



Global Benchmarking Series, 2022

Contact Center Outsourcing

March 2022

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01

Introduction

Preface

Key Findings

Preface

We appreciate the overwhelming response that we have received to the first two reports of our ‘Global Benchmarking Series, 2022’. Keeping up with our promise to touch upon different aspects of importance to CX practitioners we now bring the third of the series to you which focuses on ‘Contact Center Outsourcing’.

This report highlights the strategy, manpower aspects and technologies that organizations that outsource and BPOs focus on. The report attempts to provide a holistic view of all the areas of information that can be of interest to outsourced set-ups in delivery of exceptional customer experiences. The report also includes information on organizations’ plans around their offshore operations and most common offshore destinations.

We hope that the report will support you in your outsourcing decisions and will provide greater clarity on some of the areas where you look forward to making ‘insights-based decisions’.

Thank you for patronizing our work and we assure you an insightful 2022 for delivering best-in-class customer care operations.

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CEO, Asia Pacific Region
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Key Findings



The Business Process Outsourcing (BPO) Industry

- **Improving service journeys, Performance data and New technology** are the strategic objectives that BPOs view as **top 3 focus areas** for next 24 months
- **Improving customer experience, difficulty in recruiting staff and training/ agent development** emerge as the top challenges faced by Business Process Outsourcing Providers (BPOs)

Outsourcing Strategy

- The top **reason for organizations to outsource operations is cost reduction**, followed by **flexibility to ramp up or down**
- **46%** of respondents state their **organizations outsource** some of their operations. Of these, **64%** state that outsourced operations are **completely onshore**
 - **‘Inbound calls’ is the most commonly outsourced channel** as stated by respondents from organizations and BPOs
 - **‘Accounts Enquiries / Billing Issues’** are seen as most common **transactions supported through onshore operations**, while it is **‘Technical Support’ in case of offshore operations**
- Only **46%** of the organizations that outsource were **very satisfied or satisfied with their BPOs**. Frequency of reviews impacts satisfaction - organizations that have with **monthly reviews with their BPOs are 1.3x more satisfied**
- While **Per FTE is the most used commercial model** when outsourcing, **15%** of respondents state their organizations use **more than one pricing model** when outsourcing some of their operation

Technology Adoption among BPOs

- While around **70%** of respondents state that their organizations currently use **call recording and telephony systems**, adoption is lower for **Speech Analytics/Natural Language Processing/ Speech Analysis** and **Customer Service Mobile Apps**
- With regards to **Quality Assurance** programs, **25%** of respondents state their organizations **use only a manual tool**. **56%** state their organizations **use a combination** of manual and quality-specific software solution
- For **Workforce Management**, **85%** of respondents state their organizations **use a tool** and **38%** state **there are plans to refresh/change/upgrade the WFM tool/software**

People Management

- **64%** of respondents from BPOs state that frontline staff **attrition is up to 40% in a year**
- While **75%** of respondents state that **average absenteeism over the last 12 months has been up to 10 days**, **13%** state that the absenteeism has been **higher than 20 days** for their organizations
- **71%** of the respondents representing BPOs stated their organizations have **Work at Home (WAH) employees**– with a high proportion of respondents stating they allowed frontline staff to WAH. **Connectivity issues and employee engagement** are top **challenges** in managing WAH employees



02

The Business Process Outsourcing (BPO) Industry

An Overview

Objectives

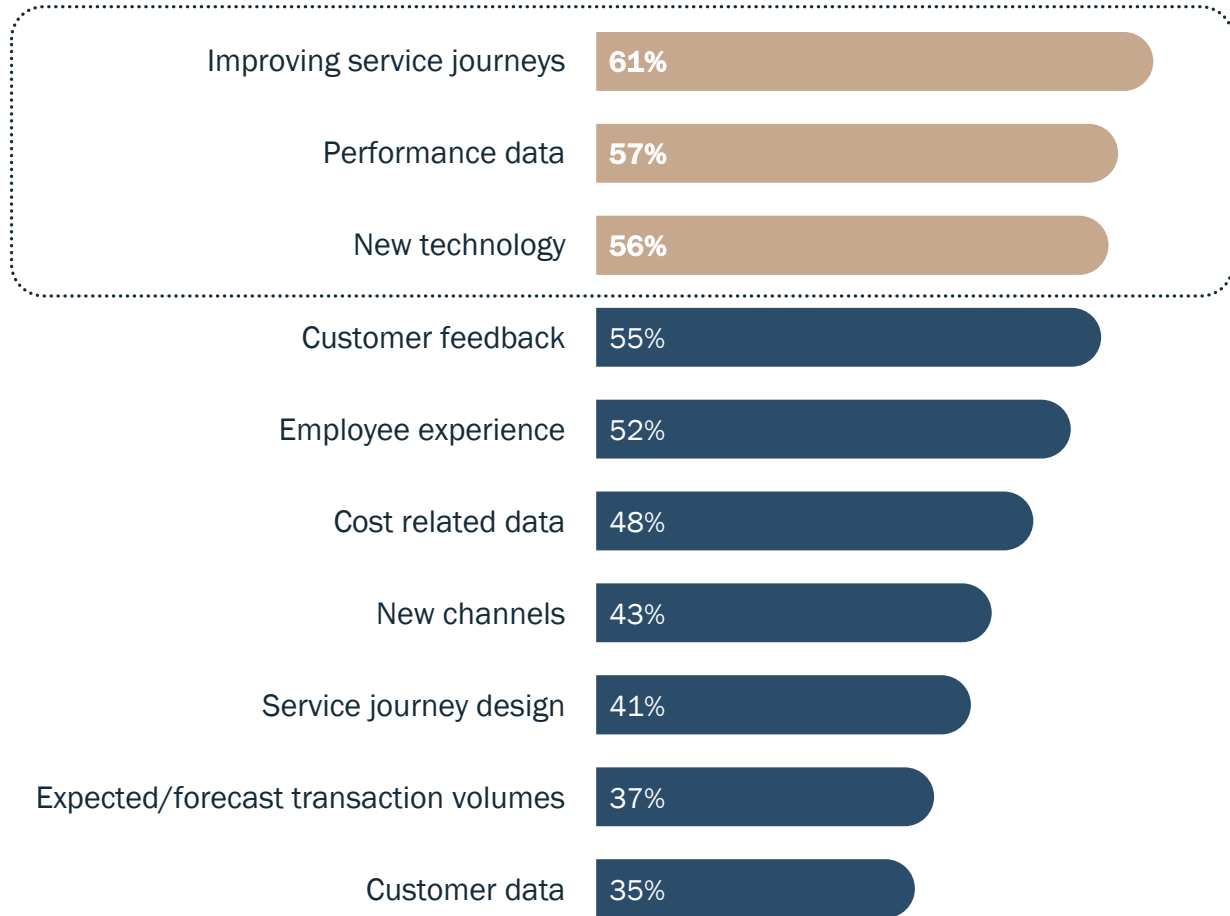
Challenges to be Addressed

The Global Business Process Outsourcing Industry

Key BPOs

Key Objectives of BPOs

Which of the following strategic objectives are you focused on over the next 24 months? (Select all that apply)



Top objectives for BPOs include:

