth priority in 2017. It remains a significant focus to directly influence ease of resolution - the consumer's top rated impact of CX.

In the 2016 benchmarking report, we commented on executive commitments towards CX being further evidenced by the fact that cost focus had dropped from second to sixth spot in one year. We're encouraged that this has been maintained. Conversely, we're disheartened to see the attention on employee engagement drop three positions to seventh place in 2017.

Why it matters: Executive commitment towards CX continues to increase, which is a real shift from five years ago when focus was predominantly on cost reduction. CX, revenue, profit growth, customer advocacy and first contact resolution represent the correct metrics to positively steer and influence strategic customer growth throughout the organisation.

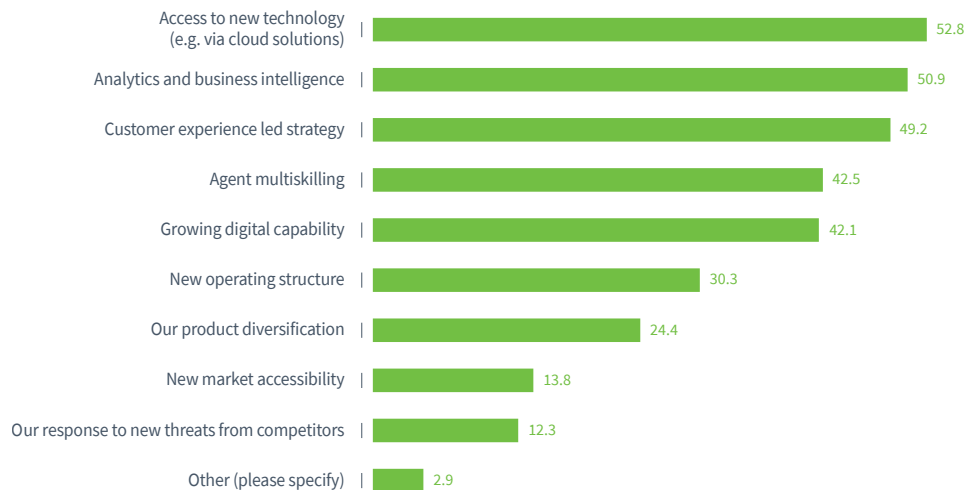
Accelerate your journey

Basic: Simply measuring the outcomes of an organisation's CX efforts is not enough. It's vital to understand what elements are impacting the overall CX metric.

Intermediate: Measuring the component parts of the CX and business efficiency in delivering it, should be tracked across, and used to improve, all channels and it should be visible from the front line to the board room. Ideally you should measure performance with the minimum time lag possible and focus on 'what customers say and what they did recently'.

Advanced: Use advanced data analytics and multiple customer satisfaction/sentiment tools and business metrics to establish a real-time view of 'what customers are doing and what they think about it', and create a view of CX effectiveness that spans the entire organisation.

Positively transforming services - *last five years*



n | 1338

Figure 1.7: Which factors have contributed most to positively transforming your services in the past five years?

Technology flexibility is key to transforming CX.

Business intelligence levels are powering new strategies, capability and an operating model evolution.

Key findings

Innovative technologies and the emergence of solutions, such as cloud-based systems, have been voted as the number one factor in contributing most to transforming CX services in the last five years. Access to these new technologies is facilitating improved analytics and with it business intelligence. This is helping validate CX-led strategies. The technology and information it provides can change everything if interpreted and used effectively.

Although results vary at a sector level, the top three items remain, if not in the sequence they are placed. It's a similar situation regionally, where many have ranked analytics and business intelligence as the number one factor contributing to positive change. It's a view held by the majority on what will help most to transform business in the next five years.

Other notable observations are the 30.3% who have seen fit to adapt their operating structure with the times. Another quarter (24.4%) have diversified their product range to leverage new opportunity.

Why it matters: Organisations that are experiencing positive change are adopting the areas that were forecast to make a difference. For example, CX strategy is the compass change programmes should direct to, cloud has provided transformation enabling agility, and people are being asked to adapt, as too is the organisation. These are the traits of a CX-focused entity that is changing and increasingly has the market focus to start adapting products and offers.

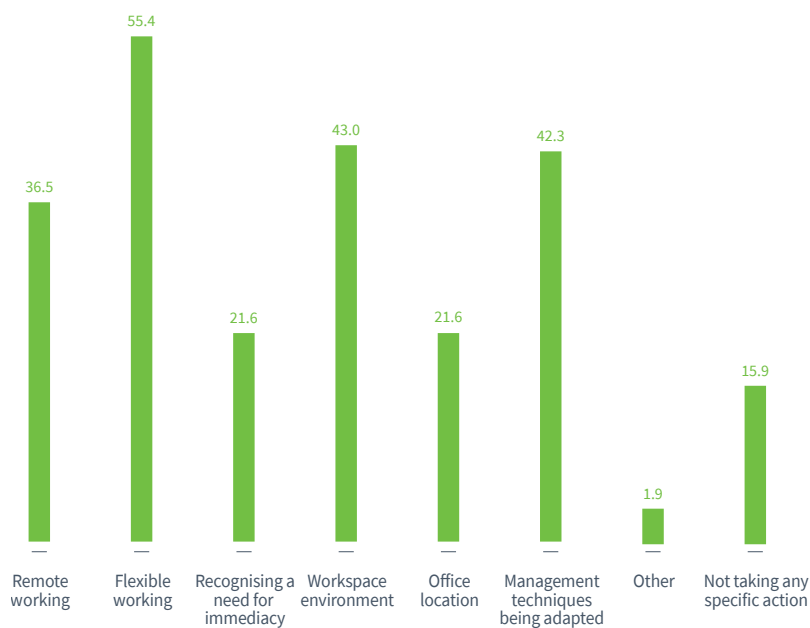
Accelerate your journey

Basic: Beyond the traditional concept of customer centricity being embedded in an organisation, an organisational-wide CX strategy is pivotal, with clear ownership at all levels and a change in organisational and cultural ethos (if required) to align to this.

Intermediate: Analytics are the key to not only tracking the success of your CX-initiatives and general performance, they're also the portal to enabling value-based interactions in real-time proactive, personalised and omnichannel environments, whilst providing you with the ability to constantly improve and innovate.

Advanced: For most organisations, achieving advanced CX capability means developing the correct levels of technology integration, be it via cloud solutions or premise/hybrid technology alignment. The ability to integrate successfully is crucial to developing the highly adaptive and flexible environments that your organisations and customers increasingly require.

Accommodating the *evolving workforce*



n | 1341

Figure 1.8: What is your strategy to accommodate the evolving demands of the millennial generation workforce (e.g. those born after 1990)?

84% are adapting their business to meet the needs of the *next-generation millennial workforce*.
Over half are evolving by *accommodating flexible working arrangements*.

Key findings

In line with evolving customer expectations, organisations are increasingly feeling the pressures borne by the evolving demand and cultural approach of employees. This has really started to gather pace through the rapidly increasing proportion of ‘millennials’ (e.g. those born after 1990) in the workplace.

Such is the impact and expectation created by a sea of change in attitudes, that just 15.9% of those sampled are not taking any action whatsoever. Of the 84.1% recognising a need to act, over half (55.4%) will accommodate a form of flexible working arrangements. In many circumstances, this can be of benefit to both employee and employer. 42.3% are revising management techniques in respect of a new breed of employee and evolving lifestyle values.

As digital, mobile, and social technologies impact personal life habits, the need for immediacy is recognised by over a fifth (21.6%) of companies as worth incorporating into the workplace, and this will help promote employee engagement levels.

Why it matters: The role of millennials in supporting organisations’ profitable growth and transformation is mission critical. Millennial and generation Y are viewed as ‘digital natives’ as opposed to ‘digital immigrants’. Organisations now face the same residency test as the importance of digital has taken hold. The nurturing and strategy to attract and retain will have a significant bearing on whether organisations gain proficiency in the new digital economy.

Accelerate your journey

Basic: Millennials are keen to learn and are generally quick at picking up new concepts and adapting to change. Maximise these traits by maintaining clear incremental personal development plans and career pathing options.

Intermediate: This generation has grown up in a far more real time and review-based society. They want to feedback, share ideas and expect more personal review. Your engagement and review frameworks must reflect and utilise this aspect of the emerging workforce.

Advanced: Personal time and strong work-life balance is crucial, often ahead of more remuneration. Consider alternative scheduling and homeworking options to alleviate this. Attracting talent from millennials is increasingly linked to how they perceive the recruiting brand, including organisational ethics and social responsibility. Recognise this in recruitment strategies and ongoing communications.

02

CX

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CX

Organisational appreciation of CX as a differentiator has become the top industry trend. CX has to adapt by committing to the opportunity created by the digital revolution.

Why CX matters?

- #1 Build customer trust
- #2 Align service to brand values
- #3 Drive business growth
- #4 Promote customer loyalty

Impact of CX transformation

- 78.2% forecast increases in assisted-service volumes
- 70.7% a rise in fully automated contacts
- Virtual assistant (Chat bots) is a top growth focus in 2017
- IoT capabilities are set to double

Appreciate CX as a differentiator

- B2B = 84.8%
- Sales = 82.3%
- B2C = 81.7%
- IT Helpdesks = 69.6%

Robotics is set to change operating models

Headcount employed

- 33.8% forecast decrease
- 35.3% forecast stay the same
- 25.0% forecast increase

CX capability – a way to go

2/3 appreciate their services will be rated 7 out of ten, or less, by users

Just 12.9% rate their own CX delivery at 9 out of ten or better

Analytics is the top trend that will positively transform CX for the better

CX is receiving strategic focus. *Operations now need to adapt to stay ahead.* New drivers powered by robotic technologies are changing the entire landscape

Who's responsible for CX?

Two-thirds have a single manager allocated responsibility for all CX

- 28.0% Manager for each contact channel
- 28.3% Non-board manager owns all CX
- 35.6% Board executive owns all CX
- 4.0% Marketing
- 4.1% Other

We say

- Establish what CX means to you
- Confirm where you want to be
- Make technology work for you

Don't be a CX zombie

Talk to Dimension Data today.

CX. There's an overwhelming appreciation from organisations on the importance of CX. Establishing trust is the leading driver of CX, followed by the matching of service experiences to brand values. More than eight in 10 companies recognise CX as a differentiator, and it's the number one indicator of strategic performance. It drives revenues, is proven to reduce costs and even adds to employee engagement levels, yet just one third of operations rate their own services at a level of eight out of 10 or better.

CX delivery is being damaged by a lack of process management, particularly across the expanding choice of digital pathways. Personalisation, intelligent automation and the ability to connect customer journeys powered by intelligence from analytics, will do most to reshape CX capabilities in the next five years. CX has to adapt by committing to the opportunity created by the digital revolution.

about the author

Mike Wells



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Mike has 30 years of experience in CX, having joined Dimension Data in 2007. He's the chief designer and architect of Dimension Data's portfolio of CX consulting solutions. His expertise lies in designing and delivering business transformational programmes and omnichannel customer management strategies for global operations. Mike is an innovator renowned in the industry for transforming the way organisations deliver CX.

Questions and answers with *Mike Wells*

1. What is the reach of CX?

CX is the experience that a customer receives at every point in which they interact with an organisation. Often this starts with their initial introduction to the brand before purchase or sign up, and they are affected by the service attributes or product information, form, functions and even packaging.

CX is integral to all interactions that a customer has during the life of the relationship, across all touchpoints, be it physical, voice or digital. These interactions, along with indirect 'noise' from media and peers, influence the customer's perception and expectation, consciously or otherwise. CX as a minimum, influences and drives a customer's decision-making, actions and behaviours which, simply put, impacts the value that they represent to an organisation.

2. Tell me something I don't know about CX?

CX is not a one-size-fits-all solution for customers, and this is equally true of an organisation's CX strategy. CX must be shaped to represent each individual organisation's brand values, business strategy, operational capability and its customer requirements.

There are tested approaches and supporting technologies to attain an organisation's aspirations. However, many struggle to personalise an approach to their needs whilst trying to deliver personalised CX to their customers.

Some organisations have determined that there isn't a set approach to omnichannel, and they've decided against connecting all channels. They've opted to optimise channel integration strategies based on value in a phased approach. These organisations are still delivering relevant solutions and successfully enhancing customer experiences.

3. Why are some organisations rating CX as more important than commercial performance?

Research proves that providing excellent CX acts as a key differentiator for driving commercial performance – organisations are now finding it impossible to ignore this relationship. It's recognised that loyal customers normally attrite less, whilst spending more. So simply CX = loyalty = revenue + reduced cost.

The ability to balance CX investment against delivering tangible value of increased revenue and/or efficiency, is key. For example, reduction in complaint handling and rework. Most organisations recognise this, however, the challenge is how they quantify it. For instance, the ability to predict and track how even a single point increase in customer satisfaction can correlate to an increase in revenue.

4. If it's that simple, why isn't everyone working on their CX?

Generally everyone is working on their CX, although often in a disparate fashion or under another guise. It may be simple to understand the value of improving CX. However, many organisations find it a challenge to frame what CX means to them, beyond focusing on providing good customer service.

CX must align to an organisation's brand ethos. Developing a strategy and transformation roadmap will create the structure to drive measured cultural change and organisational alignment. Many organisations struggle to deliver significant CX improvement because they fail to define their core CX guiding principles, based on mutual value propositions and driven by insight into customer understanding and business performance.

5. Does CX mean more to some companies than others?

CX is more important to organisations that have recognised the need to define what it means to their business and how it's perceived and received by their customers. They have built organisational constructs, culture and behaviours around delivering good CX and are bringing their employees and customers along on the journey. Normally these organisations are also better at measuring and tracking true CX value – therefore they truly recognise the value. It's difficult for organisations that do not have a coherent vision or value proposition across the organisation to assume responsibility and track its importance.

6. CX seems to be very broad in scope, can it really be managed?

Certainly, as long as it's based upon providing consistent customer experiences across all of the organisation's touchpoints and journeys. This can only be done effectively by design, in other words, insight, understanding and clear strategy.

The challenge that most organisations are faced with is that they are not ideally organisationally structured to manage CX holistically. Often customer interactions are owned or delivered across different functions and departments that are not aligned or which simply work differently. The CX operating strategy should entail clear guiding principles and cross functional working groups or a representative CX governing body – supported by strong metrics and organisational-wide calibrated data.

7. How are customer demands changing CX models?

How customers are connected to the world around them is reflected in the way they interact with organisations and brands. Emerging generations have a propensity to align themselves with brands they prefer. They want immediate access to information, interact in a peer-based virtual environment, enjoy active participation, increasingly demand speed and efficiency, and expect to interact via multiple channels, touchpoints and new technologies (such as artificial intelligence and IoT).

CX models need to reflect how an organisation's brand aligns with new consumers' perceptions. They need to create relevant omnichannel journeys in real-time environments that are tailored to customers' needs by collaborating with them. They need to provide adaptive responses in various forms (written, audio, video), based on contextual data and analytics that provide content.

8. What trends are having the most impact on CX?

The drive toward a seamless omnichannel-driven contact management topography, which provides frictionless interactions, will continue to dominate operational and technology transformation. It's critical to design connected and adaptive customer journeys, representing strong CX practices for the customer whilst remaining financially and operationally feasible for the organisation.

Seamless omnichannel-driven contact management channel constructs will generate multidimensional or Omni Data . The explosion in the availability of data means increasing complexity in developing actionable insight relating to customer actions and behaviours. Multi-dimensional data presents an opportunity for those who enhance it to develop increasingly personalised, proactive and predictive experiences. A massive surge is on the horizon in the amount of data available to collect and interpret across increasingly complex interaction points.

9. What wisdom can you share to help organisations differentiate through their CX?

Design a clear strategy based on insight – understand what your customers, employees and business really think about what good CX looks and feels like. Have a clear, but adaptive CX strategy with guiding principles that detail the required transformation along with detailed adoption planning for customers and employees alike, including clear success criteria.

Develop an omni-organisational approach – trying to deliver consistent CX in an omnichannel environment means designing and deploying it in an equally joined up manner. Siloed functions often deliver inconsistent customer experience. As a minimum, have a clear strategy and common design principles and protocols, and at best, create an omni-organisational CX structure, with clear ownership and responsibility.

Siloed functions often deliver inconsistent customer experience.

Define your own omnichannel vision – establish what omnichannel means for your organisation and implement a phased value-based approach that supports your CX strategy. Don't try to join everything up at once and let the belief of what omnichannel is define your CX; make it relevant and don't become omnichannel slaves, rather become CX masters.

Establish what omnichannel means for your organisation and implement a phased value-based approach that supports your CX strategy.

Deliver joined up context and content – once you have an optimised omnichannel vision and know where to focus your efforts, use a simple sense check at each point. Ask yourself: are we providing relevant context-driven content in the right form? For example, when a customer moves from a self-serve channel to voice, ensure that an agent has historical, and where possible, real-time context visibility and is provided with appropriate content and knowledge to deliver personalised and relevant advice.

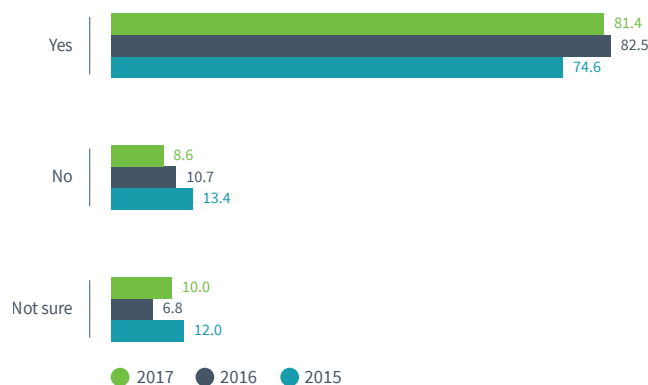
Drive innovation through data – extracting actionable insight from an ever-increasing data source pool is going to get even more complex, as we potentially experience a data tsunami in the coming years, from data being captured through complex channels and interactions. Ensure that you identify the data that drives relevant highly personalised context and content-based interactions in a real-time environment to drive loyalty and value.

Ensure that you identify the data that drives relevant highly personalised context

Read on for the global results and analysis.

Compare your organisation's performance and results to a more specific benchmark by visiting our online benchmarking portal:
<https://dimensiondata.2017cxbenchmark.com/portal/?trg=GCXBR>

Is CX a competitive differentiator?



n | 1288

Figure 2.1: Does your organisation view customer experience (CX) as a competitive differentiator?

There's overwhelming appreciation of the importance of CX, *although results vary by sector.*

84% of multichannel contact centres rank CX as a differentiator, a view shared by just 74% of digital-only CX teams experiencing fewer personal interactions.

Key findings

Over four in every five organisations (81.4%) view CX as a competitive differentiator. The numbers are comparable when viewing service provider types, business-to-consumer, business-to-business and sales operation results all ranging from 81.7% up to 84.8%. The global benchmark is dragged down by IT helpdesk providers, where CX is only deemed a differentiator by 69.6%. It's encouraging to see the number of organisations who fail to recognise the importance of CX falling to just 8.6%, a drop of 36% since 2015.

Results vary at a sector level, where some may place more emphasis on the end product being delivered than the supporting CX that goes with it. For example, compare media and entertainment, where CX is rated as a differentiator by just 64.0%, to 89.5% of those operating within the service provider and communication vertical.

The public sector stands out by some margin as the industry least conscious of how CX impacts perceptions, with just 53.1% recognising it as a competitive differentiator.

Why it matters: The results clearly support the view that organisations recognise the value of delivering strong CX in relation to business performance. However, differentiation has always been important and, for most sectors, this is becoming less achievable through just product and pricing and they're becoming increasingly reliant on the CX component.

Accelerate your journey

Basic: Understand what your customers want and what your competition is doing. Identify the viable opportunities and align them to your own brand promises. Remember, simply matching what your competitors do, even if you do slightly better, is not really differentiation.

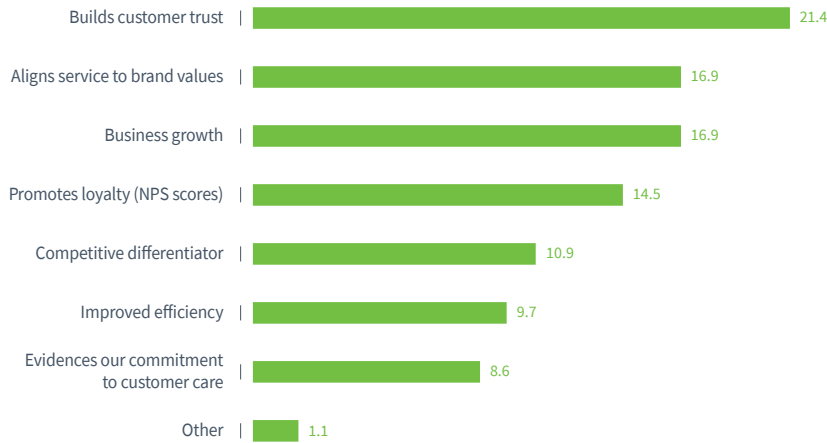
Intermediate: Identify best in class brands in non-competitive sectors that are complementary to your customer segments in terms of brand attributes. This will help you to establish what your customers are truly using as comparators to your own CX.

Advanced: Utilise ongoing advanced voice of the customer and customer interaction insight, combined with external research to create a detailed view. Maximise the use of customer and employee-based collaborative design approaches to consistently adapt and innovate.



In 2008, 59.1% viewed contact centres as a cost-centre, but by 2013, 71.6% agreed CX was a differentiator.

Most important CX outcomes



n | 1280

Figure 2.2: Which CX outcome is most important to your business?

Establishing trust is the *leading driver of CX in business*.

Matching service experiences to brand values is voted the *second most important outcome*.

Key findings

More than 81% of organisations recognise CX as a competitive differentiator. CX is rated as the most important indicator of performance by boardroom executives. Other than the direct benefits derived from improving CX such as rising employee engagement levels, cost reduction and an increase in sales revenues, the benchmarking team wanted to explore the most important business outcomes by different sector, geography and provider types.

Globally, the most important outcome driven by CX is that it builds customer trust. At a regional level there are some alternating views, with Middle East and Africa and the United Kingdom citing the most important outcome of CX investment as being the way it affects business growth.

The financial services sector places the most emphasis on how CX delivery aligns to their brand values. The public sector sees improved efficiency as the top outcome enabled by CX.

Why it matters: Trust is generally the emotional element that ultimately drives perceived loyalty. Many traditional markets are reaching saturation as business models of five years ago mature. Traditional markets are now threatened by new disruptive models and technologies and the need to generate loyalty with increasingly transient consumers becomes critical. It's recognised that keeping a loyal customer is more valuable to an organisation than replacing them with a new one.

Accelerate your journey

Basic: Clearly define your CX principles and ensure that they align to brand promises. If this cannot be done then you may need to revisit your brand values. Design customer journeys that recognise the drivers of loyalty and customer satisfaction and test these against your service delivery.

Intermediate: Use CX guiding principles to create not just design protocols for journeys and business process improvement, but to reinforce the behaviours and actions of employees and even your brand DNA. Challenge the way you do things and change your mindset from transactional to relationship-based.

Advanced: Use behavioural and sentiment-based analytics to identify pain points and faults in customer journeys. Use real-time insight and adaptive journey manipulation to deliver a proactive highly personalised experience, whilst ensuring that it also remains personable during live interactions.

Organisations' rating of CX capability

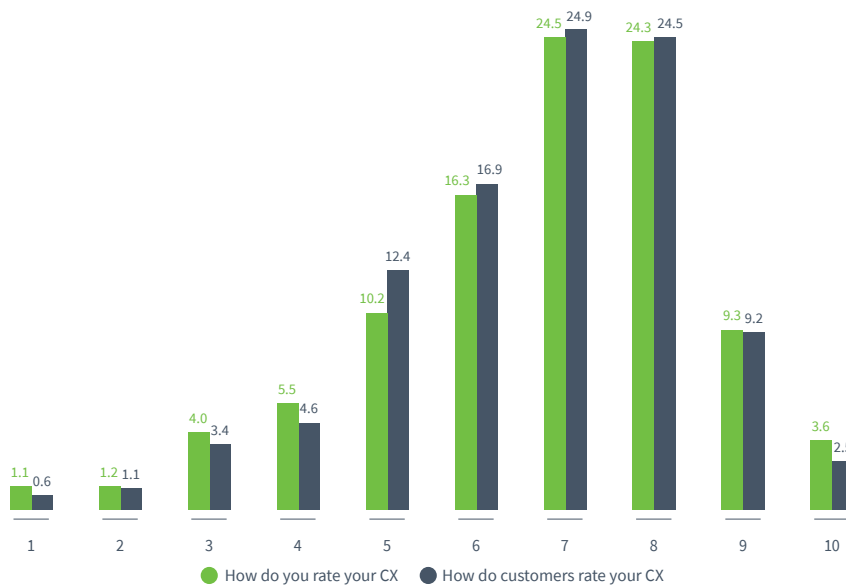


Figure 2.3: On a rating of 1-10, how is your organisation's CX capability rated?

Just over a third of the respondents believe their CX will receive a rating of eight out of ten, or more. One in five (22.0%) organisations self-rate CX delivery at five out of ten, or worse.

Key findings

Indicating the opportunity available and/or work required to enhance existing solutions, 62.8% of organisations rate their CX capability as being a seven out of ten or worse. Just 3.6% believe they're doing all they can, and can justifiably award themselves a ten out of ten.

Supporting the findings of our previous question and the importance of aligning service to brand values, the market positioning of the brand generally runs in parallel to the level of CX they perceive as being offered to customers. Consider that 49.6% of prestige brands believe their CX to merit a rating of eight out of ten or better, to 39.2% of premium and 24.0% of mid-level brands.

There is a similar correlation on operation types. Half (50.0%) of physical site operations suggest that their services can be scored an eight out of ten rating or better, versus 38.6% of multichannel centres and 30.4% of digital-only solution providers. There's a clear trend developing where digitally-focussed services place a little less effort on the CX solution, and this may simply be the relative immaturity of quick-to-market digital disrupters.

Why it matters: CX delivery must be objective wherever possible. Developing a multi-lensed data view of the perception of the organisation and the actual customer is vital. The view must encompass customer, employee and business performance data to understand any gaps in customer and business views of the experience.

Accelerate your journey

Basic: Focus on perception – understanding the customer and business perception is core to establishing what the current and required customer experience looks like.

Intermediate: Focus on expectation – establish what the expectation of the organisation is, and define where it differs from the organisation's delivery. It's important to establish what customers need, want and aspire to receive in terms of service, and how this aligns to operational and commercial capability.

Advanced: Focus on experimentation – once you've established the right mechanisms to track customer perception and expectations, use this to develop new mutual value-based propositions and journeys. Test adoption and acceptance using a mix of quantitative and sentiment-based metrics to drive innovation.

In 2013, 19.2% of organisations said their CX capability was beneath customer expectations; 24.7% said their delivery was exceeding expectations.

Who holds *responsibility for CX*

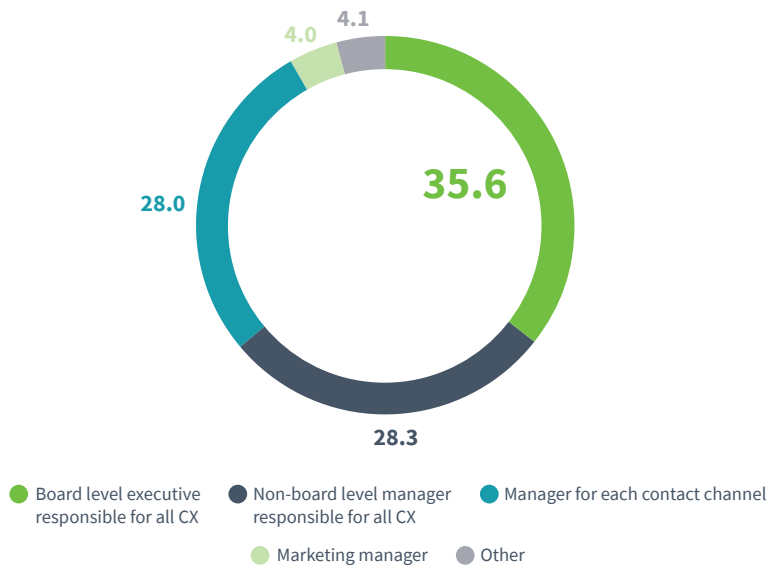


Figure 2.4: Who holds overall responsibility for CX within your organisation?

64% have a single manager allocated the *responsibility for all CX*.
 More than a quarter (28%) operate *each contact channel in silos*.

Key findings

Our research shows that organisations typically offer their customers an average of nine service channel options. 28.0% of companies are operating with a disparate management approach, and employ a separate manager for each contact channel. This approach is most prevalent in Middle East and Africa, where it rises to 38.3% of operators.

The United Kingdom (at 46.6%) is most likely to have a single board-level executive responsible for all CX. Globally, 35.6% can report the same, and it's very positive to note that this is also the most commonly adopted structure for CX management services. Ideally, this number will rise in the coming short-term as recognition of CX as the prime boardroom performance indicator manifests itself onto organisations' model designs.

In digital channel-only operations, 9.1% have allocated full CX control and responsibilities to a marketing manager, over double the global benchmark, and almost three times of the same in multichannel (contact centre) operations.

Why it matters: Senior executive accountability with clear CX metrics and goals linked to commercial success is generally seen as best practice. Regardless, there must be a common and communicated strategy with championship and ownership at all levels across the organisation. Champions must be linked through a CX involvement group or council to ensure consistency and to provide governance. Strive for an omni-organisational approach.

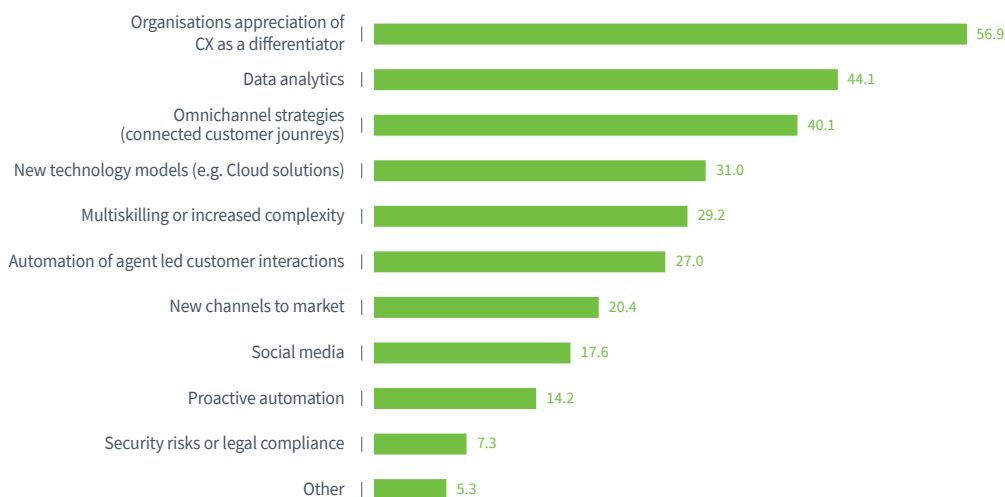
Accelerate your journey

Basic: Define a comprehensive vision, a virtual design blueprint, and actionable manifestation of CX across the organisation, with senior management ownership and board-level visibility. Establish a matrix-structured organisational approach with consistent CX SLAs.

Intermediate: Secure leadership who own CX with shared functional accountability. A CXO role or similar can drive CX improvement with an emphasis on effective interaction across all functions, channels and touchpoints, supported by a central CX function.

Advanced: Ensure a CX-focused customer centric organisational structure and delivery model is adopted with leadership championing excellent CX. All employees need to take accountability for delivering against the CX guiding principles and targets.

Top trends empowering CX capability



n | 1236

Figure 2.5: What are the top three trends empowering your customer experience capability?

Appreciation of CX as a differentiator rises from fourth place to first.

Analytics usage surges by 48% as users better qualify what customer interactions should be automated.

Key findings

These results, which see omnichannel (connected customer journeys) drop to third position from first place in 2016, highlight a more informed and pragmatic approach towards sustainable CX transformation. The 2017 sequence indicates that building a culture of CX is the catalyst and driver to the vision being embraced. Analytics, the usage of which is surging, can then validate business decisions ensuring necessary stakeholder support upon which a CX strategy can be designed and an omnichannel approach incorporated.

The significance of new technology models (e.g. cloud solutions) as an enabler towards positive change cannot be underestimated. The access to new tools and systems that this provides empowers many of the subsequent trends being reported. It's unquestionably contributing to the 20.4% of companies who are leveraging new channels to market and drive their CX proficiency.

More than one quarter (27.0%) are progressing automation techniques (which will include robotics). Another 14.2% are using proactive automation to empower their CX capabilities.

Why it matters: Differentiated CX is clearly recognised as a driver at an organisational level. However, this will only be sustainable if the right omnichannel strategy is developed and supported by the required level of analytics and metrics to prove commercial value.

Accelerate your journey

Basic: Create a single truth in terms of a clear strategy with organisation-wide awareness and appreciation that CX is a differentiator, with measurement in place to establish how the organisation is performing.

Intermediate: Establish strong visibility across the organisation of what is required to identify the opportunities and performance improvement in an omnichannel environment. These need to relate to your own customer and organisational needs.

Advanced: Design and deliver joined up and consistent experiences that are appropriately tracked across all journeys and improved in an adaptive manner. Use advanced analytics to identify transformational and innovation opportunities across all customer interactions in the organisation.



20 years ago, our first global benchmarking report placed 'replacing of face-to-face with telephone' as the top trend affecting the service industry.

Personalised CX the ‘new normal’

By Eli Kennedy, Solution Architect, CX, Dimension Data Australia

Even before travellers set foot in an airport, their smart phones send alerts about traffic conditions, expected flight delays, weather conditions, the exchange rate, and they can get navigational assistance to their hotel. All of this is achieved by the digital assistant on their smart phones – a device that is so intimately involved in their daily lives, that they cannot go without it.

Personalised CX has nowadays become a baseline expectation. Google, Apple and Facebook users already enjoy a personalised CX. Google reads emails and recognises flight and hotel bookings. It searches the addresses of both airports and hotels and compare this with real-time traffic data. It looks up travellers’ flight status on the vendor’s web site, it checks the exchange rate with a banking service, and it then checks real-time weather data for good measure. The most impressive part of all – it’s all proactive. Users don’t need to ask for help. Google identifies what information would be timely and prioritises it ahead of the usual background noise.

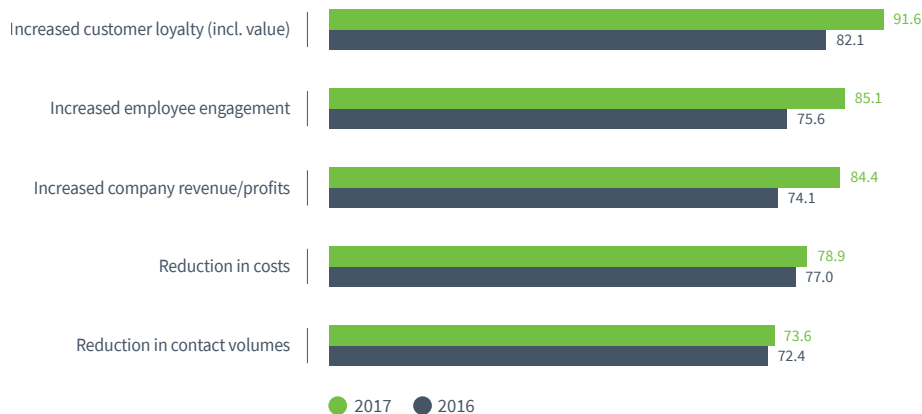
Unfortunately, some organisations are not as advanced in creating a personalised CX. For example, customers may still end calls with a feeling of lingering dissatisfaction. When they call in, they would have to provide their 16-digit customer number. Since they’re calling from the phone number registered to their account this may be redundant. They could then be asked what kind of product they’re calling about and have to listen to a long list from which to select a product.

Instead, the service provider could have utilised existing data on previous sales to interact with the customer. This is an opportunity to make the customer’s call easy and demonstrate that they care about CX, but they missed the opportunity.

Realistically not every company is Facebook or Google. Not every company has access to the cache of personal data the internet giants do. However, organisations need to acknowledge that there’s a stark contrast between the ‘new normal’ customers experience daily on their mobile phones, and the traditional CX still offered by established providers and those yet to optimise their digital business.

Like it or not – customer expectation is being defined by pure digital experiences. If organisations don’t do everything in their power to offer personalisation to customers, they may end up losing business.

Benefits evidenced by *improving CX*



n | 1171

Figure 2.6: What business benefits can be evidenced by an improving CX capability?

Increased customer loyalty (including value) is recognised as a *top benefit of CX*.

79% can show cost savings, 84% an uplift in revenue/profits, and 85% appreciate its *impact on employees*.

Key findings

Last year's results of the benefits being recouped by an improved CX capability were compelling. There are significant increases in the business benefits being reported in 2017, and the results provide very powerful evidence and validation of CX being a driving force to success.

Organisations appreciate the direct influence improving CX has on increased customer loyalty, employee engagement, and company revenue/ profits, which have all increased by double digit percentages in the last twelve months alone.

The results are fairly consistent across the data: region, sector, service, etc. One exception is that just 57.1% and 55.0% of digital businesses can evidence a benefit against costs and contact volumes respectively. In isolation, these numbers would be solid, but when the norm range is so much higher, they're the only standout. CX is enabling massive and tangible business benefits across the board, from financials to satisfied customers and employees.

Why it matters: The top business benefits from improving CX capability are important dimensions that need to be focused on to deliver excellent CX fusion between the customer, employees and the business. Balancing and aligning the satisfaction of customers and employees with the business strategy is the foundation for excellent CX.

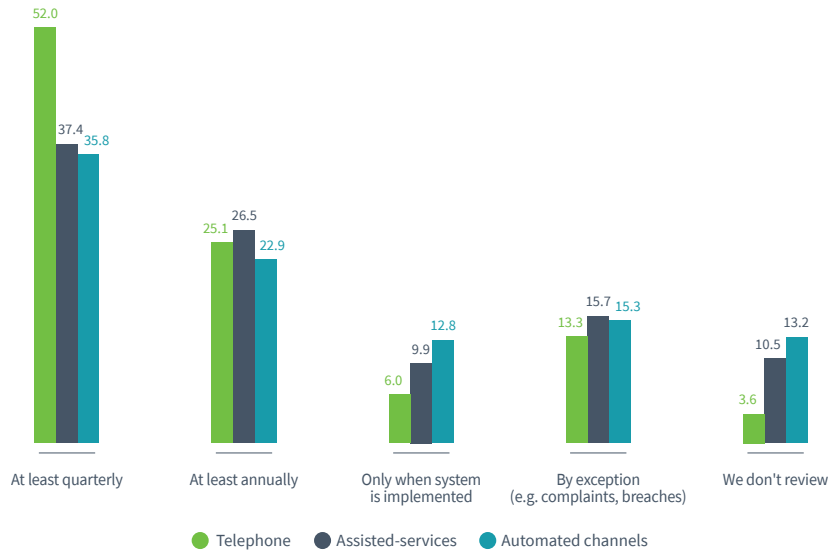
Accelerate your journey

Basic: If you recognise that CX impacts revenue, without the ability to quantify it consistently, use specific initiatives to understand the correlation between CX and return on investment.

Intermediate: If you understand the impact of CX on commerciality, with measurement at a channel, segment or customer level, there is clear recognition of the positive relationship that exists between strong employee engagement and CX regarding business performance.

Advanced: You embed tangible value recognition with the ability to measure the impact of improved/eroded CX into all aspects of the organisation. Your organisation balances business performance, employee engagement and customer experience to create mutual value propositions that are used to shape product offerings and service delivery.

Frequency of CX process review



n | 1138

Figure 2.7: How frequently do you review processes to improve the customer experience?

Digital review levels continue to lag way behind telephone.

26% of automated channels are never reviewed post implementation, 36% of assisted-services are reviewed less than yearly.

Key findings

Review frequencies are increasing, but still fall way short of where they should be. It's such an easy win that it surely merits some investment. A summary by channel grouping follows:

Telephone: to facilitate CX improvements, 77.1% will review telephone processes annually or more often. 9.6% never perform any reviews post system implementation. Both numbers are on a par with past report findings.

Assisted-services: 63.9% will conduct process reviews on an annual basis or more often, an increase from the 52.1% doing the same in 2016. It seems that the missed opportunity is being acknowledged, if somewhat slowly. Still, one fifth (20.4%) won't perform any reviews post system implementation and that has dropped from 33.4% last year.