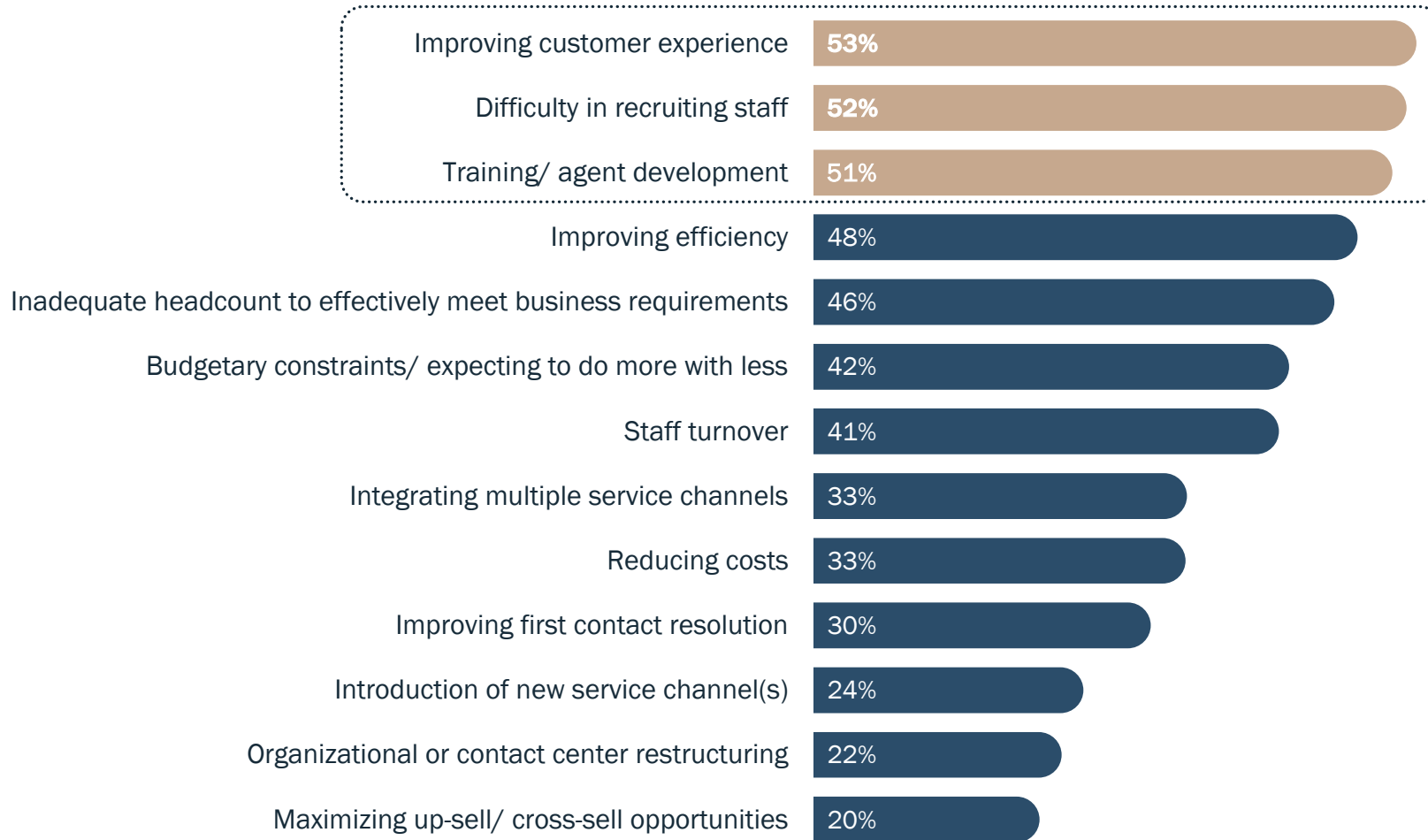
1. Improving service journeys
2. Performance data
3. New technology

Objectives where BPOs have least focus over the next 24 months:

- Customer data
- Expected/forecast transaction volumes

Key Challenges Faced by BPOs

Which of the following challenges is your organization facing in service delivery? (Select all that apply)

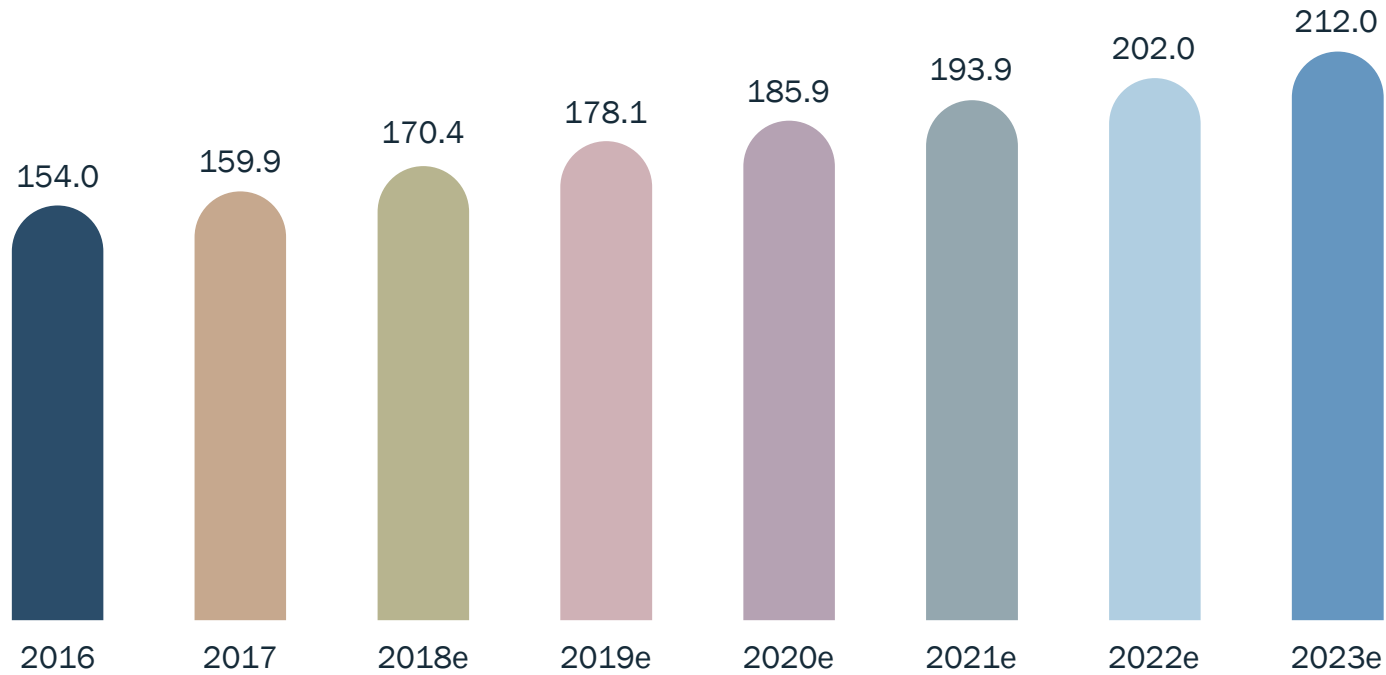


Top challenges for BPOs include:

1. Improving customer experience
2. Difficulty in recruiting staff
3. Training/ agent development

The Global Business Process Outsourcing Industry

Spends on BPO (US\$ Bn)



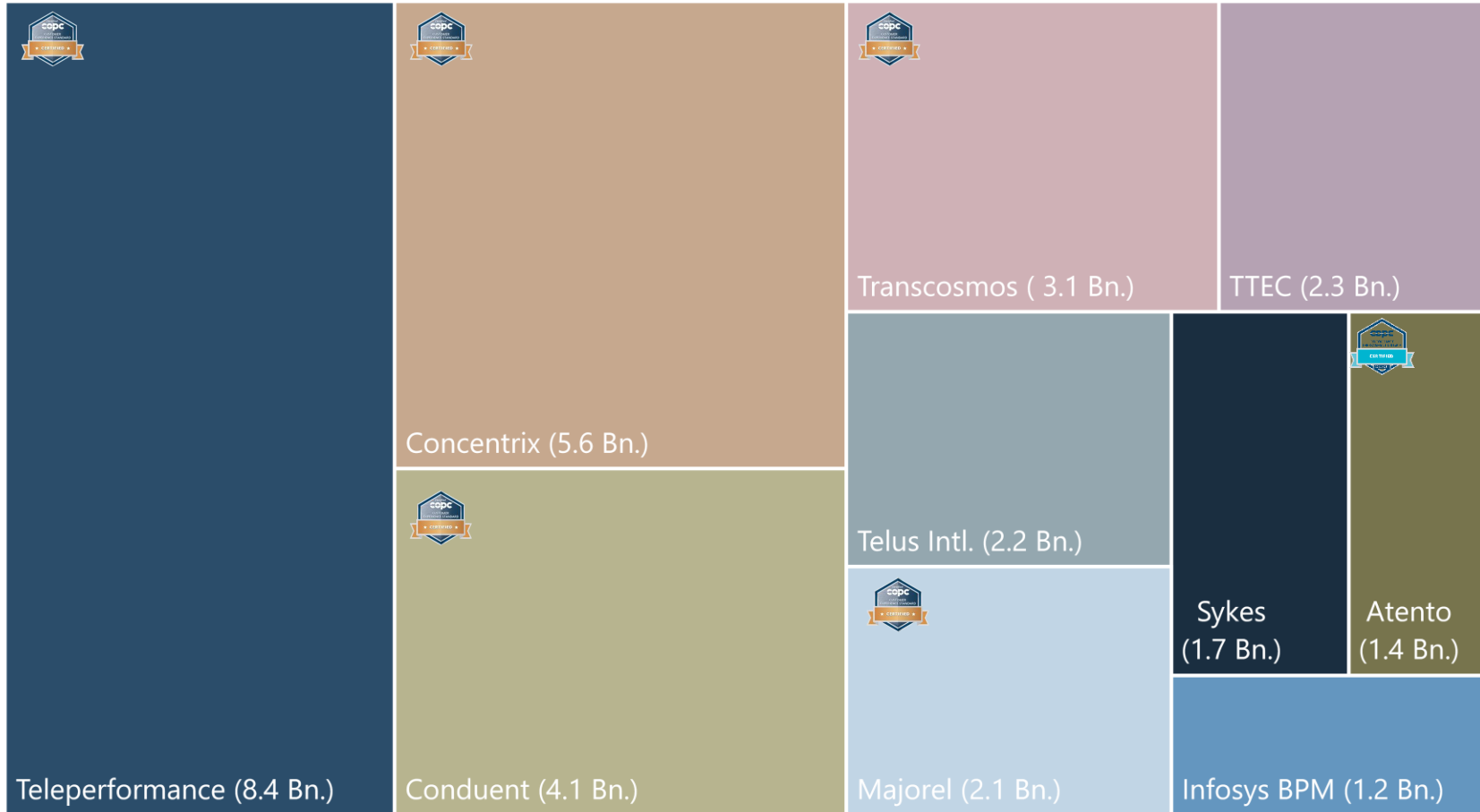
The global BPO industry is estimated to grow at a CAGR of 5.4% between 2019 and 2023

The growth is going to be fueled by cost reduction through labor arbitrage and organizations preferring to focus on core competencies



Source: Deloitte Whitepaper - Outsourcing and Shared Services 2019-2023

Key BPOs – by Revenue (USD)



Teleperformance, Concentrix and Conduent are three of the largest BPOs, contributing more than 50% of the combined total revenues of the ten key BPOs.

Source: Latest Financial Reports, 2021, 2020
Please refer to Appendix (Slide 51 for further details on the financial reports referred to)

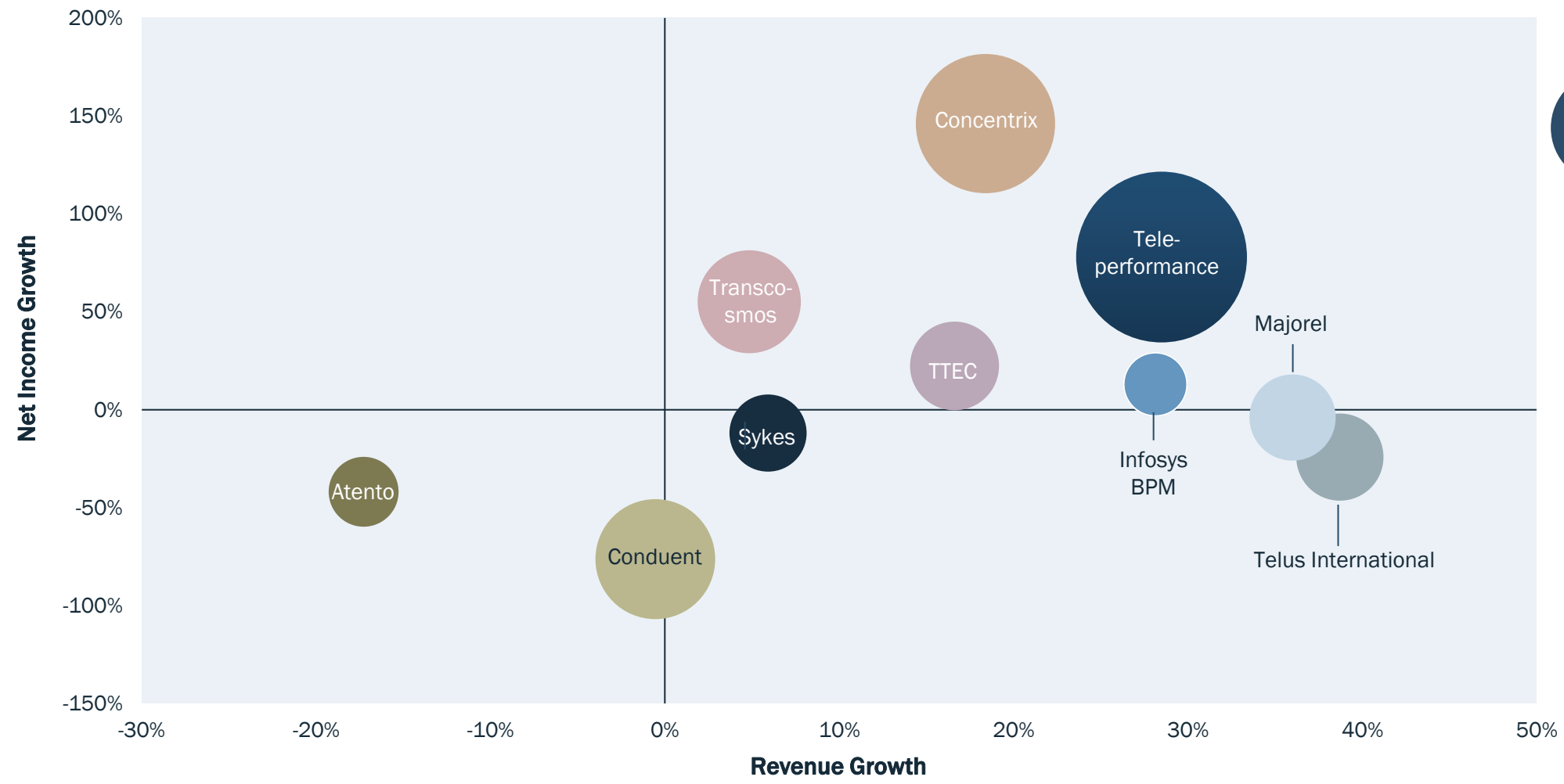


Has one or more sites/programs certified to the COPC CX Standard or currently pursuing certification.



Has one or more sites/programs accredited to the COPC Performance Improvement Criteria or currently pursuing accreditation.

Key BPOs Growth Rates – Revenue and Net Income



\$

Of the ten key BPOs that COPC Inc. studied financial details for, five reported a growth in net income while the others reported a drop compared to the previous year

Source: Latest Financial Reports, 2021, 2020, 2019
 Please refer to Appendix (Slide 46 for further details on the financial reports referred to)

Other BPOs with capabilities across geographies and languages (1/2)

In alphabetical order.....



24-7 InTouch
 Headquartered at Winnipeg, Canada
 20,000 employees
 25 centers, 9 countries
 30+ languages supported



Alorica
 Headquartered at Irvine, United States
 100,000 employees
 130 centers, 14 countries
 30 languages supported

Capita
 Headquartered at London, United Kingdom
 61,000 employees
 31 centres, 5 countries
 30 languages supported

Firstsource
 Headquartered at Mumbai, India
 27,000 employees
 39 centres, 4 countries



Genpact
 Headquartered at New York City, United States
 100,000 employees
 90+ centres, 21 countries
 30 languages supported

Hinduja Global Solutions Limited
 Headquartered at Bengaluru, India
 40,000 employees
 59 centres, 7 countries



IGT Solutions
 Headquartered at Gurgaon, India
 18,000 employees
 23 centres, 10 countries
 25 languages supported

Probe BPO
 Headquartered at Melbourne, Australia
 17,000 employees
 30 centres, 4 countries

Qualfon
 Headquartered at Highland Park, United States
 16,000 employees
 27 centres, 6 countries

Other BPOs with capabilities across geographies and languages (2/2)

In alphabetical order.....

Sitel
 Headquartered at Miami, United States
 160,000 employees
 160+ centers, 40 countries
 50 languages supported

Startek
 Headquartered at Greenwood Village, United States
 40,000+ employees
 46 centres, 13 countries
 36 languages supported

Sutherland Global Services
 Headquartered at Pittsford, United States
 38,000 employees
 58 centres, 15 countries
 21 languages supported


TaskUs
 Headquartered at New Braunfels, United States
 40,100 employees
 23 centres, 10 countries
 40+ languages supported



TDCX
 Headquartered at Singapore, Singapore
 14,000 employees
 26 centres, 12 countries
 40+ languages supported



Transcom
 Headquartered at Stockholm, Sweden
 30,000 employees
 70 centres, 26 countries
 33 languages supported



VXI Global Solutions
 Headquartered at Los Angeles, United States
 35,000+ employees
 42 centres, 8 countries



Webhelp
 Headquartered at Paris, France
 75,000 employees
 200+ centres, 55 countries
 80 languages supported