Automated: Substantiating a recurring theme of digital lagging on some basic operational disciplines, just 58.7% of fully-digitalised channels will be reviewed annually or more often. 13.2% don't review them at all, a number that rises to 26.0% when we move beyond any checks tested at implementation phases. It's a positive that it has 'improved' from the 29.3% reported in 2016.

Why it matters: With the constant need for change and real-time improvement, process reviews are becoming increasingly important. It's vital to ensure change and have the ability to adapt by quickly identifying problematic areas or fault lines in customer experiences. Currently only 38.3% of companies can track journeys across multiple channels. With the increasing demand for channel offerings, this represents a significant global challenge.

Accelerate your journey

Basic: Have planned reviews on customer journeys and processes using data gathered across multiple customer touchpoints, feedback and employee input. Proactively review processes for improvement and to inform product/services development.

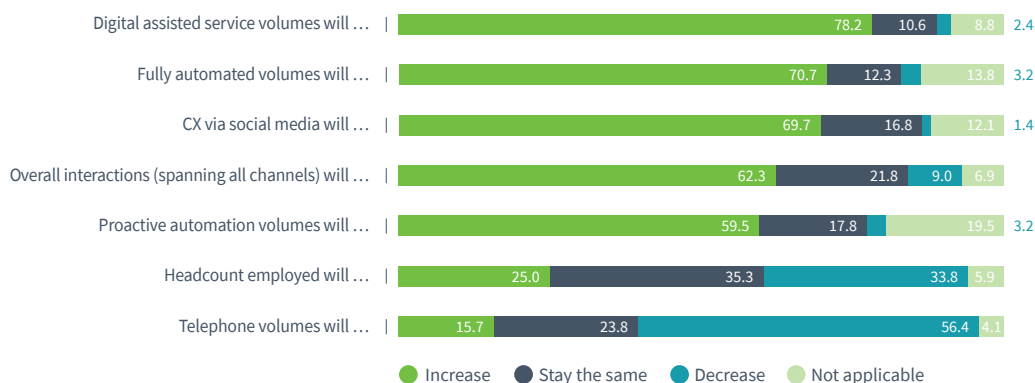
Intermediate: Develop data analytics to pre-identify issues that impact customer journeys. Drive proactive customer engagement by monitoring insight across all interaction points and using a customer journey dashboard linked to satisfaction/sentiment. Move towards understanding issues from the business and the customer's perspective.

Advanced: Deploy real-time data analytics to drive tailored propositions and inform business improvement. Allow small data analytics and propensity modelling to create individual experiences. Use advanced real-time journey dashboards to identify faults and hot spots that can be effectively and quickly adapted and improved. Focus on improving adaptive CX service.



In 2013, IVR processes were reviewed annually or better by just 34.0% of companies.

Digital transformation of CX in next two years



n | 1124

Figure 2.8: How will digital transform your CX operations in the next two years?

Customer interaction levels are forecast to rise by 62% in the next two years.

71% anticipate increases to fully automated contact volumes, while 56% expect transactions via telephone to fall.

Key findings

We've known for some time that CX models are changing shape. What's often missed when focus is placed on reducing percentages of transactions handled by phone, is that overall customer interaction propensity is rising. Consumer needs are growing in conjunction with a proliferation of devices and an expanding scope of service requirements.

As automation and artificial intelligence take hold, we're seeing the percentage of operators forecasting a decrease (33.8%) in headcount employed, outweigh those who still anticipate some growth (25.0%). If it transpires, it will be a tipping point for the industry, and may result in an accelerated advancement towards robotic (automated) solutions following a recent period of taking stock, and a slowing down of digital migrations.

Beyond the 78.2% who expect their assisted-service channels to experience growth by the end of 2018, 69.7% forecast upturns in CX via social media – something long mooted, but that hasn't really taken hold as yet.

Why it matters: With the advent of the digital revolution, the industry is having to rethink adoption and impact strategies, particularly regarding traditional contact volumes. Digital is a major focus for most organisations. However, integrating digital into connected journeys, developing self-serve capability with legacy systems, and adapting customer adoption behaviours, have often not delivered the business outcomes as quickly as many expected.

Accelerate your journey

Basic: Clearly understand the state and future of your digital capability aligned to CX strategy and customer expectations. Digital capability provides stand-alone service information alternatives and is potentially increasing overall contact levels.

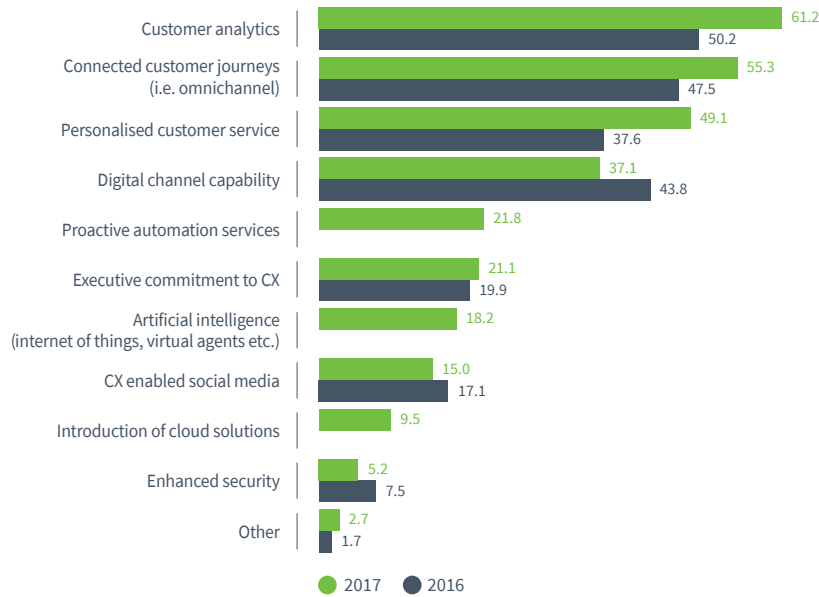
Intermediate: Adopt planning to manage and incentivise customer usage and behavioural change. Build educational elements into all channels to support this activity. Ensure that digital capability is complementary to other channels and provides services that reduce traditional contact traffic levels.

Advanced: Ensure strong adoption of planning with shared emphasis on ensuring your employees are included in the digital transformation journey, specifically in terms of design involvement and education to support the changes. Now, your digital capability is fully integrated providing adaptive services and reducing traditional contact volumes.



In 2013, 72.8% of organisations expected to expand their CX operations.

Trends that will *reshape CX*



n | 1184

Figure 2.9: What are the top three things that will reshape your CX capability during the next five years?

Analytics is voted the top factor that will reshape the *CX industry for the third year running*.
 Proactive automation services are now voted into fifth place; 18% see IoT playing a significant role.

Key findings

Customer analytics, building upon the reams of data now readily available via users’ digital footprints and traditional techniques, are helping create new levels of business intelligence levels. Organisations are using this knowledge to drive their evolving operating models and CX mapping. It’s no surprise that analytics is the number one factor globally for the third consecutive year, and that it will reshape the CX industry over the next five years.

There are some notable nuances at sector level. Personalisation in particular, is a massive and number one focus for many. Indeed, it has gained traction globally too, where focus levels have risen by 31% since 2016. Analytics remains a crucial means to an end in such instances.

Omnichannel and connecting customer journeys, remain a top trend. In terms of emerging focus, IoT is gathering pace alongside proactive automation. It’s recognised by around a fifth of providers as a top game changer.

Why it matters: Whilst customer analytics is the top trend set to reshape the industry, only 48.1% of organisations have a customer analytics tool. 41.8% say their current system doesn’t meet future needs. Using customer analytics to track CX across complex connected journeys and delivering personalised experiences, represents key challenges.

Accelerate your journey

Basic: Use fixed customer data and established feedback mechanisms, such as customer satisfaction, net promoter scores, customer effort and transactional data analysis to deliver actionable insight, and drive initiative-driven and focused change and campaigns.

Intermediate: Develop a combination of data sources (internal and external) to drive close loop improvement structures. Utilise insight into action frameworks to maximise improvement techniques that leverage customer data and behaviours to drive strategy.

Advanced: Capture customer insight data in real-time across all channels and touch points to identify issues immediately. Deliver proactive and propensity-based interactions, using data to drive business value through highly personalised content and context-rich interactions that span channels.

Analytics has been a key innovation focus since 2013, where it was second only to emerging technology as top industry trend to benefit CX operations.

Boost in customer experience, thanks to IoT

By Sheila McGee-Smith, President & Principal Analyst, McGee-Smith Analytics, L.L.C.
www.mcgeesmith.com

The Internet of Things (IoT) is set to find its early success in technology solutions that improve customer experience. Electronics companies are making huge strides in ensuring that their products will be Internet-enabled to keep up with customer experience trends. A nice example that highlights the broader implications of combining IoT and customer experience based on a solution for parking lots, was presented to me recently.

- **Connected Parking** offers car park operators new business opportunities and ideas for increasing the value and scope of services for participants. Parking solutions may include:
 - **Parking lot management** – installed floor sensors detect the availability of parking spaces and report these to the IoT cloud. From there, the vehicle searching for parking receives information and is guided directly to the vacant parking space. At the same time, statistical evaluation of the parking lot occupancy is being performed eliminating multiple vehicles driving around a lot that is already full.
 - **Community-based parking** – real-time information is sent to the cloud, updating an application that citizens can use to find vacant parking in the streets.
 - **Automated valet parking** – ultrasound sensors integrated into the side of a vehicle scan the surrounding area and identify suitable parking spaces. The system electronics then compute the most favorable steering maneuvers and automatically guide the vehicle in and out of the parking space. Automated valet parking will bring IoT-enabled parking to its technical zenith!

Connected Parking solutions contribute to the realisation of the smart city concept: intelligently connected cities featuring enhanced quality of life and environmental conditions for citizens. The concept brings many benefits for customers. With Connected Parking, the frustration of finding a parking space is eliminated. Beyond finding a parking spot, customers can also make payment from a mobile application, and reach out through text or voice when help is required.

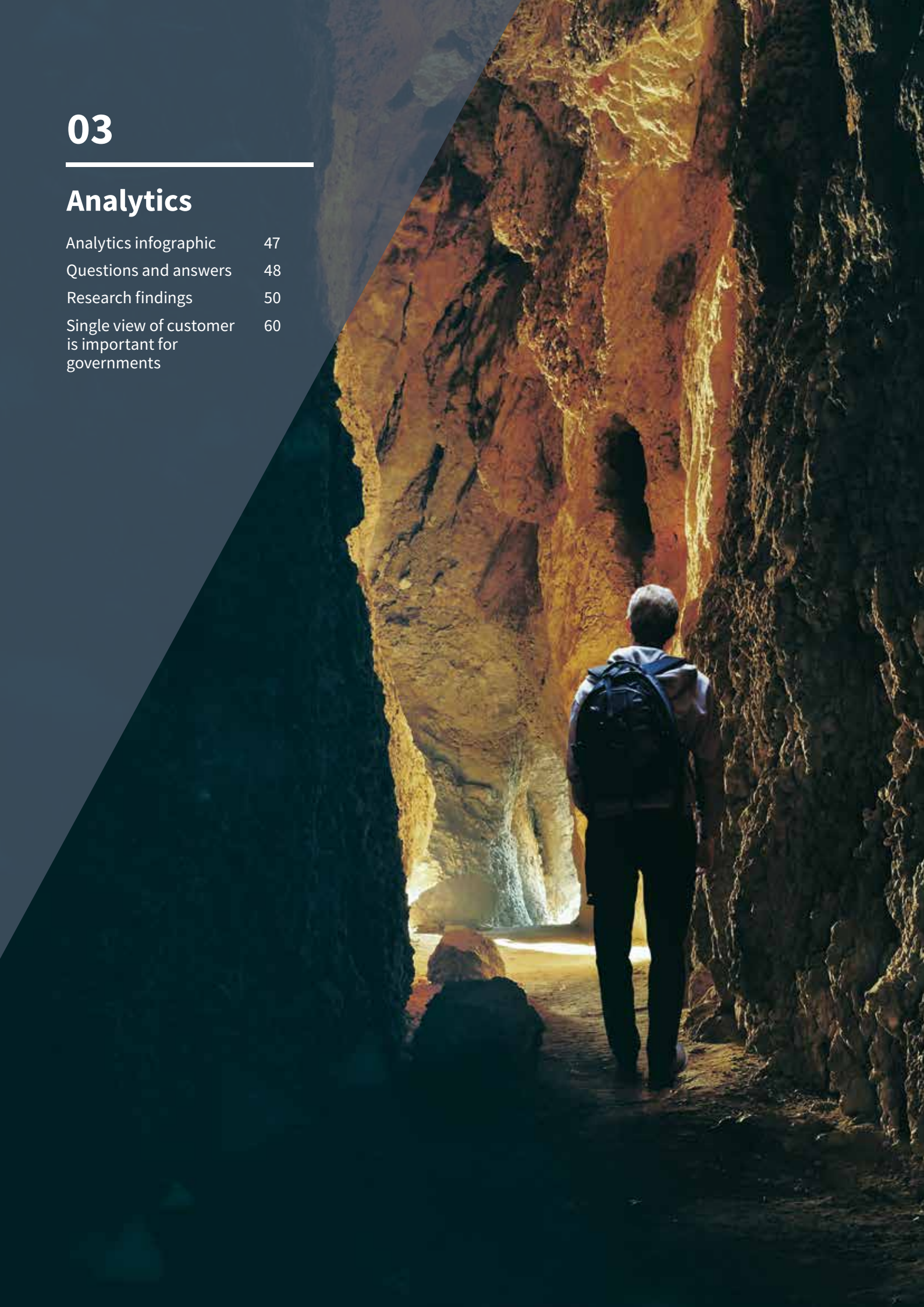
One could say Connected Parking is the “uberisation” of parking: a smartphone-enabled way to find the required asset, pay for it and receive customer care if required. Just like Uber took the frustration out of getting a taxi or the hassle of renting a car, Connected Parking takes the frustration out of parking.

The Internet of Things and customer care are ultimately about improving self-service. Customers increasingly want to self-serve, and IoT will increase the ability of providers to provide improved, personalised self-service.

03

Analytics

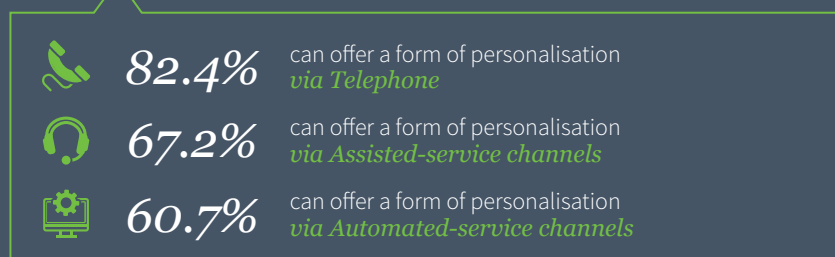
Analytics infographic	47
Questions and answers	48
Research findings	50
Single view of customer is important for governments	60



Analytics

Analytics voted top factor that will reshape CX industry, for 3rd year running. Personalisation is rising at pace, as focus shifts to robotics and automation.

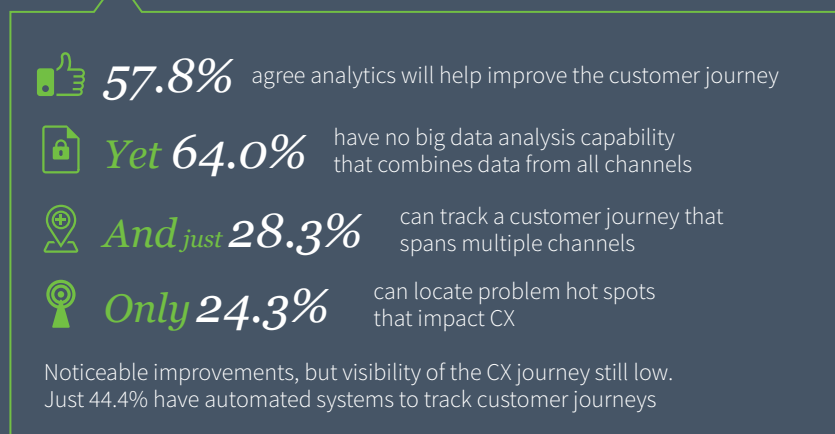
Making it *personal*



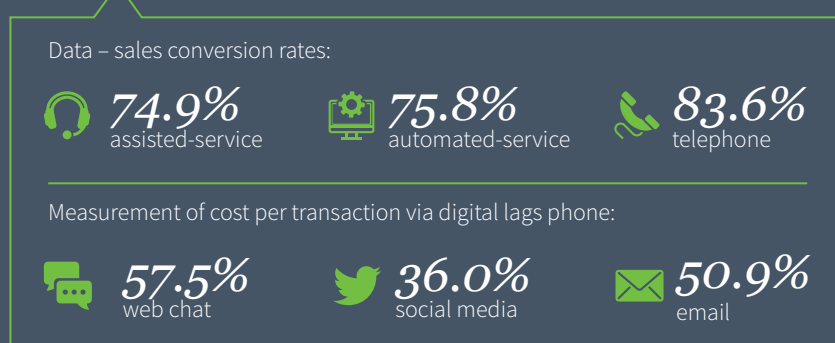
Use analytics to *enhance CX*



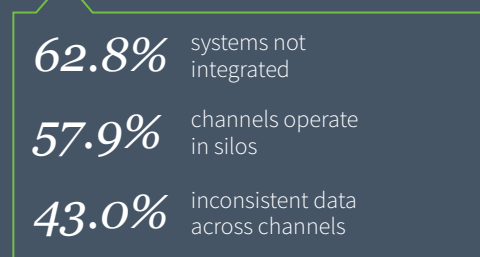
Understanding the *customer journey*



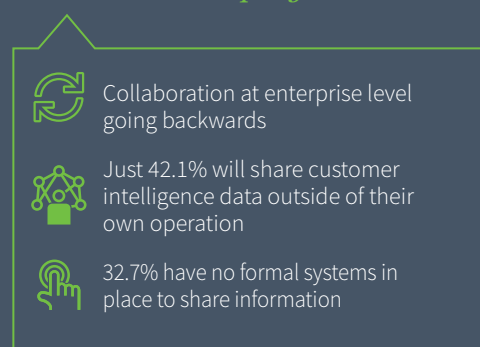
As channel capability widens, *opportunity remains to better inform contact strategies and validate business cases*



Top *challenges*



Knowledge share *regress*, when it should be *progress*



To *harness and understand* (mass) data is critical to performance. *New drivers powered by robotic technologies* are changing the entire landscape

We say

- *Customer journeys* should be intuitive
- *Contact channels* should be connected by design
- *Data that informs* your strategy is crucial for survival

Analytics empowers

**Talk to
Dimension
Data today.**

Analytics. It has again been voted as the top factor that will change the customer experience industry. Yet, many organisations only look at superficial data to determine how to make improvements in service offerings. Without a strong practice focused on collection and analytics of data, it's impossible for an organisation to deliver personalised experiences to customers.

Also, without centralised sources of data, analytics can be difficult. Data management and systems integration are major challenges to implementing analytics, as well as a lack of communication within the organisation to drive customer experience improvements.

about the author

Matthew Saskin



Managing Principal Consultant, Customer Experience (CX) Americas, Dimension Data

As head of contact centre and CX services in the Americas, Matthew's team aims to improve CX through the strategies they develop for contact centres. Matthew has a background in ITIL-aligned service delivery and deployment of complex enterprise architectures spanning across technologies. He's worked with clients, from mid-market to 10,000+ seat contact centres, across a range of verticals.

Questions and answers with *Matthew Saskin*

1. Why has analytics been voted the top factor that will change the CX industry?

The delivery CX is changing, and we see a strong focus on providing a highly personalised or proactive service. A key driver of delivering this type of service is to understand the customer – their history, their current context, and their likely future needs. All of this is driven by vast amounts of customer data. Without some form of analytics capabilities, it's just a sea of data from which organisations can't derive any meaning. The tools exist to liberate and inform CX propositions. Knowledge is power, and the information available must be capitalised on.

2. What's meant by 'performance analytics'?

As the data within this year's report shows, organisations are capturing customer experience-related data across several different fronts, both customer facing, such as customer satisfaction surveys and internal, such as traditional quality management/agent scorecards. With such a wide range of data available, 'performance analytics' can be defined as the analysis of available data utilised to improve the overall performance of the customer experience, contact centre, and agent.

3. How do companies avoid getting lost in all this data?

Organisations need to step into the practice of analytics with a solid plan in place. Even before getting to a point where there is sufficient data to analyse, it's critically important to have a plan with a set of end goals on what to measure. For example: 'we want to understand the correlation between agent performance and customer satisfaction to better tailor an agent on-boarding program.'

The set of end goals drives the type of data that an organisation needs to capture, the mechanism for capturing the data, and the ultimate question that analytics is attempting to answer. Without that forethought, it ends up being more happenstance than intent that the appropriate data to draw business conclusions is collected.

4. What are the main challenges being encountered with analytics systems?

A main challenge is the lack of a consistent view of who the customer is. A primary driver of performance analytics is to enable a highly personalised, proactive delivery of services. It's critical that an organisation begins with a clear understanding of who the unique customer is. Based on that, additional data (history, context, future needs) can be collected and stored appropriately. Challenges, such as a lack of integration between systems, are more about data management and the integration of data than anything else.

Challenges, such as a lack of integration between systems, are more about data management and the integration of data than anything else.

5. What tips can you offer to overcome the obstacles?

Begin the process with a plan, execute dutifully against the plan, and revisit the plan over time to make revisions. However, it's important for organisations to remain agile and to get to work. It's unreasonable to expect that the work around data analytics can ever be fully complete when overall customer experience metrics are continuously changing. Rather, organisations should set initial targets and set to work at collecting data, analysing it, understanding the results, and working over time to evolve their data collection and analytic processes and capabilities.

6. What is the current state of data analytics?

There is a 'collision' between traditional contact centres, data warehousing and analytics systems, and back-end business applications like customer relationship management systems. These are often applications that have unique fiefdoms within an organisation, however, they can blend customer data from far afield within an organisation to deliver a true single view of the customer. Smart organisations can break down boundaries between these disciplines to better utilise data to deliver an exemplary customer experience.

7. What new customer analytic trends are emerging?

Trends include the use of voice biometrics or other similar capabilities to deliver a seamless, or in some cases automated, customer identification and verification experience. Organisations recognise the need to confirm customer identity to accurately track behavior and utilise it for future analytics purposes. Another trend is to track customer interaction history from traditional 'contact centre' channels (e.g. voice, chat), and expand it to include web traffic and physical/in-person interactions. These additional channels are as critical as the traditional service channels.

8. Any quick-win wisdom you can share?

Get to work. Analytics, more so than any other practice, seems fraught with indecision as a result of perceived complexity. Develop a small number of use cases (fewer than five) to drive the collection of data, analysis, and use of the analysis, and put them into practice. This serves the dual purpose of gaining practical experience, as well as proving the business case and outcomes.

Analytics, more so than any other practice, seems fraught with indecision as a result of perceived complexity.

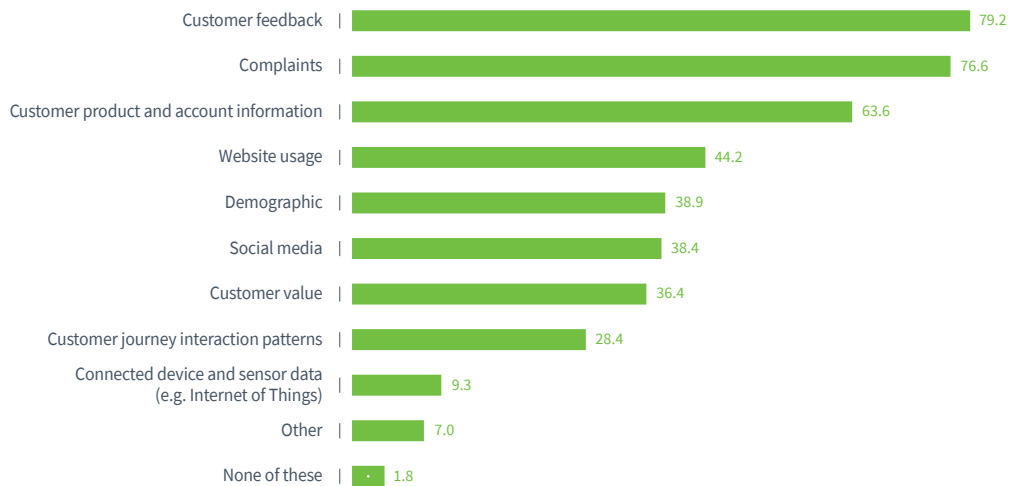
9. What will CX powered by analytics look like in five years?

We're only at the beginning stages of delivering highly personalised services to the customer. In the next five years, it's not unreasonable to expect that organisations will, as standard, proactively contact customers based on their preferences, e.g. offering the opportunity to re-order a product based on past purchase history. Also, when customers contact an organisation, e.g. the manufacturer of a home appliance, they would already know who the customer is and the reason regardless of channel used. These are all simple use cases, and they're just scratching the surface of the type of personalisation of experience that should become extremely commonplace in five years – all of which are driven by analytics.

Read on for the global results and analysis.

Compare your organisation's performance and results to a more specific benchmark by visiting our online benchmarking portal:
<https://dimensiondata.2017cxbenchmark.com/portal/?trg=GCXBR>

Data types collected



n | 1128

Figure 3.1: What types of customer data do you regularly collect to improve service offerings?

Data collection activity is rising.

Organisations are sourcing data from wider channels and at a deeper level.

Key findings

Organisations are now aggressively widening their nets to source a much deeper level of information around their CX. They go beyond traditional means of capturing information via feedback and product holdings. The number of companies collecting data is also increasing, as operators seek to refine solution models, leverage automated options and ultimately improve service offerings.

Those mining social media for sentiment, preferences and more, have increased from 32.7% in 2016 to this year's 38.4%. Collection of demographic data is also up (a rise of 47%), as 38.9% now explore patterns associated with age and status and customer profile. This is complemented by the 9.3% already using automated IoT-type data sources, an area in which we forecast rapid growth. The 28.4% of organisations currently reviewing customer journey interactions should increase if channel relationship patterns are to be properly understood.

More than one third (36.4%) are tracking customer value, a mechanism many are using to personalise CX offerings, and to pitch appropriate product solutions.

Why it matters: By rapidly expanding the breadth and depth of data being collected, organisations are setting themselves up to offer more tailored products, services, and experiences to customers, based on their history and context.

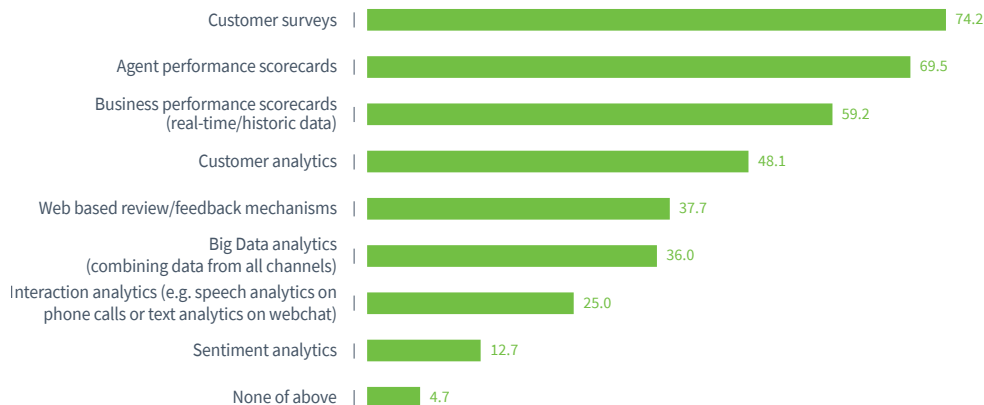
Accelerate your journey

Basic: Start by collecting basic customer feedback information via surveys or similar mechanisms.

Intermediate: Take action based on data. For example, use customer purchase history to drive an offering, or use transactional information, such as an order in process to deliver proactive messaging or notifications to your customers.

Advanced: Track the full interaction history of the customer across channels based on data, and drive handling of customer issues based on channel. Does the customer use web chat anytime they have a product question, but make a call when this is a service issue? Look to proactively route them (based on channel) to the person most likely to sell them a product or resolve their problem most effectively.

What business information *tools* are available?



n | 1118

Figure 3.2: What business information tools are available?

Usage of big data analytics has *grown by 75%*.

Business intelligence capability is below expectation – *less than half have customer analytic systems in place.*

Key findings

The top three business intelligence tools deployed have remained consistent for several years. Scorecards are considered as a core business intelligence tool. They provide a traditional headline view on an operational performance, but they don't show the big picture on today's digitally intrinsic CX journey, and more specifically they don't explain the factors impacting the real outcomes being created by CX.

To differentiate, organisations now appreciate that a much deeper level of analysis is necessary with a view to gathering better intelligence to inform solutions, decision-making and operating structures. In turn, the results show that companies are adopting a combination of analytics systems to facilitate a more advanced approach.

Almost half (48.1%) now have tools to capture customer analytics, and prestige brands lead the way along with the media and entertainment sector. More than one third (36.0%) can now access a big data analytics solution to process data collated from across the business, as capability levels rise from last year's 20.6%.

Why it matters: A key component to understanding the needs of the customer is having capabilities in place to perform analytics across the various customer data sets within an organisation. As we can see among prestige brands, organisations that wish to be leaders in the field should be quickly moving towards this capability.

Accelerate your journey

Basic: Understand the types of customer data that exist within your organisation and devise a plan to use the data.

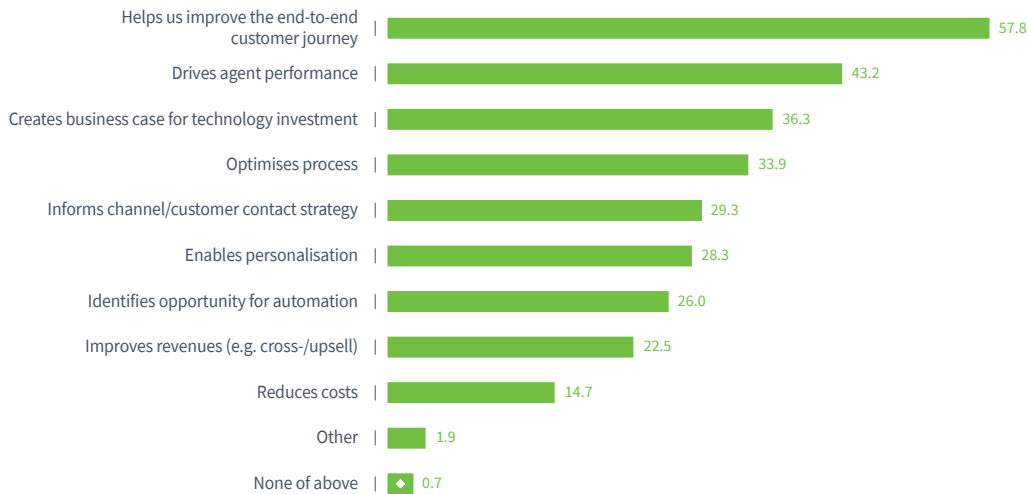
Intermediate: Rank and prioritise sources of customer information to determine the highest value targets for data integration, which are typically sales-related data to drive tailored offers to customers.

Advanced: Continue down the planned roadmap, and integrate additional sources of data and create new use cases for the use of your customer data.



In 2008, 72.7% had a centralised system to collate data and generate management information reports.

Impact of analytics on CX capability



n | 1056

Figure 3.3 : What are the top three ways in which analytics helps your CX capability?

Understanding the end-to-end *customer journey* is the top benefit of analytics. Organisations widen focus beyond the agent to better inform contact strategies.

Key findings

There's a rising appreciation on how analytics are helping organisations improve end-to-end customer journeys. This has driven agent performance, to become the number one desired business outcome obtained with a view to enhancing CX capabilities.

Looking at other business benefits associated with analytics, 28.3% state that it enables personalisation strategies; 26.0% highlight its importance in identifying opportunity for automation; and 33.9% list its contribution to optimising processes as a key benefit. There's a clear view that a broad spread of benefits is derived. The wealth of new business intelligence via analytic systems is also helping organisations validate business cases for technology investment. Some 36.3% are already maximising this benefit.

There are clearly direct commercial benefits to improved CX capability, but it's encouraging to observe that cost savings and revenue items are deemed to be a secondary outcome for many. The core focus is instead on informed operating model design, leveraging appropriately configured technologies.

Why it matters: To improve customer experience, it's critical to understand the overall journey a customer takes. What channels do they use, and why? Where in the journey is friction leading to negative experiences? Where can the journey be tailored to provide a more personalised experience?

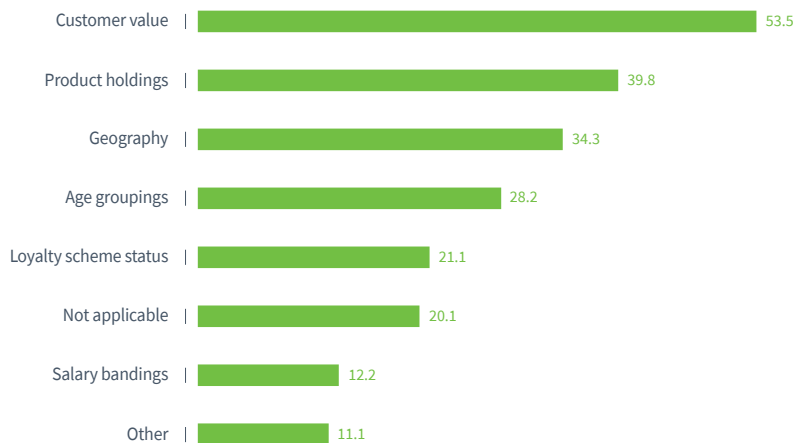
Accelerate your journey

Basic: To start, look at what your CX improvement goals are that can be supported by analytics. Is it to increase sales? Improve satisfaction? Minimise customer waiting time?

Intermediate: Once key goals are identified, begin to investigate data that is related to those end states. Ask yourself: why and when are customers waiting? When is the right opportunity for a cross-sell or up-sell?

Advanced: As your capabilities mature, begin to experiment with different scenarios (such as via A/B testing) to determine where you can drive improvement for the overall business.

Customer segmentation



n | 1098

Figure 3.4: What techniques do you use to segment/ tailor service offerings to your customer base?

80% apply some form of *customer segmentation*.

Overall, customer value is the top methodology, as over a third also leverage location and *product holdings to customise services*.

Key findings

The number of organisations segmenting customers has increased for four consecutive years. Of the 79.9% of organisations who segment and/ or tailor their services in some shape or form, over half (53.5%) do so based upon customer value. Product holdings (39.8%), followed by a combination of demographic splits, are next most commonly used techniques.

Personalisation techniques are becoming a norm across each channel grouping, but remain most commonplace via telephone where they're in play for 82.4%. For assisted-service and automated channels, personalisation strategies are, thus far, placed 67.2% and 60.7% respectively. The most common approach to initiate personalised offerings is by channel path (menu options) and profile information. However, the use of other more advanced analytic-based approaches is increasing, particularly on digital channels.

Over one fifth (21.1%) have adopted loyalty schemes to group their customer bases and provide frameworks that can help personalise service solutions. This method is used more in the sport, leisure and hospitality sector (71.4%), travel and transportation sectors (40.5%).

Why it matters: An exciting practical application of analytics is to segment the customer and tailor service offerings. This is to provide a better experience through personalisation and a positive business impact by, for example, offering products to customers that they are more likely to purchase.

Accelerate your journey

Basic: Identify the largest macro-segments that are applicable to your customer base – perhaps a single segment for premium customers.

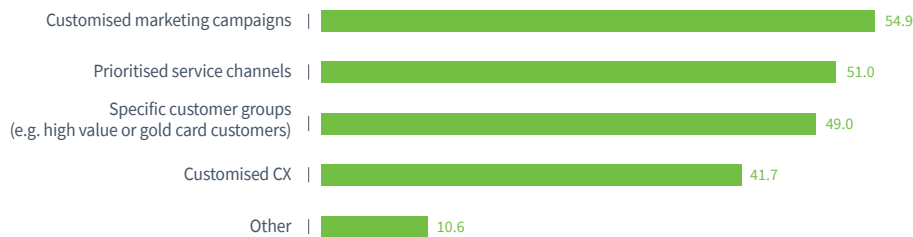
Intermediate: Utilise those segments to offer a premium service (bypass the queue) or tailor an offer (cross-sell a complimentary product).

Advanced: Based upon successes, further segment the customer base and offer additional use cases based on personalisation, with a goal towards segmenting the individual and their history with the organisation.



In 2008, just 32.8% of organisations had a form of segmentation.

Style of personalisation *offered*



n | 900

Figure 3.5: What style of personalised service can you offer?

Customised CX levels almost doubled.

Customer groupings and channel prioritisation are now adopted by half, and 55% have personalised marketing campaigns.

Key findings

Personalised service capability is ranked as the third top factor that will transform the CX industry within the next five years. A clear sign of the advancements already underway is the almost doubling of customised CX service offerings from 23.0% to 41.7% in the past 12 months. We're seeing some significant trends at a regional level too, particularly in Asia Pacific, where customisation capability is already at 60.9%.

Prestige level brands are the most likely to have a customisable CX offering in place, with premium and budget brands following accordingly. Interestingly, it's the budget brands at 71.8% which are most likely to customise their marketing campaigns.

Beyond full customised CX offerings, it's marketing campaigns and prioritised services options that are in place (by way of rudimentary personalisation efforts) for most CX organisations. As robotic solutions, enabled with artificial intelligence advance, fully customised CX will only improve and become commonplace. Personalisation is not an ideological concept, it's already here, and will become a core differentiator and ever more expected.

Why it matters: Organisations of all types, led by prestige brands, are rapidly adopting capabilities to deliver a customised experience to customers. To capitalise on experience as a differentiator, it's critical that organisations lacking this capability move quickly towards implementation.

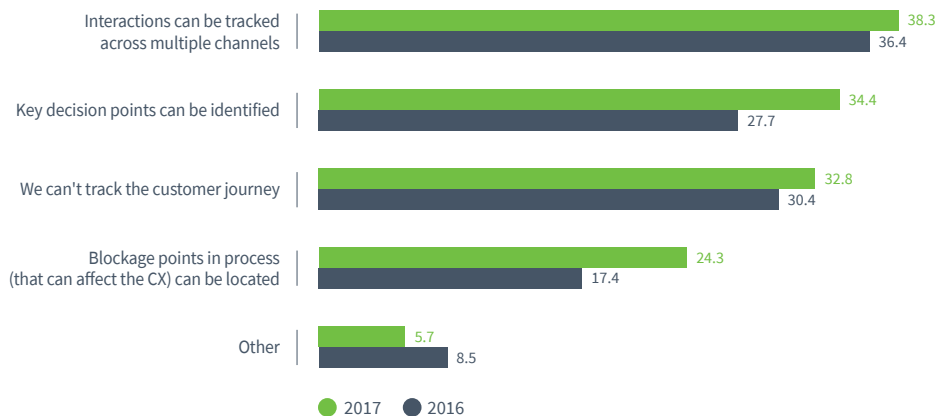
Accelerate your journey

Basic: Begin with basic proactive identification of customers; if they're logged in to a website or you can positively identify them by their phone numbers, provide a useful piece of proactive information or greet them by their name.

Intermediate: Once a mechanism is in place to identify customers across channels, begin to build a list of proactive messages to present based on channel such as information on current account status, updates on orders and or shipping, etc.

Advanced: As analytics capabilities evolve, continue to add additional personalised use cases to drive customer engagement and experience.

Tracking customer *journeys*



n | 1044

Figure 3.6: How well can you track the customer journey across your service channels?

There are noticeable improvements, *but visibility of the CX journey is still poor.*
Just 38% can track an interaction that spans multiple channels; *a third has no ability to track.*

Key findings

Connecting customer journeys that span multiple channels is the third top trend affecting CX organisations in 2017. It's also voted as the second top trend that will help transform the CX industry in the next five years. Despite that, almost one third (32.8%) of organisations cannot track customer journeys that involve more than one channel, in any form at all. The situation has deteriorated in the last year.

Of those who can track the customer journey, 38.3% can gain full insight on customer behaviours, and can now map user patterns across multiple channels. Rising 24%, over one third (34.4%) can identify key decision points.

Further evidence of the inroads made, can be gauged by the growth in those operations now able to identify blockages in the process that have a direct impact on the quality of CX. Capability levels have increased by 40% in just one year, although three quarters (75.7%) still operate without any visibility of these problem hotspots.

Why it matters: Without a clear understanding of the totality of the customer journey, it becomes difficult to make meaningful improvements to the overall experience. The growth over the past few years in how many organisations can track the customer journey, serves to support the recognition of just how important this capability is.