WNS
 Headquartered at Mumbai, India
 49,610 employees
 55 centres, 12 countries

03

Outsourcing Strategy

Strategy

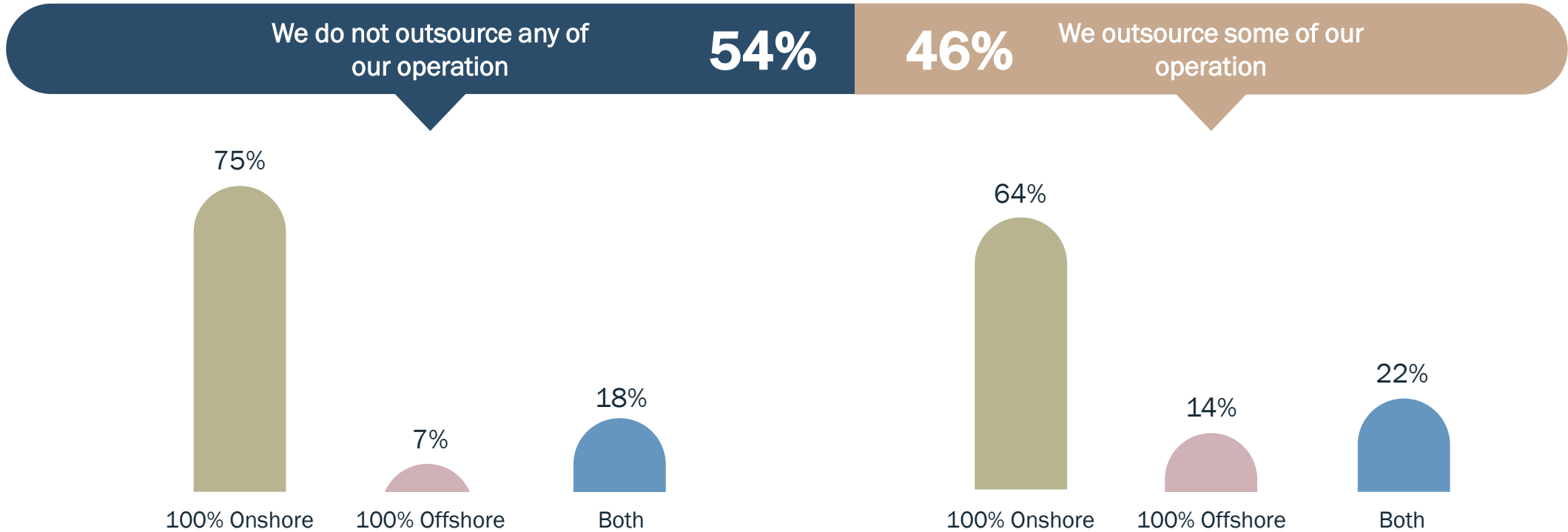
Outsourced Operations

Future

Why outsource?

Outsourcing Strategy

Which of the following best describes your operations?



46% of respondents stated **their organizations outsource** some of their contact center operations – of these 64% stated that they have only onshore operations

Outsourced Operations – Reasons for Outsourcing

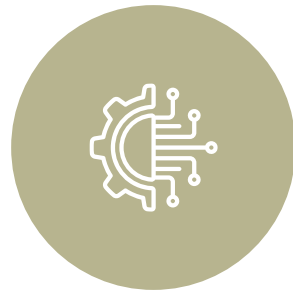
Rank the following in order of importance in terms of why your organization outsources?



Cost reduction



Flexibility to ramp up or down quickly



Technology capability



Performance management (outsourcers are experts in contact centers)



Out of hours support



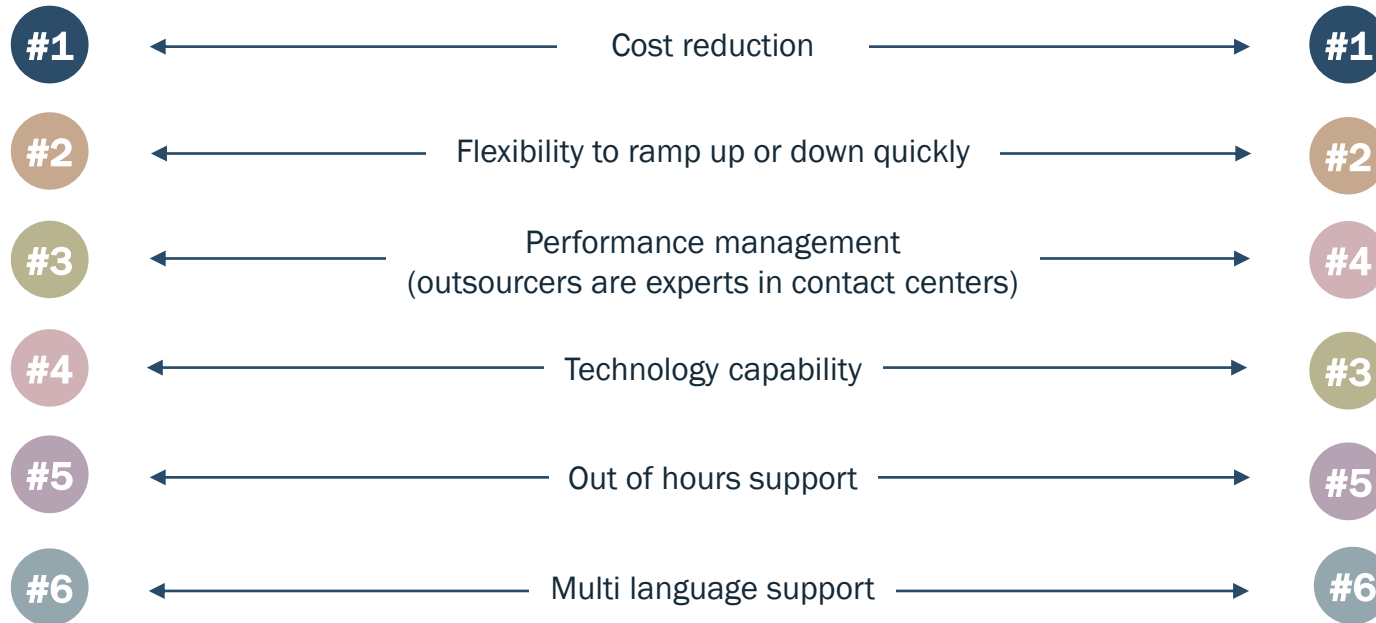
Multi language support

Unsurprisingly, '**Cost reduction**' emerges as the top reason for organizations to outsource their contact center operations

BPOs' View on 'Why Clients Outsource?'

Rank the following in order of importance in terms of why you think your clients outsource their customer care operations? (BPO VIEW)

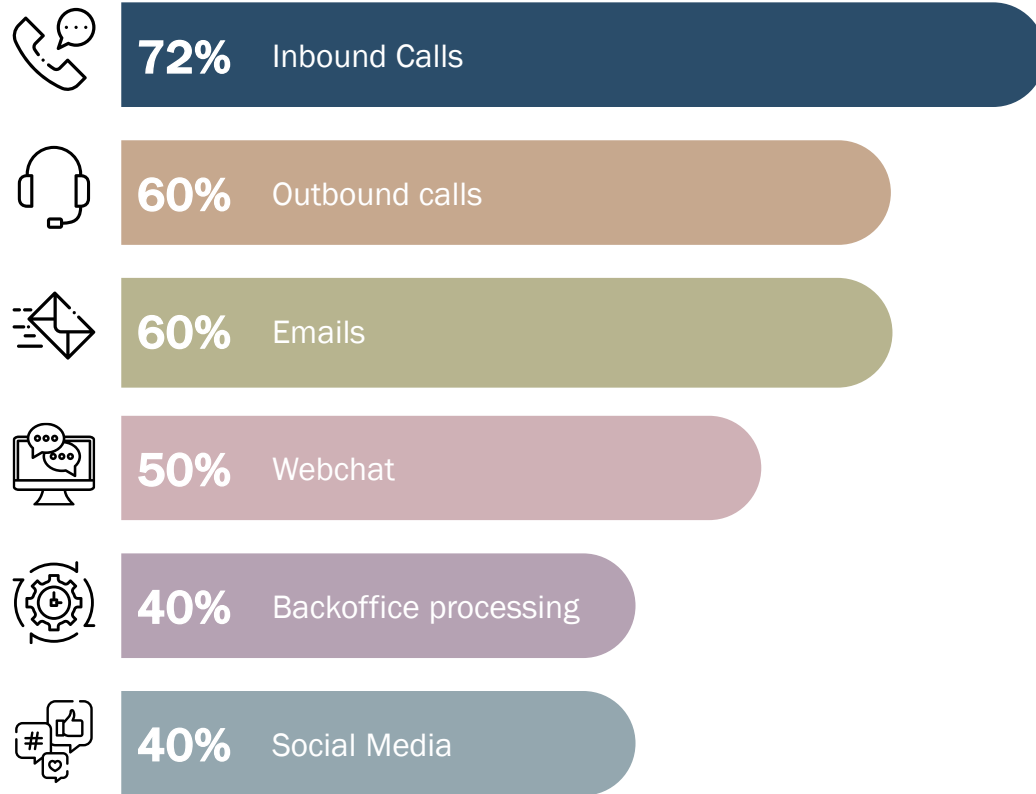
Rank the following in order of importance in terms of why your organization outsources? (CLIENT VIEW)



'Cost reduction' and **'flexibility to ramp up or down'** are the top reasons stated by both the BPOs and the users of outsourcing services

What Operations are Outsourced Onshore?