Accelerate your journey

Basic: Begin by taking a top-down view of your customer's journey. What channels are utilised and for what purposes?

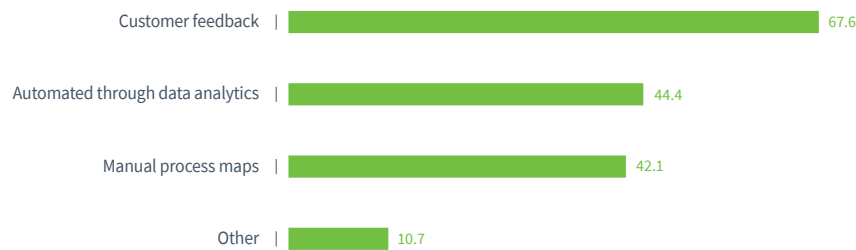
Intermediate: Once you have a clear understanding of how your customer interacts with the organisation, seek to identify areas in the interaction where they're negatively impacted (e.g. delays, asking for redundant information, etc.) by utilising available data.

Advanced: Finally, review the customer journey with an eye towards process improvement. Where can processes be optimised to further improve the customer experience?



Ten years ago, 49.7% could track and view customer interaction journeys; digital expansion has seen tracking capability decline.

Methods to track customer *journeys* across multiple channels



n | 703

Figure 3.7: What methods do you use to track customers' journeys spanning multiple channels?

Manual systems *remain the norm.*

Automation levels are rising though with 44% using data analytics to *track interactions across multiple channels.*

Key findings

Of those organisations providing multiple channels and able to track customer journeys, the vast majority are still using reactive and/or manual process methods to track interactions that span multiple channels.

More than two thirds (67.6%) depend on customer feedback for information on what may or may not be affecting their experience of the provider's service. Another 42.1% are using a manual process map system, that does not provide a true or complete picture of the actual CX delivered.

However, 44.4% of the 67.2% of providers able to track the customer journey do now have automated data analytic systems in play. These automated solutions will increasingly form a backbone to deep intelligence gathering to enhance CX delivery. Acknowledging the focus customer journey tracking is now receiving, and the availability and with it the affordability of systems via cloud and other technology options, we expect interaction analytics to be an area that will only gather momentum.

Why it matters: Manual processes are bound to introduce errors, or not be updated at some point. Organisations that focus on management of the customer journey are moving rapidly towards the use of data analytics to monitor and manage the customer journey.

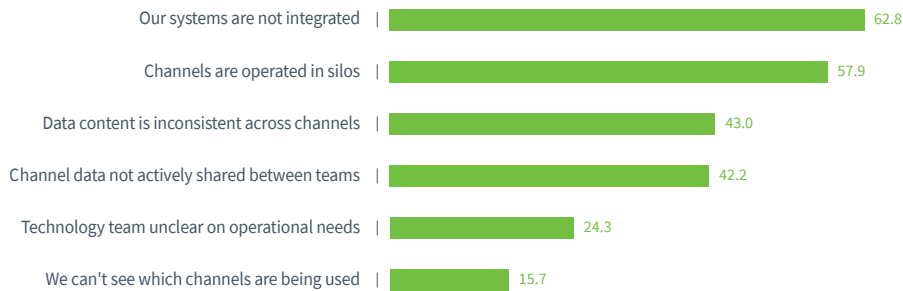
Accelerate your journey

Basic: As a starting point, begin by gaining a baseline understanding of your customer's journey through a manual process, such as journey mapping.

Intermediate: Once the customer journey is understood, identify key points where data collection exists and automated tools can be utilised to measure key metrics.

Advanced: Over time, consider automated systems that can support the tracking and measurement of customer journey metrics.

Challenges of tracking *customer journeys*



n | 898

Figure 3.8: What are the main challenges you face when attempting to track customer journeys?

Poor system integration causes the most problems when *tracking customers' journeys*.

58% compound the problem by operating channels in silos, and a quarter of technology teams are unclear about their operational needs.

Key findings

32.8% of companies that offer multiple service channel options cannot track customer journeys, and over half (55.6%) that do are operating via manual processes. It's therefore important that companies understand what and where the main challenges are.

Lack of integration is a known issue, although it's increasingly remedied with solutions, such as hybrid cloud models. Further opportunity can be gained in educating the 24.3% of technology teams unclear on operational needs.

A huge cause of concern is the 57.9% of organisations who are managing their channels in silos. Conflicts will be created via internal politics and personal agendas. Variances in objectives will create massive headaches whenever attempts are made to impose a consistent approach that spans across the split areas of responsibility. The challenge is at its worst (74.3%) within the travel and transportation sector. Digital-only type providers are seemingly the most integrated, where just 35.7% operate a silo-based approach.

Why it matters: The single largest inhibitor of tracking the customer journey is data management. The top challenges organisations face in tracking customer journeys, are all variations of how they manage their customer-related data. Before diving into advanced analytics, it's key for organisations to understand where customer data resides and try to manage and integrate it to support analytics moving forward.

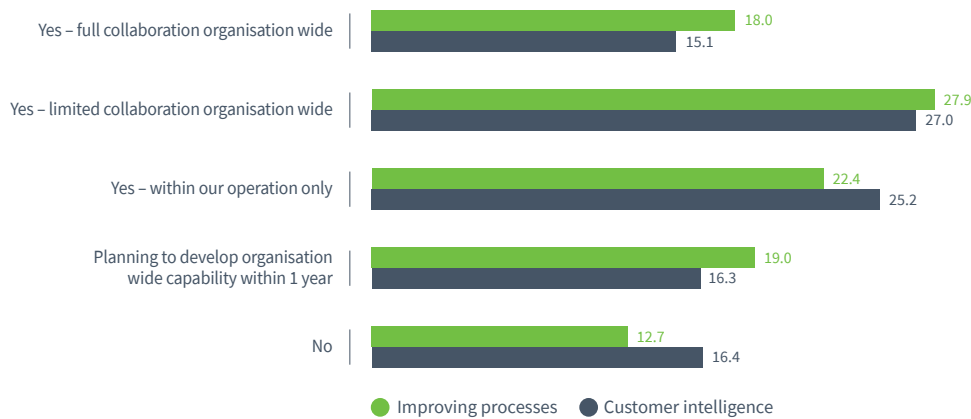
Accelerate your journey

Basic: Begin by looking inside your organisation. Where does your customer data reside? In what systems? Managed by what portions of the business?

Intermediate: Armed with an understanding of where data resides, begin to make decisions about appropriate systems of record for aggregation of data.

Advanced: Once data is aggregated into a centralised location, the process of data analysis can be pursued.

Sharing intelligence and *improving processes*



n | 1039

Figure 3.9: Do you have effective procedures to improve processes and share customer intelligence across the full organisation?

Collaboration at an enterprise-level has worsened (again).

Just 46% will share information on process improvement outside of their own operations and 58% won't share any customer intelligence whatsoever.

Key findings

More than ever before, user transactions and with it CX, are incorporated into the wider enterprise. The need for company-wide collaboration should be increasing, not worsening.

Intelligence share, and a proactive responsiveness to improve processes, must form a cornerstone to the success of every organisation. The reality is that companies are becoming worse at collaborating and disseminating customer intelligence.

Just 45.9% have full or partial procedures in place to collaborate on processes at an organisational level. Even less (42.1%) will share any intelligence on customers outside their own operations. One fifth (22.4%) and one quarter (25.2%) contain process information and business intelligence respectively within their own unit.

Most concerning, but providing easy opportunity to improve, is the 31.7% of companies with absolutely no procedures, or which are only at a planning stage of introducing enterprise-wide capability to improve processes. It's a similar story for intelligence share, where nearly one third (32.7%) are doing nothing or are still in a planning phase.

Why it matters: A critical component to the data management problem, is people and their roles and responsibilities. No amount of technology or analytics systems can fix issues relating to operations within an organisation that do not share data. This challenge becomes increasingly pronounced, as the delivery of customer experience rapidly extends to all corners of the organisation.

Accelerate your journey

Basic: Understand the customer data that exists and undertake an exercise to determine where it resides organisationally.

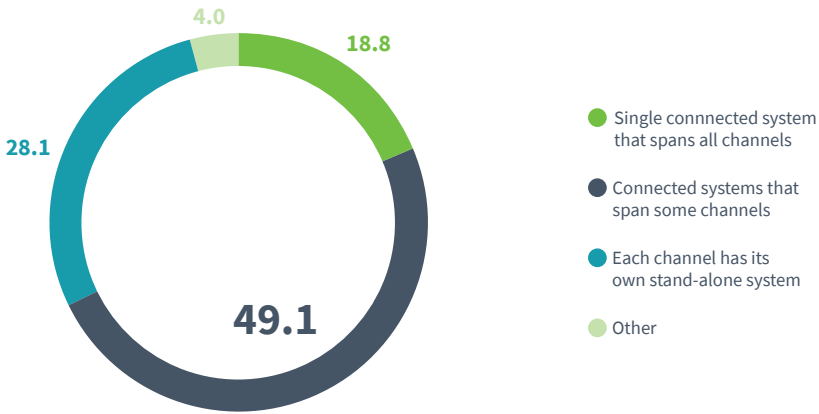
Intermediate: Ensure that early in the processes, your operations communicate to support the future sharing of data for various CX-related purposes (e.g. support, sales and marketing and overall interaction history).

Advanced: As new operations come online and begin supporting your customer, ensure that there is a continual effort to incorporate data to support the broader customer experience.



In 2008, 25.3% were fully cooperating on processes at an organisation-wide level. 24.0% had formal mechanisms to share intelligence.

Customer management *systems*



n | 994

Figure 3.10: What customer management systems are available?

Less than 20% possess a customer management system that spans all contact channels.
 Almost one in three channels has its own stand-alone system.

Key findings

Analytics is the most powerful factor that will change CX delivery within the next five years, yet 44.4% of organisations still report difficulties in obtaining a single view of their customers' interactions, as a top challenge. Another 36.2% complain that there is no consistency in how systems on different channels are configured, creating a lack of uniformity of data captured.

A fortunate 18.8% of CX providers currently enjoy a single connected system that spans all channels. Digital-only service providers clearly place an important emphasis on this as their competency levels rank almost double that of multichannel providers (37.5% versus 18.8%).

Half of those surveyed (49.1%), have connected systems(s) that at least span some, but not all, channels. The public sector (38.7%) and education (38.1%) verticals are the most likely to have implemented stand-alone systems for each contact channel. Globally, 28.1% have done the same.

Why it matters: Increasingly, business applications, such as customer relationship management systems, are becoming critical in tracking the overall cross-channel customer experience. Regardless of whether it's a customer relationship management system or otherwise, more organisations understand the need for a single system of record to manage the customer experience across multiple channels.

Accelerate your journey

Basic: Take stock of your existing channels that are in place and identify, where possible, a common system to store data generated by those channels.

Intermediate: As your organisation expands to take on new channels, ensure that care is taken during the evaluation and purchase process to verify the ability to support integrating data into existing systems.

Advanced: Over time, the closer your end channels can be tied to the system of record (such as via use of customer relationship management that supports omnichannel service delivery), the more likely your organisation is able to collect data to better manage the experience.

View from the Public Sector

Single view of customer is important for governments

By Cath Drinkwater, local Government Platform Impementation Manager, City of Gold Coast

Most companies are motivated to enhance their CX to retain and increase their customer base or sales figures, however, government entities have traditionally not developed such strategies. Seen more a ‘necessary evil’, the CX across a range of customer channels has been lacking. Long call queue wait times and cumbersome web sites are a result of the ‘do more with less’ mentality held by the majority of politicians, independent of a party.

Adding to the pressure, is the inability to send government-collected personal data overseas (the debatable silver bullet called offshoring). With heavy union pressure to retain golden age conditions in certified agreements (working nine day fortnights and annual increases in remuneration), means senior officers are looking for a sustainable solution to their woes.

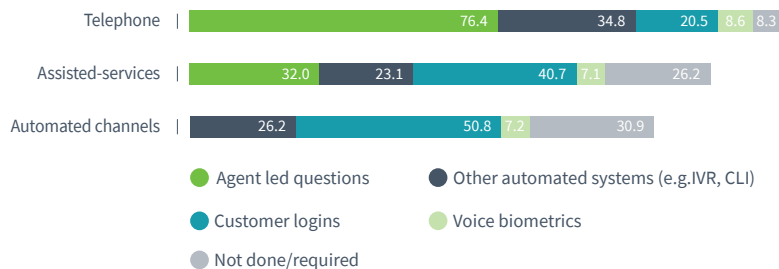
Looking for ways to reduce the bureaucratic red tape are not new – any agency worth noting will have a multitude of improvement programmes on the go. However, the realisation that there’s power in bringing services together has finally reached the tipping point.

A single view of the customer overcomes the normal cost versus CX paradox. Customers want their services in single place provided seamlessly and digitally. Shared-service concepts (mainly seen at a state level) have only gone as far as sharing resources and providing access to multiple legacy systems for each agency. It hasn’t provided the efficiencies and improved services originally envisioned.

The best answer for government institutions is to start small and build out a single view of the customer. Implementing, for example, a local government platform will allow cities to have a single record of a person. It sounds simple, but currently there’s no way of knowing whether a person who owns a house in ‘Surfers Paradise’ also owns a dog and has three parking fines outstanding, as well as a request to fix a pothole on their street.

Bringing customer information together has numerous benefits. It allows customers to go online and check their services and make payments. Moreover, cost (and burden) per contact on the more traditional channels such as phone or front counter may reduce from around \$16 to \$9. With over a million contacts a year, it’s easy to see how the business case stacks up.

Verifying customer identity



n | 1015

Figure 3.11: How do you verify customer identity?

Automation levels are increasing.

Voice biometrics system deployments have doubled and are gaining significant momentum.

Key findings

Continuing a progressive trend towards the reduction of a manual identity verification method, the level of automated techniques is rising across all three contact type groupings.

Customer login details, at 50.8%, is the top mechanism used to verify customer identity on automated channels. At 40.7% it's also the most common method for assisted-service transactions. As mentioned, the volume of manual identifications is decreasing, but it's still by some way the most common experience encountered on telephone interactions and represents a significant opportunity for streamlining.

While still accounting for a relatively small chunk of overall interactions, the use of voice biometric systems has doubled in the last year, and by a near 150% since 2015. Ranging from 7.1% on assisted-service channels to 8.6% on telephone, it's applied in steady measure across all three channel groups. There's evidence of keen focus within several industry sectors, where some deployments levels are almost double the global benchmark.

Why it matters: The use of voice biometrics for both customer identification as well as fraud detection is a key trend in the industry across channels, with many organisations seeing improvements in identification and verification rates, as well as reductions in operational costs related to manual identification processes.

Accelerate your journey

Basic: Outline areas where your customers can identify themselves, for example, with the interactive voice response, on the web, when connected to an agent, among others.

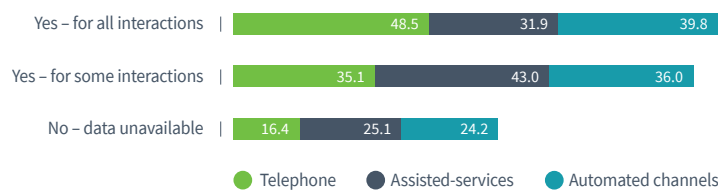
Intermediate: Begin to take steps towards automated identification, such as via matching caller ID, or, take a verified customer on a web portal and allow them direct phone access tied to the existing verification.

Advanced: As use cases grow, expand the scope of automated identification to include verification as well (through voice biometrics or a similar mechanism).



In 2013, 88.6% of organisations were using manual processes to verify customer identity.

Measurement of *conversion rates*



n | 655

Figure 3.12: Do you measure sales conversion rates across each contact channel?

A quarter of the sample have no data available on sales conversion levels on *assisted/ automated channels*. Less than half can measure (and compare) it *across every channel*.

Key findings

Contact management strategies for commercially orientated companies should ideally be based around a combination of customer preferences, and the models impacting on achieving organisational goals. Different transaction types are often far better suited to certain channels, with conversion rate results providing the case evidence. These conversion rates can also offer powerful data on return on investment that, where appropriate, will help fuel commitment to, and further confidence in, the CX team's approach and spend.

Less than half (48.5%) of organisations are measuring and comparing sales conversion rates against each contact channel. Digital channels in particular lag way behind the often more scrutinised (human element) telephone factor. Around one quarter have no data available at all.

These results speak to the neglect mentioned in our 2016 Global CX Benchmarking Report, and that digital needs a human touch. The solutions are there, but they need to be designed, deployed and regularly reviewed just as frequently as traditional phone customer service operations.

Why it matters: For most organisations, investments in customer experience must be justified by some financial improvement. One way to prove this business case is to identify channels and interaction types that are more effective for sales conversion, and begin to steer customers towards these channels.

Accelerate your journey

Basic: Understand what channel types are in use today for interactions where a sales event may take place.

Intermediate: For these interaction types and channels, begin to measure the conversion rate, not just across the customer base, but on a per channel basis.

Advanced: For channels where sales interactions do not take place, perform customer research to identify if there is a new opportunity to introduce sales activities into those channels.

Measurement of *cost per transaction*

Yes	2016	2017
Telephone (agent led)	83.0	70.8
Web chat (incl. instant messaging, co-browse)	66.4	57.5
Virtual Assistant (Chat Bot)	Not asked	57.1
Email	59.2	50.9
SMS text	41.0	49.5
Back office admin support	Not asked	47.6
Physical location (incl. service kiosks)	42.1	46.6
IVR (touch-tone/speech)	54.2	45.2
Video chat	47.3	44.6
Internet of Things	Not asked	40.8
Proactive automation services	34.1	37.9
Mobile application (smartphone, tablet apps)	38.3	36.9
Social media (Facebook, Twitter, etc.)	43.9	36.0
Website (incl. knowledge portals, peer-to-peer systems, etc.)	36.6	33.8

Figure 3.13: Do you measure the cost per transaction on each channel you provide?

n | 989

Measurement of cost per transaction is *still widely neglected*.

Opportunity remains to better inform contact *strategies and validate business cases*.

Key findings

Most organisations will fail to measure service costs by transaction on the vast majority of channels they offer. At best, 29.2% won't track phone costs per item handled, with 42.5% doing same for web chat.

Understanding the cost per transaction of each contact type is crucial, given its relevance to all types of CX providers. Following some years of slow but positive movement, this year's research presents mixed results.

The lack of cost management, particularly on the newer, emerging digital channels, suggests an absence of accountability and ownership. Just over one third (36.0%) are tracking the cost of providing social CX. Only half (50.9%) will do the same for email.

As new performance indicators are introduced, it may be that some traditional metrics are relegated. Cost will always remain crucial and subject to scrutiny at any time, and data will help defend and validate preferred engagement strategies for CX.

Why it matters: Cost reductions can be a means to justify a business case for investment in customer experience. Without a clear understanding of cost to serve across channels, it can be hard to balance the customer demand for a channel against the business impact (positive or negative) of using the channel.

Accelerate your journey

Basic: Begin with identifying the two to three channels that drive the highest volume. For these channels, identify both the overall manual cost to serve (in manpower), as well as the likelihood of first contact resolution. A channel may be 'faster', but takes more interactions to remediate a contact.

Intermediate: Once a methodology for measurement is in place, begin to collect cost to serve across lesser utilised channels as well.

Advanced: Armed with sufficient data, begin the process of steering your customers to a target channel to minimise overall cost to serve. Be careful not to impact the delivery of a quality experience at the same time.

04

Digital




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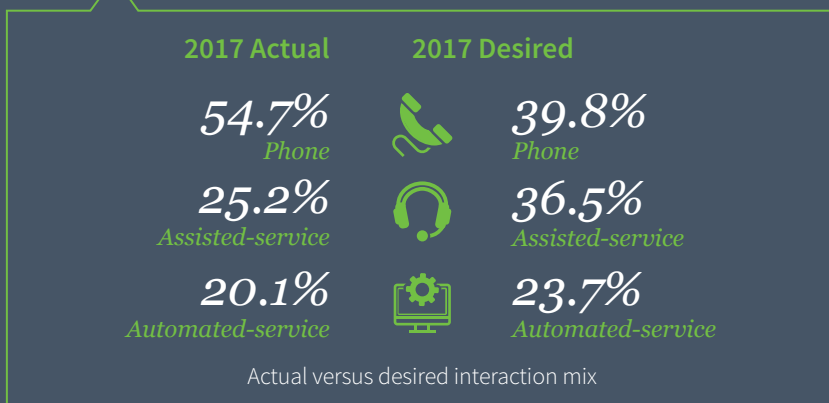
Digital

Digital uptake levels have slowed, affected by poor design, deployment and marketing. Solutions fall short of customer needs, but demand remains high.





Top factors driving digital transformation

-  **#1 Improve CX** – 69.7% vote CX as top reason driving digital strategies
-  **#2 Customer demand** – at 56.3% emerges as second top priority
-  **#3 Cost reduction** – versus 52.2% motivated by commercials

Phone contacts have dropped 17% since 2015, but digital transformation has slowed.



What's hindering customer usage of new channels?

-  **48.1%** *Customer awareness* of solution
-  **30.4%** *Functions* don't meet user needs
-  **19.0%** *No presence* on customers' preferred channels
-  *Security concerns* are dropping, but *lack of* strategy and required architecture creating delays.

Social media appeal as a service channel is high amongst mostly under 25s; with growing interest levels from 25-34 year olds.

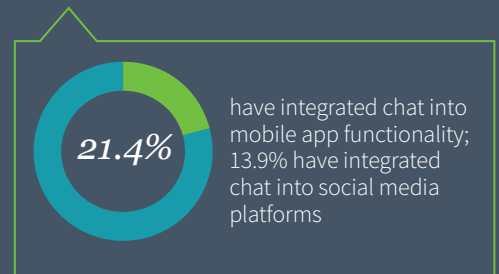


Mobile app functionality

Top movement area is on *establishing mobile-enabled web content*

- 49.6%** can order, amend, cancel services
- 47.0%** can update personal information
- 12.0%** of smart apps now include video user guide content

Web chat is *most frequently deployed* as a service aide (69.9%), rather than as a sales tool (47.0%).



Proactive (automation) 3rd top method to initiate outbound contacts

9+ channel offerings now a norm, appetites for apps and social are rising as AI and IoT focus intensifies.

We say

- The world has formed a *digital skin*
- Meeting CX demands requires *a leap of faith*
- Advance your digital strategy with *flexibility and data*

Embrace digital opportunities

**Talk to
Dimension
Data today.**

Digital. CX and customer demand for digital are the top considerations for driving digital channel strategies. Yet digital uptake levels are behind forecast. They are slowed by solution functionality that's not meeting customer needs and poor marketing of the solution existence. CX is core to digital transformation, and digitally-relevant businesses are focusing on aligning system user experiences, both internally and externally to drive positive disruption.

This means not only changing the CX with a new application or with improved customer service, but re-arranging the entire organisation to become more agile and responsive to customer needs. Innovation is key, and organisations need to build an internal competency that enables them to continuously adapt and thrive through explorative innovation and prototyping. The development of this competency starts with strong leadership and an innovative culture, which in turn best serves customer needs.

about the author

Wayne Speechly



Group Managing Director – Digital Advisory, Digital Practice, Dimension Data

With a passion for helping organisations improve performance, Wayne's vision has always been client- and business-centric. This is evident through his formulation and management of highly effective teams, who focus on solving business problems and who deliver bespoke, digital solutions. The result is an excellent track record for exceeding business metrics focusing on consulting, running business units and transformational projects.

Questions and answers with *Wayne Speechly*

1. How are digital solutions changing CX?

Digital is radically transforming customer experience by enabling organisations to tailor and optimise the delivery of customer-centric interactions, products and services. If implemented correctly, each customer will experience a differentiated service that is personalised to their unique needs. Many organisations fall short in truly putting the customer at the core. However, digital solutions carry the capability to enable organisations to bridge the gap and deliver on unmet customer needs.

2. How can you improve CX in digital contact channels?

Many organisations don't understand the customer's path to purchase, their service expectations and how to align this against their operations. To effectively map the customer's journey, organisations should create customer personas which inform and validate digital channels. By implementing customer personas correctly, the overall customer experience should improve, and customer loyalty can increase.

3. Why are there so many extremes in digital service capabilities?

For many organisations, the primary hindrance to becoming digitally mature lies within the legacy systems that still exist in the business. Whilst companies are under significant threat to protect their existing business concerns, they are faced with the equally daunting prospect of remaining relevant in the rapidly changing business environment. This concept has led to the mainstream adoption of a bi-modal practice. The gap between the current state of the organisation, and where it needs to be to optimally operate, is large. Having to deliver on short-term business outcomes whilst ensuring long-term sustainability and relevance is causing divergence to manifest.

4. What digital innovations excite you most?

The high level of disruption that digital brings to the world, is certainly the most exciting part. With this comes accelerated innovation, new technology, unique ways of doing things, as well as a level of uncertainty. The impact of digital means we need to re-think the way we

solve problems, build solutions and the way we work. We can take very little for granted to ensure we're likely to succeed.

How businesses evolved and remained relevant in the past moved at a slow pace. However, some industries have always moved faster – but the Fourth Industrial Revolution brings with it a level of change and uncertainty that hasn't been experienced before.

5. Describe the key trends in digital transformation

By far the most important question in the mind of C-level executives is: 'what relevance does new and emerging technology have on my business?'. In the past, it was certainly easier to manage the introduction of technological and evolutionary improvements, given they were for the most part incremental.

Today, there are several significant and transformative technologies emerging simultaneously and organisations are having to deal with digital transformation, the threat of survival in the market and now, the introduction of numerous disruptive technologies.

Augmented and virtual reality represents the possibility of another significant change in the way human beings are interacting with each other, as well as with technology. Augmented reality presents both an opportunity, but also an ever-prevalent risk of detachment as a species.

6. What's surprised you about the digital evolution?

Certainly, what's intrigued me most is the approach to problem-solving and how it has radically evolved. The ability to think about exponential change, disruption, possible threats and most importantly, being able to harness opportunity is driving a behavioural and talent revolution. It's important for organisations to think about how to best promote this.

Individuals with the support and enablement of technology are managing to solve problems at scale far more effectively than ever before, and for the most part without being taught how to do so. This is a phenomenal accomplishment of humankind working together.

7. Why are organisations lagging in their digital capabilities, many of which are being widely used in our private lives (e.g. video, skype, instant messenger)?

The success of consumerisation has allowed technology maturity and mass-market consumer applications to leapfrog the pervasiveness of enterprise provided digital capability for the consumer. This doesn't mean that these consumer applications are better when it comes to security, governance or even quality compared to enterprise application alternatives.

What has transpired is that these consumer applications have now entrenched themselves into many organisations, mainly because of the seamless integration between personal and business utilisation of technology, which is linked to the same individual. In this regard, many enterprise-grade digital applications have not crossed the chasm from purely business relevance to personal prominence and favouritism.

8. How can organisations improve integration of service channels?

Organisations need to overcome traditional ways of thinking and, more importantly, siloed legacy operations. They need to ideate and execute creatively in solving customers' demands and needs. Customers are now less loyal to brands and more to experiences. In addition, the fluidity of the market is more prominent now than ever. To improve the experience of service channels, business, IT and product need to align to exactly what the customer wants, and most importantly, how best to dedicate efforts to deliver a superior and differentiated customer experience.

A practical way to gain momentum in this structural and cultural change is to leverage various stakeholders from different functions in the business, and adopt a sprint approach focused on solving a problem. Organisations will be surprised at how well a diverse team will collaborate and bring unique insights into improving a service channel.

9. What will digital business and CX look like five to 10 years from now?

With exponential change upon us, it's quite difficult to know what businesses will look like in the near future. What is clear, is that there will be a dramatic shift in the role technology plays in delivering a personalised and relevant service to customers. With the advent of robotics, artificial intelligence and machine learning, the opportunity for organisations to provide an intuitive and remarkable customer-centric experience will certainly change the way businesses deliver in the future.

What's more interesting, is that organisations need to successfully pursue transformation before new age technologies are mature and properly integrated. This is due to the gap that exists between traditional business and digitally-relevant business models. Customer experience will therefore shift significantly, and not always positively, over the coming years as organisations grapple with how and what to change.

Read on for the global results and analysis.

Compare your organisation's performance and results to a more specific benchmark by visiting our online benchmarking portal:
<https://dimensiondata.2017cxbenchmark.com/portal/?trg=GCXBR>

Factors driving digital transformation

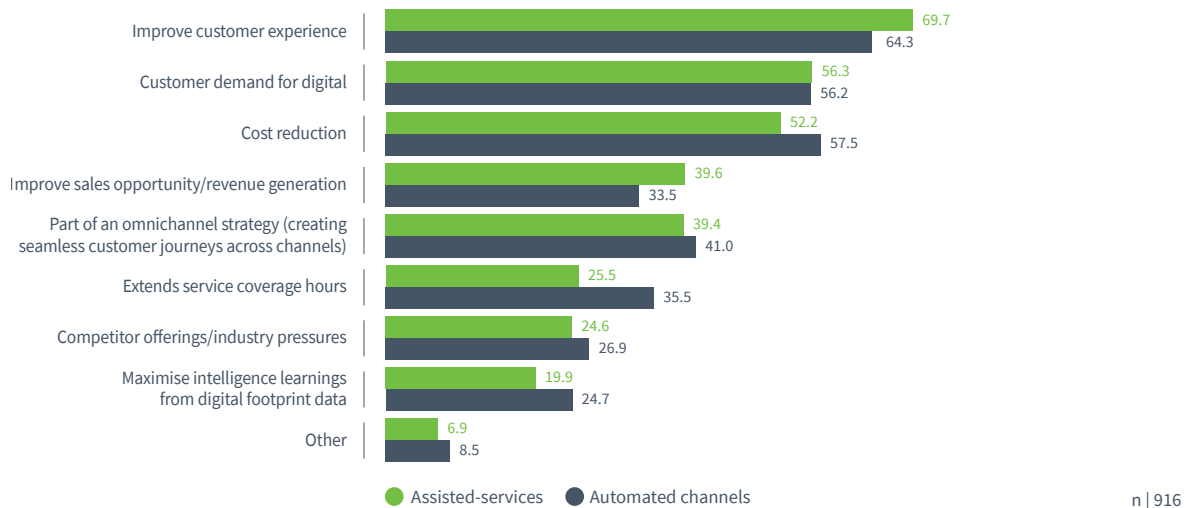


Figure 4.1: What are the main factors driving your digital business transformation?

CX remains a top consideration for driving digital channel strategies.
 Customer demand for digital choice jumps into second place, as cost reduction becomes less of a factor.

Key findings

Two years ago, cost reduction was the top factor driving organisations toward digital transformation. Cost reduction remains a huge consideration when evaluating digital solutions, but now falls behind both customer needs and whether digital can improve the customer experience. This reflects a maturity in approach. It's no longer about simply creating a presence under a pretext of cost saving, but rather about designing omnichannel service structures that facilitate seamless customer journeys regardless of channel paths taken, and complement the overall CX.

While no organisation should blindly follow paths taken by competitors, it's perhaps surprising that just a quarter cite industry pressures as a reason for going digital. The reality of today's world is that most organisations need digital transformation, and failing to transform may mean that they lag behind competitors, and their business may cease to exist.

Many companies which have transformed digitally, are gaining huge advantages in the information provided by digital footprints. They're using digital footprints to customise services and apply appropriate automation. The number of companies using actionable analytics as the basis of their transformation and a catalyst to act, is expected to rise.

Why it matters: At the heart of any digital transformation in an organisation, is the customer. It's not surprising that improving customer experience remains a prominent factor. Many organisations are realising that cost optimisation of IT cannot remain a leading indicator when considering digital transformation. For this reason, understanding what your customers want, and aligning your efforts to delivering against this, is an important approach.

Accelerate your journey

Basic: Talk to your customers, both existing and prospective, to find out what they want from your organisation.

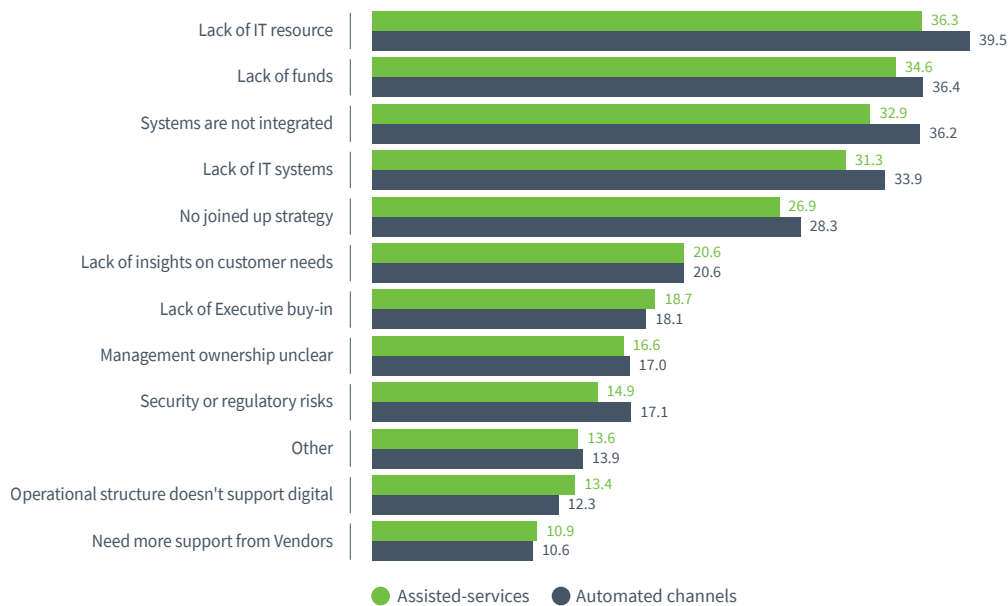
Intermediate: Create and formulate a detailed customer journey map and customer experience strategy which provides clear metrics on how to deliver a better and more seamless customer experience.

Advanced: Reorganising the organisation to ideate, innovate and deliver against customer experience ensures not only that customer metrics, but also operational, financial and product aspirations have the greatest likelihood of sustainable success.



In 2013, just 36.4% considered digital as a way to reduce cost.

Top factors slowing digital *business transformation*



n | 911

Figure 4.2: What is slowing your digital transformation within your CX operations?

Lack of IT resources and budget are top factors for slowing *down transformation to digital*. Security concerns are decreasing, but strategy or *structure uncertainty is creating delays*.

Key findings

There's not one compelling factor that's stalling digital transformation. Apart from funding constraints, which are always a challenge and can be overcome with new cloud options, the main issues for lack of digital transformation are framed around access to people and the required IT systems, and perhaps most crucially, an integrated strategy to implement a model.

Encouragingly, less than one fifth report executive support as a problem. However, the one in six organisations which state that management ownership is unclear, doesn't tell the full story. Many organisations design and deploy digital channels in silos, and this can create CX turmoil (reference figure 7.7).

The challenges listed are not insurmountable. The main issue is a robust strategy and governance system to develop digital transformation against clear (and shared) business objectives.

Why it matters: Digital transformation is not an easy feat, especially considering market disruption and businesses that always evolve. Businesses that are on their digital transformation journey will soon begin to experience short-term wins. It's then that you have to remain focused on your goals for longer-term success, as well as removing barriers that may impede upon your success.

Accelerate your journey

Basic: Conduct an audit of where your business currently is, and identify the gaps that exist between the as-is and desired state.

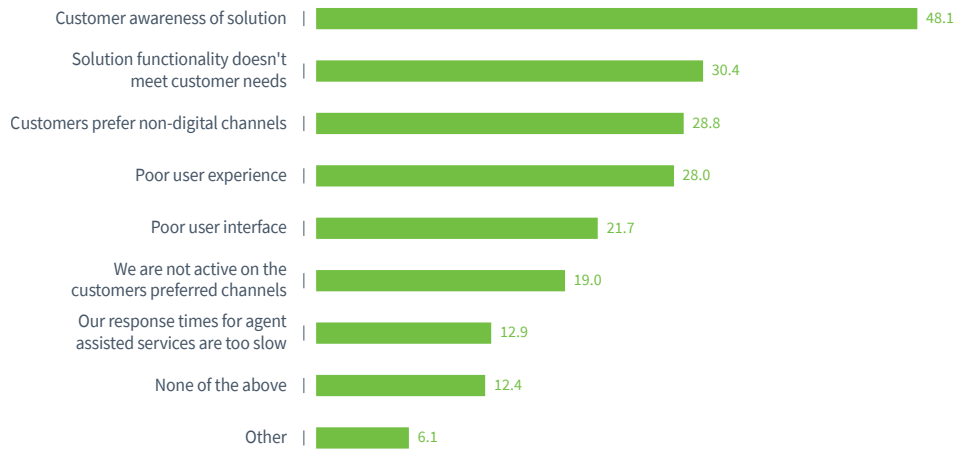
Intermediate: Drive an agile yet structured programme to manage and overcome the factors that your company identifies as the most challenging in driving digital transformation.

Advanced: Create a responsive organisation that can adapt and respond to as well as manage known and unforeseen risks on a continual basis in an agile and meaningful way.



In 2008, 15.8% were using financial incentives to drive customers to lower cost (digital) channels.

Factors hindering usage of digital



n | 985

Figure 4.3: What are the factors that hinder customer usage of new digital channels?

Nearly half the respondents cite poor customer awareness as a factor hindering usage of digital solutions. Almost one in five aren't providing the channels customers want, with 30% saying functionality falls short.

Key findings

Despite customer demand for digital channels, usage levels are not at the required levels yet. The number one reason impacting usage of new digital channels is customer awareness of the solution, where financial services (banking/investment) at 61.4% suffer most. A solution is to concentrate on marketing new channels to customers, but it's an area that is often overlooked.

A recurring theme impacting digital uptake levels is where solution functionality doesn't meet user needs. A rush to establish, and lay claim to, a presence on new channels, is resulting in 69.6% of CX providers circumventing due process on the design and testing which ensures the effectiveness of digital solutions.

Over one quarter (28.0%) of respondents are conscious that user experiences on digital channels are poor. Another 19.0% say they're not yet active on channels preferred by customers. If left unattended, these numbers will grow and result in customer retention – all customers desire is to have their queries resolved easily.


Why it matters: To ensure that customers are likely to embrace new digital channels, it's best to include them in the early phases of the product and service delivery lifecycle. Customers are more inclined to buy into and support new and engaging ways of communicating with the organisation, if their insight is actively and authentically included into the architecture and crafting of the solution.

Accelerate your journey

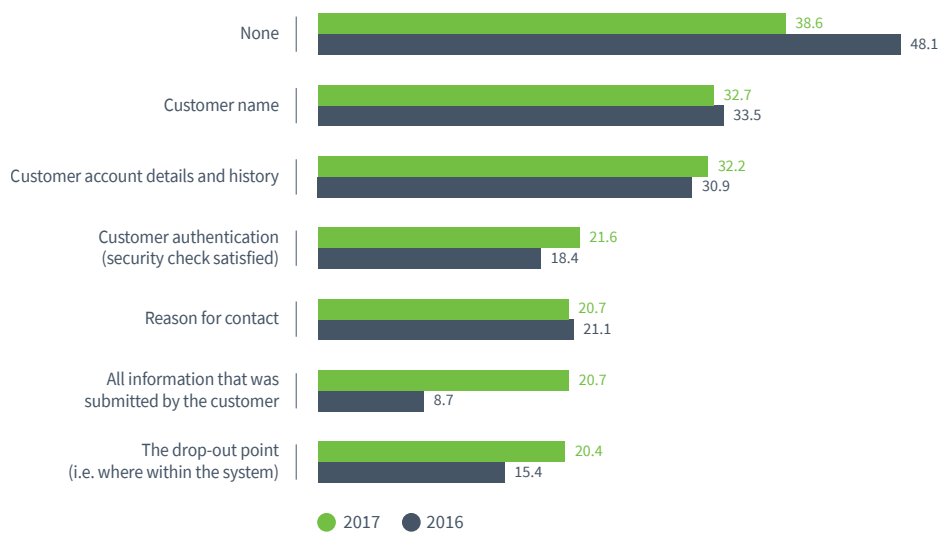
Basic: Update your product lifecycle process to include the customer at various critical points in the development and build phase.

Intermediate: Introduce incentives that drive and align customers to on-boarding new channels in a way that drives greater exposure. Also, reward customers for engaging with the organisation in different ways.

Advanced: Create a customer-centric ecosystem for success. Customer personas that meaningfully archetype who your customers are and what they want from your organisation lead to the introduction of new and exciting channels. The usage of these channels is defined around your customers' willingness to engage through these mediums. Proactive management of this customer journey at regular intervals is essential, coupled with encouraging customers to simultaneously give their input.

 In 2013, 66.4% of organisations believed self-service systems cause significant customer dissatisfaction.

Information passed to agent following *self-service dropout*



n | 740

Figure 4.4: What information is passed on to the agent when a customer drops out of self-service?

Signs of improvement as a fifth of the respondents now provide all available *information to the receiving agent*. 39% of customers electing to drop out of self-service are still *being transferred blindly*.

Key findings

While there's not much sign of any real change on previous year's results, the altered numbers in the graph are heading in the right direction. Ultimately, what this tells us is that 61.4% of customers who drop out of automated self-service channels to consult with an agent, do so with some of their information having been passed on. This is the biggest movement area since last year, where just over half (52.9%) shared some information.

Moving to the other end of the scale, 20.7% will enjoy a smooth transition to the agent, having had all their information shared, and by default, have no need to frustratingly be made to repeat themselves.

One positive observation is that 20.4% of organisations can now accurately identify, and one would presume take steps, to remedy issues that cause customers to drop out at certain points of the self-service systems. These organisations can now gain insights into problem hotspots that may be damaging customer experiences.

Why it matters: Organisations need to be data-driven and recognise and elevate the role that data plays in being a digitally mature organisation. Apart from creating an optimised data architecture, organisations need to collect, process and interpret data in ways that enable them to deliver exceptional customer experience. At the same time, data needs to be the objective and primary indicator in any transactional or strategic organisational decision.

Accelerate your journey

Basic: Defining and implementing a data architecture that optimises the environment is a key entry point to becoming data-driven.

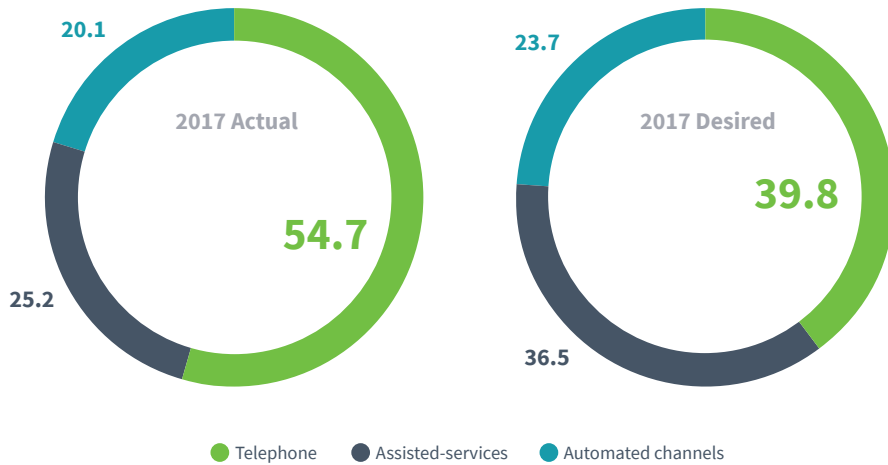
Intermediate: Integrating and transforming how data is collected and used, including the contact centre, necessitates the move from being data fragmented and reactive, to a state of data efficacy and optimisation.

Advanced: Data is consistently the number one variable in driving customer experience and organisational decisions, thereby ensuring that customers are better served due to relevant and insightful interactions.



In 2013, 54.1% of customers dropping out of self-service systems would be handed off without any information passed to the receiving agent.

Actual versus desired *interaction split*



n | 858

Figure 4.5: What is your actual versus desired split of customer interactions by channel grouping?

Phone contacts dropped 17% from 2015, but the actual split of interactions fall way *short of the desired model*.

Digital uptake levels are losing momentum, as they are affected by poor deployments and *unsatisfactory design and marketing*.

Key findings

CX providers still have to develop before they can align the actual split of customer interactions to their desired operating model. The percentage of transactions handled by agents via telephone continues to fall, although the 5.2% drop in the last year represents a slowing down of the migration of phone interactions to digital channels.

Despite this, we're seeing some type of growth across almost all digital channels, as customers' appetites for digital and alternative options remain high. However, the volumes being processed via these channels remain low overall. The percentage of traffic going through fully automated channels is the most closely aligned with the desired model (compare 20.1% actual versus 23.7% desired).

We're also seeing some evidence of organisations adopting a more pragmatic and balanced approach towards migrating phone interactions towards partial/full automation, with fluctuations annually on which model mix may work best. A constant is that telephone traffic will continue to decrease, as increasing use of robotics will see automation rise in the coming short to medium term.

Why it matters: It's quite possible that your customers are already utilising competitive services, without you even knowing. Establishing and maintaining a loyal and trusted relationship with your customers, means knowing when and how they want to interact with your organisation. Despite slowing traditional channel prevalence, many organisations need to refocus on building digital solutions that are aligned to customer wants and needs, as well as supported by solid customer driven insights.

Accelerate your journey

Basic: Plot your customer journey and identify existing customer touch points and mechanisms for serving these through digital channels.

Intermediate: Create customer incentives for engaging with the organisation through new digital channels and at the same time, solicit, respond and integrate feedback accordingly.

Advanced: Create customer persona archetypes which then formulate desirable channels of use as specified by customers themselves. Both adoption and usage of digital channels by identified customer persona archetypes need to be motivated through incentives and gamification.

In 2013, the split of actual interactions was 66% for telephone, 17% for assisted-service, and 17% for automated channels.

Popularity of channel by age group

Percentage	Under 25 years	Between 25 and 34 years	Between 35 and 54 years	Between 55 and 70 years	Over 70 years
Social media	1st 39.3	4th 16.9	5th 1.9	6th 0.5	4th 0.6
Mobile application	2nd 30.8	1st 26.0	3rd 8.5	4th 1.6	6th 0.3
Web chat	3rd 12.1	3rd 18.5	4th 6.3	5th 0.9	4th 0.6
Telephone	4th 8.1	5th 12.2	1st 46.0	1st 85.1	1st 89.6
Email	5th 8.0	2nd 24.9	2nd 35.8	2nd 8.8	3rd 2.1
Other	6th 1.7	6th 1.5	6th 1.5	3rd 3.1	2nd 6.8

n | 746

Figure 4.6: Which contact channel is most popular with the following age groups?

Smart app popularity is up and it's a top three choice for *everyone under the age of 55*.

Social media appeal is high amongst, but mostly limited to, under 25s, *but showing signs of growth amongst 25-34 year olds*.

Key findings

Mobile apps have risen to become the first-choice contact channel for those aged between 23-34. It's increased in popularity amongst 35-70 year olds, and is at worst a top three choice for everyone under the age of 55.

Social media continues to solidify its popularity amongst millennials and those under 25 years of age. It's increasing its appeal to those aged 25-34 as well, although it's a fourth-place preference behind mobile apps, email and web chat. For all others, it's yet to gain much acceptance as an appropriate customer service channel.

While the proportion of contacts handled by telephone falls yearly, it will remain a key escalation option and is still the predominant channel of choice for everyone over the age of 55. Conversely, digital options are preferred by 54.0% of those aged 35-54. The numbers become powerful when considering those aged under 25 and the 25-34 age group, where 91.9% and 87.8% respectively prefer channels other than telephone.

Why it matters: Customer personas do not just look at how customers want to interact, they also segment your existing customer base. Generational demographics should play a key role in understanding who your customers are and how they seek to best experience your organisation. A telling sign is the digital channels that will emerge prominently, given the increase of younger generational types in the market. One size does not fit all, and it is no longer enough to have a great multi-channel offering. Organisations need to have personalised omnichannel capability.

Accelerate your journey

Basic: Have an objective understanding of customers' needs and wants based on broad clusters, which can be driven by generational type.

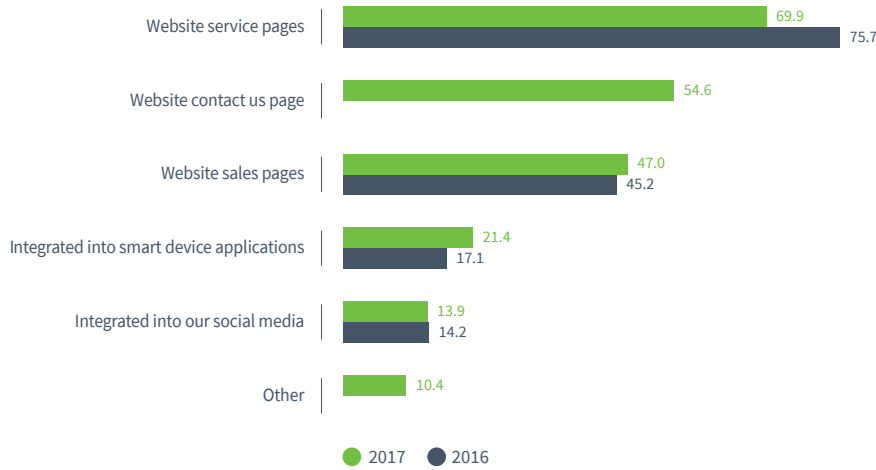
Intermediate: Provide optimised omnichannel capability with customer preferred choice of service across digital channels.

Advanced: Have an optimised persona-driven customer journey map, to determine which digital channels are required to best and uniquely serve each category of customer profile. These should be revisited and evolved on a regular basis.



Just five years ago, and prior to social media and mobile app advancements, web messaging was the top choice for the emerging millennial generation.

Web chat *deployment*



n | 509

Figure 4.7: Users: Where have you deployed web chat?

Web chat is most frequently deployed as a service aide, *rather than as a sales tool.*

One in five respondents have integrated chat solutions to smart apps, *one in seven into social media.*

Key findings

Web chat in some form is now supported by 52.4% of organisations providing CX services. Another 32.3% plan to implement a solution within the next 12 months. Interaction levels have doubled over the last two years, but remain minute overall, as it's increasingly being deployed for niche usages.

As deployments become more targeted and refined, current users of web chat are scaling back their availability on website service pages, where it was used by 83.5% of users in 2015 versus just 69.9% today. Surprisingly, it's still less available on the sales pages of website, but deployments have remained much the same for the last three years.

We previously predicted that web chat could become the servicing mechanism that connects smart apps and/or social media CX. Only one in seven organisations have social media integrations, however, we're seeing steady growth through smart apps functionality offerings, with a 34% year-on-year rise since 2015.

Why it matters: The appeal of web chat is not having to talk to an agent via the phone. Web chat is less than ideal as the primary mechanism for digital engagement, as it is not platform or channel agnostic and is often dependent on the availability of agents to respond in real-time. In numerous real-life experiences, it's easier to call into the contact centre given the richness of content when talking, as opposed to typing. The real opportunity for web chat, in the short- to medium term, lies with chat bots. With artificial intelligence and machine learning, the ability to integrate responsive chat bots into almost any channel or platform is essential, as other forms of engagement begin to gain momentum.

Accelerate your journey

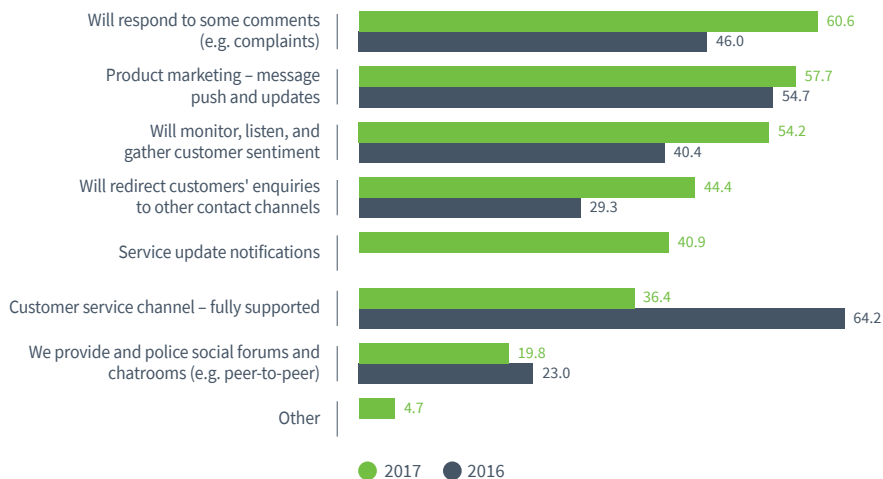
Basic: Conduct a customer survey to understand demand for web chat (including service and platform/channel expectations), which will allow the right effort to be invested in.

Intermediate: Experiment with the chat bots you've developed around specific customer needs and wants and elicit customer feedback.

Advanced: Experiment with artificial intelligence and virtual reality against specific customer personas.

In 2013, 30.7% had deployed web chat to service pages; 20.7% to sales pages. Deployments have since doubled.

Using social media to *improve CX*



n | 601

Figure 4.8: Users: How are you using social media to improve CX?

Nearly two in three (61%) will respond to *social media comments*.

44% will subsequently redirect customer enquiries to other (and less public) contact channels. 41% use *social media to send service updates to customers*.

Key findings

Two thirds (66.8%) of CX organisations currently operate a social media channel. As indicated in figure 4.6, a social media channel is very popular amongst the growing millennial generation. For now, the number of companies running social media sites and electing to provide full CX support is falling rapidly.

Instead, there's a growing trend to redirect customer enquires received via social forums to other contact channels, and this has risen from 11.9% in 2015 to 44.4% this year. CX providers are also recognising social media's value as a listening channel to track customer sentiment. Social media users have surged from 18.5% (in 2015) to 54.2% in 2017.

While no historical data is available, it's worth noting that 40.9% of users have started to leverage social channels as a means of issuing service update notifications to customers. This can have a fantastic and well received impact on outages and alerts, helping to prevent unplanned event volume surges.

Why it matters: By leveraging social platforms that talk to multiple customers at once, you can transform brand perception around service delivery. However, this may be detrimental to the brand if handled incorrectly. As many organisations start to establish an online presence, these practices and customer engagement tend to be structurally removed and distant from the operations of the organisation. Integrating social media channels more seamlessly into the customer lifecycle, including core enterprise applications like CRM and ERP, will drive a richer experience and ultimately more customer-centric service delivery.

Accelerate your journey

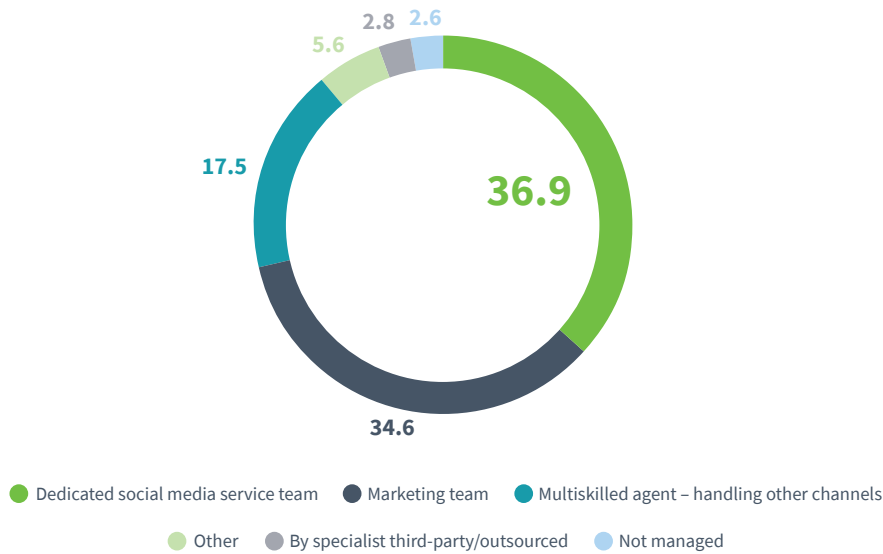
Basic: Identify and define the current and desired state for customer service via social media, not including digital marketing.

Intermediate: Integrate social media channels into core business processes so that they exist as primary channels to engage and service clients.

Advanced: Define customer personas along with co-created journey maps that are properly integrated into business operations and become a mature channel to serve. Identify metrics to manage these channels like any traditional channel.

 In 2013, just 18.5% considered social media as part of a CX channel strategy solution.

Management of social media



n | 647

Figure 4.9: Users: Who manages your social media service channel?

Over a third of social media is still being *managed by marketing teams*.
 Another third has a dedicated social media team in place (*decreasing from 53% in 2016*).

Key findings

At a global level, one third (34.6%) of social media service channels are still being managed by the organisation’s marketing team. There’s significant variation in how the numbers compare when viewed at a sector level.

We would expect this percentage to fall as management recognises the need for tighter CX management, beyond the channels used to aide product marketing initiatives. In line with this forecast, 54.4% are already providing CX management support via dedicated and/or multi-skilled agents.

Just 2.6% of users don’t manage their social media at all, and another 2.8% have sourced the expertise of third party social media specialist partners. The degree of variation by service, operation, sector types and more, supports an argument to engage specialists to guide your social strategy and CX support model that’s customised to your business needs.

Why it matters: It’s not important who manages social media channels, as much as how it is formally seen as part of the customer journey and product lifecycle. Essentially, the product lifecycle should be created with the customer journey at the centre. Social media should form another element of the many well-defined and managed channels to market. Managing social media separately from other channels will inevitably lead to a less than expected customer experience often leading to fragmented or disparate journeys across other channels and social media.

Accelerate your journey

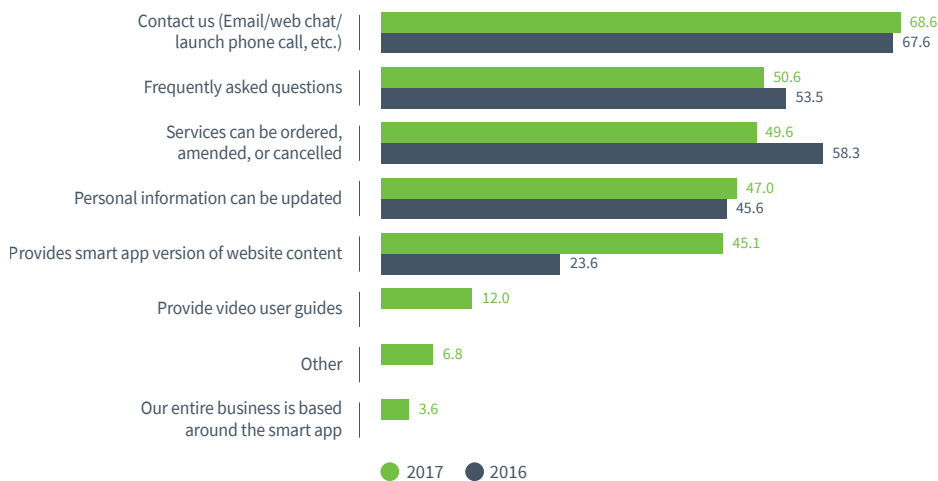
Basic: Ask yourself: How does the internal product lifecycle process incorporate social media to engage and service customers?

Intermediate: What practices in the organisation bring the team managing social media closer to the product, contact centre and most importantly, sales. If this feedback is only reporting into marketing, then a large opportunity gap exists.

Advanced: Every employee and team in the organisation should be structured and measured around customer service. Regardless of where teams or individuals report to, the importance of integrating social media channels across functional business areas is essential to enhance customer centricity.

Five years ago, the majority of organisations were simply monitoring social media chat, for most it wasn’t considered a service channel.

Mobile application *functionality*



n | 532

Figure 4.10: Users: What mobile application (smartphone or tablet) functionality is available to customers?

A top movement area among respondents is to establish a mobile-enabled website.

12% of smart apps now include a video user guide, and almost half allow users to update personal information or order/amend services.

Key findings

Continuing its explosive growth, the proliferation of mobile app availability amongst CX providers has grown by 117% in just two years. Smart apps are now readily available from 56.2% of organisations, a number that's forecast to increase to 82.7% by the end of 2017. These apps provide real-time and convenient interaction and information gateways. Deployments will surely only grow further, particularly amongst certain business sectors.

Of existing users, half (49.6%) can offer advanced functionality that allows services to be ordered, amended or cancelled. Some 47.0% allow personal information to be updated. Facilitating the ease of use, particularly on more complex uses, the number of companies focusing efforts on mobile-enabled website capability is rising exponentially. It's risen 91% in the last year alone.

One in eight operators are now using video to help support customer needs via smart apps. It will be interesting to monitor steady growth as differing usages of video appears to be gathering momentum in the CX space.

Why it matters: The most widely accepted measure of successful digital transformation is the digitisation of the customer value chain - from product concept to purchase, fulfillment and assurance. The customer value chain uses self-service applications with which customers interact and transact. However, many organisations have built these applications without transforming how the business re-thinks customer centricity, culture, structures and systems to be truly responsive and data-driven – all of which are critical to becoming customer-centric.

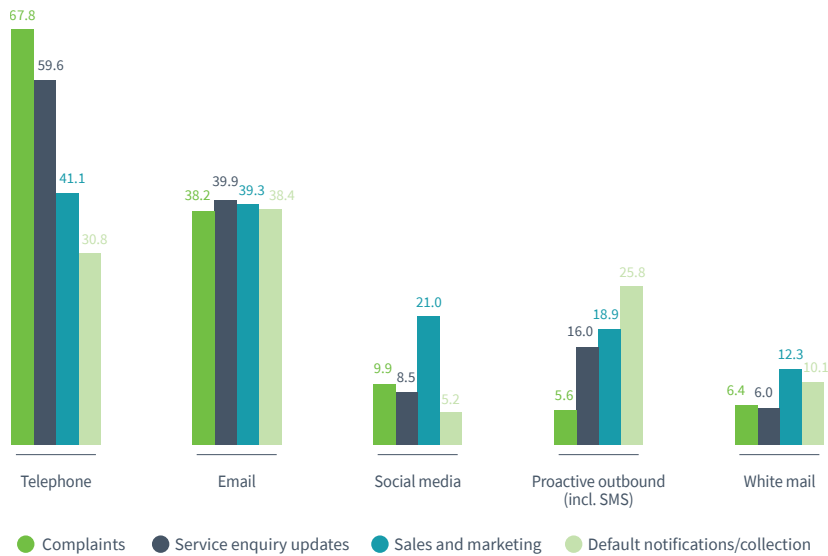
Accelerate your journey

Basic: Identify whether the development of an application is driving business process optimisation within the organisation or whether it's optimising the business value chain.

Intermediate: Embark on a wide-scale business transformation initiative. Address key internal transformation initiatives first, before prioritising the development of an application to transform the customer experience.

Advanced: As the whole organisation has embraced change, and transformation exists across many facets of the business, the application becomes the final piece which links the customer into the organisation. Here, the user experience is crucial, but the strength of customer experience lies within the organisation and not within the application itself. Transformation, and more visibly automation, has occurred regardless of the application being created.

Preferred channels for *initiating* contact



n | 945

Figure 4.11: Users: What channels do you most commonly use to initiate outbound contact with customers in the following situations?

There is a good spread of channels in use for all interaction types.

Proactive (automation) is the third top method used to initiate contact, while the preferred method used by sales and marketing is social media.

Key findings

As indicated in the 2016 Global CX Benchmarking Report, the contact mix will vary for each sector, but the global picture provides a good overview of the widening channel spread now used to proactively initiate interaction across differing contact types.

Situations in which email can be used are being applied consistently, regardless of the nature of outbound contact. Social media has a more limited use, with a clear leaning towards leveraging it on sales and marketing activities. White mail is almost dropping off the scale as a mechanism to proactively engage with customers.

It's not surprising that telephone is most frequently adopted. It's personal and, importantly, also the most flexible. It'll be retained by most, but also complemented by video or other assisted digital channels, as an escalation option and/or for more complex contacts, certainly in the short to medium term. Analytics, improved business intelligence and increasing comfort around automation will inevitably see proactive outbound techniques rise at pace during this same period.

Why it matters: Digitally transformed organisations offer a relevant and personalised experience, regardless of whether customers are initiating or receiving communication. Customer personas help map not only how customers make contact, but specific and individual ways that each channel should serve their unique needs.

Accelerate your journey

Basic: Survey your customers to gauge demand for preferred choices of engagement with the organisation. Develop these channels according to current demand.

Intermediate: Enable your customers to interact with their desired channel which integrates into actual business processes.

Advanced: Align customer personas to a customer journey map and desired outbound channels, which are then integrated to form part of your core business processes. From the beginning, these personas should be defined individually in accordance with preferred methods of engagements. For example, determine which customer segments would prefer to engage over live chat as opposed to email.



27.9% had automated outbound email systems in place as early as 2008.

IVR call statistics

Percentage	2015	2016	2017
% of calls received that are initially routed through an IVR system	76.9	80.9	83.2
Average IVR call time (seconds)	144.0	74.7	87.4
Average time to abandon within the IVR (seconds)	73.2	41.5	49.3
% of total calls routed to the IVR that are completed/resolved by the IVR system	35.6	34.9	34.0
% of IVR calls that drop out to an agent	53.0	56.6	57.3
% of calls abandoned within the IVR	11.4	8.5	8.7

n | 485

Figure 4.12: Users: What are your interactive voice response (IVR) call statistics for the following categories?

The percentage of calls being routed through interactive voice response is increasing, with 34% being resolved within the system.

A positive indicator of CX improvements is that call times have increased in tandem with time to abandon.

Key findings

Interactive voice response is the longest standing channel where contacts are processed digitally and without an absolute need for agent intervention. Organisations are refining it as a solution and, despite the alternatives available, the percentage of calls that are routed via interactive voice response continues to rise.

Of those operators able to offer it as an option, 83.2% will initially route all calls received via their interactive voice response system. 57.3% of those calls will subsequently drop out to an agent, but over a third (34.0%) will be resolved within the interactive voice response, and provide the CX provider with some significant cost-saving benefit.

Further evidence of how interactive voice responses are improving, is the reduction in calls that are being abandoned. It's down 24% in the last two years and the average time to abandon has steadied at 49.3 seconds, some 24 seconds less than it was in 2015. As interactive voice response systems are developed, actual time spent in these systems has reduced, indicating more streamlined and efficient processes, and a move away from elongated and frustrating interactive voice response 'jail-like' experiences.

Why it matters: Interactive voice response systems still provide a valuable service. Simplifying the number of levels and menus encountered will optimise the CX. It's a cost-effective solution, which can work well in the right situation, if designed and reviewed properly. Visual IVRs accessed online and via mobile devices can learn from the past mistakes of phone IVR systems.

Accelerate your journey

Basic: Schedule regular reviews of your IVR processes. Allocate an operational owner responsible for optimising the CX experiences, and applying identified service improvements.

Intermediate: Use voice of customer programmes to harness CX feedback, and to identify areas for improvement that will improve interactive voice response resolution rates, and minimise call abandonment levels.

Advanced: Drive the CX by incorporating it into your omnichannel strategy, enabling frictionless user journeys. Use the processes in place for phone to deploy visual IVR solutions on smart devices.



Ten years ago, just 24.5% of calls were routed via interactive voice response, and 74.4% of those would drop out to an agent.

05

Operations

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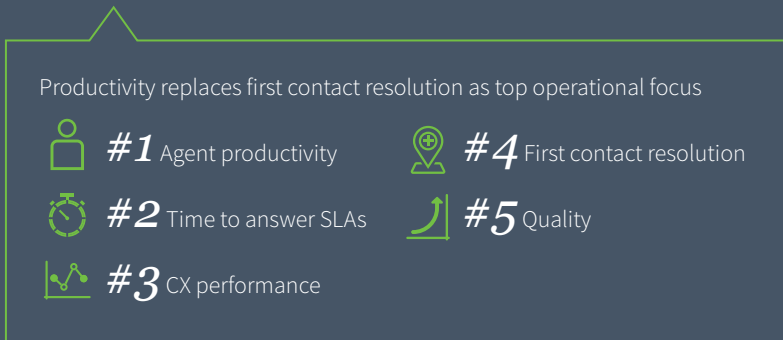


Operations

Human cost and productivity are being challenged as automated solutions improve.

Breakdown between strategic relevance of CX and operational management techniques, as complexity and commercial pressures increase.

How is *operational performance* targeted?



Customer satisfaction measured

	Actual	Target	Used by
C-SAT scores	68.4 ↓	73.5	69.6% of operations
Customer effort scores (CES)	50.8 ↓	58.3	15.8% of operations
Net Promoter Scores (NPS™)	34.0 ↓	37.8	43.9% of operations

37.8% will also seek *voice of the customer feedback* on services delivered

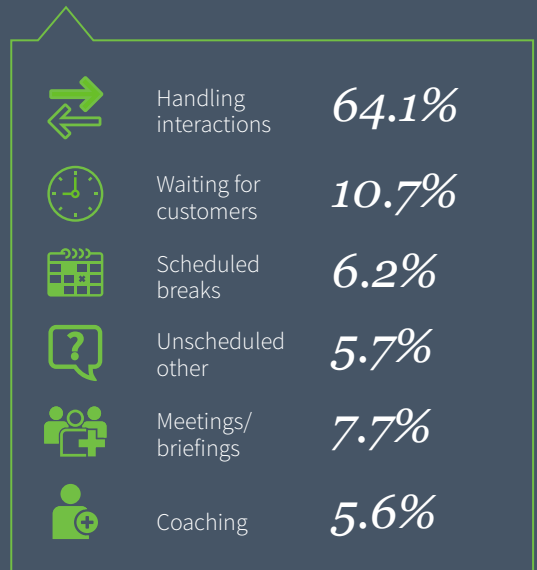
Real *customer outcomes* tracked



Cross channel – *contact management stats*

Channel stats	First call resolution	Handle time	Response time
Phone	76.0%	4.4 mins	76.7% within 20 secs
Web chat/ messaging	71.5%	41.5 mins	6.9 mins
Video chat	71.1%	54.4 mins	14.0 mins
Email	64.3%	74.3 mins	266.6 mins
Social media	63.3%	33.9 mins	60.1 mins
SMS text	54.0%	23.8 mins	32.4 mins

A day in the life of a CX agent



CX - The uncomfortable truth: Performance falls short of targets as a focus on service fails to keep up with evolving customer demands.

We say

- *Ease of resolution* counts most towards CX
- *First contact resolution (and CXs)* on digital paths are lagging phone
- *Operational structures and processes* need to get digitally aligned

Optimise operations – *differentiate and win*

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Operations. Productivity and the human cost of CX are being challenged as automated solutions improve. There's evidence of a clear breakdown between the strategic relevance of CX and operational management techniques, as complexity and commercial pressures increase. Productivity has replaced first contact resolution as the top operational focus. CX performance, the top strategic performance indicator, drops to third top priority.

The benchmarking results highlight significant inconsistency in operational process between new digital and traditional CX channels. Ease of resolution is what counts most to the customer, but cross-channel delivery is inconsistent, and overall, performance levels are falling short. Operational structures and design need to go digital if they are to keep up with evolving customer demands.

about the author

Darren Arnold



*Strategy Director,
Merchants Limited,
a Dimension Data
subsidiary company*

Darren has operated in the CX and contact centre space in Europe and the Middle East and Africa for over twenty years. With many years of experience in managing large scale operations, both captive and outsourced across multiple verticals, he now develops strategy with a clear understanding of how to execute operationally.

Questions and answers with *Darren Arnold*

1. What are the latest operational trends?

The major operational trends to look forward to are proactive service and personalisation driven by technology, big data and analytics. Anticipating customer needs ahead of time is a potential contact avoidance measure and cost saver, opportunity for upselling/cross-selling, a positive force for improved customer experience, and in many cases, a huge opportunity for reducing churn.

Customers are becoming increasingly accustomed to personalisation. The organisation's challenge is to extend this capability beyond the marketing function and into the service domain.

Applying actionable intelligence from data analytics can be a game changer, and will help organisations deliver greater personalisation in terms of channel choice at specific stages of the customer journey, agent preference, interaction style and personalised next best offer.

2. How are increased influences in technology impacting operational delivery?

Whilst new technology is enabling more efficient operations and offers the opportunity to improve the customer experience, in some regards it's also adding to the complexity of CX delivery. Lack of integration across legacy systems remains a major challenge for organisations. At an operational level, this makes it difficult for agents to have a single customer view to deliver a great customer experience.

Workforce management across multiple channels continues to be an obstacle to optimised operations, especially where organisations cross-skill agents on different channels. As messaging and social media become more prevalent as service channels, expectations of 24-hour near real-time response increase.

3. How will operations evolve as automation and robotics take hold?

Operations will become more reliant on highly skilled and flexible agents as less complex and transactional interactions are automated. This will be necessary, not only for those customer enquiries identified as beyond the scope of the automated channels, but also for when the artificial intelligence has identified the need for additional support. This may come in the form of a hand-off to the live agent or through help in person – a reverse-assisted support if you like.

This would result in a lower friction interaction for the customer and the robotics channels would be less easily identified as non-human.

The adoption of artificial intelligence, automation and robotics does not in itself resolve the challenges of product failures, logistics, flawed process and ineffective policies, etc. Therefore, higher-value and more complex engagements, especially those where customer distress makes the interaction a real moment of truth and empathy is necessary, will be handled by more highly skilled and more empowered agents with assisted-service support.

4. Why is there variance in how different channels are managed?

There isn't enough variance. Contact centres have managed the voice channel for decades and have evolved the disciplines necessary to attract, recruit, train and performance manage agents in this channel. The nuances required to be effective in these areas for digital channels hasn't evolved as quickly as the proliferation of these new channels. Instead, CX management has attempted to shoehorn the old processes, procedures and practices into the new world.

5. Why are operational drivers frequently so inconsistent with strategic objectives?

Apart from a few evangelists, the recognition of a definitive link between customer experience and loyalty, and therefore bottom-line performance, is a comparatively new phenomenon. Up until a few years ago, the majority of organisations viewed CX as a cost centre and cost efficiency was the imperative. Driven in the main by disruptors, it's hugely encouraging that customer experience is now the number one strategic objective. However, there remains a lag as operations attempt to catch up and adapt their old 'tried and tested' methodologies, metrics, reward mechanisms and management styles. In addition, truly understanding an outside-in perspective of customer experience and the necessity to break down the silos to which this inevitably leads, makes it difficult for legacy centres to transform.

6. How can operations ensure that technology helps rather than hinders?

There has been a trend for operations to be less involved in the selection process for new technologies. Being involved in the process from the beginning, even if it's not in a decision-making capacity, ensures a psychological investment in the project, and therefore automatically increase the chances of success. Moreover, engagement through the process, from requirement specifications and supplier selection through to implementation, exposes operations to the information they need to ensure that planned benefits are realised.

7. Are new digital channels contributing to better CX services?

In absolute terms, customer service standards are rising and becoming more consistent across sectors. However, it's clear that improvement is lagging behind the speed at which customer expectations are increasing. Customers are exposed to more personalisation, from music streaming providers to online retailers tailoring suggestions and offerings. Beyond what's normal basic segmentation, some customer management operations do seem to struggle to customise their service offering. As channel choices increase without the necessary integration to allow full customer view, fragmented interactions impact the customer experience. This new expectation of personalisation, combined with the reality of disjointed customer journeys, is driving customer satisfaction expectations up and perceptions down.

Apart from customer expectations, organisations that recognise the increased complexity of CX services, e.g. skilling agents across channels, higher value-live interactions, broader product and tariff knowledge requirements and investment in the right tools and training for their people, deliver greater customer experience and receive better customer satisfaction results.

8. Where can operations improve?

A good start would be to recognise that to be effective across different channels requires new thinking and new skill sets. The old approach to attracting talent which has been training, performance managing and, ultimately, retaining that talent, will not work in the new world.

Take an outside perspective on every aspect of the customer journey and change accordingly. Understanding why quality scores are generally vastly different to customer satisfaction scores should give an indication to the principle.

Work hard to turn data into information, into analysis and then into actionable intelligence – big data is expensive and useless unless translated into action. Be as involved as possible in all technology decisions impacting the customer, whether a contact centre initiative or not.

Make employee engagement a strategic imperative. Technology is a huge enabler, but much of CX will remain, for now, a people business.

9. Is it time to re-invent operating models to meet evolving CX demands?

Yes, it is. Organisations that truly embrace customer experience as the number one imperative must adopt an outside-in approach. Many customer journey mapping exercises become, in essence, process mapping and efficiency-seeking projects. When mapping the customer journey from the customer's perspective, it becomes clear that the customer interfaces with many parts of the organisation. Each of those parts is dependent on the others to deliver the desired customer experience. To really deliver an optimised customer journey, it becomes apparent that the silos of old need to be broken down and organisational structures, beyond just the contact centre, must become integrated, physically, as well as on process maps.

To really deliver an optimised customer journey, it becomes apparent that the silos of old need to be broken down and organisational structures, beyond just the contact centre, must become integrated, physically, as well as on process maps.

10. What will digital operations look like in the next five to 10 years?

CX operations will look very different from today. As the challenges of legacy system constraints reduce and the adoptions of cloud increase, combined with maturation of artificial intelligence and automation technologies, the contact centre will be a more integrated part of the organisation. With highly skilled agents working seamlessly with technology and being empowered to resolve complex, high-value interactions, organisations will attract more highly skilled and ambitious talent.

Highly skilled agents working seamlessly with technology and being empowered to resolve complex, high-value interactions, organisations will attract more highly skilled and ambitious talent.

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Factors *impacting CSAT*

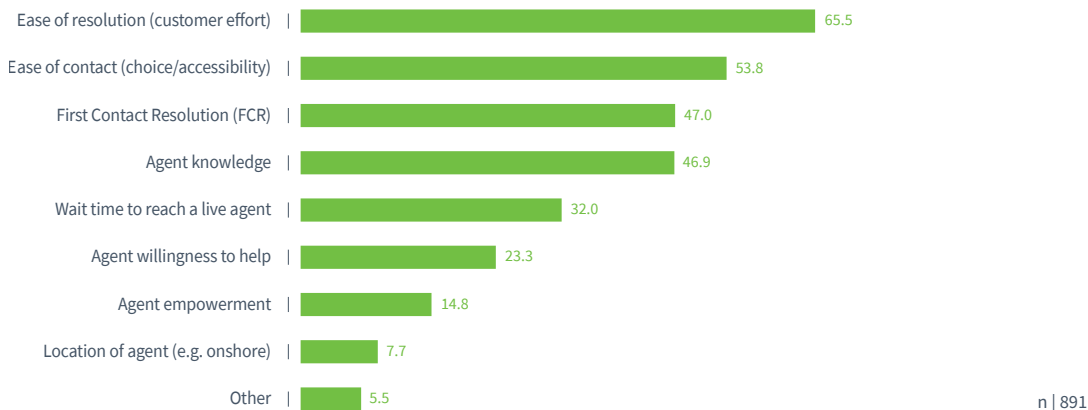


Figure 5.1: What are the top three factors that impact customer satisfaction with your service?

Ease of resolution counts most *when it comes to customer satisfaction*.

Channel choice is becoming increasingly important, *as the impact of wait times and agent location reduces*.

Key findings

Ease of resolution has become an even more important factor when considering impact on customer satisfaction. It's the top consideration for every sector apart from sports and leisure (including hospitality) and education, where agent knowledge is regarded as the top factor.

Ease of contact is increasing in importance year after year. It's increased again since 2016 and it's now the second top ranked factor influencing CX perceptions. Assuming new solution options are deployed well, improved ease of resolution will help validate organisational investment in meeting consumer demands. The options of contact channels customers can interact across will be expanded – many of which will be digital and less costly.

Customer wait time to reach a live agent is becoming less of a determining factor. It's still the fifth placed consideration, but it's voted so by just one third (32.0%) of the sample this year, versus 43.7% in 2016. Location of agent, presumably on a basis that an agent is knowledgeable and can assist as required, continues to be ranked very low and contests some views on offshoring.

Why it matters: Understanding what is important from a truly outside-in perspective is critical to ensuring that focus and investment is directed in the right areas. A proliferation of channels offers greater choice. However, unless organisations ensure that the requirements for attracting and training talent, developing appropriate KPIs, managing performance, etc. across these channels are changed, they will not make resolution easier.

Accelerate your journey

Basic: Overlaying new channels onto an under-performing environment will give customers more choice, but will likely lead to fragmented service and poorer resolution. Ensure that you develop existing services while driving expanded capability.

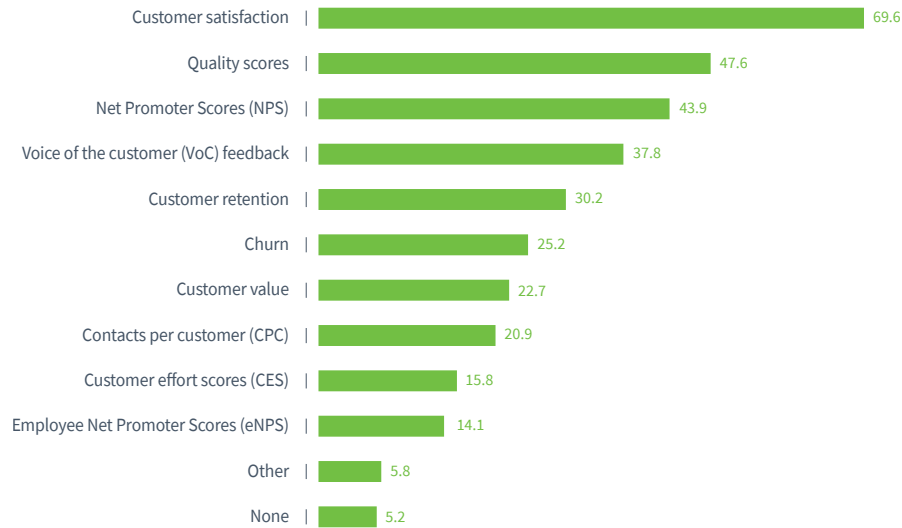
Intermediate: Focus investment on what the end customer is telling you. Use customer feedback to rapidly identify where and when their frustrations build. As new technologies are introduced, actively engage with all stakeholders to ensure that they're enabled via appropriate training and management to maximise the new technology system's capabilities.