Channels outsourced onshore



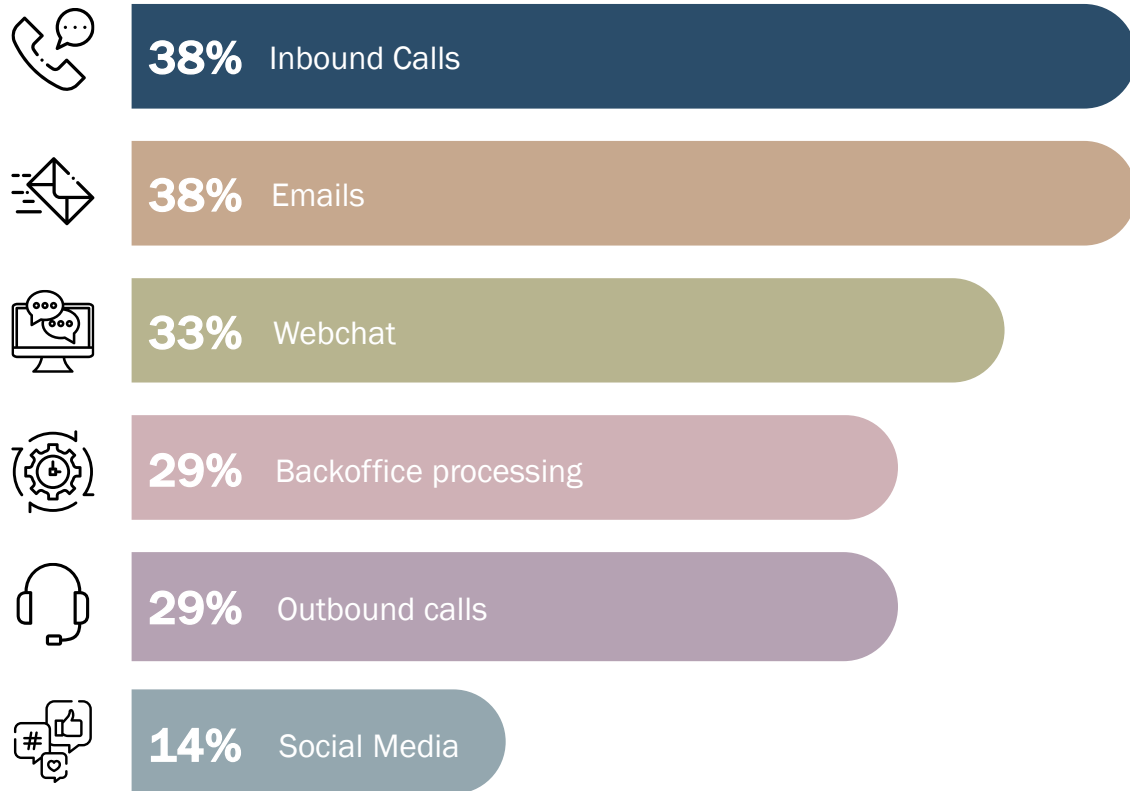
Transactions outsourced onshore



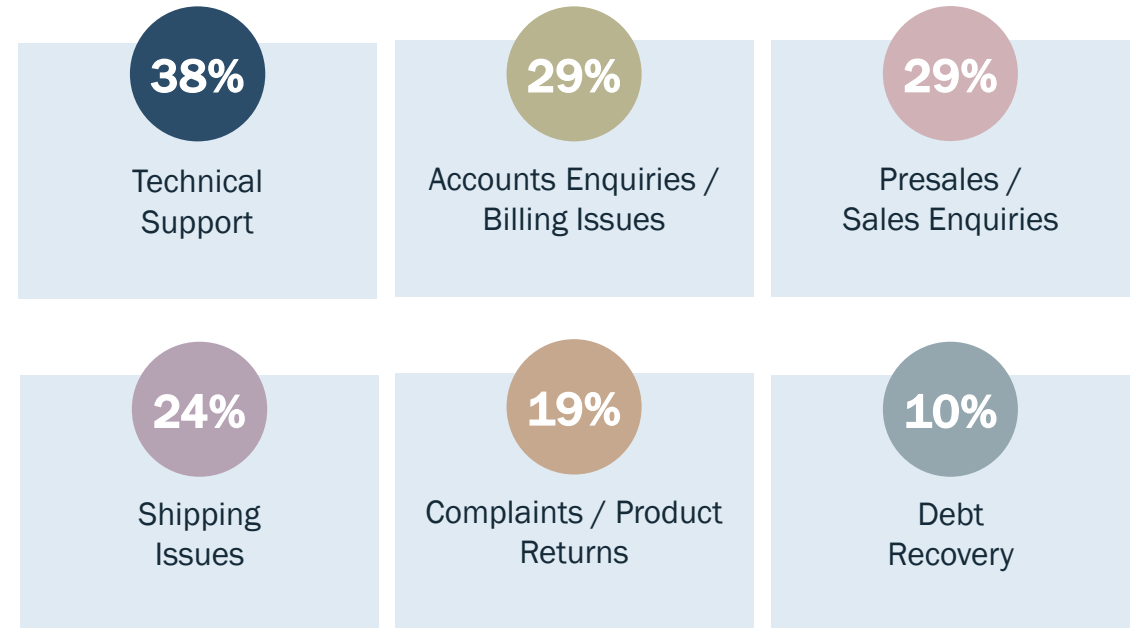
60% of respondents stated their organizations have onshore operations related to **'Accounts Enquiries / Billing Issues'**

What Operations are Outsourced Offshore?

Channels outsourced offshore



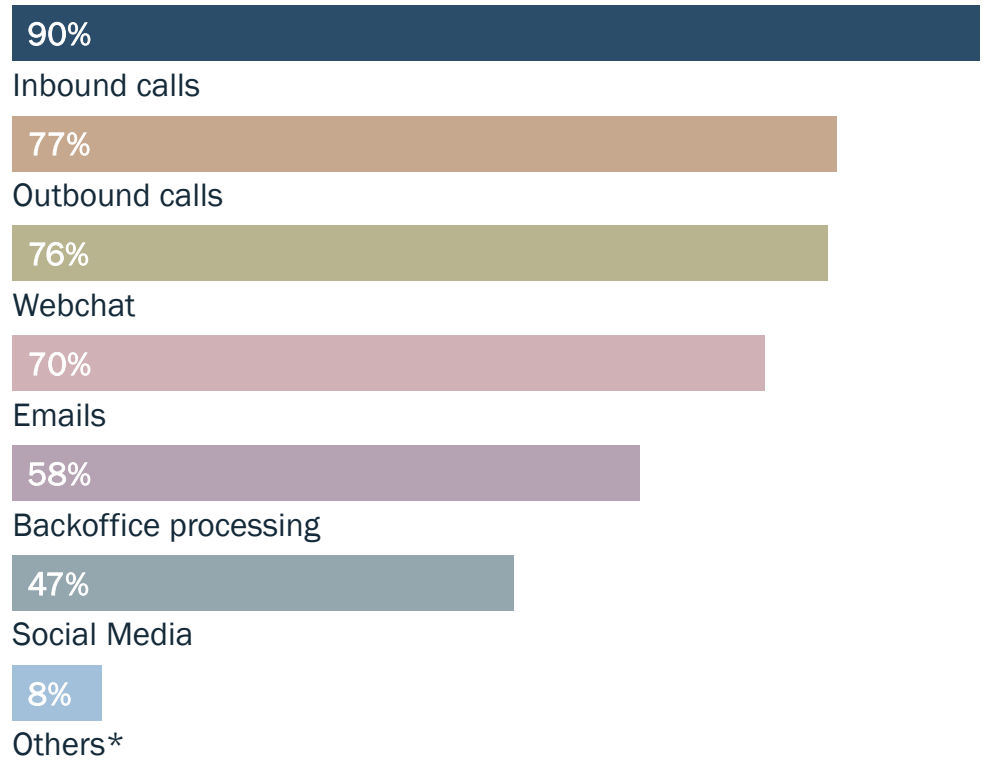
Transactions outsourced offshore



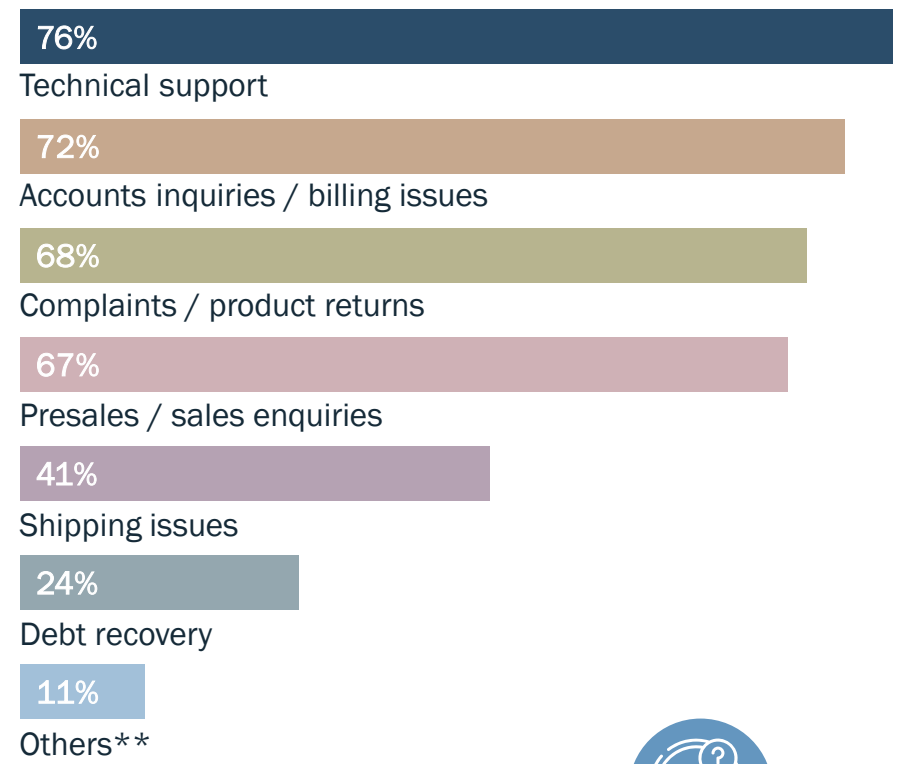
38%
of respondents stated their organizations have offshore operations related to **'Technical Support'**

Channels and Transactions Commonly Supported by BPOs

Channels supported



Transaction Types supported



90% of the respondents representing BPOs stated they provide support in inbound calls
 Most common types of transactions supported include 'Technical Support' and 'Accounts Inquiries / Billing Issues'



* Others include Messengers (WhatsApp), SMS, Mail etc.) ** Others include Order Management, Surveys, Insurance Claims, After Sales, Dispute Management etc.

Outsourced Operations – Plans for Onshore and Offshore Operation

Plans for Onshore operation

Plans for Offshore operation

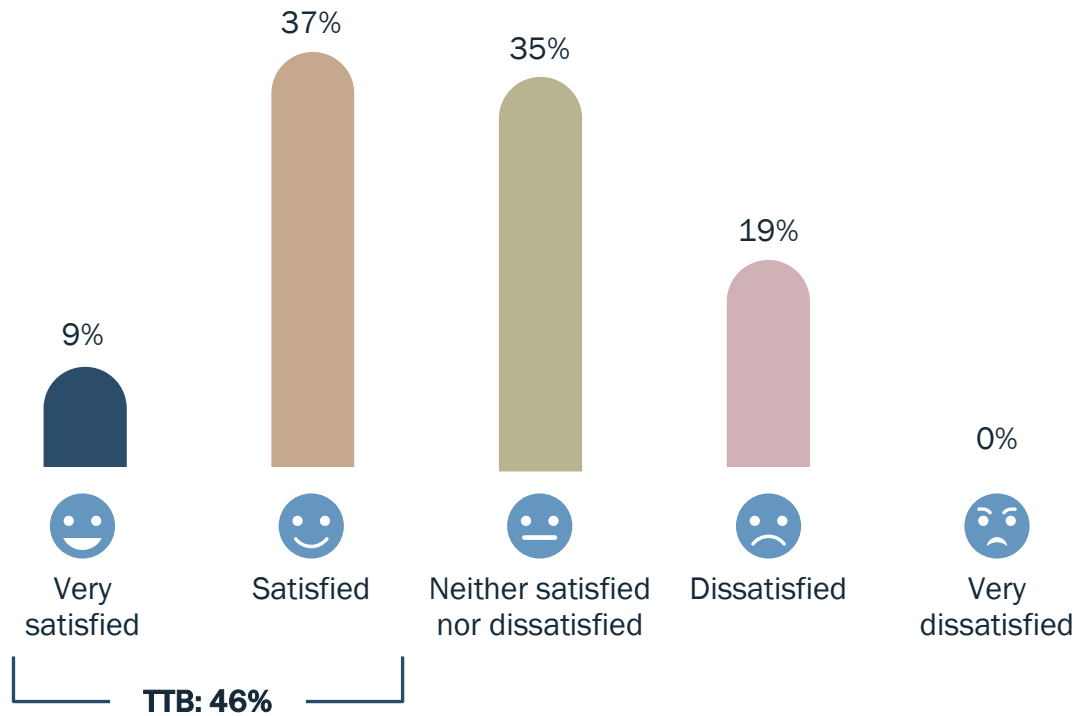


51% of the respondents stated their organizations intend to expand the proportion of their outsourced **onshore** operations

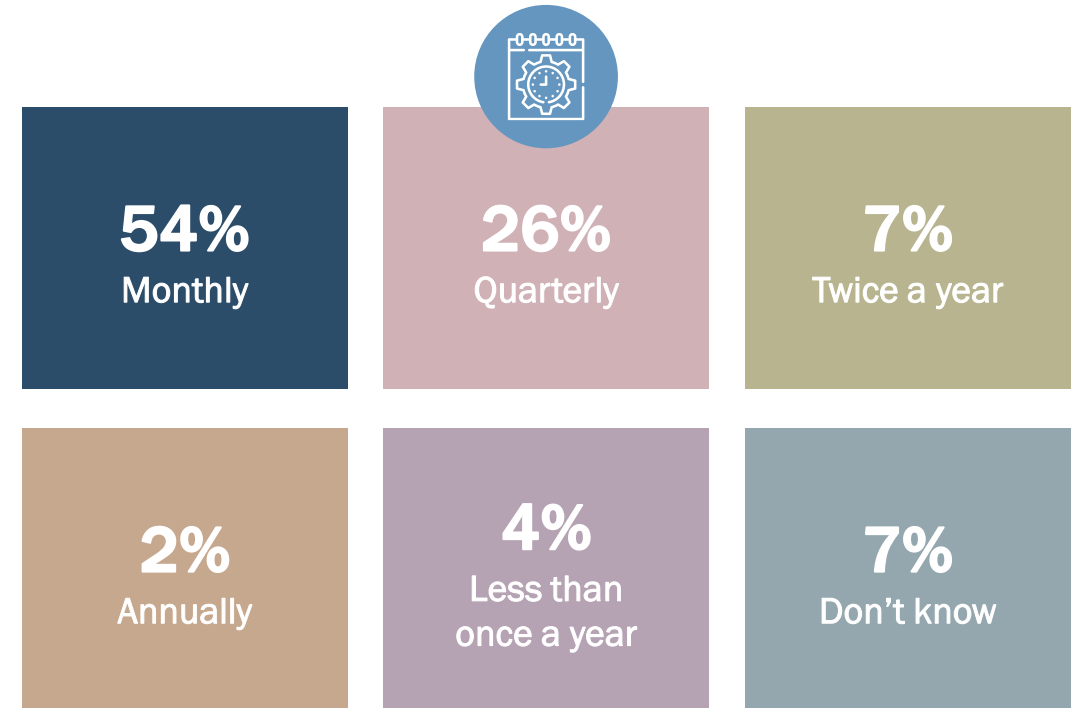
53% of the respondents stated their organizations intend to expand the proportion of their outsourced **offshore** operations

Outsourced Operations – Managing BPOs | Satisfaction and Formal Reviews

How satisfied are you with your outsourcers' performance?



How often do you perform formal business reviews with your outsourcer? (Select all that apply)



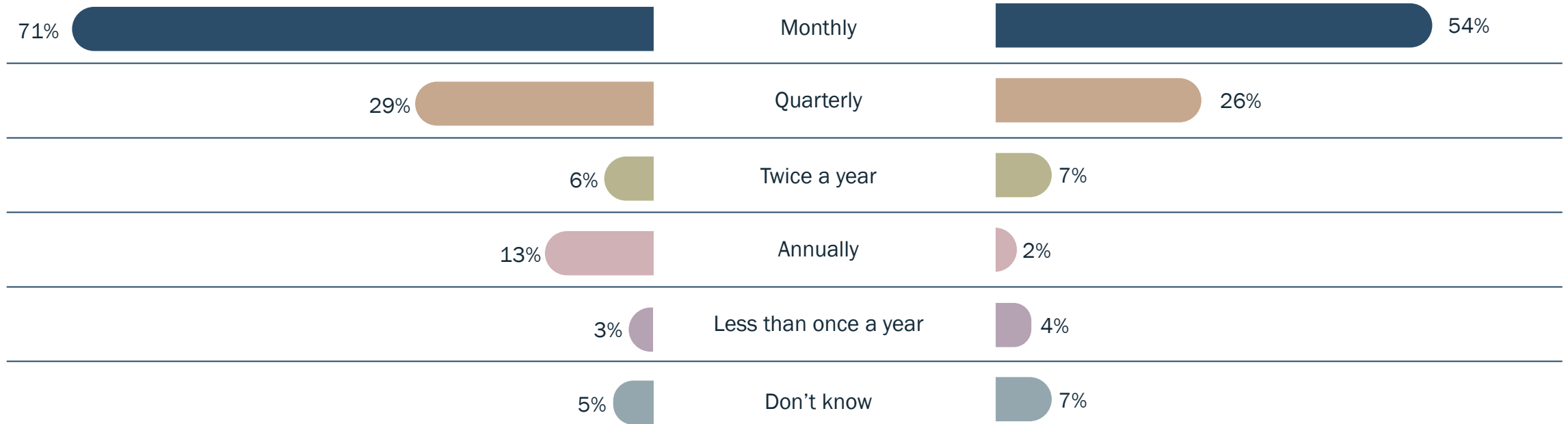
Only **46%** of respondents from organizations that outsource stated they were satisfied (TTB%) with their BPOs. We observed that organizations which have **frequent (monthly) formal business reviews** with their BPOs, were **1.3x more satisfied**