Advanced: Conduct a detailed, 'outside-in' customer journey mapping exercise. Ensure this extends to the whole journey and not just isolated contact channels. Listen to what the customer journey map really says. The likelihood is that to enable a change in the customer experience and remove friction from customer interactions, the organisation will require a significant breaking down of silos across the enterprise.



Top factor impacting customer satisfaction in 2008 was wait time to speak to a live agent.

CSAT measures used



n | 918

Figure 5.2: Which of the following does your operation measure?

There is a varied spread of customer satisfaction measures, as not one-size fits all.

Less than a third of the sample will measure churn or retention, but 44% has now captured net promoter score levels.

Key findings

Customer satisfaction is the most widespread and frequently used operational measurement. It's rated as the top metric by respondents in 13 industry sectors out of 14. Financial services voted net promoter scores into top spot (60.0%) as their most commonly used performance indicator, with insurance being the exception to the rule. Global Benchmarking research indicates an ongoing increase in the popularity of net promoter scores being used to gauge customer views on service experiences. However, just 14.1% of companies have elected to use the same tools (e.g. employee net promoter scores) to temperature check internal, employee and engagement levels.

Customer value is one of the top mechanisms used to help segment and personalise CX. Personalisation is one of the main trends forecast to transform CX in the next five years. However, there's still a way to go because at this stage, just one out of five (22.7%) are measuring customer value. Surprisingly, just 30.2% of organisations will track customer retention levels. By association, voice of the customer is becoming a more commonplace review area. However, there are wide variations across the industry sectors regarding voice of the customer's popularity and adoption.

Why it matters: As more organisations recognise the link between customer sentiment and loyalty (and therefore bottom-line performance) the need to measure this effectively will increase. At the same time, consumers are becoming fatigued with constant requests to complete surveys. Innovative methodologies such as speech analytics linked to contact outcome, can be used to discreetly ascertain sentiment.

Accelerate your journey

Basic: When measuring customer sentiment, ensure that the output is not merely the score. Make the feedback visible to those in the organisation who can effect change, and take actions based on this feedback.

Intermediate: Select the measure that is right for your business by aligning it to the outcomes you aspire to. Attach value to verbatim comments and build a closed-loop process to ensure that customers with negative sentiment are contacted quickly, and knowledge gaps are closed. Identify key themes and design interventions to prioritise CX improvements.

Advanced: Recognise that different elements are important to consumers at different stages of the customer journey. For example, agent empathy is unlikely to be an important factor to a customer during the quotation stage of a car insurance journey, but it's very important at the point of claim. So select your methodology, questions and survey approach based on the nature of the interaction.

 Net promoter score usage has more than doubled since 2013.

CSAT scores – Actual vs. Target

Scores	Actual	Target
Customer satisfaction	68.4	73.5
Customer efforts scores (CES)	50.8	58.3
Net Promoter Scores (NPSTM)	34.0	37.8
Employee Net Promoter Scores (eNPS)	38.7	45.2
Quality scores	81.0	84.6

n | 469

Figure 5.3: What is your actual versus targeted score for each of those you measure?

Customer satisfaction scores *fall to a historic record low.*

Performance falls short of targets across all traditional and alternative 'satisfaction' methods, *as service fails to keep up with evolving CX demands.*

Key findings

Customer satisfaction scores are at a historic low. They've decreased by almost 10 percentage points in the last year, from 78.3% to 68.4%. There has also been a decrease in the targets of some 12 percentage points, down from 85.3% in 2016 to 73.5% in the same period. This presents a disturbing picture when considered against board-level appreciation of CX as a competitive differentiator, and a stark reality that customer satisfaction scores have been steadily falling since 2011.

Regardless of the method adopted, actual performance falls short of targets across every measurement area. Organisations within the upper quartile present much better results, but still fall short as their targets are also higher.

There's massive variation in actual and target scores across sectors too. This may be attributed in part to varying customer satisfaction methodologies, in conjunction with the organisation's calibration on service quality alignment to their market positioning, and with it the delivery of their own company specific objectives.

Why it matters: Increasingly, organisations recognise CX as a competitive differentiator, and declining customer satisfaction will become a key focus area. For service delivery teams, this will mean a shift in the way operations are managed and the way people are recruited, trained, managed and goals are set.

Accelerate your journey

Basic: Start by identifying the elements that are restricting your agents from providing the level of service that the organisation and, more importantly, its customers demand. Review recruitment practices, training, available tools, management structures and, critically, KPIs and reward mechanisms.

Intermediate: Understand the experience being delivered today by implementing a robust voice of the customer programme to capture and understand customer expectations, needs and desires. Systematically analyse the data to derive actionable insights and integration into the organisation's decision-making process, as well as designing specific programmes to address opportunities.

Advanced: Act as the eyes and ears of the organisation and do so transparently and as near to real time as possible. Actively encourage engagement from across the business, so that marketing, product, logistics, finance, etc. see first-hand the impact that their decisions make on customers. Be prepared to break down silos and head towards a CX-primed customer hub model.



Customer satisfaction scores were at 80.4% in 2008; by 2013 they'd fallen to 72.4%.

Time has come to brand CX as an ‘industry’

By Fiona Keough, Chief Executive Officer at Auscontact Association

www.auscontact.com.au

Customer experience (CX) has evolved and it’s now an established industry. It’s no longer a phase or a buzz word. CX entails the entire lifecycle of the customer journey, and has brought about a multiplicity of disciplines and supply chain providers across the organisation.

In the 80s and 90s, companies ignored the needs of customers in favour of their own objectives. The sentiment, ‘the customer is always right!’ came into being after the turn of the century, and has today evolved into ‘CX is key’.

Throughout time, organisations have also utilised various disciplines to measure CX. They have ranged from mystery shopping, quality assurance, customer satisfaction, net promoter scores, customer effort/net easy through to various voice of the customer programmes – none of which provided the full picture of a customer’s experience.

CX encompasses a vast field of knowledge, skills and competencies on which customers engage and touch. CX has evolved today to include disciplines such as social psychology and anthropology, user experience, and digital humanities and linguistics. Organisations think of customers broadly, not just as consumers, but also as internal business customers and stakeholders. The conversation moves from personalisation of information and engagement, to individualisation.

The body of knowledge and expertise that is required in the delivery of a great CX incorporates more than just the transaction. Great CX delivery encompasses all that happens around the customer’s experience, across the entire organisation. It entails the before, during and after of customer contact. The entire lifecycle is the realm of CX.

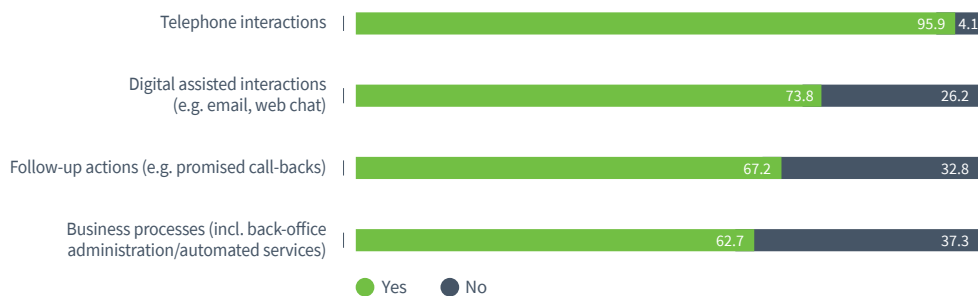
Organisations typically have the following channels: phone, web, social media, email, intranet, various apps, chat, and chat bots. Each of these channels is striving to deliver its own authentic version of CX.

Moreover, the end-to-end supply chain of information, services and engagement that occurs to provide a customer experience includes IT, human resources, operations, products, services, knowledge experts, and communications. It becomes clear that CX is a mammoth endeavour.

The CX world has now become an industry in itself, which acknowledges a multiplicity of disciplines and supply chain providers, and a distribution of knowledge, all converging to deliver a single outcome focused on the customer.

As with any industry, CX will not be exempt from challenges. To successfully facilitate CX, organisations need to move from modular to hybrid and then new technologies. Workforce selection and training, creating industry standards, and evolving new ways to measure success will also need to be addressed.

Where is *quality measured*?



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Figure 5.4: Where do you measure quality levels?

There's ongoing inconsistencies in *cross channel quality controls*.

The gaps are being closed fast and digital reviews have increased by 49% yearly, but a third of the sample *never review quality of back office or follow-up actions*.

Key findings

Quality levels have been relatively well tracked across telephone interactions for some time. They've now reached a new high having improved by a further 7% since 2016, leading to an almost perfect 95.9% application rate.

More significantly, improvements across other interaction types are starting too. There's a 50% year-on-year uplift of quality measurement on digital interactions. At the same time, the number of operations measuring quality on business processes and follow-up actions has nearly doubled.

Whilst the uplifts portray considerable progress, it also highlights an unacceptable level of continued negligence where more than a quarter (26.2%) of organisations are failing to track quality on digitally-assisted transactions. It should, at least, be on par with telephone management scrutiny. Similarly, over a third (37.3%) are not managing quality on back office and automated processes. Another 32.8% won't measure quality adherence on agreed follow-up action areas.

Why it matters: Measuring quality across all channels will become critical as the voice channel declines in relative terms and digital interactions continue to grow. As the priority of CX increases, it's likely that quality frameworks will evolve too.

Accelerate your journey

Basic: Incorporate quality management into all new channel programmes. Recognise that customers utilise channels for various reasons and at different times. Ensure that your quality management framework reflects the differing requirements.

Intermediate: Define the purpose of your quality framework before designing and implementing it, e.g. regulatory compliance, process adherence, agent management and customer experience, etc. It's unlikely that a single framework can meet all of these, so prioritise. Use your voice of the customer programme and all available feedback mechanisms to define what a quality experience means to the customer and build around that.

Advanced: Create a customer-first culture by incorporating a focus on quality into all aspects of your customer's interactions. As CX competes head-on with efficiency measures, and self-service deals with lower value and more transactional customer requirements, recognise the value of your agents and empower them to improve service quality.

Operational *performance metrics*

Rank	2016	2017
Agent productivity	4	1
Time to answer SLA's	3	2
CX performance	2	3
First contact resolution (FCR)	1	4
Quality control/process adherence	5	5
Net Promoter Score	6	6
Sales revenue/leads generated	8	7
Agent schedule adherence	10	8
Employee satisfaction	7	9
Cost to serve	9	10
Other	11	11
Contact deflections (usage of non-voice channels)	12	12

n | 402

Figure 5.5: What are the top three metrics used to measure operational performance?

Agent *performance metrics*

Rank	2016	2017
Productivity – calls/contacts handled	1	1
Quality control/process adherence	2	2
Average handle time	5	3
Quality	4	4
Customer satisfaction/CX scores	6	5
Schedule adherence	7	6
FCR	3	7
Sales (incl. upsell/cross-sell)	8	8
Net Promoter Score	9	9
Other	10	10

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Figure 5.6: What are the top three metrics used to measure agent performance?

Productivity replaces first contact resolution as top operational focus.

The latest approach indicates commercial realities of ensuring that resources are first available, *and second, providing the desired CX.*

Figure 5.5 Key findings

Agent productivity is back to the fore, and has been rated the top operational metric in every region except the Americas. The Americas focus on similar efficiency-based measures (time-to-answer SLAs). This marks a disappointing regression in approach and a move away from the more qualitative outcome-based metrics that have been surging in recent years.

There's a lack in continuity around how CX-centric strategic performance drivers are being applied at the front line of operational delivery. CX has been demoted from first to second, and now third priority in the years from 2015 to 2017. It indicates a considerable disconnect in management approaches at different levels. What you measure, will drive what you get by way of performance outcomes, and the outcomes should reflect the organisation's objectives. A review of operational priorities is clearly in order, or vice versa, and consideration should be afforded on whether the strategic outcomes are indeed reflective of the reality and cost pressures applied.

Geographically, there's a wide disparity on where organisations view CX importance at an operational level. From a sector standpoint, there is also quite a difference of opinion on which metrics constitute most importance.

Cost and efficiency pressures *dominate agent targets.*

Messaging around strategic relevance of CX and associated indicators *may be lost or at best misunderstood.*

Figure 5.6 Key findings

Agent performance drivers are relatively aligned to the operational drivers. Therefore, it's not surprising that first contact resolution has fallen from third to seventh most important measurement of agent performance. At the same time, it's concerning that priorities towards average handling times have risen so significantly. This suggests that closing a customer contact as quickly as possible is more important than resolving the issue(s) at first time of asking.

Bucking the trend and earning the digital disruptor tag is the fact that digital-only (assisted-service) operations place CX, net promoter score, quality and first contact resolution as their highest ranked performance drivers. This is a clear area in which management of digital is leading the way on phone-centric operations.

Whilst there's a need to ensure that agents are productive, there must be a balance between driving efficiency and setting up agents to succeed. A balance can be created through reaping the proven benefits of impressing customers through CX, and in turn, ensuring that call propensity is understood as closely as a single contact handling time.

Why it matters: The continued disconnect between strategic objectives and operational/agent metrics that drive behaviour will constrain organisations from meeting their CX aspirations. Bold leadership is required to shift the traditional mentality and, appropriately, cascading KPIs from the board to the agent is necessary

Accelerate your journey

Basic: Ensure that the way productivity is measured is reflective of the changing shape of your CX delivery models. Human interactions are quickly becoming more complex and of higher value to the organisation. These interactions are often the difference between retention and churn. Traditional productivity and efficiency measures may not be applicable in this new world.

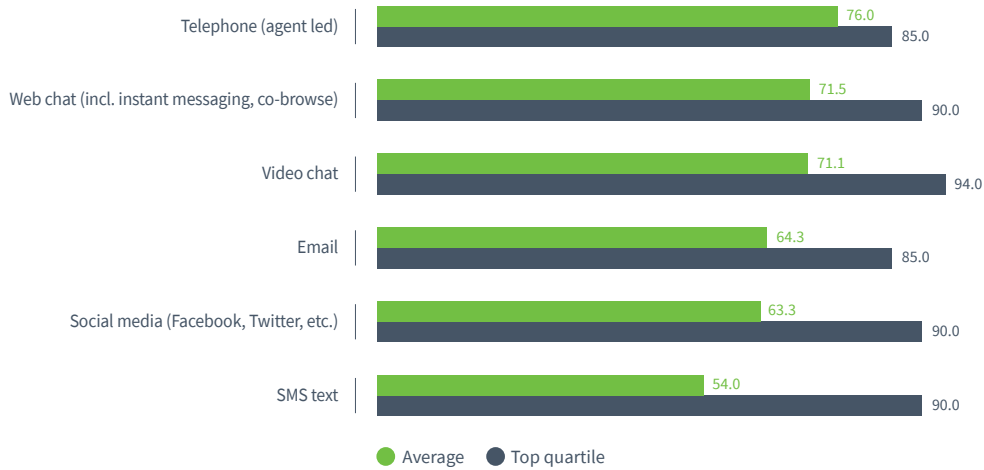
Intermediate: Striving for efficiency and delivering exceptional CX are not mutually exclusive. Introduce measures that link productivity to outcome, e.g. resolutions per hour or promoters per day. This approach incentivises your agents to focus on the customer, whilst simultaneously promoting diligence of effort.

Advanced: Leverage new technologies to shift operational cultures without discarding some of the more traditional measures to which stakeholders have become accustomed. Gamification is an effective tool to drive the right behaviours, and allows your organisation to shift the weightings of KPIs to ensure that focus is on the right areas and to respond to changes.



Customer satisfaction, first contact resolution and contact handling capacity were the top three operational targets in 2013.

First contact resolution



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Figure 5.7: What are your first contact resolution rates for telephone and assisted-service contacts?

Assisted-service channels lag telephone benchmarks on first contact resolution.

The nature of channel will mean some discrepancy in results, impacting contact strategy plans.

Key findings

The last two questions provided commentary on the diminishing focus being placed on first contact resolution when evaluating operational and individual agent performance. The good news for customers and organisations alike is that the decrease in priority hasn't translated to much of a change in resolution rates. In fact, aside from the 1% drop on telephone, first contact resolution remains above the performance recorded in the 2014/15 benchmarking reports. There's also some sign of an upturn on web chat, and it's almost on a par with telephone. Email, social and SMS have all dropped under the assisted-service benchmark in 2016.

The upper quartile results highlight the 'art of the possible' and a level to which the other respondents should aspire. There's indication of some exceptional performances on certain channels from different sectors, although there are no clear trends on which to report.

With so many channels on offer and variances in first contact resolution experiences, contact management strategies can be further optimised through active channeling of selected enquiry types to the most appropriate channel. Mechanisms to assess the true first contact resolution of interactions handled through omnichannel processes also merit consideration, as the operational landscape evolves.

Why it matters: Integration and reporting across channels remains one of the key challenges organisations face as they take on omnichannel aspirations. It's imperative that organisations measure first contact resolution holistically from the customer's perspective. Recognise that your customer may have attempted self-serve via an app or online, before instigating a web chat, and then finally called your contact centre. Without cross channel visibility, first contact resolution results are merely a measure of the effectiveness of a channel and not related to the customer's experience.

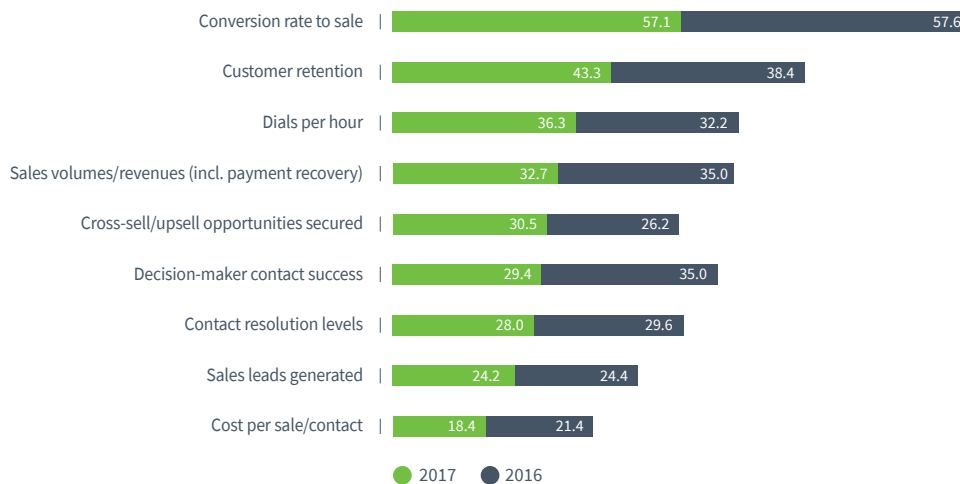
Accelerate your journey

Basic: Review your methodology used for calculating first contact resolution and ensure that it reflects your customer's perspective. Analyse repeat contacts by reason and identify proactive interventions that will avoid repeats, e.g. when customers contact about x, they often call back about y.

Intermediate: The broadening range of CX support models, has led to agents roles becoming more complex. Update knowledge management tools to ensure your agents can access the necessary information at the right time.

Advanced: Implement artificial intelligence platforms with robust continuous learning processes and that relevant interactions are supported in a way that satisfies customers. Use analytics to identify opportunities for avoiding repeat contacts (and first-time contacts). Introduce formal processes for disseminating this intelligence across your enterprise and implement action. Apply an outside-in first contact resolution measure that applies across the channels and pinpoint weaknesses by channel and interaction type.

Outbound contact *measurements*



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Figure 5.8: What are the top three measurements for outbound contacts?

Measurements centered on quality over quantity

Conversion rates again the top performance indicator for outbound transactions, followed by customer retention

Key findings

Conversion rates in sales is the most important measure of outbound activity, as it has been for the last three review periods. Customer retention is voted as the second top factor, and solidifies its surge from 12 months ago. Proactive, but relevant, outbound contact with a view to enhancing retention can improve any CX strategy, and with it promote retention levels.

Results vary in accordance with service type. IT helpdesk's prime focus on contact resolution levels is anticipated and appropriate. Sales conversions, revenue and leads generated dominate attention within sales operations.

It's surprising that decision-maker contact success has fallen back from the recent momentum gained. There's questionable return in placing a higher value to targets on dials per hour if the agent is struggling to reach the right person. Also puzzling is the low number of organisations tracking cost per sale/contact. Each business will have its own rationale for preferred measurements, and the global trends serve as a solid checklist on deciding where to align.

Why it matters: One of the key upcoming trends is proactive intervention, and having an effective outbound strategy is key to this. Expect a shift, similar to our experience in inbound environments, towards alternative channels, beyond pushing marketing messages. Targeted and personalised contacts will be key to success.

Accelerate your journey

Basic: Avoid the temptation to try and achieve too many objectives in a single campaign – limit it to three. In a sales environment, don't lose sight of brand protection and ensure that you have processes for responding to unexpected customer behaviour. Strive to recruit the talent with values aligned to the brand and create the 'right' sales culture for your brand.

Intermediate: Be diligent in selecting the right platform. Whilst perceived as the most efficient, predictive dialler capability is unlikely to deliver a return on investment in a low volume, high average handle time environment. Consider cloud platforms with commercial and functional flexibility to respond to business requirements and ensure cost effectiveness.

Advanced: Use analytics to turn big data into personalised, proactive campaigns that anticipate customer needs, whether sales or a service intervention. Apply the same thinking to outbound as for inbound regarding channel choice, and instigate contact through preferred channels wherever possible.



Conversion rate to sale and sales volumes/revenues were the top two most important outbound targets in 2013.

Call time statistics

Percentage	2015	2015	2017	2017 top quartile
% of inbound calls answered within 20 seconds (once the call has exited the IVR and been connected to a human agent)	76.4%	76.2%	76.7%	85.0%
% of calls abandoned	7.3%	6.5%	6.9%	4.0%
Call transfer rate	Not asked	14.9%	15.0%	5.0%
Average call handle time – by human agent (incl. hold and wrap)	294.0 seconds	283.2 seconds	261.4 seconds	150.0 seconds
Average hold time	50.6 seconds	36.8 seconds	36.3 seconds	15.0 seconds
Average wrap-up and administration time after each inbound call	78.8 seconds	63.1 seconds	54.9 seconds	15.0 seconds

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Figure 5.9: In your contact centre, what are the call time statistics for:

77% of calls are answered *within 20 seconds*. 7% of calls are abandoned and 15% will be *transferred between agents*. Call handling times have decreased and are now on *average four minutes 21 seconds*.

Key findings

The percentage of calls answered in 20 seconds has been relatively static in recent years. However, the top quartile of respondents is answering over 8% more calls in 20 seconds. Top quartile companies also provide strong case evidence on average handle time and wrap-up administration times. Collectively, they enable a saving of over a minute (or 66.2 seconds) per contact. Their call transfer rates are just one third of the global benchmark too.

There's evidence of sustained improvement in the reduction of the average call handle time, which is nearly 22 seconds shorter this year. There are, however, some regional variations of note. Australia and New Zealand have the highest average call handle time at 323.2 seconds, versus the Middle East and Africa at 221.5 seconds.

Unsurprisingly, when viewing the results by market position, budget-level brands have the lowest percentage of calls answered in 20 seconds (72.4%), versus the prestige brands which report 77.9%. The budget brands, however, do have the quickest average call handle time at only 219.4 seconds.

Why it matters: The results indicate that customers are less concerned about answering times than getting resolution to their queries, therefore, striking the balance between efficiencies and service levels will remain a key focus. Transfer rates and holding time are undervalued as levers to be pulled to both improve efficiency and remove considerable frustration from the customer experience.

Accelerate your journey

Basic: Average abandon rates over a month or year very often hide problem areas at a daily or interval level. Work with other functions in your business, especially marketing and billing, to enable more accurate forecasting and thus enable effective match of resource to demand. Introduce agile capability to defer demand to periods of greater capacity.

Intermediate: Review, update and if necessary, upgrade your knowledge management system so that it functions for what it's designed to do – deliver the right information to your agents quickly and in a way in which it can be absorbed. Both transfer rates and hold time will be significantly reduced and your customers will have a much less frustrating experience.

Advanced: Where possible, break down barriers across CX (channels and functions) and leverage available capacity through selected and careful cross skilling. Introduce assisted-service capability, both customer facing and agent assisted, to reduce demand where self/assisted-service is possible, and improve resolution speed where human intervention is necessary.



Ten years ago, call abandonment rates were a huge 13.6%.

Response times – Assisted-services

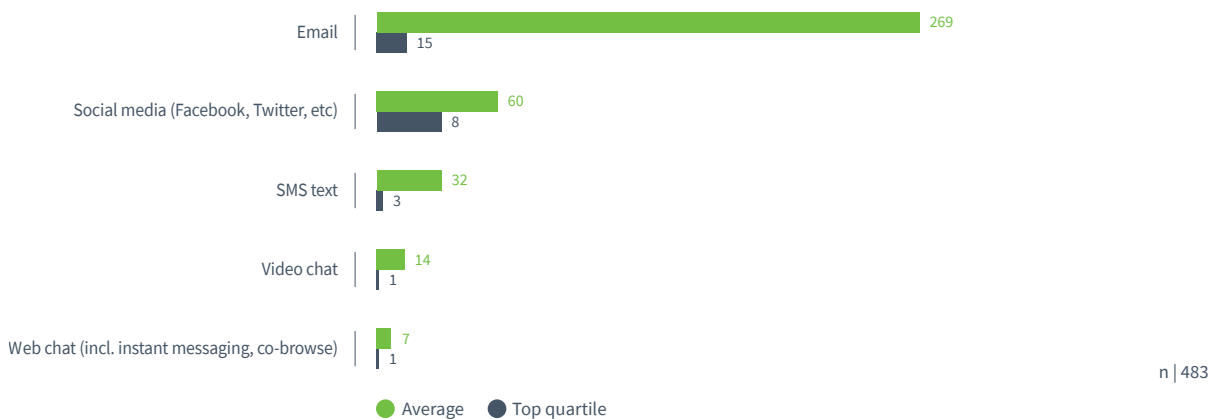


Figure 5.10: What's the average response time for the following assisted services?

Digital response times have improved with *exceptional results from the top quartile*.

Average email for top quartile of companies is 15 minutes versus the *global benchmark of almost five hours*.

Key findings

Organisations are swiftly becoming much better at managing responses on assisted-service channels. Response times continue to improve as maturity increases. Emails are being answered a full 30 minutes quicker than in 2016, with social media 18 minutes faster and SMS 14 minutes better. There's been a slight decline on web chat which is three minutes slower than in 2016.

The top 25% of respondents provide exceptional performance across all channels, with web chat, video chat and SMS near immediate response times. These top quartile performers also answering emails 18 times more quickly than the global average.

Digital-only operations provide some curious results. They excel on social, SMS and chat, but are over twice as slow as everyone else at answering email enquiries.

There's a large disparity on performance when looking at how the regions and individual sectors stack up. Please visit the CX Benchmarking online results portal, located at: <https://dimensiondata.2017cxbenchmark.com/portal/?trg=GCXBR> to filter data according to specific requirements.

Why it matters: As customers accelerate their adoption of new channels, social and business communication and expectations relating to how response times are influenced, become blurred. Users of social media, chat and messenger (or equivalent) are used to near-immediate responses 24 hours a day. As such, their expectations will rise when communicating with other service channels (including the contact centre).

 In 2008, email response times were just over 26 hours, by 2013 they'd improved to 14 hours.

Accelerate your journey

Basic: Be cognisant of customer expectations. Social media and users of SMS and messenger-type services expect near immediate responses 24 hours a day. Communicate anticipated response times where possible and avoid duplicate multi-channel demand by meeting these commitments.

Intermediate: Incorporate the workforce management disciplines honed over decades in the voice space into assisted-service channels. Whilst growing rapidly, as a percentage of total contacts, these channels remain relatively small in most organisations and in these low-volume environments efficiencies can be lost. Effective planning is therefore paramount.

Advanced: Leverage artificial intelligence and agent-assisted capability to enable blended responses, thus reducing human effort per interaction and therefore increasing concurrency. Deploy predictive analytics to anticipate your customers' needs and identify opportunities to pre-empt real-time demand with proactive interventions.

Handle times – *Assisted-services*

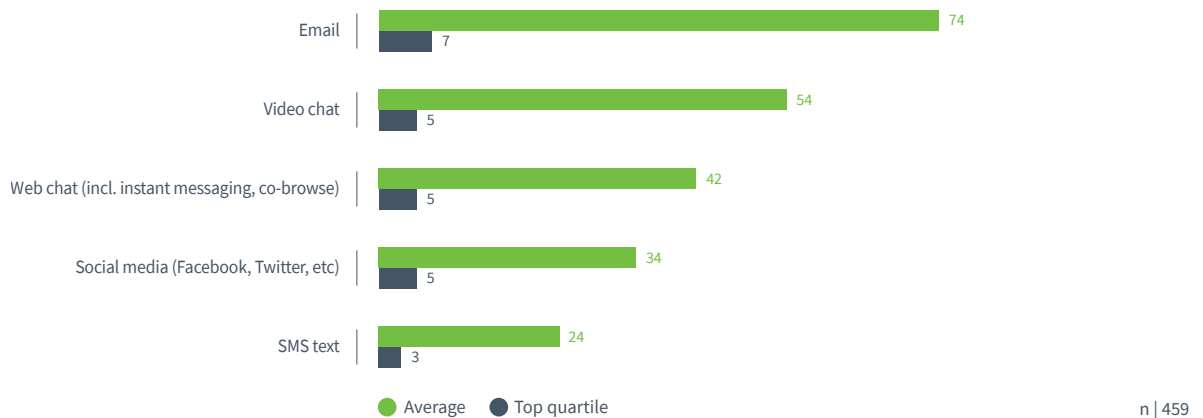


Figure 5.11: What is the average handle time for the following assisted services (minutes)?

Handle times are *decreasing quickly*.

The top quartile’s performance demonstrates the ‘art of the possible’ with a handle *time range of three to seven minutes*.

Key findings

As with the response times, there has been good improvement across the board regarding handling times for assisted-service contacts. Major improvements are with email (13 minutes quicker) and social media (18 minutes).

The significant detail from the results is how the top 25% of performers are leveraging their technology set-up to really differentiate through agent support and deliver much expedited handling times. Their handling times range between three and seven minutes, compared against a range of 24 to 74 minutes.

Geographically, there are some inexplicit variations in the handling times for certain contact channels. For example, the Americas are closing web chat transactions in just 19.3 minutes, compared to the United Kingdom, where it takes some 73.5 minutes to conclude each contact. Clearly the web chat teams are being stretched too thinly.

It’s evident from the top quartile of performers that there’s still a long way to go, and with it opportunity for many organisations.

Why it matters: Handling times become more important as customers interact on channels via their mobile devices. Customers nowadays interact with organisations between the priorities of their day-to-day lives, rather than setting time aside. A key requirement will therefore be speed of resolution.

Accelerate your journey

Basic: Be realistic in the promises of your response times and set accurate customer expectations. When introducing channels, factor in that in a low-volume environment, efficiency levels will be low and service levels will be poor. Consider the value cross-skilled super agents who are able to reflect your brand in writing to different customer types, often concurrently, can offer your team.

Intermediate: Review, update and, if necessary, upgrade the knowledge management system so that it functions as intended – to deliver the right information to the agent quickly and in a way they can absorb. Maximise the benefits of these channels by packaging the information in a way that is easily captured and can be sent to the customer, rather than lengthy and often confusing free format narrative.

Advanced: Deflect and balance contact volumes via a combination of assisted and fully automated service channel alternatives. Avoid the temptation to overstretch agents by expecting them to handle too many concurrent interactions.



In 2008, web chats were being resolved in around nine minutes. New models have agents juggling multiple chats, and longer times to resolution.

Agent utilisation

Percentage	Inbound operations	Outbound operations	Blended operations	Global
Handling customer contacts/interactions	66.1	49.2	63.4	64.1
Available (waiting for customers)	11.0	11.4	10.3	10.7
Team meetings/briefing sessions	5.5	9.8	6.6	6.2
Receiving coaching/one-to-one with manager	4.9	10.5	6.1	5.7
Scheduled breaks (coffee breaks)	7.5	9.3	7.8	7.7
Unscheduled other (miscellaneous)	5.0	9.7	5.8	5.6

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Figure 5.12: What percentage of an agent's week is spent:

Blended channel operations *have the least wastage*.

Blended models also incur more off-phone coaching/briefing time resulting in a fine balance on what provides the most efficiency.

Key findings

When scheduled to work, e.g. not absent because of illness or approved vacation (reference figure 6.4 on vacation and training allowances), an inbound agent will spend 66.1% of their work week handling customer transactions. This is very much on a par with recent historic trends. A further 11.0% is spent 'waiting' and 'available for work'.

Worth noting are regional spreads in actual handling time: the Middle East and Africa's benchmark is 60.2% compared to the Americas at 67.8%. Such gaps may not seem wide, but do have the potential for significant impact on cost when a percentage point either way can significantly influence commercials and/or services. Pushing productivity to tipping point risks a deterioration in employee engagement, absence, and attrition.

Unknown or unscheduled other activity is always a concern. It can be tantamount to 'wastage', and typically leads to 5.6% of all agents' time to be lost each week – for a 40-hour week, this is equivalent to a time of two hours and 14 minutes that could potentially be better utilised.

Why it matters: Balance is the most important factor for organisations when considering the optimum breakdown of the working week. Insufficient training and coaching time will result in extended handling times and lower levels of customer experience. Whilst contact-handling time may be increased, the effectiveness of those contacts may well be eroding the top line efficiencies seemingly achieved in a very high-occupancy environment.

Accelerate your journey

Basic: One size does not fit all, and volumes, average handle time, complexity, speed of change, etc. all influence the optimum model. By using the benchmarking portal: <https://dimensiondata.2017cxbenchmark.com/portal/?trg=GCXBR> to determine what works best for a particular kind of CX operation. Efficiency measured only in talk time can be misleading, so link this to outcomes to ensure delivery against holistic objectives.

Intermediate: Track the impacts on people and customer metrics as contact-handling time changes, e.g. first contact resolution, customer satisfaction, net promoter score, attrition, and absence.

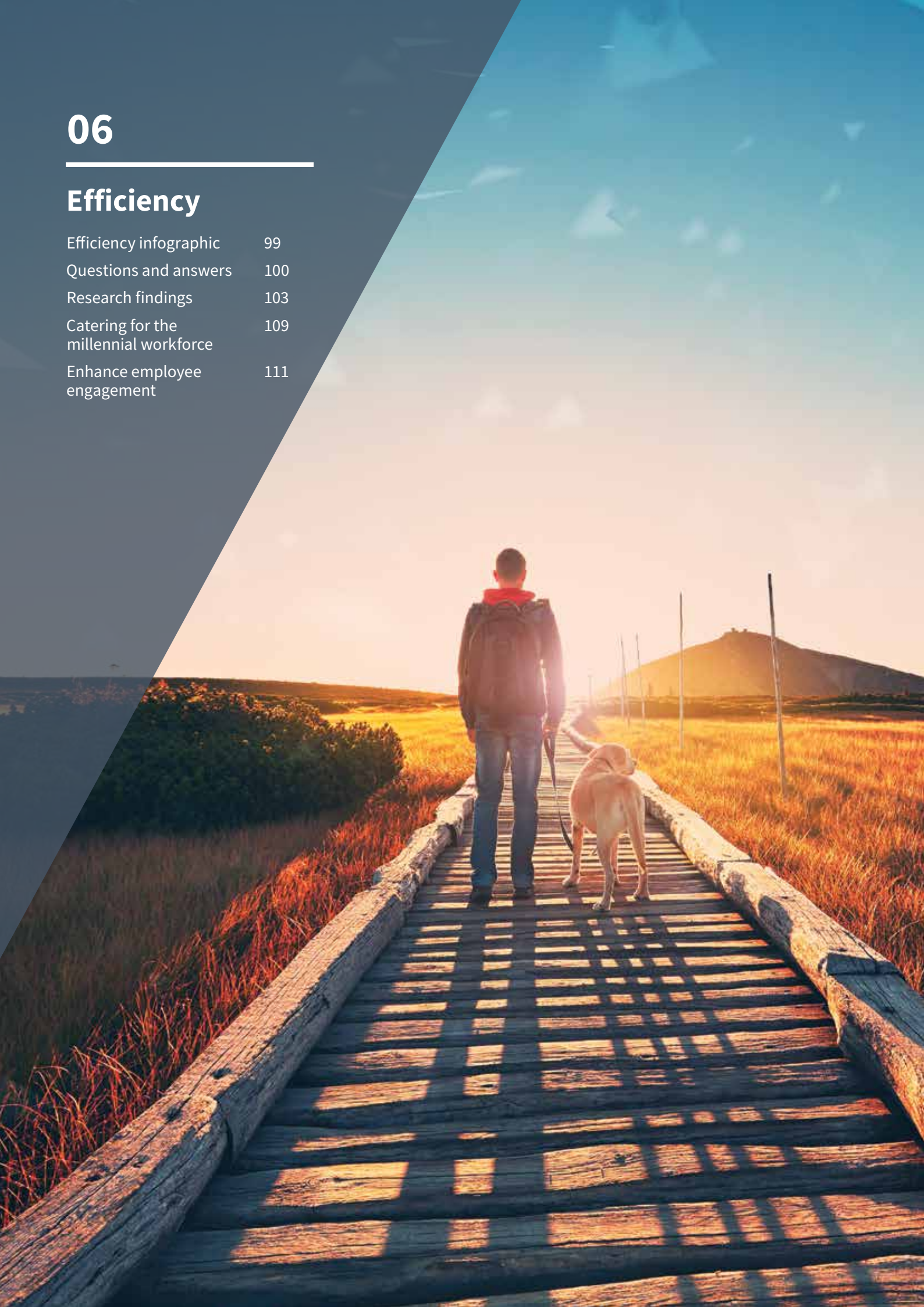
Advanced: Cross skill (with care) and blend channels where appropriate to utilise spare capacity. Build flexibility into the scheduling process to allow value add activities to take place when real-time demand is lower.



Ten years ago, 67% of an agent's day was spent handling interactions.

Efficiency

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Efficiency


Organisations struggle between a strategic desire to evolve and a silo management operating model that hinder digital and workforce optimisation.

Efficiency levels are further challenged by the absence or inconsistent use of core support technologies.

Service efficiency systems are under-utilised


Complexity levels are growing
 **Yet 31.5%** operate without knowledge management systems


Cost pressures are returning
 **Yet 41.3%** operate without workforce management technology


CX is top strategic indicator of operational performance
 **Yet 22.4%** operate without performance management solutions

Agent analytics and a surge in elearning techniques emerge as 2017's top optimisation priorities.

Operating models evolve

 **62.5%** of agents dedicated to *telephone*, versus **68.3%** in 2016

 **37.5%** of agents supporting *assisted-digital interactions*, versus **31.7%** in 2016

 **66.4%** of agents are *multiskilled across contact/skill* types

Average team size is 13 agents


Employee engagement indicators

 **44.8%** say employee *engagement is rated at 8/10 or better*.


Yet agent absenteeism is twice that of management, and has doubled since our first report 20 years ago. Attrition levels have settled at **19.9%** and at lowest level since 2012.

 *Employee skills* and experiences are now a premium, but average length of service is just 28 months.

How to accommodate the evolving workforce?

 **84.1%** are adapting to meet the needs of *next-generation* millennial workforce

Over half 55.4% are open to *flexible working arrangements*

 **42.3%** are modifying *management techniques*

Employment contracts are being re-shaped

 Percentage of permanent contracts offered continues to drop: **80.1%** of agents are on permanent contract; as temporary staff levels rise **51%** in last 3 years

 Average vacation allowance: **20.5 days per annum**

 **9.6 days** are allocated for *development training*

Emerging technologies are creating a platform for unprecedented *efficiency opportunities* – both in business and customer effort, but resources will need *new skills* to support the re-shaped environment.