TTB% - Very satisfied % + Satisfied %

BPOs' view on Formal Reviews with Clients

How often do your clients perform formal business reviews with you? (Select all that apply) (BPO VIEW)

How often do you perform formal business reviews with your outsourcer? (Select all that apply) (CLIENT VIEW)

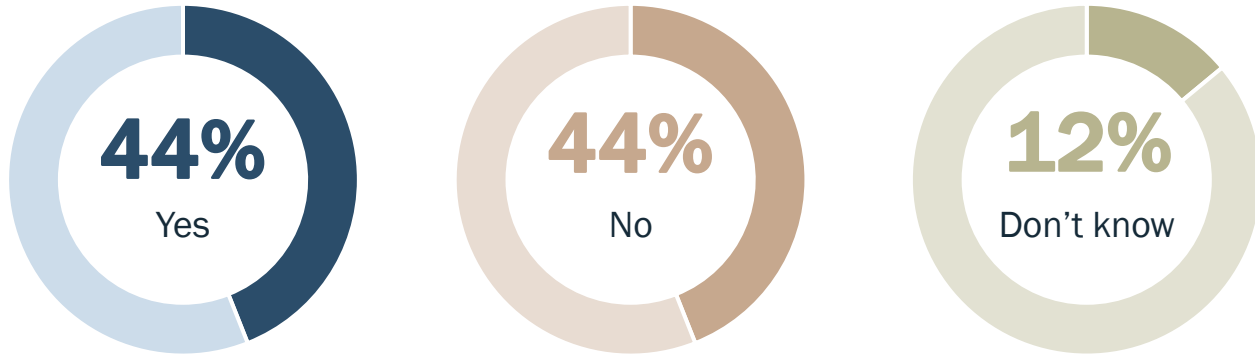


The most common frequency at which 'formal business reviews' are conducted with BPOs is on a **monthly basis**



Using Vendor Management Organizations (VMOs) for Outsourcing

Do you have a formal Vendor Management Organization (VMO) in your company to engage with outsourcers?

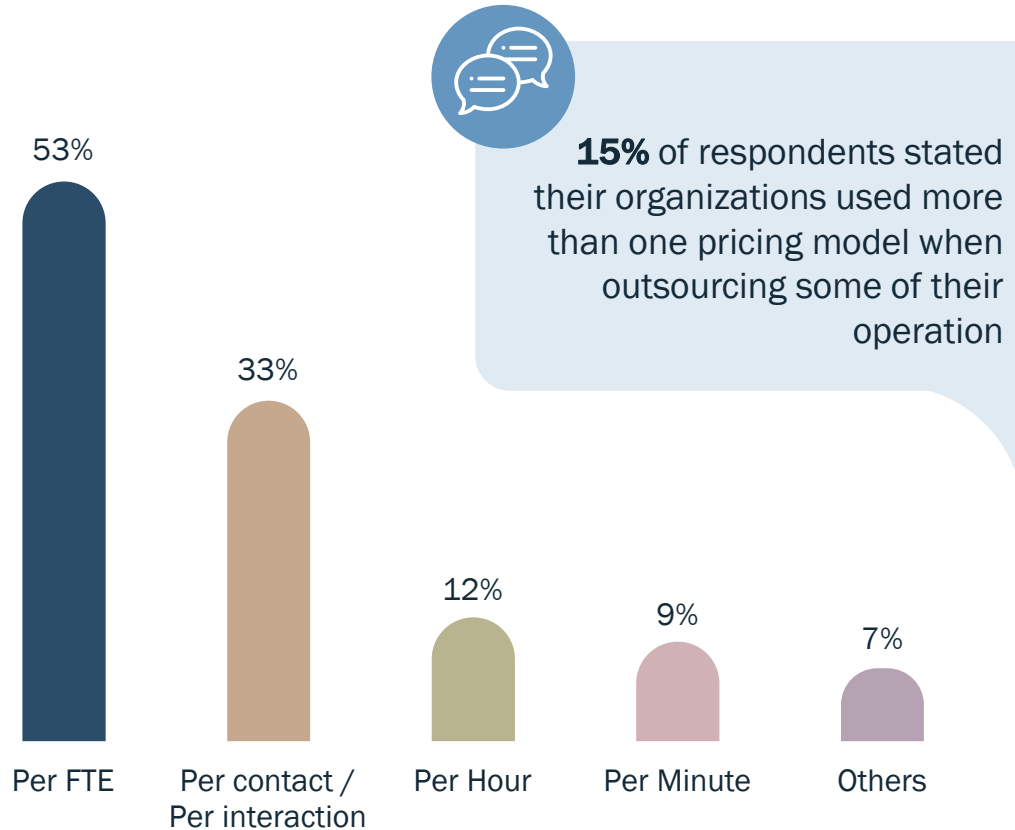


A VMO is an organizational unit or group of individuals, typically within the client enterprise, responsible for managing at least a portion of the enterprise's programs with BPOs/OSPs

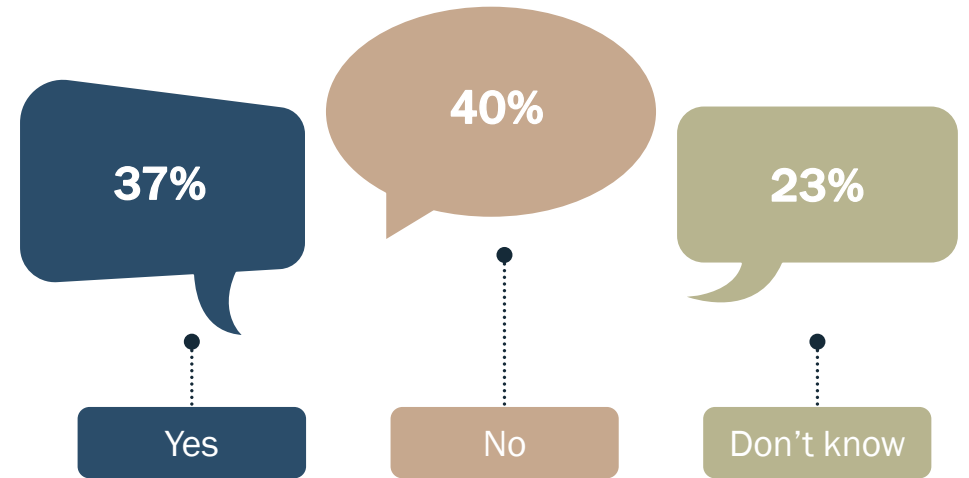
Organizations with a formal VMO are **1.2x more likely to be satisfied** with their BPO providers

Commercial Models Used While Outsourcing

What commercial model(s) do you use when outsourcing?



Do you also use a 'risk/reward' component as part of the commercial pricing model that you use?



A similar proportion of respondents stated they also use / do not use 'risk/reward' model in combination with commercial models used to outsource

Organizations with a VMO are 2x more likely to use a 'risk/reward' model in combination with other commercial models

* Others includes models such as minimum cost per month, cost per additional ticket etc.