We say

- View efficiency as a *CX enabler*
- *Adapt operating models* for tomorrow's support needs
- Accelerate workforce optimisation approaches via *technology enablers*

Do more with less

**Talk to
Dimension Data
today.**

Efficiency. Organisations struggle between a strategic desire to evolve and a silo management operating model that hinders digital and workforce optimisation. Efficiency levels are further challenged by the absence or inconsistent use of core support technologies (service efficiency systems are not being utilised to their full potential). Although complexity levels are growing and cost pressures are returning, some organisations are operating without knowledge and workforce management systems.

Agent analytics and a surge in e-learning techniques have emerged as 2017's top optimisation priorities. Employee skills and experiences are now a premium. Yet, agent absenteeism is twice that of management, and has doubled since our first report 20 years ago. Emerging technologies are creating a platform for unprecedented efficiency opportunities – both in business and customer effort. However, resources will need new skills, and operating models need to be structured to support the re-shaped environment.

about the author

Mithum Singh



**General Manager:
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Mithum recently won the award and holds the prestigious title of Contact Centre World's Workforce Management Professional of the Year. He has 17 years of contact centre experience across a range of industries, from large telcos to financial services, aviation, motor, retail, and banking.

Questions and answers with *Mithum Singh*

1. What, in your opinion, is the key to successfully managing efficiency in CX operations?

Efficiency should never be viewed or managed purely as a business imperative. Efficiency, and ease of resolution is, and always has been, a key driver of customer satisfaction.

Organisations must start to recognise that their workforce optimisation practices dictate their customer experience to the same degree as agent behaviour and business processes. First contact resolution and customer effort metrics are just as affected by good workforce optimisation practices as they are by good quality practices. Workforce optimisation also plays a pivotal role in agent wellbeing through good scheduling and support practices. Well-cared for, well-rested and well-empowered employees are satisfied employees who are brand advocates who deliver exceptional customer experiences.

2. Why are there still so many gaps on leveraging systems to improve efficiency?

Operating in an era of rapid digitalisation has left businesses to grapple with a multitude of legacy systems that were never designed to support the channels of today, whilst simultaneously trying to stay current with emerging technology.

Many companies continue to take the traditional, siloed approach to efficiency management. They focus solely on handling time reduction, without considering the wealth of opportunities highlighted through quality, business improvement and customer experience feedback for people, process and technology optimisation. This lack of system and functional integration has meant that data is often not available in the format required, and deriving active, real-time intelligence for effective total efficiency management is an ongoing struggle.

3. How do operating models and efficiency practice vary by channel?

There is no 'one-size-fits-all' solution to the management of efficiency in an omnichannel environment. The practices that have successfully enabled the optimisation of mature channels, such as voice, simply do not work for live environment channels, including social media and chat. This makes it even more critical to ensure that mature channels are fully optimised whilst on the journey to predict and plan more effectively for the increasing real-time interaction volume.

Emerging technologies like Bots hold incredible untapped potential for efficiency gains in the real-time environment – if deployed strategically. Understanding customer demographics and segmenting those most likely to use each channel, also becomes critical to accurately spread workload demand.

4. Where are organisations going wrong?

The most common pitfall for many organisations is that they simply don't understand their people or their customers well enough. The strategic misalignment that ensues has profound consequences. Workforce wellbeing deteriorates due to poor planning. Customers are driven into channels that they don't want to be using. Technology investments fall flat because they don't match business requirements and cannot be successfully integrated. A single view of the customer cannot be obtained.

A perfect example of this is the common practice of using multiple switches within one channel. Lack of integration then prevents cross-skill or personnel blending, resulting in a loss of efficiency, increasing workforce frustration and a dilution of the customer experience. Therefore, a holistic approach to efficiency management taking into consideration all people, processes and technology factors, has to be a business imperative.

5. What do you see as being the simplest areas to improve?

Having a clear understanding of both customer expectations and business objectives is key. From this, an appropriate and meaningful SLA can be defined and this is where a key opportunity lies – organisations need to go back to basics and ensure that they are measuring their success appropriately. This starts by selecting the correct measures and having a clear understanding of how they are defined and their subsequent calculations. The process is simple, yet so many organisations are currently falling into the trap of either under- or over-stating their performance due to the simplest of errors in calculation, e.g. service level calculations not matching the company's automatic call distributor (ACD).

6. Is there a preferred operating model to ensure consistency of approach across all channels?

The operating model deployed within any organisation is largely determined by both the competitive landscape and the individual company's value proposition. Practices vary across channels and within specific industry verticals, however, there are several best practice methodologies and principles which should always be applied. These include standard supply and demand practices, accurate workforce profiling, correct application of labour practice principles, ensuring standard workload requirements and correctly defined metric measures.

7. Why are basic workforce optimisation systems lacking?

Good workforce optimisation always brings a quantifiable return of investment. But, for most organisations, specialist skills like workforce optimisation are not a core area of expertise. As a result, there is often a lack of awareness of what can be achieved through making an investment in a robust workforce optimisation function. Technology investments are often made without ensuring that the skill exists to leverage its capabilities. Workforce specialists are also often not consulted during technology procurements, resulting in a complete mismatch of functionality. Conversely, in many cases, workforce staff are still being forced to continue to use limited toolkits, such as Microsoft® Excel, due to the lack of investment in technology. Matching the right technology with best-in-class skill remains a struggle for many organisations.

8. How can organisations better leverage the full suite of features from their workforce optimisation systems?

So much of the functionality of good workforce optimisation suites is being under-utilised due to a lack of understanding and skill. Organisations need to draw on true workforce industry specialists to ensure the best return from their technology. Long-term forecast modules must be used to support strategic planning at an executive level. Scheduling modules need to be used to the full extent to benefit operationally from individual base, split shift, performance and seniority-based schedules. The capability to blend channels is a future imperative. Commercial modules need to be leveraged to support cost centre budgets. In summary, the workforce optimisation suite must be viewed as both a strategic and operational tool and be set up to support business strategy from day one.

9. What new approaches excite you?

CX is no longer a buzz word – it has finally become a strategic imperative for forward thinking businesses. This has brought with it the recognition that support functions such as quality and workforce optimisation cannot continue to work in siloes, driving objectives that are more times than not, at total odds with each other. The cross-functional integration of key support service skills is creating blended teams of specialists who are completely aligned to the same key objectives. They have allowed for the production of a single view of the customer and a watertight approach to operational execution. The intelligence being derived is active and precise and is allowing for rapid and targeted operational deployment with stunning results.

CX is no longer a buzz word – it has finally become a strategic imperative for forward thinking businesses.

10. Lastly, as the influence of automation, robotics, and artificial intelligence rises at speed, will we be more efficient five years from now?

Emerging technologies are undoubtedly creating a platform for unprecedented efficiency opportunities – both in business and customer effort. But there are several significant considerations that organisations will need to take in hand to be in a position to tap into this potential.

Emerging technologies are undoubtedly creating a platform for unprecedented efficiency opportunities – both in business and customer effort.

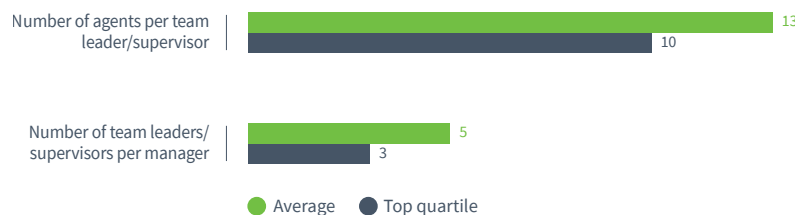
New technology is only one piece of an increasingly complex puzzle. Businesses will have to strategically design their customer's journey and engineer processes to support them through these new channels. They will also need to ensure successful blending of all environments and transform their existing workforces to support these new ways of working. This is no small feat and it will require some bold moves, including rapidly de-shelving legacy systems to realise the benefits. One thing is clear – those who procrastinate are going to be left behind.

Those who procrastinate are going to be left behind.

Read on for the global results and analysis.

Compare your organisation's performance and results to a more specific benchmark by visiting our online benchmarking portal: <https://dimensiondata.2017cxbenchmark.com/portal/?trq=GCXBR>

Team size



n | 546

Figure 6.1: What is your average team size?

Standard team size remains at *13 agents per manager*.

Upper and lower quartile of responses range from 10 at most generous end of scale, *up to 15 at most aggressive level*.

Key findings

Team sizes have remained static at 13 agents to a manager for each of the last four years. Results are more widely spread when viewed at an operation-type level. Physical site operations (e.g. high street store) average at 10:1 (agents:supervisor). Contact centre environments range from 12 – 13 agents per team (that's telephone versus multichannel respectively). Digital-only operation's staff lean towards a 14:1 ratio.

Regionally, there's little variation. The United Kingdom has the smallest team sizes (12) and Europe the largest (14). The scale widens a little further at sector level, but there's nothing too out of the ordinary. It appears that operation size is what most impacts team size. The smallest CX operations (0 – 50 employees) have the smallest team sizes (11) versus the largest (1001+) with 15.

The number of supervisors per senior manager has remained steady, but there are signs of tighter models being preferred as the benchmark nudges downwards from 6:1 in 2015 to 5:1 in 2017.

Why it matters: Business complexity will impact the optimal approach. Centres handling simple transactional interactions may allow for larger team sizes and fewer managers, versus complex CX centres who'll merit a more intense management support ratio. The organisation's customer value proposition should also be considered in terms of how responsive they want to be.

Accelerate your journey

Basic: At the most basic level, consider the daily activities that team leaders need to carry out. Consider starting at a lower ratio and broaden it over time, until you reach equilibrium.

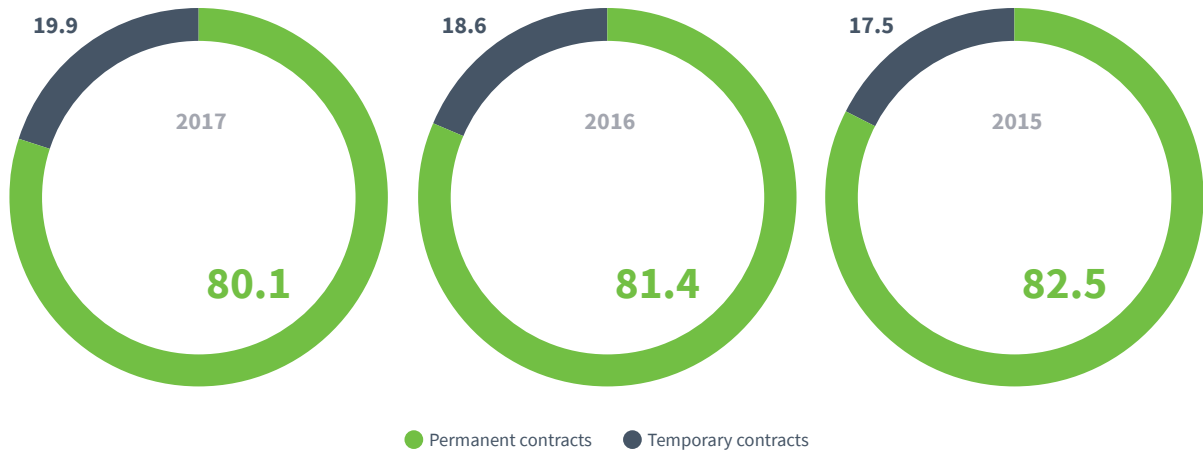
Intermediate: Look at balancing your customer experience and customer demands with staffing ratios, by removing mundane tasks with the use of technology.

Advanced: Keep the organisation's customer value proposition in mind when broadening or increasing the ratio of agents to team leaders. Consider the impact on operations if applying more generous management support.



Average team sizes have remained the same for much of the last two decades. 1998 benchmark was 12 agents to one manager, 2008 benchmark was also 12.

Employment contract types



n | 763

Figure 6.2: What percentage of agents are employed on:

The percentage of permanent contracts *offered continues to drop*.
 Temporary contracts have risen by 51% since 2014, *and remain an ongoing trend*.

Key findings

As CX providers prefer an increased balance of flexibility over stability, there's been a clear trend towards employing agents on temporary contracts for six consecutive years. Ignoring the gradual drop-offs being experienced, it can be acknowledged that four in every five (80.1%) agents still enjoy a permanent contract.

The desire for quality over elasticity sees employees working at prestige level brands have more chance of contract security, compared to their counterparts at budget brand organisations. Similarly, 23.6% of agents at sales-only environments will be on a temporary contract, versus just 17.4% at IT helpdesk operations.

The ranges are widest at both regional and sector level. A quarter of agents (25.2%) in the Middle East and Africa region are on temporary contracts. In the United Kingdom, it's half again, at just 12.4%. Those working within education are most likely to be on temporary arrangements (38.9%) versus the lowest sector: healthcare and pharmaceutical (13.4%).

Why it matters: The gradual increase in flexible staffing will drive service efficiency, however, it may influence the degradation of the customer experience. Permanent contracts drive employee engagement, which in turn drives staff and skill retention. This supports tenured knowledge and support institutional capital and will positively influence CX and first call resolution.

Accelerate your journey

Basic: When deciding on the associated staff mix, consider a blended solution (e.g. enquiry types and enquiry-type routing) with a heavier weighting towards contracted staff dealing with transactional enquiries, and permanent staff dealing with more complex enquiries.

Intermediate: Determine shift lengths, based on customer volume, before implementing a staff mix. Intraday patterns will influence your final staffing mix.

Advanced: Consider labour laws and governmental legislation, particularly around leave accumulation. It could present a financial liability and impact your associated budget planning.

Twenty years ago, just 69% of agents enjoyed permanent contracts; by 2013 it had risen to 87%.

Induction training time

How many days induction training is provided to:	Agent	Team leader/ Manager
Global	15.6	13.9
Back-office services (admin only)	11.7	10.6
Digital (no phone)	11.3	12.0
Multichannel (telephone and digital)	16.0	14.1
Telephone	14.7	13.4
Physical site (e.g. retail store)	13.7	6.0

n | 654

Figure 6.3: How many days of induction training is provided for:

New agents training lasts typically two to *three weeks in duration*.

As complexity levels rise, provisions in training have *steadied after a three-year decline*.

Key findings

Training allowances for new recruits have been declining steadily over several years. This is despite growing levels of complexity, as basic transactions are automated alongside higher instances of multi-skilling. The reduction is being partially offset by evolving trends towards e-learning, knowledge management tools and roaming coach resources. However, from a set training allowance perspective, today's agents receive just 15.6 days training, versus the average of 18.7 days in 2014.

There remain some huge differences in approach at a sector level. Manufacturing businesses provide agents with the fewest training days (12.3 days), versus 19.3 days in the travel and transportation sector.

Results also vary by operation type. Agents dealing with multiple channels are offered the most induction training, as their jobs are generally more complex. Results from the top quartile of companies show they typically allow four weeks or more. This is almost one third more than the norm, as some organisations seek their competitive advantages through training investment.

Why it matters: With the shift to omnichannel and the drive to blend agents between enquiry types and channels, the digital platforms need to be embraced when preparing new recruits. Pre-training via a digital platform will reduce training complexity and prepare staff more rapidly. This will also drive the speed to productivity and improve service efficiency.

Accelerate your journey

Basic: Verify whether your training process and approach is still fit for purpose. The general 'one-size-fits-all' approach will not support the varied channels and associated skill types.

Intermediate: Ensure that training staff are equipped to deliver to the specific development needs of each specialist channel. Adapt coaching models across the individual channels, to balance CX and service efficiency, but protect consistency of the services received.

Advanced: Ensure that resource planning models allow for the specific training allowances being afforded to each channel, and the time required to achieve full competency.



Induction training allocations averaged 18.7 days as recently as 2013; allowances have since dropped by 17%.

Training and *vacation time*

Days	Vacation (paid time off)	Formal training
Global	20.5	9.6
Americas	15.9	9.0
Asia Pacific (excl. NZ)	17.9	10.8
Australia and New Zealand	20.5	7.6
Europe (mainland)	24.6	9.6
Middle East and Africa	19.2	11.0
UK	24.2	8.9

n | 627

Figure 6.4: How many days are agents allocated each year for:

The average vacation allowance is four weeks per annum, *varying by region.*

Employees can also enjoy approximately two weeks of *development training annually.*

Key findings

Training for new employees will vary by sector, provider type and other factors (reference figure 6.3). It's no different for development training, where operations will provision an average of nearly two weeks (9.6 days) for formal 'off job' training in their annualised schedule and resource model assumptions. The upper quartile of operators affords slightly more at 12 working days.

The training range is much wider when viewed at operator type. Resources in physical sites receive 6.0 days for formal training, contact centre employees around 9.7 days, and those from digital-only environments get an impressive 17.5 days.

Globally, agents can expect to receive four weeks of (20.5 days) paid time off/vacation time. These results are almost on a par with the 20.7 days awarded last year. Europeans benefit from the most generous structures at 24.6 days. Contracts in the Americas are being crafted slightly differently, resulting in much lower holiday-time allocations of 15.9 days. Again, it's evident that allowances awarded by the top quartile of responses are considerably more generous.

Why it matters: Organisations need to verify whether training and vacation time is calculated correctly in their shrinkage tables. These factors probably make up 50% or more of their overall shrinkage allocation. If not correctly planned for, it could influence your commercial and financial efficiency.

Accelerate your journey

Basic: Ensure that planning is done for tough periods during training and vacation time. It will benefit your organisation if this is planned at an inverse to your volume demand forecast across the month and year.

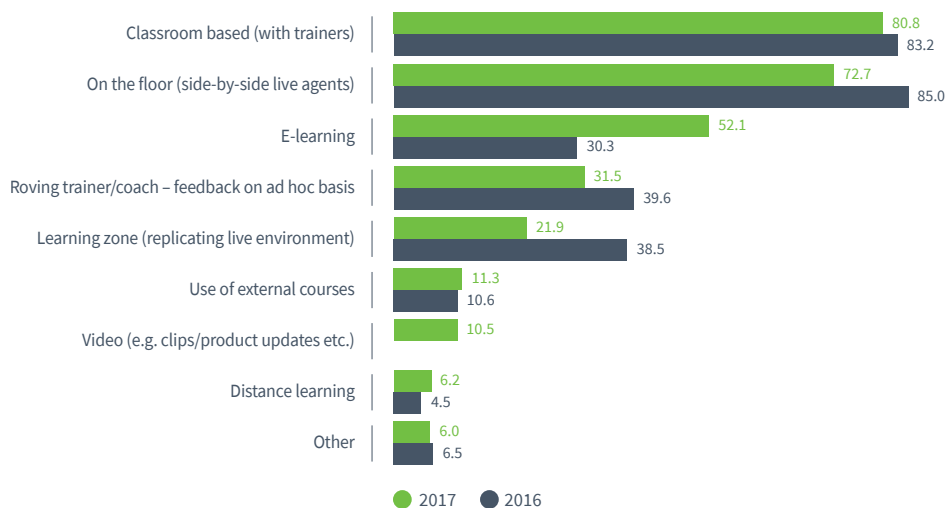
Intermediate: Training allocation needs to match the need to support the correct levels of competency across the various channels. This may even extend to individual needs and requirements, instead of a blanket approach across all staff.

Advanced: Consider planning vacation time 15 weeks ahead of time as an encouraged practice. This will influence agent wellbeing via them using accrued leave, in conjunction with the necessary workforce management capacity plans.



Two decades ago, agents were receiving 22 days vacation per annum, and 16 days of development training

Most effective *training methods*



n | 840

Figure 6.5: What are the top three most effective training methods for your operation?

There is a surge in *e-learning techniques*.

Video tutorials also gain traction and are applied by 11%, but the traditional classroom or ‘buddy’ system approach still dominates.

Key findings

Traditional methods of CX training (e.g. classroom-based and on-the-floor support), are still deemed the most effective techniques by every region and operation type. The one exception is digital-only operators, with their main approach being through e-learning.

The adoption of e-learning tools to support primary techniques is gaining momentum elsewhere too. With a growth of 72%, it has been adopted by more than half (52.1%) of all companies. This may be at the expense of live learning zones, whose popularity has decreased by 43%, and is now used by just one in five (21.9%) operators. The proportion of ‘digitally native’ millennial generation employees increases each year, so it’s no surprise that digital-style learning courses are gaining in popularity.

Video tutorials (10.5%) is another area forecast for gaining popularity. For physical site operations, it’s already become the second top training method used at 30.0%. There’s been a small regression in the numbers of roving trainers, but almost one third (31.5%) will still resource coaching roles to support live/real-time training needs.

Why it matters: Organisations should include customer satisfaction and agent performance as part of their KPIs for training departments and trainers. Although training has always been regarded as a tactical execution area, this area could contribute to the overall strategic CX.

Accelerate your journey

Basic: Organisations need to obtain a better understanding of how training methods impact varying delivery. Consider introducing outcomes-based training mechanisms to make learning more interactive, and by default have staff take more responsibility for their own learning.

Intermediate: Situational and simulated training should be regularly tested to ensure that it simulates the needs of live environments, e.g. have the trainers experience and deliver the service they’re training.

Advanced: Organisations will compare the costs of each training method (classroom versus on-the-floor versus e-learning), against agent tenure and period of attrition drop off, to calculate agent ROI. Based on this outcome, a preferred method of training can be derived in conjunction with the employee engagement benefits they provide.



Side-by-side (in a live environment), classroom and learning zone were the top three preferred training techniques in 2013.

Use of home/flexible working

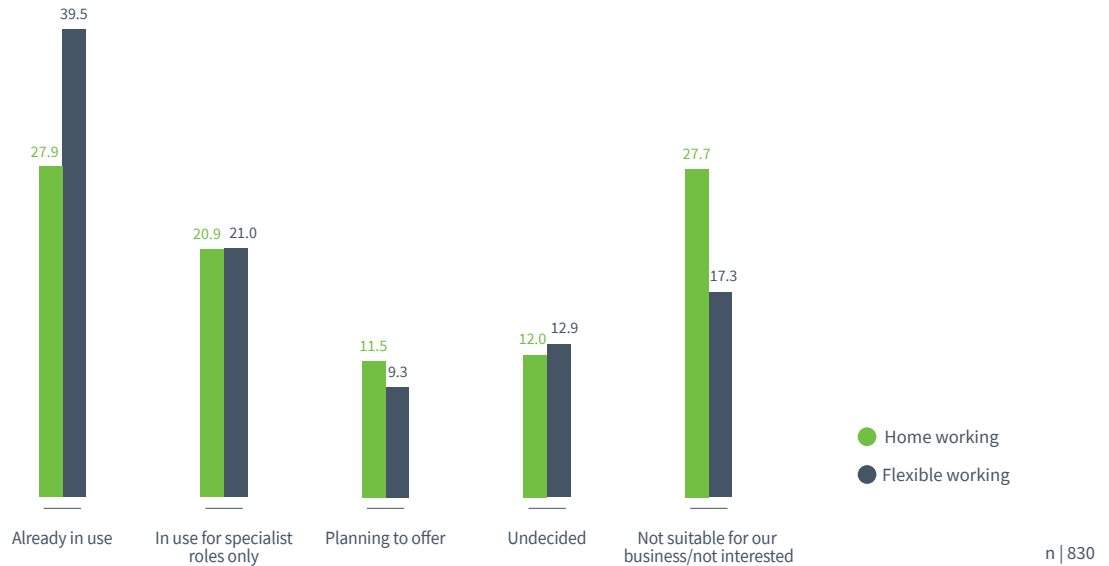


Figure 6.6: What is your organisation's view of home and flexible working?

Organisations are opening their minds to *employees' flexible working needs*.

Just 30% are undecided or believe it's unsuitable for their business; 61% currently offer or are planning to permit a form of home working.

Key findings

Organisations are recognising the changing attitudes and minds of employees and evolving their models accordingly. Nearly 50% are already permitting home working in some form, with an additional 11.5% planning to offer it. Even more organisations are offering flexible working models (60.5%), with a further 9.3% considering it.

Flexible working trends are relatively consistent at a regional level too, Middle East and Africa are the two exceptions lagging behind the rest. However, even there it's on offer for 47.1%, albeit half of that is for specialist roles only.

Home working is a different matter altogether, and one where there are some regional stand outs. The Americas and Europe lead the charge on deployments at 66.2% and 61.7%, compared to Middle East and Africa, where just 32.3% are using it. For the Australia and New Zealand, Asia Pacific, United Kingdom, it's between 41.2% and 46.9%.

Why it matters: Flexible working will support a work-life balance and promote and improve levels of productivity. Demand for it will increase as a result of a new age of employees seeking a better balance of work and life. Digital technologies, assuming security needs are met, will continue to facilitate mobility and more accommodating employee-friendly structures.

Accelerate your journey

Basic: Poll staff on preferred working hours and working shifts. Introduce and amend staff profiles to meet the demand profile required, and match this to the recruitment pool.

Intermediate: Introduce seniority, performance-based scheduling with a targeted recruitment strategy to support flexibility.

Advanced: The introduction of home working will reduce real estate requirements and allow for more flexible scheduling to meet expected volume demands. Frontline staff will also benefit from a reduction in traveling costs and loss of productive time, while traveling to and from work.

Ten years ago, 9.6% of organisations accommodated some form of remote agent, 2.4% of which were home-workers.

Catering for the millennial workforce

by Nancy Jamison, Analyst at Frost and Sullivan
ww2.frost.com

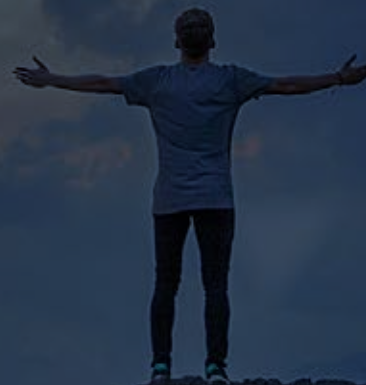
When it comes to millennials, the lion's share of the press focusses on how to cater for the consumer in this group. What probably is a glimpse of the blindingly obvious to many, is that those consumers increasingly consist of our CX and contact centre employees and supervisors. According to Pew Research, by the end of 2016, millennials comprised roughly 30% of the workforce. Thankfully, a rising trend of incorporating the preferences of this growing workforce began to reveal itself in the design of numerous solution provider offerings in 2015 and 2016.

There are several traits of this generation that permeate how they work and how they feel about work. Millennials seek work/life balance more than other generations, even though their non-stop use of technology and always-on attitude makes it often hard to disconnect from work. Along these lines, they choose flexibility in where and when they work over pay. They are more socially conscious and favour brands that have a similar mindset. Additionally, they also live on their mobile devices and social networks, prefer to self-help, and more easily collaborate in a work environment than prior generations.

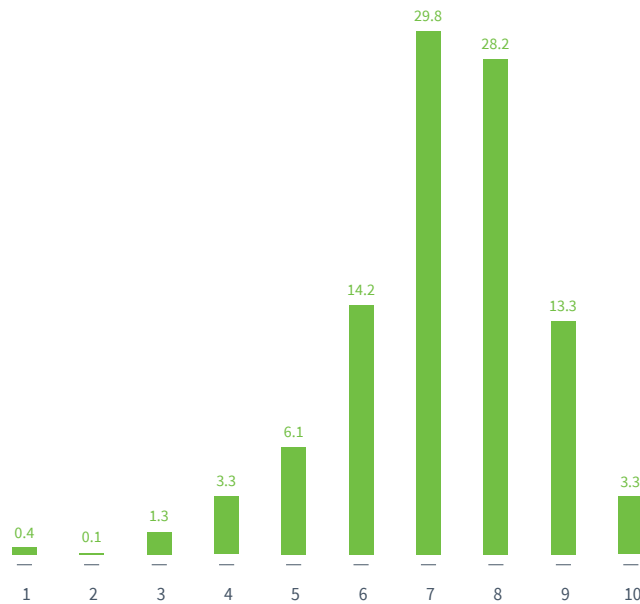
The contact centre industry has responded with solutions which match these traits. In the area of workforce optimisation, for instance, we now have very flexible scheduling options that incorporate preference management. New mobile apps have emerged that enable agents and supervisors to untether from their desks, and manage their centres and their work life on-the-go. Most exciting is the array of new agent desktops with fresh, modern UIs, that can be populated with myriad functions from UC/collaboration, video, and gamification, to widgets that allow access to sometimes creative third party applications.

For a generation touted for seeking rewards, agent empowerment has also been a central design theme. Not just in enabling agents to have more control over their work environment, but in making it easier to do their jobs. Here advanced analytics come into play. For instance, speech analytics, sentiment analysis, predictive analytics, and other solutions are feeding tools which help agents to better assist customers across channels and fundamentally improve the Customer Experience. Customer journey mapping and guided resolution are examples of additional tools that help to empower the agent in doing their jobs as well.

Increasing contact centre operational efficiency, while reducing costs, has always been at odds with improving the Customer Experience. Agents and supervisors are our most important assets in this mix and are situated in the centre. After decades of focusing on performance management and operational metrics, it is refreshing to see a focus on making the jobs of our most important assets easier, and more enjoyable.



Employee engagement rating



n | 840

Figure 6.7: On a rating of 1-10, how would you rate your employee engagement levels?

45% say employee engagement levels are on par, rating 8/10 or better.

Budget level brands and the public sector report the lowest engagement levels.

Key findings

Some 85.1% of organisations recognise the positive relationship between an improving CX capability and employee engagement levels. The results suggest this CX effect is now transitioning to agents on the front line.

Employee engagement is made up of several factors. However, agents enjoying their roles and then providing a good customer experience is a massive influencer, and 88.8% of respondents now rate their employee engagement at six out of ten or better. Results are very similar between outsourcers and in-house operators. Employee engagement is separated by just one percentage point. On the same basis, those dedicated to back-office work are much happier in their roles than those working the phone. Physical locations have the most satisfied employees, with one in five sites reporting engagement scores of 10 out of 10.

Curiously, the sweet spot in terms of operation size falls at either end of the spectrum, as half of those employed in either the smallest or largest operations rate employee engagement at eight out of 10 or higher. Results also improve in line with market positioning, as prestige brands offer better employee levels of satisfaction than budget operators.

Why it matters: With staff costs accounting for 70.3% of the overall CX operating budget, more emphasis is required in employee engagement. However, the staff least communicated to in the business are the frontline staff.

Accelerate your journey

Basic: At the most basic level, a clear frontline communication strategy is required which needs to be easily available and accessible.

Intermediate: Design and develop an engagement model that supports management interaction. Introduce a voice for the agent forum, where concerns and challenges can be raised, while achievements can be recognised and celebrated. Consider live agent blogs and live senior management chats, so a two-way channel can be opened.

Advanced: Introduce and open an ongoing employee satisfaction survey which allows free text, so that staff can communicate at any given point. Ensure that surveys are monitored and feedback is provided through appropriate channels



In 2013, the top methods to promote employee engagement were clear goals and process alongside proactive communications.

Enhance employee engagement

by Blair Pleasant, President & Principal Analyst of COMMFusion LLC

www.commfusion.com

Engaged employees are satisfied employees, who are more productive, and produce better results for business. Organisations with higher engagement levels have better operational, organisational, and financial outcomes. In fact, organisations with engaged employees outperform those without by up to 202%, and benefit from lower absenteeism and turnover.

According to a Dale Carnegie study, the reality is that only 29% of an organisation's workforce is engaged, while 45% are not, and 26% are actively disengaged.

With so much on the line, how can organisations improve employee engagement?

Let's look at employee engagement within CX operations? Agents who are motivated, engaged, and empowered, are more satisfied with their jobs, and provide better customer care. Organisations can enhance agent autonomy by encouraging agents to use their skills, knowledge, and insight to make key decisions and to improve processes. When agents feel comfortable initiating conversations and listening to customers, when they have the freedom to use their best judgment and not simply read from scripts, and when they're not just focused on reducing average handle time, they can produce better results.

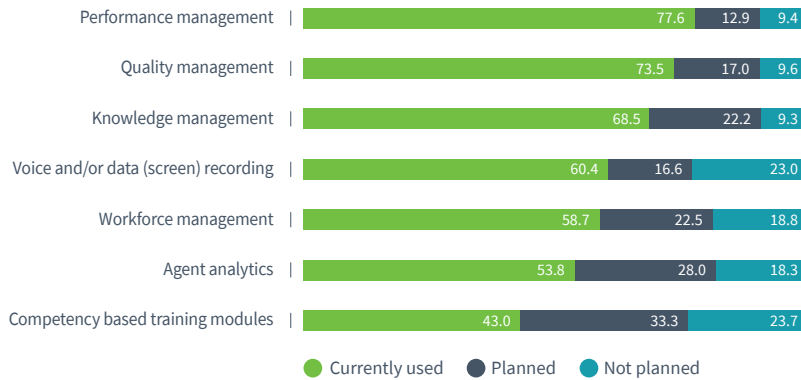
Proper coaching and training is critical, as well as providing feedback through agent dashboards. In contact centers, gamification is important, because competition can be very motivating – if agents see their co-workers performing better, it may inspire them to improve. If agents can view everyone's key performance indicators and metrics, they can see if they need to work a little bit harder. By providing prizes and rewards for agents who meet goals, outperform their peers, or learn new skills, gamification is helping to increase agents' engagement.

Feeling connected is crucial, but it's often difficult for remote and mobile CX workers who feel isolated and out of touch. Unified Communications and social media tools can help to make agents feel more connected, while making it easier for them to openly interact with each other, as well as with supervisors and executives, leading to improved employee engagement.

Tools such as video conferencing and social software allow employees (including remote agents) to interact with peers, supervisors, and others throughout the organisation. This is also a way for agents to provide insights and feedback. When employees feel that they're being heard and that their ideas matter, they are more likely to be engaged.

What is your company doing to help improve employee engagement? Remember, satisfied agents lead to happy customers, and that's what it's all about.

Systems used to promote *service efficiency*



n | 837

Figure 6.8: What technology systems are used to promote service efficiency in your organisation?

In the face of increasing complexity, 32% of respondents *operate without knowledge management systems*. Just 58% can access analytics systems, despite common *acknowledgement that it's the main game changer*.

Key findings

Many organisations continue to operate without access to key workforce optimisation technology enablers. This year's results indicate that past plans to close the gaps have not been implemented as forecast.

It's hard to understand those who display zero intent to implement, particularly as these are foundation level workforce optimisation solutions for many. A move towards mobile and/or flexible working will make workforce optimisation (and systems to support remote resource management) an even more critical dependency. The challenge for now, is that 31.5% operate in the absence of knowledge management systems, 46.2% are without agent analytics, and over a quarter (26.5%) have no quality management technologies.

Overall, 41.3% have no workforce management technologies, but this rises to 62.5% when the results are drilled down to back office administration operations, and even further to 75.0% on digital-only business units. This highlights a massive inconsistency in the deployment of both management practices and workforce optimisation systems across the different channel types being supported.

Why it matters: In the face of rising complexity, the need to co-ordinate resources across skills/channels and provide them with required knowledge (including information updates), will only become more of a challenge. With the continued focus on customer experience and the need to differentiate services in a very competitive market, organisations need to be more consistent in deploying differentiating technologies across all relevant channels.

Accelerate your journey

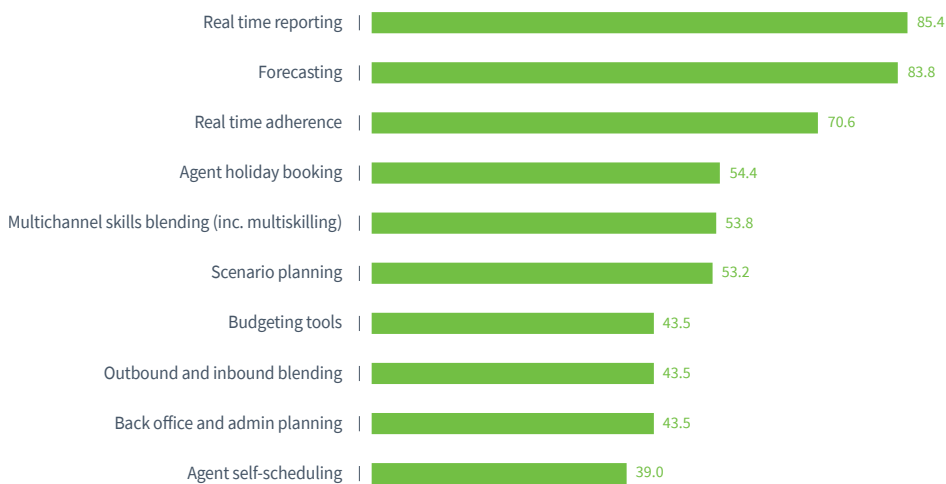
Basic: Consider integrating all cross-channel support functions, namely: management information, workforce management, quality assurance and business intelligence to drive business level performance, consistency and frontline service efficiency.

Intermediate: Conduct regular business process reviews to understand the impact the above technology platforms could have on each channel supported by your organisation.

Advanced: Ensure that there is an understanding of the difference between data, information, versus insight and actionable intelligence. This will help ensure more quantifiable value being derived from the systems used or missing.

Back in 2008, 79.1% of operations had performance management systems; 69.2% had agent analytics, 56.4% had e-learning available too.

Workforce management *functions available*



n | 487

Figure 6.9: Users: What functions are available within your workforce management (WFM) system?

Workforce management is a massive opportunity for a CX win.

Effective resource planning and management can only improve internal and external engagement.

Key findings

Just 58.7% of organisations have workforce management systems in place. Those who do have a better opportunity to maximise operational effectiveness, evidence the return on technology investment, and leverage system capability levels to the full.

The functionality levels of the systems that are in place can be split between basic operating features, such as forecasting, that should be applicable and deployed by all, to other 'optional' add-on features (e.g. agent holiday booking). With regards to forecasting, the gaps are at their largest on digital (e.g. assisted-service support) and back-office administrator operations, and are at an unsustainable level.

The numbers only relate to organisations with existing access to workforce management tools. If we account for everyone, the situation is much worse. For example, acknowledging that 85.4% of users have real-time reporting, the gaps towards full deployment appear small. Add in the 41.3% without any workforce management, and the reality is that just 50.1% of organisations have real-time reporting in place.

Why it matters: With the current economic pressures and changing global political landscapes, service efficiency will need to be influenced more through workforce management. Organisations cannot continue to ignore the need for workforce management, either through a manual process or enabled with a tool. Workforce management is not just needed in a services environment, but is a must in sales environments too.

Accelerate your journey

Basic: Consider conducting a health check of your current workforce management staff skills to understand where the gaps are. Verify your workforce management processes, which are fit for purpose, and assess how well the various functional tools have been applied.

Intermediate: Utilise your workforce management tool to support and enable your cost centre budgeting process, for medium and long-term budget planning. Consider utilising your workforce management tool for seniority and performance-based scheduling.

Advanced: Consider utilising the tool to support strategic scenario planning through the simulation/scenario planning module. Where relevant, utilise the tool to evaluate cross-skilling opportunities and a better productivity balance.

Workforce management *effectiveness*

Percentage	Telephone	Assisted-services
Forecast accuracy – contact volumes	72.5	36.0
Forecast accuracy – resource requirements	59.4	35.8
Scheduling efficiency (alignment of shifts to contact patterns)	55.7	30.2
Agent schedule adherence levels	53.2	28.6
Agent satisfaction with WFM process	26.5	15.7
Management satisfaction with WFM process	30.0	18.0
None of the above	15.1	37.7

n | 483

Figure 6.10: Users: What targets are in place to measure the effectiveness of the workforce management team?

Productivity is *neglected on assisted services*.

The absence of measurements impacts ROI and ultimately user uptake of alternative (digital) solutions, as *inefficiencies run through to the CX*.

Key findings

Overall, management’s attention towards targets to measure the effectiveness of the workforce management team have improved slightly since the 2016 Global CX Benchmarking Report, but the disparity in approaches between phone and assisted-service contact channels remains at an unacceptable level.

The likelihood of targets being applied for telephone are, in general, almost double that of what’s in place for assisted-service operations. Digital contacts are in the process of overtaking traditional phone-based interactions, more than one third will track volume forecast accuracy (36.0%) or alignment of actual staffing needs to the original forecast (35.8%).

The negligence in assessing agent and management satisfaction along with the workforce management process is troubling. Workforce management has a significant bearing on employee engagement, which in turn will impact CX. Yet very little is being done to consider whether the shift patterns and working hour schedules are meeting the needs of those affected by the process.

Why it matters: The ‘arcane’ thinking that having the right skills in the right place and at the right time is all that’s required, is dated. The modern organisation requires and demands that value be added across various touch points to influence optimisation and efficiency. Getting the workforce management value chain optimised could save an organisation millions.

Accelerate your journey

Basic: Ensure that there is alignment of sound planning (forecasting and scheduling) principles across the contact centre estate/CX channels. Consider utilising a bottom-up approach, so that forecasting and scheduling patterns are not forced because of budget constraints.

Intermediate: Ensure that the workforce management practices are matched with the correct labour/staffing contracts and management execution, as this could make a difference in turning mediocre results into exceptional results.

Advanced: Consider designing and developing a workforce management scorecard and a service level agreement with business, so true/factual value can be measured. Over and above technical measures, consider measuring workforce management on their interpersonal engagements, as this could only benefit performance on how the message gets carried across.

 In 2013, just 27.2% were tracking volume forecasts across all CX channels.

Knowledge management *system functionality*

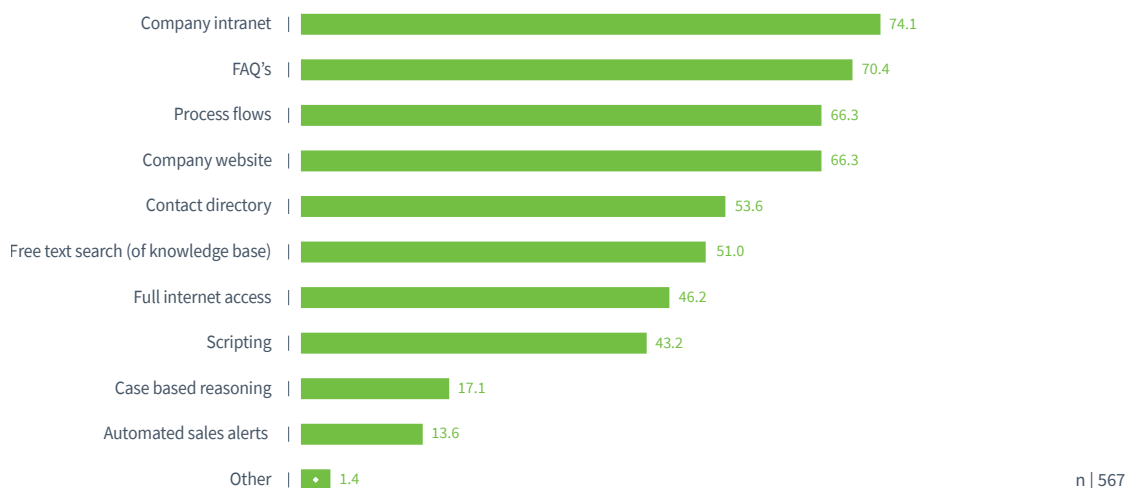


Figure 6.11: Users: What functions are available within your knowledge management system?

Knowledge management system deployment levels are relatively consistent across all solution, service, and provider types.

A third of agents cannot access process flow guides and 14% receive automated sales alert prompts.

Key findings

Globally, 68.5% of organisations have some form of knowledge management system in place to aid CX support. Another one fifth (22.2%) are planning a solution. Service-based operations and IT helpdesks are much more likely to implement a solution than sales divisions. It's a sizeable focus for those in the Middle East and Africa regions, where 29.5% are exploring new knowledge management capabilities.

The need for effective knowledge management is apparent. The application of basic functionality from existing users is not. Almost half (46.4%) of knowledge management systems currently do not provide access to something as simple as an internal contacts directory. Just two thirds (66.3%) have access to their own company website.

Another third (33.7%) cannot see process flows to validate queries on which they need procedural guidance. Similarly, keyword searches can enable agents to find the information they need from knowledge bases and relay it to the customer in a quick and timely fashion. However, 49.0% operate without a free-text search on their knowledge management system.

Why it matters: With customer offerings and agent roles becoming more complex, providing agents with as much information as possible through some form of knowledge management system is crucial, particularly as the pace of change intensifies and consumer demand for instantaneous information deepens. These automated technology solutions have become essential at agent level, and are increasingly being expected via automated artificial intelligence too.

Accelerate your journey

Basic: Consider your key performance indicators, and use these to guide the design and development of your knowledge management system. Make it outcomes-based.

Intermediate: Enable the tool to take suggestions and recommendations from frontline staff, so that it can be fed back into the system and others can learn from the possible process efficiencies and sales drivers.

Advanced: Form a user group to evaluate trends, challenges and performance drivers with a view to improving design and further develop your knowledge base at prescribed intervals. Ensure that this refresh support is built into the technology contract.

Length of service by role

Months	Agent	Team leader/manager
Global	28.7	43.3
Americas	29.0	43.4
Asia Pacific (excl. NZ)	26.9	39.6
Australia and New Zealand	30.9	43.5
Europe (mainland)	28.7	41.4
Middle East and Africa	27.6	44.7
UK	28.6	48.9

n | 571

Figure 6.12: What is the average length of service for the following roles?

There is a direct relationship between *brand positioning and employee tenure*.

The upper quartile tenure levels run at three to five years for agents and management respectively.

Key findings

Regionally, there's not much variation in the average length of service from employees at agent level. Tenure levels run between 26.9 to 30.9 months, or just two and a half years. Results from the upper and lower quartile of survey respondents range from 36 to 18 months respectively.

Team leaders and/or manager roles typically remain for longer and average globally at just over three and a half years (or 43.3 months). The top quartile reaches five years.

In-house operations achieve service periods that are almost 18% longer than that of outsourcers. Despite having amongst the lowest levels of employee engagement, the public sector retains staff for the longest (35.6 months).

There's also wide-ranging results by operation type. Digital-only agents stay on for just 16.0 months. Surprisingly for some, telephone-only agents provide the most loyalty at 29.8 months. Also bucking common perceptions, and perhaps indicative of the competitive nature at that level, is that prestige brands struggle to retain staff as ably as budget-brand organisations.


Why it matters: The value of retaining tenured staff has long-term CX benefits, as organisations will build intellectual capital and retain knowledge. Tenured staff means loyalty to brand and has a direct correlation to agent satisfaction. Agent satisfaction, in turn, means lower attrition rates, which will benefit organisations financially.

Accelerate your journey

Basic: Consider utilising tenured staff to influence newcomers by being a brand champion. Consider running a champion-challenger model, which is championed by the most tenured agents.

Intermediate: Reward and recognise agent tenure, from 12 months onwards. Consider agent pay increases or benefit increases every 12 - 18 months to coincide with your agent ROI model.

Advanced: Consider the ergonomics of your environment. A capital investment in creating an ergonomically friendly environment will result in staff retention and in financial benefit (through a reduction in training attrition).

 Length of service was as much of a problem twenty years ago, as it is today. Back then the average tenure was just 29.3 months for agents.

Attrition *by role*

Percentage	Agent	Team leader/manager
2017	19.9	10.0
2016	21.5	10.2
2015	21.9	11.1

n | 506

Figure 6.13: What is your annual attrition rate for the following roles

The top quartile operations show the ‘art of possible’ *with attrition at less than half of the norm.*
Agent attrition is typically double that of *other roles in the organisation.*

Key findings

Attrition rates are reducing. However, agent attrition rates remain almost double than that of team leader and/or management roles. The top quartile of results indicates what can be achieved and where agent and team leader/manager attrition drops by half to 9.0% and 5.0% respectively. This should be the benchmark target, although a wide variation at a sector level should also be considered when establishing the desired ‘to be’ position.

The lowest agent attrition benchmarks are experienced within the technology industry, whose 13.2% compares well against the education sector (23.5%) at the other extreme. Regionally, the variance is smaller and results range from 18.0% (Europe) up to 22.9% (Asia Pacific). Less than one percent separates agent level results between in-house and outsourced solutions.

For team leaders/managers, attrition levels are worst in Asia Pacific, at 13.0%, versus a regional best of 8.5% in Middle East and Africa. Smaller operations (those with less than 200 employees) also report stronger results at management level than larger centres.

Why it matters: Attrition always involves a significant financial burden. More emphasis needs to be placed on understanding reasons, while attrition percentage needs to become a KPI for team leaders, managers, and support.

Accelerate your journey

Basic: Ensure exit interviews are in place to establish the cause of attrition, and whether it’s preventable. Consider creating more scheduling flexibility. Ensure you have the correct staff profile and mix to match customer demands and business complexity.

Intermediate: Consider short and medium term incentives against the key drivers of employee engagement. Satisfy those, and many organisations will confirm it’s not always about remuneration. Work out what matters most to your team.

Advanced: Consider re-looking at the entire agent cycle. The process of reducing attrition should start while agents are being ‘pipelined’, so that the correct profile is sourced, but more importantly, brand association is created from the first engagement. Even a 1% improvement has a positive impact on the bottom-line.



Agent attrition was same level in 1998 as it is today. It surged to 27.5% in 2013 before settling again.

Absenteeism *by role*

Percentage	Agent	Team leader/manager
2017	9.5	4.9
2016	9.9	5.0
2015	13.0	5.4

n | 526

Figure 6.14: What level of absenteeism do you experience for the following roles?

As with attrition, agent absenteeism remains *almost double that of management roles*.
 Results from top quartile follow similar trends and *are less than half the norm*.

Key findings

The 2017 Global CX Benchmarking results and trends affecting absenteeism run almost in parallel with attritions. Management absenteeism is around half of that of agent roles, and performance from the top quartile of respondents average out at around half the norm.

The situation is gradually improving year-on-year, and there is hope that a trend towards more flexible working and better workplace environments will further reduce preventable absenteeism. Roles are becoming more varied and interesting, and tedious work is progressively moving towards automated channels. It will help if jobs could become more engaging and rewarding, which in turn can only benefit engagement and reduce costly absenteeism levels.

There are variable results at sector and regional levels too, the latter undoubtedly affected by local provisions on employee contracts and whether employees are paid when absent. Outbound teams suffer the highest absence levels at 12.4% for agents and 6.8% for managers.

Why it matters: Just as attrition has a significant impact on costs, so too does absenteeism. It could have a much larger influence on customer experience, as it impacts business in real-time. High absence could be because of low motivational levels and staff morale, caused by a variety of factors.

Accelerate your journey

Basic: Proactively manage absenteeism through staff engagement sessions and individual one-on-one discussions. Make staff aware of their rights in terms of the number of allocated absent days, while at the same time sharing the impact their absence has on the rest of the team.

Intermediate: Consider incentivising attendance with an additional pay out if there are no days absent recorded on their behalf. To minimise customer impact or service level impact, base workforce management shrinkage plans according to trends and days like pay weekends.

Advanced: A clearer understanding of the reasons for absence by region, tenure, weekday patterns and seasonality will place your organisation in a more insightful position to manage and decrease absenteeism.

 Absenteeism has almost doubled from the 5.6% (agents) and 2.2% (manager) recorded in 1998.

Operating budget splits

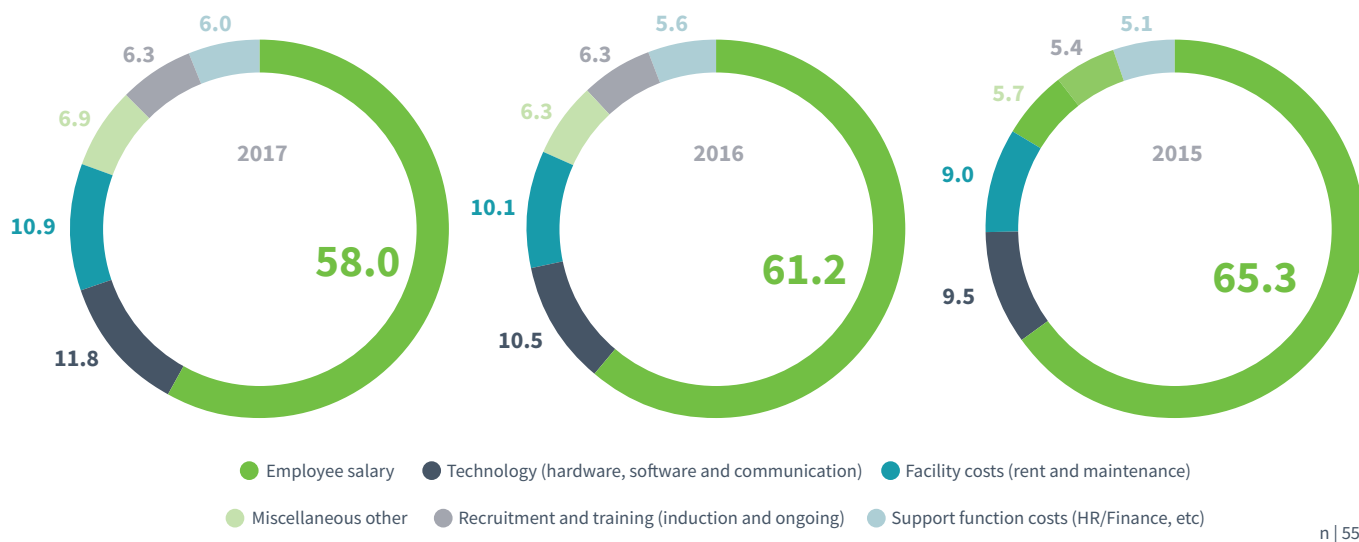


Figure 6.15: What percentage of your operating budget is allocated to the following?

Spend on employee salary drops as *technology and facility costs rise*.

There's an 18% increase in support function cost and 17% growth in recruitment and training budgets.

Key findings

Employees' salaries continue to represent the bulk of CX operating budgets, although the spend is reducing in percentage terms. In fact, there's been an 11% reduction from 2015. Evidence of the need to automate and digitalise solutions is apparent as focus primarily reverts to technology and facility development, where investment is up 24% and 21% respectively.

At 41.3%, digital-only operations allocate the smallest budget split to employee costs. Multichannel teams allocate the most at 59.0%. This at worst highlights the variables that come into play with the various and often unique operating models that are now required to manage the range of contact channels and associated support services, which are all part of a single CX in the eyes of the customer.

Regionally, Asia Pacific is focusing most of their budget allowance on technology (15.2%). Australia and New Zealand are behind and potentially at risk from lagging in an increasingly automated CX world with a budget allowance of 8.7% for technology.

Why it matters: There is a challenge on the horizon: increasingly skilled workers want better conditions versus the organisation's need to focus on the effectiveness of technology and the associated digital channels which consumers demand. Budget spend will increasingly become a more intricate balancing act with varying consistency between channels.

Ten years ago, technology spend accounted for 7.6% of the operating budget; staff costs were consistent with today's spend at 59.7%.

Accelerate your journey

Basic: As CX models evolve, operating structures and interaction mixes are changing. Specialist roles, may also require new salary ranges. Review forecasted resourcing and feed it into your budget planning accordingly. A carry forward approach of what's gone before will not suffice.

Intermediate: Organisations need to know what's going on and where to focus attentions. Our research indicates a lack of cost-to-serve measurements and resource control systems across most channel paths. Ensure appropriate measurements, objectives and data is available to inform your investment strategy.

Advanced: Consider evaluating new technology via proof of concept models. They'll allow you to test user appetities, CX benefits and a robust return on investment forecast. This information will also build strong business cases for new budget spend too.

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Technology

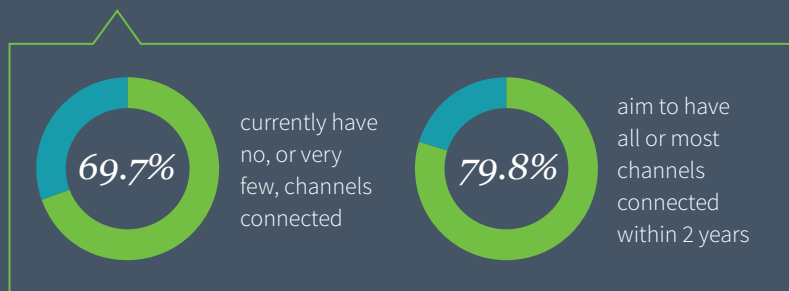
Technology was the No. 1 enabler to positively transform CX services in the last five years.

2017's top technology trends




-  **#1** Omnichannel – integration of technologies
-  **#2** Digital business transformation
-  **#3** Data analytics
-  **#4** Cloud technology solutions

The ability to customise emerges as a new challenge; *robotics appears on the horizon.*

How many channels are covered by omnichannel (connected customer journey) strategy?

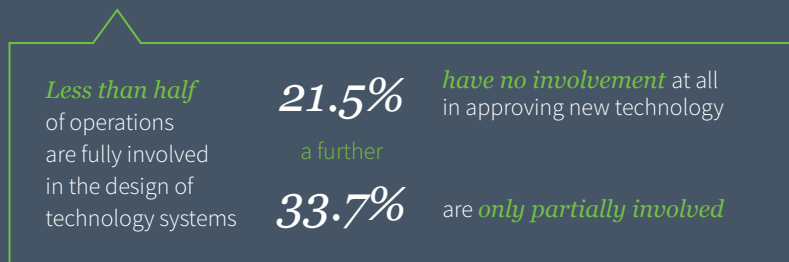


Top technology challenges

-  **#1** Legacy systems inhibit flexibility/progress
-  **#2** Integrating multiple technology systems
-  **#3** Securing budget/costs

Over half of all operations are affected by **3 core factors** hindering CX technology capability

Technology teams need to collaborate more closely with CX operations



Technology systems fall short of business needs

41.9% say digital systems fall short of current needs

Over **2 in 5** analytic systems are not meeting existing requirements

73.9% say their technology will fail to meet future needs

Hybrid cloud models gain in popularity

59.9% planning to locate their technology in the cloud; almost 1 in 4 already doing so – hybrid cloud is the preferred model for over half.

Over **8 in 10** say access to new functionality and future proofing are key benefits.

Omnichannel remains the No. 1 technology trend; ¾ of users say cloud enables omnichannel capability via integrated platforms

We say

- **Digital systems** have not displaced traditional interactions as forecast
- **Technology strategies** need to connect enterprise requirements
- **Robotics** will add to the dilemma

Avoid a digital crisis

Talk to Dimension Data today.

Technology. It was voted as the number one enabler to positively transform CX services in the last five years. Yet, over a quarter of organisations say that their technology systems are failing to meet their current needs. Omnichannel solutions that integrate enterprise systems and connect customer journeys is the top technology trend for 2017, but nearly seven in 10 organisations currently have none, or very few, channels connected. The ability to customise has emerged as a new top focus, and analytics is cited as the top factor to reshape CX in the next five years.

Cloud continues to grow as a model in public, private and hybrid forms. Over eight in 10 existing users say cloud has provided access to new functionality, with future proofing a key benefit. Significantly, three quarters of users also say cloud enables omnichannel capability via integrated platforms. Robotics will add to the dilemma, and technology strategies need to evolve and become agile in connecting growing enterprise requirements. Thinking of CX technology as a connected element in a holistic enterprise IT eco-system and overcoming traditional work splits between business and IT adopting new concepts as swarming, will be key for success.

about the author

Siegfried Schallenmueller



*General Manager
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(CX) Europe,
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As head of Dimension Data's European CX business, and with more than 20 years of experience, Siegfried is an expert at integrating IoT and CX platforms with end-to-end business processes. He's worked with leading industry players to merge the physical and digital worlds, while ensuring an all-important human touch.

Questions and answers with *Siegfried Schallenmueller*

1. Digital disruptors framed around analytics, personalisation and proactive automation are forcing a new speed of transformation. How can established organisations compete?

Don't panic! Ensure a deep understanding of your customer preferences and market dynamics as far as customer services and engagements are concerned. Identify the appropriate business cases for making a difference in customer service, and use those to drive ambitions for implementing new technology. Personalisation and proactive automation provide a tremendous opportunity to achieving more individual engagement with clients. However, for it to be effective, you need to source and then use the appropriate data to make it meaningful and ultimately help your digital transformation journey. Established organisations can certainly compete as long as they are learning, adapting and customer-centric.

2. Customers want multiple channels and to dictate how they engage. How can IT ensure that operational solutions meet needs?

Measure what you need to manage. Provide detailed reporting on channel usage, customer segments and special events, by implementing metrics and triggers paired with analytical capabilities. Drive channel usage by implementing specific functional benefits, e.g. integrate a passport reader in your mobile check-in application, and implement voice of the customer feedback to ensure the solution functionality meets needs, and that you can identify innovative ideas on how to improve. Finally, ensure flexible capacity management by integrating cloud or as-a-service capabilities into your system architecture.

3. Digital and robotics are set to completely reshape CX. What's the implication for IT teams?

IT teams need to develop a broader understanding of a technical and functional CX architecture. The architecture needs to integrate multiple traditional and digital vendor technologies provided on premise and from the cloud. More than ever, mainstream vendors and niche players need to co-exist in a patchwork eco-system, where IT teams become the moderator and provide enterprise-specific integrations, based on strong application programme interface skills and agile development and project management foundations. The IT teams now need to move faster than ever before, proactively open their minds to emerging or evolving needs and ensure their operational structures can cope with the increasing stretch being placed on them.

4. Major challenges exist around integration – why?

Implementing CX capabilities in a digital world entails more solutions than before and single vendors can no longer fulfill needs. In the era of integration of eco-systems from various vendors, real-time management of data and data streams, analytical capabilities need to be managed simultaneously as part of an omnichannel architecture.

A CX architecture is a co-effort between internal IT teams, integrators and vendors. Internal teams need to have an open mindset to integrate services from multiple suppliers into flexible but secure CX architectures. Understanding artificial intelligence and IoT presents a new set of requirements for data management and service integration that must be learned and managed. Beyond this IT teams need to reshape their foundation of specific technology expertise, towards a solution architect mentality where piecing together the various solutions will be a crucial differentiator.

Traditional customer relationship management vendors are having to evolve too, as they will increasingly become digital channel management players, while key contact centre or omnichannel providers will tap into their domain.

5. How can I connect technology solutions (and customer journeys)?

Today, software development is becoming the glue in service-orientated architectures. CX architects now need to have core capabilities to allow for flexible integration of new solutions. They need an understanding of software architecture, application programme interface development and release management become a mandatory ingredient for adopting new solutions. For example, a new messenger service or artificial intelligence-driven chat bot can be integrated through an application programme interface, instead of waiting for a roadmap from an established CX vendor.

Most of the core CX vendors have opened their products for integration, as well as for capturing key data from an interaction to manage or extend a journey profile.

The future of CX solutions will be driven by integrating services from multiple sources and locations, based on an enterprise architecture and secure, agile application programme interface integration.

6. Can IT teams lose focus with the mountains of data produced by digital footprints?

Remember that data is the fuel of CX, so ensure that you capture relevant data and make it actionable. IT teams need to determine the real-time and historical data that they need to provide a superior service or engagement for clients. They need to focus on business needs, and obtain data patterns and structures from the business, e.g. collecting information relevant to business, such as from smart devices.

The team needs to comprise of business and data architects defining and modeling the enterprise data architecture. They need to think about how data fits into the overall model at aggregation level, and avoid data siloes which are not connected to broader journey management. Outsource certain data collection tasks with pre-interpreted sets of information to data management service providers.

Align the effort to the strategic and team's objectives, to ensure that you relate the value being added to the investment, and at the same time, identify gaps that could be plugged with new technology.

7. How can we ensure alignment between the delivery needs of operations and IT?

IT needs to become part of the business conversation. Ensure that business, operations and IT are aligned and have a common vision and share a passion for delivering CX as a competitive differentiator.

Instead of following traditional models, create an agile roadmap based on structured methodology. Allow all stakeholders across the siloes to buy into common goals and create visibility of constraints. Rethink how tasks will be divided between IT and operations. A joint workgroup striving towards a common vision, with shared purpose is a basic but frequently missing base. Closer collaboration between CX and IT units will help the organisation develop tools and processes to allow for operations to manage the technical processes in CX more independently.

8. *What does the future hold five years from now?*

A lot of what we perceive as experimental will be part of daily routines. For example, traditional browsers may be replaced by smart, artificial intelligence-loaded messaging services. Proactive maintenance and natural language interfaces will become part of our daily lives. For these trends to materialise, we need to have an integrated view of digital and human interaction. The advances of technology will fail if human interaction in customer service is not transforming. Agents and service staff need to be empowered with knowledge, focusing on more specialised interactions supported by technology. They need to focus on relationship management and creating the 'extra mile' experience.

9. *How should organisations prepare for digital transition to robotics, IoT, etc.?*

Organisations need to view their CX journey as an integral part of their overall digital transformation. Adoption of digital dominance, IoT and robotics requires a holistic management of the transition of business processes. So again, it's not about picking a smart technology trend, but determining the need for transformation on an enterprise level across business needs and models. Organisations that assume this holistic view, and who have robust process methodologies in place, will be prepared for true digital CX.

10. *Finally, what excites you most about IT today?*

IT is back on the main stage and more connected to business needs than ever before. Digital transformation is fueled by IT, and conversations between business and IT are more connected. Key stakeholders understand that the real competitive advantage of CX can only be attained by achieving a balance between digital (IT-driven) and human interaction. The future seems to have unlimited possibilities on how, where and when the CX can be developed. The success factor may be in how focussed teams remain, and without doubt, how effective they are in executing new solutions that can be integrated and that can grow in tandem with the business.

Read on for the global results and analysis.

Compare your organisation's performance and results to a more specific benchmark by visiting our online benchmarking portal:
<https://dimensiondata.2017cxbenchmark.com/portal/?trg=GCXBR>

Technology trends

Rank	2016	2017
Omnichannel – integration of technologies	1	1
Digital business transformation (migration of voice traffic to digital)	3	2
Data analytics	4	3
Cloud technology solutions (hybrid, public and private cloud/hosting)	7	4
Personalisation of services	Not asked	5
High service availability/business continuity	5	6
Social Media	Not asked	7
Technology consolidation	2	8
Proactive outbound	8	9
Cyber security	6	10
Other	9	11
Internet of Things (incl. robotics/automation)	Not asked	12
Voice/digital biometrics	10	13

Figure 7.1: What are the top three technology trends being prioritised by your CX team?

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Omnichannel capability enabled via integrated solutions is the top technology priority.

Digital transformation, analytics, cloud technology and service personalisation complete the top five IT trends for 2017.

Key findings

A desire to progress omnichannel capabilities and connect relevant contact channels, remains the number one technology trend for CX teams. Omnichannel is a dominant theme across all geographies and in every vertical except for the education sector.

Analytics is cited as the top factor that will help transform CX in the next five years. It's expected to gain even more focus as a technology trend in the coming years. For now, it has already risen to the number one spot and is firmly established as a critical technology trend.

The traditional IT trend pattern changes shape for those placed in fourth and fifth positions. Cloud has become a fundamental consideration for most CX providers, and it has jumped three places in the last year to fourth top technology priority. The flexibility enabled by hybrid cloud solutions is contributing to new functionalities and with it the personalisation of services, which are all now being realised as a top priority.

Why it matters: Enterprises now face a wide range of technical options to deliver disruptive CX to their clients. To avoid an influx of redundant digital capabilities, a clear business strategy driven by markets, customer segments, and business models need to drive alignment. Key questions are: can organisation and processes deliver against the technical capabilities? How should adoption in the customer community be managed?

Accelerate your journey

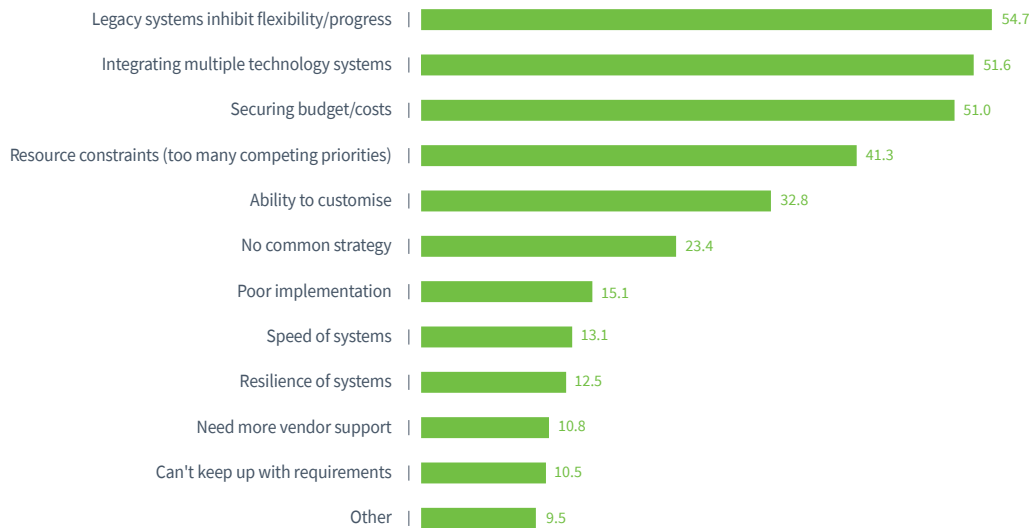
Basic: Align and consolidate your omnichannel implementation roadmap with your business strategy, capabilities and organisational maturity. Drive the deployment of true omnichannel capabilities as a change management project, and not as an IT initiative.

Intermediate: Manage how clients interact with you using data analytics to understand the detailed dynamics of your omnichannel interfaces. Focus on making a customer engagement easy by offering automated processes and self-care options utilising situational context.

Advanced: Focus on disruptive CX. Be proactive and anticipate customer needs or questions. Human interactions will more often be escalations that require a highly knowledgeable expert, and one who is enabled by proactive artificial intelligence technology.

 CRM was the top technology trend in 1998. By 2008, top focus was service availability, and by 2013 attentions had evolved to voice, data and video convergence.

Technology challenges



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Figure 7.2: What are the main challenges affecting your CX technology systems?

There's no change in the core *four obstacles being faced*.

The ability to customise emerges as a new top 5 challenge for technology teams.

Key findings

The top four challenges impacting the effectiveness of CX technology systems continue from the 2016 benchmarking report, although the sequence has been altered. The flexibility of legacy systems has switched places with system integration, and securing budget/costs changed places with a stretch on resources.

Aligning to a drive for better personalisation of solutions, the ability to customise CX systems to specific organisational needs is a problem for nearly a third (32.8%) of technology teams. The numbers rise sharply for several sectors (e.g. manufacturing, service provider and communications) for whom customisation is of even greater importance.

Almost a quarter (23.8%) of CX providers report a lack of common strategy as an issue affecting technology systems. An all too present silo-based approach to multi-channel capability is contributing to the issue. Just one in 10 (10.8%) operations feel they could do with more vendor support to help maximise the performance of IT systems, but slightly more (15.1%) do highlight poor implementation as a concern.

Why it matters: CX technology is no longer focused on a pure contact centre stack, or random customer relationship management backend integration. CX systems need to be positioned in an overall enterprise IT architecture with a clear strategy on interfacing with data sources and middleware platforms. Avoid a siloed view on CX solution stacks, and take an agile technology development and deployment approach within your enterprise.

Accelerate your journey

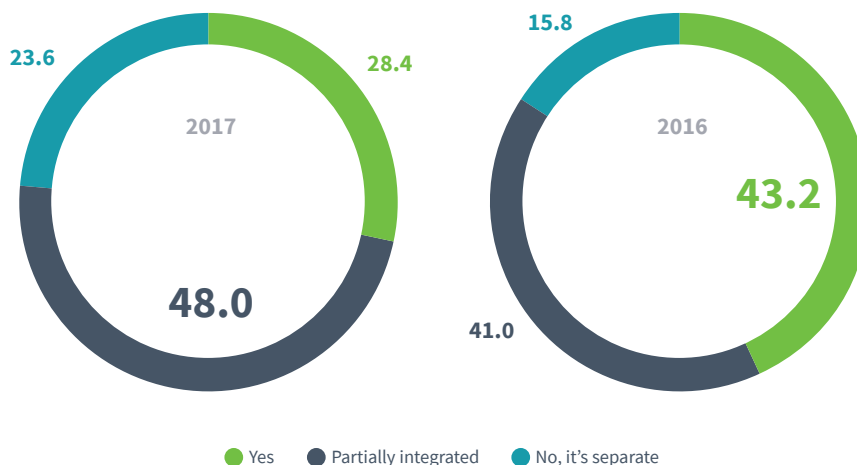
Basic: Align your CX technology needs to the IT enterprise architecture roadmap. Use API integration to help weave in new channels or services as IoT or mobile apps.

Intermediate: The CX technology eco-systems will continue to grow and tap into more IT layers. Integration of third party cloud services such as messenger services or artificial intelligence bots will become inevitable and impact your security policies and data management. IT needs to establish strategies and procedures to cope with this to stay relevant to your stakeholders.

Advanced: Drive the evolution of your enterprise IT architecture from a holistic view dissolving functional siloes. Evolve from a vendor-centric to a service-centric view where business requirements drives your IT roadmap. Focus on developing functional skills and specialist resource to maximise the benefits from evolving CX technologies.

In 2013 the top technology challenge was integration, followed by a lack of flexibility. Legacy infrastructures were a fourth priority focus.

Organisational integration of *technology architecture*



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Figure 7.3: Is your CX technology part of your organisation's enterprise architecture?

Full integration of CX-based technology *reduces further across enterprises.*

Almost one quarter of systems are now being operated entirely separately, *and partially integrated solutions are becoming the norm.*

Key findings

The likelihood of an organisation's CX technology being part of an enterprise-wide architecture solution diminishes each year. Just two years ago, 47.4% of organisations were reporting fully integrated systems that spanned the enterprise. Today, it's almost halved to just 28.4%.

During the same period, we're seeing a surge in both partially integrated (up 17%) and stand-alone/separate solutions (up 49.4%), which represents a continuing trend first noticed in the 2015 benchmarking results.

There is some variance in approach at a sector level. This is indicated by the 52.6% of organisations in the media and entertainment possessing full architecture consistency at an enterprise-wide level, versus just 12.5% capable of the same in the travel and transportation industry. Once again, there's a definite pattern regarding operation size and there being evidence of a full integration strategy, where size of centre (with a couple of exceptions) typically results in more company-wide assimilation on technology architectures.

Why it matters: Drive a stronger alignment of CX technology within the overall enterprise architecture. CX technology is rapidly moving into the digital domain with a high appetite for business data and business process integration. Organisations will not realise the benefits of digital CX technologies if there is no link with the overall enterprise architecture and business data models.

Accelerate your journey

Basic: Categorise your CX technology by functionality and sourcing options. Establish a landscape of existing solutions and identify redundancies and dependencies to create a master plan.

Intermediate: Consolidate your CX capabilities with the enterprise's IT components. Digital and multimedia CX technologies drive requirement into infrastructure layers (security, networking, flexible computing resources), as well as into business process automation systems. Align and integrate step-by-step, ensuring responsiveness and consistency.

Advanced: Position yourself to interchange CX technology modules (e.g. artificial intelligence engine or a messaging platform) without changing the whole setup. Select CX technology through a best-of-breed approach, and master complexity by managing application programme interface abstraction layers.



Ten years ago, some 69% of CX technology systems were part of the enterprise architecture in some form, versus 76.4% today.

Omnichannel CX design

The importance of engaged and empowered cross-functional teams

by Jude Carter, Principal Consultant, Dimension Data Australia

Consumers' disparate experiences with organisations are becoming far too common. Organisations need to change their approach to customer experience (CX) from being channel-specific, and focus on consistency of service via integrated customer journeys.

A case in point is when a consumer needs an urgent written information from a bank to apply for a home loan from another institution. The consumer queues at the bank, only to be told that the representative is not authorised to type up a letter on a bank's letterhead, and that it can also not be emailed or posted 'because it's all automated'.

The consumer then turns to the contact centre, where they receive a completely different experience and a can-do attitude. The consumer is told by the agent that they would happily email a closure letter, but that it's also already available online through the internet banking portal

How silos started

Organisations (regardless of size) are segmented into specific functions and departments. This is done for many good reasons, including specialisation and efficiency. However, these departments or functions operate in silos where their goals are not aligned. Silos can be a significant problem throughout the organisation, but are particularly toxic to CX initiatives.

Almost all organisations now recognise that CX is a key measure of success. They are also starting to understand that CX transformation cannot happen in pockets of the organisation, but requires a 'whole of company' approach.

For traditional hierarchical organisations, senior management must first define the CX strategy, and then shepherd the company through the accompanying cultural transformation. This may be difficult for many organisations caught in an era of disruption and a frenetic pace of change that struggles to move fast enough.

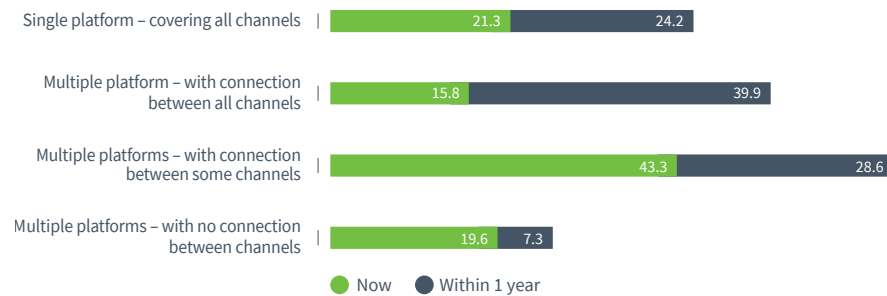
Best approach for CX initiatives

CX initiatives can be led from below, and can be tackled one-customer-journey at a time. The key is to form an engaged and empowered cross-functional team, with representation and support from multiple departments and functions of the organisation. It's critical that this team is inoculated against, and protected from, the cultural norms of silo-based thinking.

Basic steps to consider:

1. Assign a champion to 'CX' - they may need to convince many people to buy in to the venture.
2. Understand the metrics of success that senior management and executives require from changes in CX. Baseline the metrics so that they can measure the impact of CX initiatives.
3. Understand the goals of all the departments in the cross-functional team. What makes for success in the marketing, digital, sales, back-office and IT teams?
4. Understand how improvements in CX will help departments in the achievement of their goals.
5. Due to competing priorities, non-attendance at cross-functional workshops can be a common and significant issue. Ensure that there is agreement on a clear governance structure with defined escalation processes, and substitute delegates as appropriate.

Contact channel *infrastructure management*



n | 796

Figure 7.4: Which of the following statements best describes your technology infrastructure for managing your contact channels?

Multiple platforms with some connection is the most *common approach today*.

The main improvement focus is now on creating connectivity *across platforms and between all channels*.

Key findings

The 2017 benchmarking report highlights mixed results regarding the reach and depth of technology infrastructure platforms. One in five (21.3%) operate a single platform covering all channels. A small rise to 24.2% is being forecast in the coming twelve months.

Of the 78.7% running multiple platform infrastructures, 59.1% report at least some connection between channels. Currently just 15.8% of those lay claim to full system connectivity, although there is a stated intent for that to more than double (to 39.9%) by 2018. At the same time, those operating multiple platforms with no connection between channels will drop by over half, from 19.6% to 7.3%.

In simplistic terms, 37.1% of CX operations have a solution that's fully connected, 19.6% are operated in silos and the other 56.7% fall somewhere in the middle. Looking ahead, the focus is clearly on building up solutions' capability that can link together all the channels offered.

Why it matters: Customers look for ease of use, resolution convenience and consistent experiences. Enterprises need to understand the input/output of each channel, manage journey data and monitor interactions by identifying priorities and exceptions. The number of platforms isn't a concern, as long as a central logic governs data flows and work items.

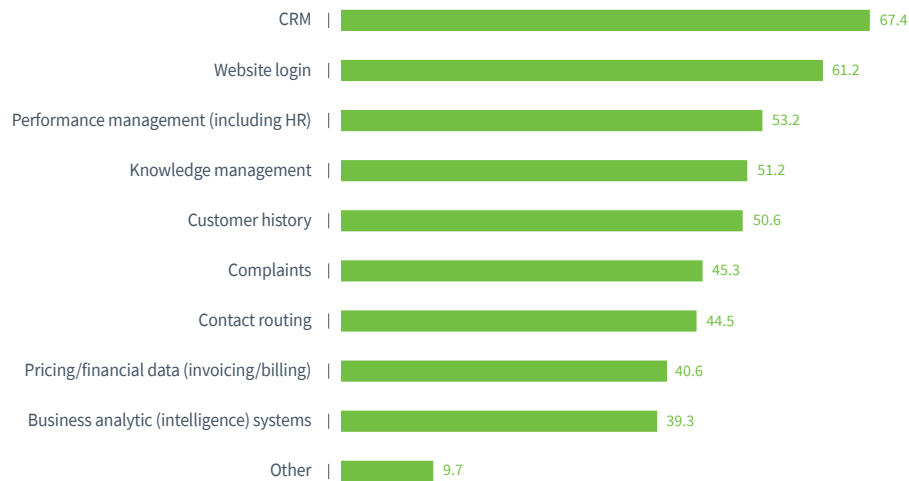
Accelerate your journey

Basic: Achieve a clear understanding of channel mechanics and interdependencies. What data are key input, and what relevant output needs to be managed for a consistent experience and journey? Ensure transparency of the processes involved!

Intermediate: Accept the challenge of implementing an omnichannel solution by prioritising the channels that are most closely connected. Establish holistic workflow management that links various platforms. Identify redundancies in your platform infrastructure (e.g. customer relationship system versus CX platform) and establish relevant connections by making a clear decision of the specific system(s) enabling a task.

Advanced: Measure what you manage! Establish monitoring capabilities across consolidated platforms for channel support. Focus on channel usage and process response times.

Company-wide *platforms*



n | 834

Figure 7.5: What company-wide (standardised) platforms are in use?

Enterprise-wide access to systems is slowly advancing, but wide gaps remain.

Only half have a standardised knowledge management capability, and just 39% of business analysis systems span across the company.

Key findings

Overall, there are some positive signs of progress from the 2016 benchmarking report, as the number of organisations reporting company-wide access to systems is rising. Customer relationship management solutions are again the most likely available systems, although even they are only fully accessible at enterprise level to 67.4%.

Year-on-year, there's also a small upturn of 13.6% in those with company-wide business analytic (intelligence) systems. Prestige brands (at 49.7%) are the most likely to have invested in such systems. They have endeavoured to personalise and understand how they can retain strong customer value. Overall, the numbers remain low, and it's worth noting that analytic systems are amongst the least likely to have been deployed consistently across the entire company. This comes despite analytic systems being appreciated as a game changer that has, and will, re-shape the industry during the last and forthcoming five-year periods.

The other notable change is on availability of pricing/financial data, where access levels have risen by 78.9% since the 2016 benchmarking review.

Why it matters: A consolidated view of the customer's history, profiles and behaviours is key to ensuring superior CX in an omnichannel world. Continuous investment into platforms managing both operational and analytical customer data will determine enterprise success. Set clear priorities and make data actionable for the agent and digital channel managers.

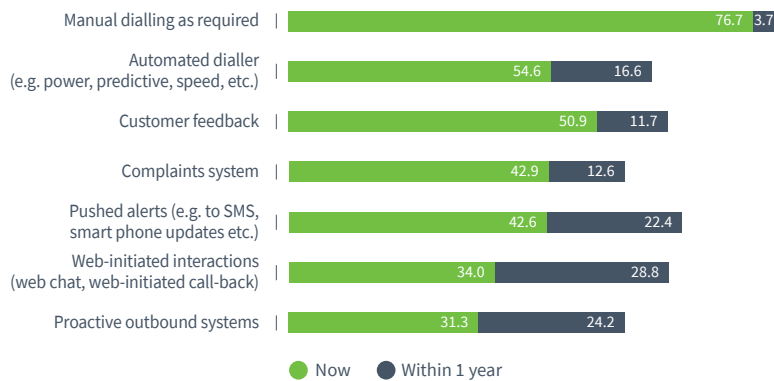
Accelerate your journey

Basic: To manage the customer experience in your business, define offline and online key data that you need to consolidate. Prioritise platform standardisation and define relevant interfaces in case it takes too long.

Intermediate: Extend your knowledge base and learn from every customer interaction by capturing relevant information. A growing complexity on agent-led CX services will drive. Self-service and increased complexity of services drive a strong need for knowledge management. Integrate soft knowledge feeds from internal and external social media platforms.

Advanced: Position yourself to align patchwork technologies as part of a drive for full standardisation. Standardise to a functional capability-level by being able to exchange vendor technologies in a flexible way. Invest in building meta-layers based on your company's IT intelligence.

Outbound *business systems*



n | 326

Figure 7.6: What systems do you use for outbound interactions?

Pushed alert technologies have grown by **39% in the last year.**

Web-based interaction systems and proactive outbound solutions **the top growth focus in the next 12 months.**

Key findings

While manual dialling remains the most common technique for instigating outbound interactions, and a preferred path for over three quarters (76.7%) of CX providers, the usage of automated solutions is intensifying. The number of organisations operating proactive outbound systems has increased from 23.1% in 2016 to 31.3%, a rise of 35.5%. During the same period, pushed alerts to SMS and smartphone updates, amongst others, have grown by 38.8%.

Web-initiated contact, whether via chat or call-back, is due to receive the most focus and growth in the year ahead. The other focus areas are the proactive outbound and pushed alert solutions.

Over half (54.6%) of CX operations have some access to a type of automated dialler system. However, planned deployment activity suggests it will soon be overtaken by more digitally-based and robotic-led solutions.

Why it matters: Outbound interactions will increase significantly, driven by digital channels, enabled by automation and to meet demands from connected customers. There will be an increase of self-services, intelligent response systems, as well as proactive notification also initiated by IoT. Increasing agent productivity with dialler automation is still on the agenda, but outbound interactions will increasingly become an integral element of digitised customer journeys, and interactions will be proactively facilitated by messengers, mobile apps and web sites.

Accelerate your journey

Basic: Review your support and customer engagement processes. Identify opportunities for injecting proactive engagement with your customers as part of an enhanced support or self-service experience.

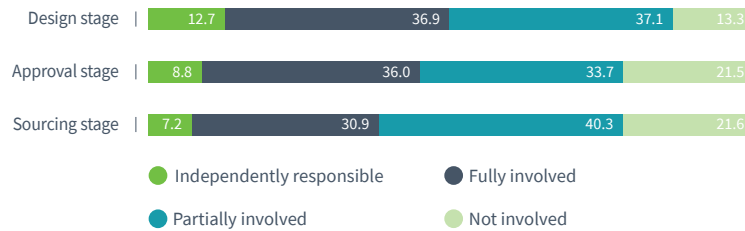
Intermediate: Ensure that your customers can take control of automated interactions. Invest in mobile applications and link these with messenger services that drive outbound interactions through bot technology. As such, you'll increase response times and benefit agent productivity by eliminating low-level, time-consuming interactions.

Advanced: Focus on avoiding disruptive experiences for your customers by adding advanced analytics to manage proactive contact. By doing this, you can surprise your customers by foreseeing next steps and answers. Link proactive notifications with knowledge systems and core customer relationship management data to enrich the relevance for your customers.



Twenty years ago, 85% of outbound contacts were processed by manual dialling.

Involvement in IT sourcing and *design decisions*



n | 827

Figure 7.7: How involved is the customer operation's team in the technology decision-making process?

Less than half of operations are fully involved in designing *technology systems' needs*.

Technology decisions are increasingly taken away from CX teams, and even fewer are *included in the approvals process*.

Key findings

It's imperative for operational teams to be closely involved in the design and approval process of new technology systems that will be used to provide CX services. The trending of recent years has led to a diminishing percentage of teams being afforded due involvement to ensure technology solutions meet consumer needs. Over half (50.4%) of operations have no or only partial involvement in the design stage of new solutions, and consequently, are being set up to fail.

Even fewer have a say in the approvals and sign off on new technology systems upon which they will have to rely. Just 44.8% are fully involved or directly responsible for sign-off on functionality and the delivery of new solutions.

Of lesser consequence, assuming that the design and approval stages are robust, 61.9% of operational delivery teams are, at best, only partially involved in the sourcing of new technology capability. The involvement of delivery teams arguably ensure that the shortlist of vendors selected are those best suited to delivering against the CX needs.


Why it matters: Designing or redesigning CX systems is a key opportunity to align operational and IT teams. Enterprises should not miss this opportunity since a full involvement will ensure better adoption and understanding between the parties. Most system implementations follow an agile approach, including multiple vendor technologies which also require an intense team effort.

Accelerate your journey

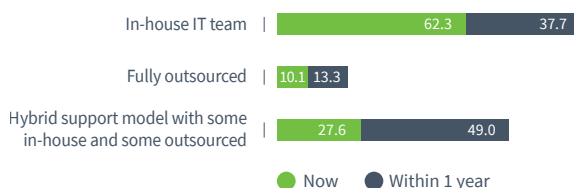
Basic: Foster a deep understanding of CX and technology upskilling needs from both IT and operational teams. Invest in team building for mixed operations and IT teams. Select a team set-up which removes the strict separation between operations and IT.

Intermediate: Drive IT decisions, based on business-driven use cases. For key CX system decisions, nurture use case labs instead of just verifying technical capability. Consider a strong focus on pilot implementation and evaluation both from an adoption and technical fit perspective.

Advanced: Implement feedback processes from your customers to drive continuous evolution of your CX technology landscape. Ideally create panels for capturing systematic feedback, making customers implicitly or explicitly part of the decision process.

 In 2013, 58.8% of operations enjoyed more than a limited involvement in the design of new CX technology systems.

IT support



n | 833

Figure 7.8: Who provides the IT helpdesk support for your CX operations?

IT support models are evolving and *taking on a new shape*.

Hybrid approaches have increased per forecast, as sole dependency on in-house *IT teams gradually declines*.

Key findings

Most IT helpdesk support is provided via in-house teams. However, in the last few years we've seen an increased leaning towards hybrid support models, where some support is provided in-house and some outsourced to third parties. This is consistent with evolving technology ownership models, and a drive toward hybrid cloud solutions integrated with legacy systems.

The 2017 benchmarking results highlighted 27.6% of service desks that are now provided by hybrid support models, representing an increase of 22.1% in the past 12 months. The forecast is that this will almost double to 49.0% within the year, and by 2018 it will be the dominant support model.

The number of fully outsourced IT helpdesk solutions remains relatively flat with past years at 10.1%, indicating that this will remain a niche solution for some. The evolving models swing primarily between in-house and hybrid models. There's some variance across sectors in terms of percentage range for each model, but the general pattern is consistent with the global result.

Why it matters: The support model strongly depends on the scope of the CX operation. CX technology has become an integral and mission-critical part of an enterprise IT architecture. The complexity and degree of integration that IT systems have on the wider business will have a bearing on selecting the right support option. There needs to be clear accountability and ownership, particularly when many parties become involved.

Accelerate your journey

Basic: Assess your IT support structures in conjunction with the organisation's transition towards multi-vendor and cloud-based solutions. Supplier management roles will be a necessity to ensure that benefits are maximised. Set targets for suppliers, based on business outcome metrics, as well as their core technology deliverables.

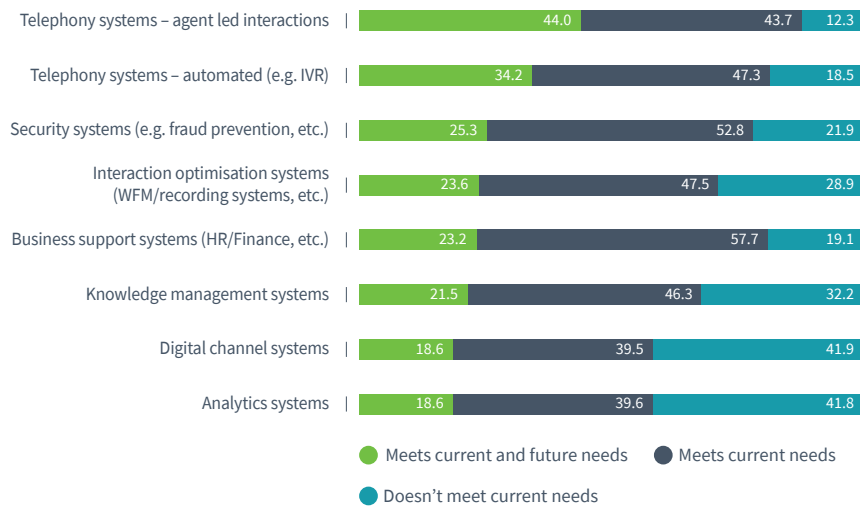
Intermediate: Leverage automation for standard support issues, and enable operations to manage CX technology with self-care tools. Review help desk processes and align vendors and integrators with your enterprise support model.

Advanced: Review your support interfaces and dependencies with the overall enterprise architecture. When building high-levels of automation for digital interactions, use the workflow automation and data management support provided by the CX technology to create processes upon which future automation can be based.



In 2013, 15.4% of IT teams were not targeted on service delivery, those who were focused most on service availability.

How does technology meet *current and future needs*



n | 757

Figure 7.9: How well do the following technology system items meet your current and future needs?

Digital systems fall short by 42%, and the same number report inadequate analytics.

The number of companies which fear digital channel technology won't meet future needs has increased to 81%. An average of 27.1% say technology systems are failing current needs.

Key findings

Considering all systems, and remaining flat with results from the 2016 benchmarking report, an average of 27.1% of organisations say that their existing technology systems don't meet their current business need. Significantly, and perhaps most damagingly, considering the impact they're expected to have on evolving operational models, analytics and digital channel systems are the furthest behind on meeting current operational needs, and a problem for over two in five centres. Analytics and digital channel systems are also a major threat going forward, with just 18.6% confident that they have the right solutions in place.

Looking forward towards the readiness of systems for future state delivery needs, and again across all systems, almost three quarters (73.9%) on average say their technology systems will fall short of future business needs.

Major threat areas include knowledge management, which in the face of ever-increasing complexity for human-led interactions is a growing requirement for many. For now, over half (53.7%) say their systems are inadequate to support current operations. This will soon rise to 78.5% if left unattended.

Why it matters: Focus on developing analytical and knowledge management capabilities – these are critical to the digital customer experience. You need to focus on system solutions that span the entire customer journey, and not on a stop gap solution for a single channel. Integrate heterogeneous solutions using application program interfaces (APIs) and develop your own customised mix of best in breed solutions.

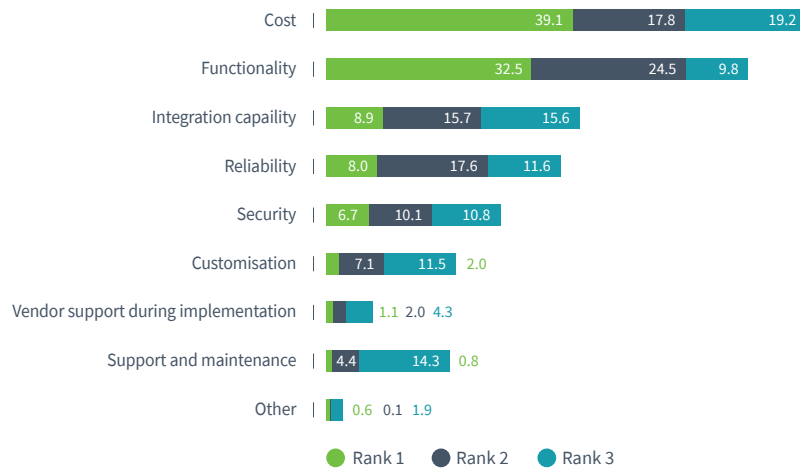
Accelerate your journey

Basic: Develop a holistic view of your technical capabilities and your organisational process readiness. Ensure that your operations and processes match your technical capabilities. e.g. a knowledge management system will fail if you cannot link it to your enterprise knowledge sources or agent interactions.

Intermediate: Set clear priorities for fixing capability gaps depending on your business needs and future CX roadmap. Ensure that you can add technical capabilities through application programme interfaces and flexible services you can control and provide.

Advanced: Don't rely solely on vendors to meet your requirements. CX system optimisation requires that technology solutions be combined with business intelligence if you are to deliver best-in-breed capability. Ensure appropriate levels of skills and agility in your organisation to facilitate the process.

Decision factors for *new technologies*



n | 833

Figure 7.10: What are the top three factors when deciding on new technologies?

Cost and functionality are primary factors in the *technology decision-making process*.

Integration capability, reliability and security make up the remaining top five *most common considerations*.

Key findings

Cost and functionality of the system are the unsurprising top factors for consideration when deciding on new technology solutions. It's the sequence of what comes next that provides a more telling insight into organisations' priorities and their decision-making process.

On the basis that the price works and the functionality delivers, the first thing operations then look at is the integration capability of the proposed solution. This is in keeping with the ranking of omnichannel integration of technologies as the number one technology trend for 2017. Assuming the system ticks the boxes on reliability and security, the ability to customise the system is a priority for just over one in five (20.6%) organisations.

At a sector level the picture is quite consistent, but security does stand out as a much greater consideration for some, particularly where the implications of a breach may impact the organisation's licence to function and/or reputation (e.g. financial services).

Why it matters: Organisations will always look for value for money. A strong focus on secure integration and customisation capabilities for future viability is recommended. Superior CX will require flexible add-on capability to accommodate various vendor technologies and services. Prepare to manage an eco-system that interconnects traditional vendor propositions with your own customised solutions. Where viable the systems should be procured via an on-demand commercial model.

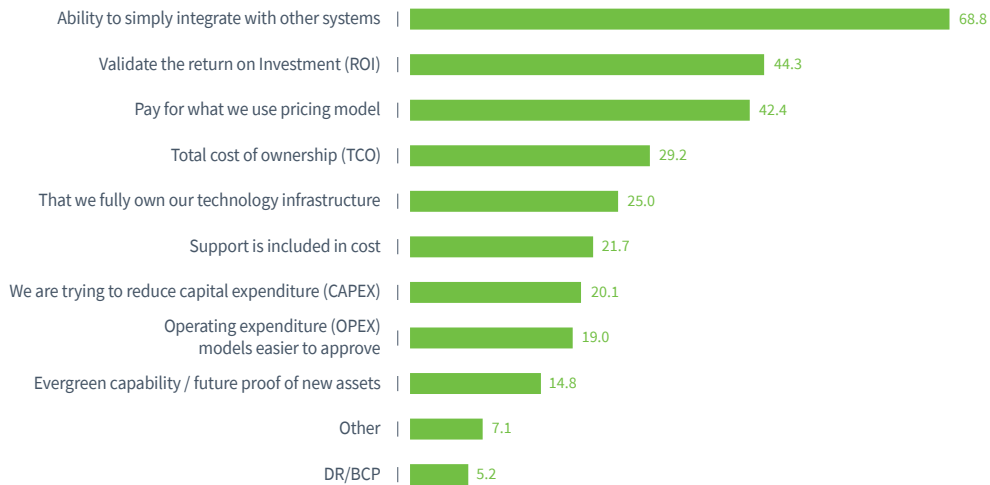
Accelerate your journey

Basic: Define your CX roadmap and required technology investments. Categorise what you buy as turnkey standardised (commodity) services, and what may require a high level of customisation (which is anything that touches or influences an ability to personalise the CX).

Intermediate: Create an integrator and vendor advisory board that gives you transparency on solution stack options to make the right decisions. Match new elements of your CX technology with your broader unified communications, customer relationship management and workflow infrastructure.

Advanced: Create a support model with your key vendors and partners to give you the flexibility to build an eco-system of technology which feeds your CX strategy. Don't be scared to customise and be specific about the CX experience you want to create.

Commercial consideration *when sourcing new technologies*



n | 831

Figure 7.11: What are the top three commercial considerations when sourcing new technology?

The ability to simply integrate with other systems is a *top commercial solution requirement*. Flexibility is also crucial as a *pay-per-use pricing model emerges as a key decision influencer*.

Key findings

Cost is acknowledged, above all else, as the most important element impacting new technology decisions. A deeper dive into the criteria that impacts the commercial mindset highlights the domination of omnichannel deliverables and that new systems must be able to integrate with other systems. If they don't, the future costs to remedy may be high, and it poses a significant risk to the strategic vision around CX.

Return on investment is pitched as the second top driver, but as the research indicates, organisations are struggling to measure and pull the required data to prove this properly. The fact that it's a consideration is positive.

Making up the top three selection criteria, and perhaps fuelled by the alternate procurement models enabled by new cloud solutions, and a desire for operating expenditure models, is the adoption of pay-for-use pricing models.

Why it matters: The requirement to integrate with other systems reflects a growing understanding of the broad reach of CX IT systems across the entire enterprise. Digital capabilities are commonly available as cloud-based, pay-per-use services, which meet the need of the enterprises for OPEX models and supporting flexible exchange of platforms.

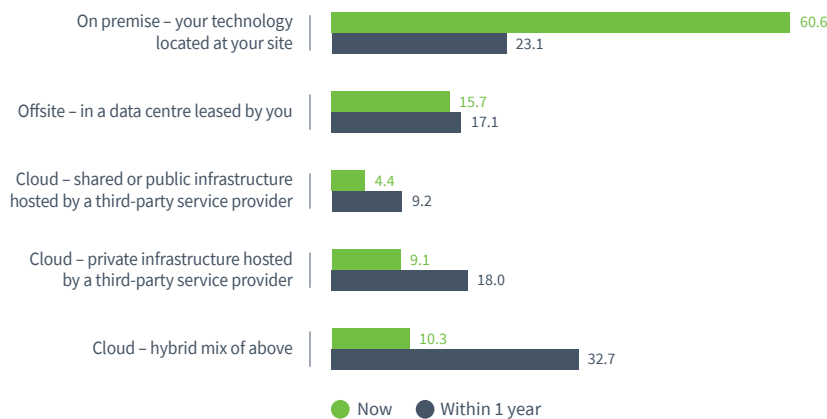
Accelerate your journey

Basic: Improve your management capabilities to facilitate the supervision and integration of CX technologies from various suppliers and sourcing models. It's important that you invest in change management skills and processes within your business, operation and IT teams.

Intermediate: Prepare yourself to measure return on investment by adding new metrics to your processes and organisational culture. These metrics need to drive the appropriate operational behaviours and validate CX contact management strategies. Realise that you need to create the ability to assess the returns from new technology investments.

Advanced: Know the real costs of your CX by building total cost of ownership models, which include organisational effort and ongoing change management requirements.

Technology *location*



n | 827

Figure 7.12: Where's your CX technology located?

60% plan to locate their technology in the cloud, and almost a quarter do so currently. One in five will lean towards a private cloud infrastructure.

Key findings

Wholly-owned technology models are gradually being replaced by cloud and hybrid solutions. Of the 76.3% organisations owning their own technology, 60.6% of that number is made up of on-premise solutions. The forecasts indicate a change in approach and that 59.9% of technology systems will soon be hosted in the cloud, as wholly-owned solutions decrease to just 40.2% (nearly half of what they are now).

Nearly a quarter currently operate cloud-based solutions, a number that's set to more than double in the next year. The area receiving most attention is hybrid cloud. It's not only the most popular cloud format today, it's set to treble from 10.3% to 32.7% by the end of the year. Hybrid cloud solutions are heavily acknowledged as helping connect legacy solutions to new technology, and facilitating the organisational journey towards omnichannel capability.

For some, private cloud solutions remain the sole option. While future plans are not quite as aggressive as those for hybrid cloud models, private cloud deployments are also set to double from 9.1% to 18.0%.

Why it matters: In some scenarios it doesn't always make sense for systems to be entirely cloud based, for example, connectivity to a legacy switch infrastructure may be on premise, with the rest in the cloud. Hybrid IT models are now forming the base of most architectures, as hybrid cloud/hosted solutions gain in popularity.

Accelerate your journey

Basic: Document your current and future CX roadmap independent of a sourcing model and depending on your business needs. Explore best of breed options for the desired capabilities.

Intermediate: Pick your sourcing option by assessing security and reliability, requirements for individual changes, stability of requirements and internal skills to manage hybrid models.

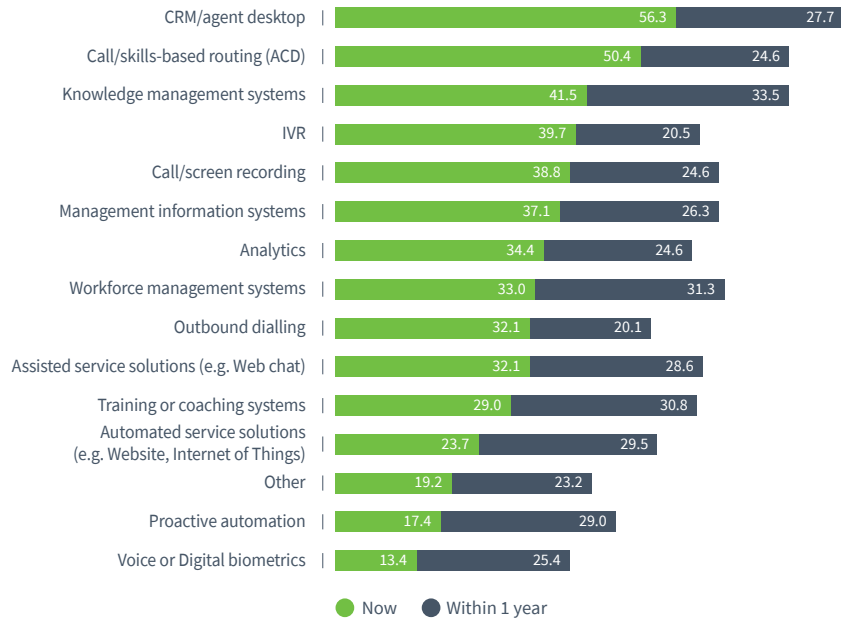
Drive innovation independently from the core, and adopt a methodology of adding functionality to an existing base by utilising the flexibility that cloud providers offer.

Advanced: Have a long-term plan for the development of core infrastructure. Take ownership of compliance, security, differentiated services and business systems, while accessing and adopting cloud-based services to create enhancements and flexibility.



It's almost ten years since cloud technology was first mentioned in the Global Benchmarking Report.

Technology in the *cloud*



n | 224

Figure 7.13: Users: What elements of your technology are hosted in the cloud?

A balanced cross-selection of *solutions are hosted in the cloud.*

Significant growth is being forecast, *indicating solutions are delivering users with the desired return.*

Key findings

As infrastructure models are re-shaped to incorporate cloud solutions, participants of the 2017 benchmarking report were asked to confirm what systems are currently being provided via cloud, and to provide an insight into their focus going forward. A cursory glance highlights that there's a very balanced cross-selection of solutions being hosted in the cloud.

The range of elements that are being targeted for cloud technology solutions within the next year is relatively narrow, at 20.1% for outbound dialling up to 31.3% for workforce management systems. In short, cloud options have expanded to span almost every solution type, and in many cases deployment intensity levels for cloud will nearly double.

The areas receiving most attention include three of the channels predicted to grow the most. These three channels are: automated services (including IoT), proactive automation techniques, and assisted service systems. It makes sense that niche solutions, such as voice or digital biometrics, are also high on the radar for cloud, and are being planned by 25.4% in 2017.

Why it matters: Cloud-based services promise commercial benefits and continuous evolution. However, base your decisions for cloud services on requirements regarding specific integrations and customisations to avoid being locked into standardised solution designs.

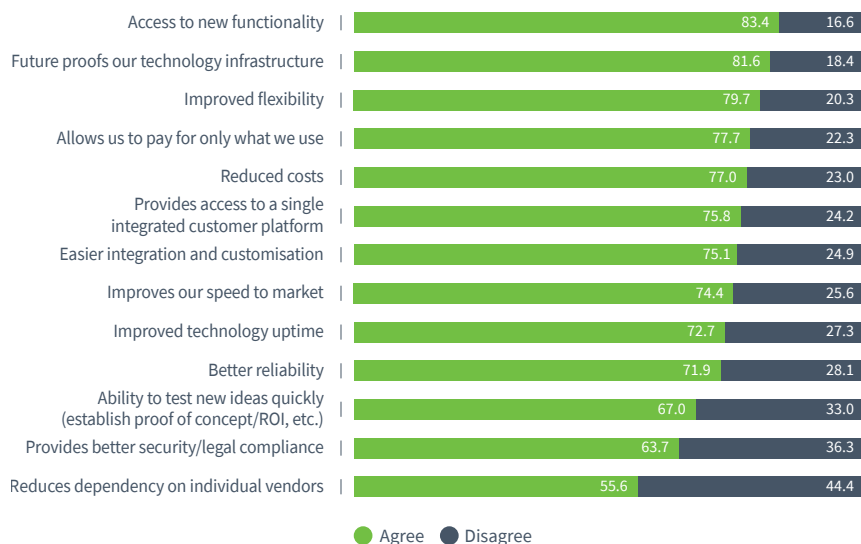
Accelerate your journey

Basic: Consider your technology systems and assess where cloud may enhance your current CX capability, and evaluate how it will contribute to your business objectives. Use it to expedite exploration and testing of innovative techniques (e.g. video, artificial intelligence, IoT or biometric services).

Intermediate: Align your CX strategy with an enterprise-wide cloud strategy and benefit from the availability of wider skills and economies of scale. Ensuring consistency of security and compliance.

Advanced: Create your strategy around cloud and on-premise infrastructure. Build your plan to enable flexibility, functionality, as well as enhancements. Focus strongly on unified communication systems that extend the CX operation capability (e.g. kiosk solutions, branch and backoffice integration).

Impact of hosted/cloud technologies



n | 219

Figure 7.14: Users: How has the use of hosted/cloud technologies affected your business?

Over eight in 10 say access to new functionality and future proofing is a key benefit.

Three quarters of users say hosting/cloud solutions enable omnichannel capability via integrated platforms.

Key findings

Existing users of hosted/cloud technologies continue to report a powerful impact on their businesses. Over eight out of 10 (83.4%) users providing feedback on their experiences with cloud, say that it has provided access to new functionality, with future proofing being a key benefit for another 81.6%. Of the sample, 77.0% say it reduces cost, 77.7% that it enables them to pay only for what they use, and 74.4% says it increases speed to market. These numbers are compelling.

Perhaps of most significance is that three quarters (75.8%) of users say cloud enables omnichannel capability via integrated customer management platforms. It seemingly creates a path towards eradicating past show-stoppers involving legacy systems, resource capability and cost.

More than two thirds (67.0%) are leveraging cloud solutions to test out new ideas and, at the same time, establish a proof of concept for new solutions. Security appears to be the only real dampener, but at 36.3% it's over-shadowed by the 63.7% who say cloud can offer better protection on security and legal compliance.

Why it matters: The analysis shows a strong appreciation of the benefits of cloud solutions driven by quicker access to new technology, commercial considerations and reliability. With all this excitement, organisations need to assess carefully how they run different components of their CX operation, alongside the flexibility and customisation cloud can offer.

Accelerate your journey

Basic: Define the core and extended capabilities (and performance outcomes) that your CX eco-system needs to provide. How are they delivering now, and where do they fall short?

Intermediate: Review the ability of your cloud services to be extended and customised. Is there an application programme interface layer you can use to map your specific requirements (e.g. workflow automation) and calculate the potential benefits cloud may provide?

Advanced: Carefully combine multi-tenant service offerings with dedicated hosted services, thereby eliminating the burden to run your own infrastructure by using a pay-per-use model.



In 2013, just 57% of companies believed cloud solutions would provide cost savings; only 26.4% believed it would enable compliance.

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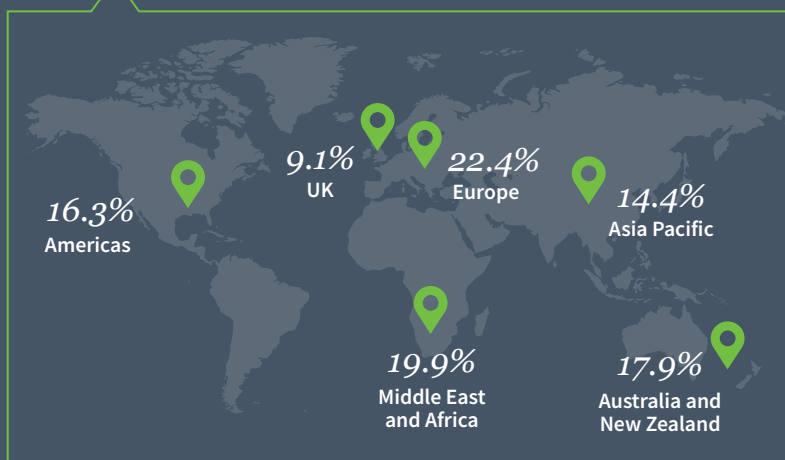


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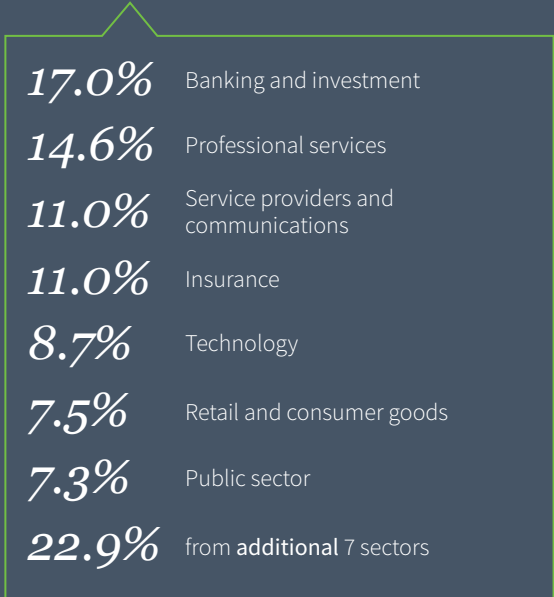
1351 participants | 80 countries | 14 industry sectors

Spanning all aspects of CX, data from our deepest sample in 20 years can be viewed at 10 different levels

Regional representation:



Representation by industry:



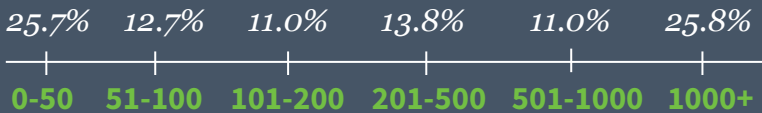
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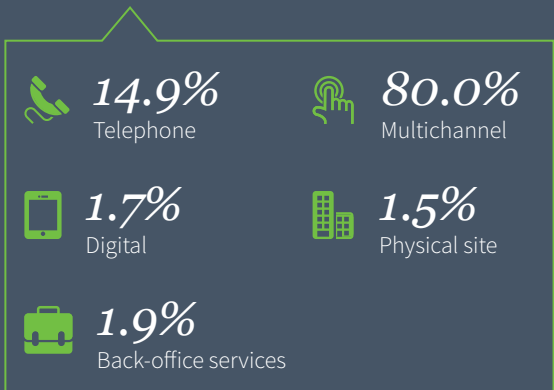
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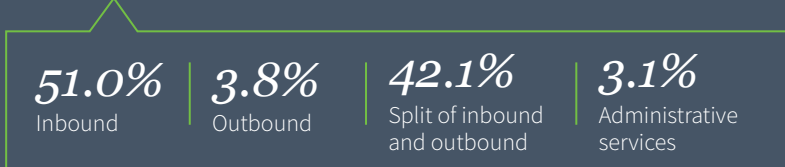
Number of employees:



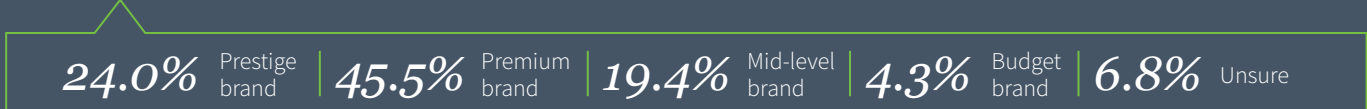
Operation type:



Interaction mix:



Brand positioning:



about the author

Richard Holmes



Benchmarking Report Manager, Dimension Data

Richard is driven to optimise global operations with best practice performance, and to research emerging trends to improve CX for clients. He has over 16 years of experience in CX and contact centres, and provides crucial insight for Dimension Data's Global Customer Experience Benchmarking Report. He has been a core member of the team for six years.

Sample specification

Research methodology

The findings of the 2017 Report are based on responses from 1,351 participants from 80 countries across Europe, Asia Pacific, Australia, Middle East and Africa, and the Americas, and spans across 14 industry sectors.

From contact centre to customer experience - the Global CX Benchmarking Report tracks an industry's evolution over 20 years.

We believe that our Report provides the only global research of its kind. We go beyond most other reviews, in that we provide key findings on the research, assessed at 10 levels, with reference to historic trend patterns. We also provide context, with guidance on steps towards best practice and how to accelerate positive business transformation.

The Report comprises seven core chapters, supported by an executive summary. We analyse over 950 data points across more than 90 charts. We review the benchmarking questionnaire annually and refresh survey topics, questions and response options to balance historical reference points with the latest focus areas and emerging trends.

View data at 10 levels including: geography, size, sector, brand positioning, service, contact, operation and provider type, as well as historic data trends.

Data collection

Participants are navigated intelligently through the survey, based upon their responses and services capability. We provide respondent sample numbers for each question, and results are validated in accordance with standard market research rules. We also employ a robust data integrity check process that includes validations of participants' response content, separate outlier assessments across data points, and result authenticity, before submission towards a final dataset.

Participant benefits

Each participant completing our annual benchmarking questionnaire receives:

- a free electronic copy of the latest Global CX Benchmarking Report, valued at USD 1,750
- access to our online Benchmarking Results Portal
- year-round benchmarking assets ranging from vertical reports and summary presentations to infographics, and more

Subscribe now at: www.dimensiondata.com/benchmarking

Privacy and data security

Your privacy

We stringently protect all data and ensure the privacy of all participants' information. We only publish the company names of participants who provide us with express permission to do so. Our full privacy policy can be accessed via our CX Benchmarking website: www.dimensiondata.com/benchmarking

Data security

The security of participants' data is extremely important to us. To ensure confidentiality and security, the data is hosted in secure data centres. Data is used only for the purpose of research and is accessible only by the benchmarking research team, in line with our privacy policy.

Our content

The Report is designed to provide context and easy-reference access to the information sets:

- Each chapter begins with a summary overview infographic.
- This is followed with a short summary of key findings, leading into a Q&A style interview with the chapter's author, who provides insights on findings and expert guidance, based upon their relevant experience.
- Feature articles on trending topics enrich the content.
- Detailed analytical findings follow each chart and table, with recommendations on how to implement best practices.

Typically presented as global statistics, all of the data in the 2017 Global CX Benchmarking Report can be accessed interactively on our online Benchmarking Results Portal for a more customised view. The Portal enables multidimensional filtering of the data, for example, by region, sector, and size, or at any time, by a single filter.

Benchmarking Results Portal

Compare your organisation's performance and results to a more specific benchmark by visiting our online benchmarking portal:
<https://dimensiondata.2017cxbenchmark.com/portal/?trg=GCXBR>

Referencing the benchmarking results

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Industry associations and partners

We thank the following industry associations and groups. They each provide valuable resources on CX by helping support our research and broadening the Report's reach by sharing it amongst their local membership communities.

Dimension Data encourage you to leverage the available support services, and to engage with your local association. Please visit the websites below for further information.

International

CXI Today

<https://cxi.today>

Americas

Contact Center Network Group (CCNG) Magnet

<https://ccng.com/magnet-program>

Customer Care Institute (CCI)

<https://www.customercare.com>

Greater Toronto Area Contact Centre Association

<http://www.gtacc.ca>

Manitoba Customer Contact Association

<http://mcca.mb.ca>

Society of Workforce Planning Professionals

<http://www.swpp.org>

Congreso Regional De 2017 Interaction Con Clientes

<http://www.criclatam.com.ar>

Asia Pacific

Call Center Planet

<http://benprise.ning.com>

Contact Centre Association of Singapore (CCAS)

<http://www.ccas.org.sg>

Customer Relationship Management and Contact Centre Association of Malaysia (CCAM)

<http://www.ccam.com.my>

Hong Kong Call Centre Association (HKCCA)

<http://www.hkcca.com>

Indonesia Contact Center Association (ICCA)

<http://icca.co.id>

NASSCOM (India)

<http://www.nasscom.in>

Thai General Insurance Association

<https://www.tgia.org>

Thailand Contact Centre

<http://www.callcenterthailand.net/home/index.php>

Australia & New Zealand

AusContact Association

<http://www.auscontact.com.au>

Contact Centre Institute of New Zealand (CCiNZ)

<http://www.ccinz.org.nz>

Telecommunications Users Association of New Zealand

<http://tuanz.org.nz>

Europe

CCMA – Netherlands

<http://www.vccma.nl>

Contactcentres.be

<http://www.contactcentres.be>

European Confederation of Contact Centre Organisations (ECCCO)

<http://www.eccco.org>

Klatenservice Federatie (KSF)

<http://www.klatenservicefederatie.nl>

Insights: The Middle East Call Centre 2017 (MECC)

<http://www.insights-me.com/callcentre/>

NACC – Russia

<https://callcentreguru.ru>

The Forum

- Professional Planning Forum
- Quality & Customer Experience Forum
- Data, Analytics and Insight Forum
- Customer Strategy & Leadership Forum

<http://theforum.social>

Swiss Contact Centre Association (CALLNET.CH™)

<http://callnet.ch>

Middle East & Africa

BPeSA (South Africa)

info@bpsa.org.za

Contact Centre Management Group (CCMG)

www.ccmg.org.za

Independent Contact Centre Consultants Association (ICCCA)

<http://www.iccca.co.za>

UK

Call Centre Management Association (CCMA)

<http://www.ccma.org.uk>

CallNorthWest

www.callnorthwest.org.uk

Contact Centres

<http://contact-centres.com>

UK Contact Centre Forum

- South East Contact Centre Forum (SECCF)
- London Contact Centre Forum (LCCF)
- Midlands Contact Centre Forum (MCCF)
- Yorkshire Contact Centre Forum (YCCF)

<http://uk-ccf.co.uk/>

The Welsh Contact Centre Forum

<http://www.welshcontactcentreforum.co.uk>

Systems partner

InsightNow

For more information please visit www.insightnow.co.uk

Participant acknowledgements

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Access One
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STM (Société de transport de Montréal)
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