04

Technology Adoption *among BPOs*

Solutions for Contacts Centers

Technology Adoption Lifecycle

Adoption of technology for:

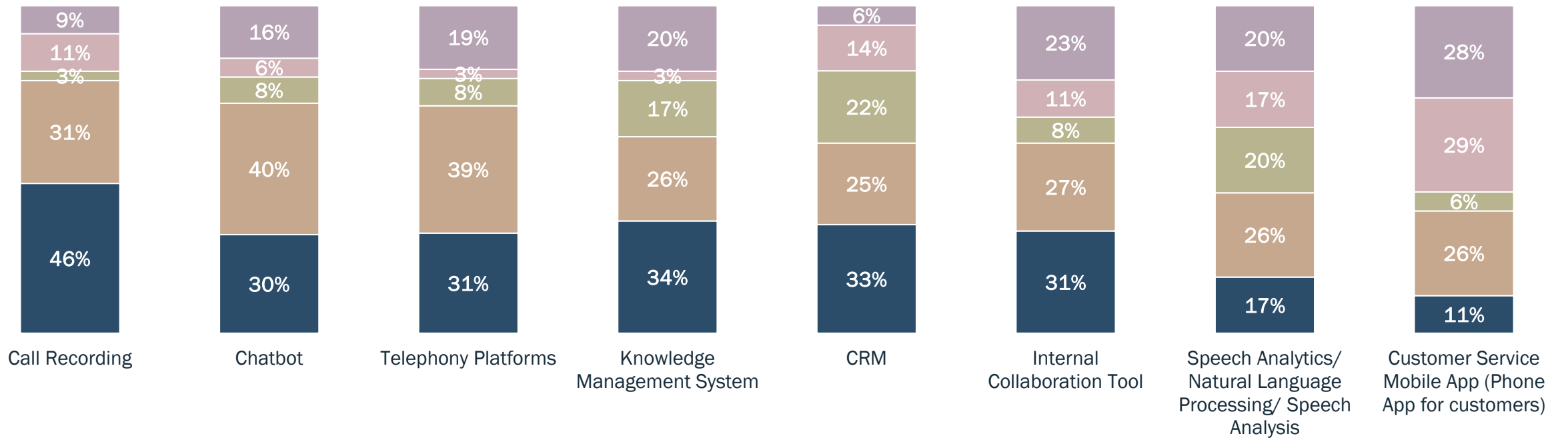
- Quality Assurance
- Workforce Management



Solutions for Contacts Centers – Current Adoption and Plans for Future Usage for BPOs

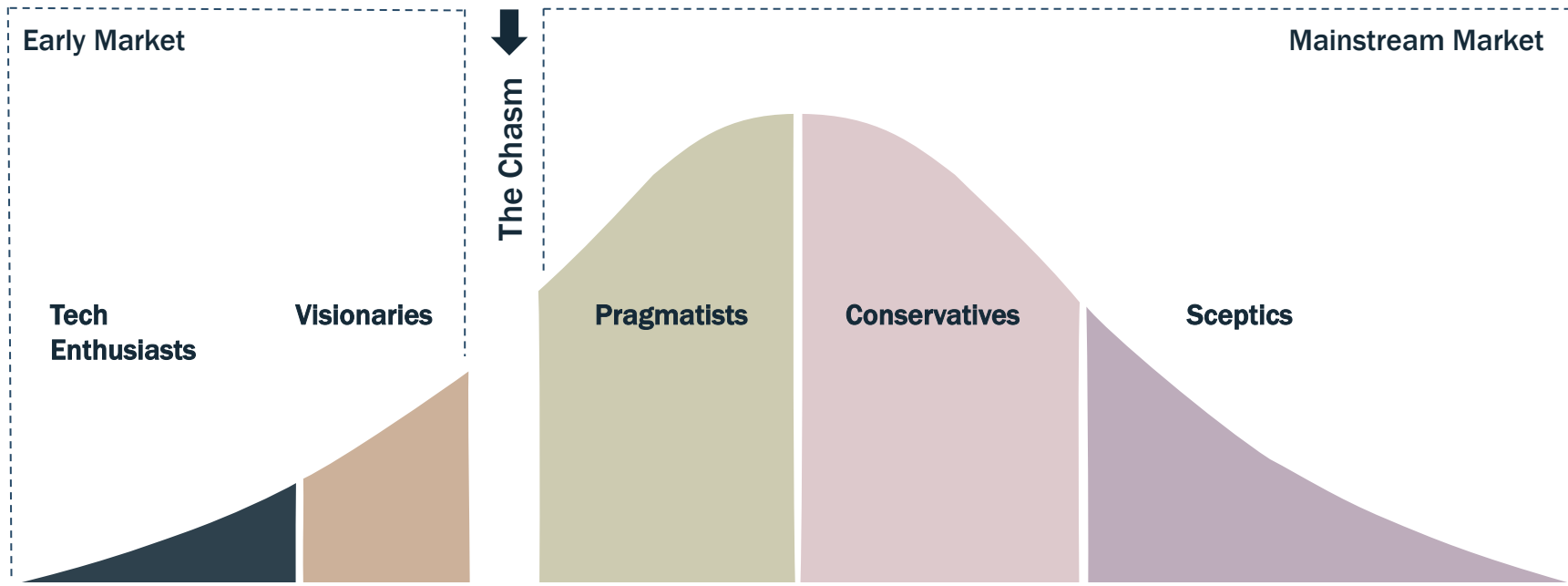
Please describe your level of technology adoption for:

- Currently using with NO plan to refresh/change/upgrade
- Planning to implement in next 18 months
- Unsure/unaware of plans
- Currently using with AND planning to refresh/change/upgrade
- Currently have no plans regarding this technology



A larger proportion of respondents stated their organizations plan to implement **CRM (22%)** in the next 18 months, closely followed by **Speech Analytics/Natural Language Processing/ Speech Analysis (20%)**

The 'Technology Adoption Lifecycle'



Innovators 2.5%
Early Adopters 16%

Innovators are technology enthusiasts. Most likely the first set of users to invest in a technology

Early Adopters include users that quickly test and begin using a new technology

Early Majority 50%
Late Majority 84%

Early Majority and Late Majority – includes bulk of the users. 'Early Majority' are the users that drive 'market share'

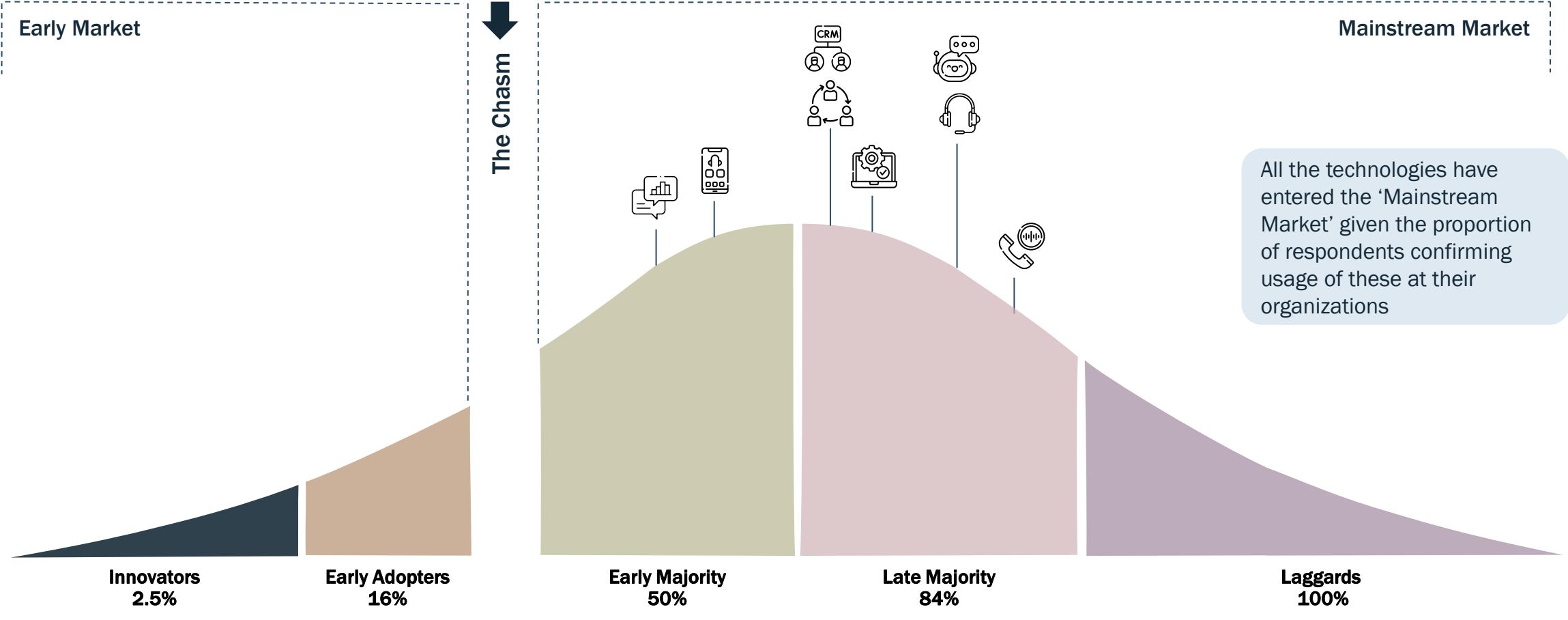
Laggards 100%

Laggards: last adopters of a technology

The 'technology adoption lifecycle' demonstrates the market growth for a technology by sorting its adopters into five categories. It is based on "Diffusion of Innovation (DOI) Theory", developed by E.M. Rogers in 1962.

The Chasm
 In the technology adoption lifecycle, there's often a large gap between early adopters and the early majority. This gap is known as the 'chasm'.
 The reason it's so difficult to cross the chasm is that there's a huge difference between the needs of the early adopters, and the needs of the early majority. 'Crossing the Chasm' is often about meeting the needs of the 'early majority' (pragmatists).

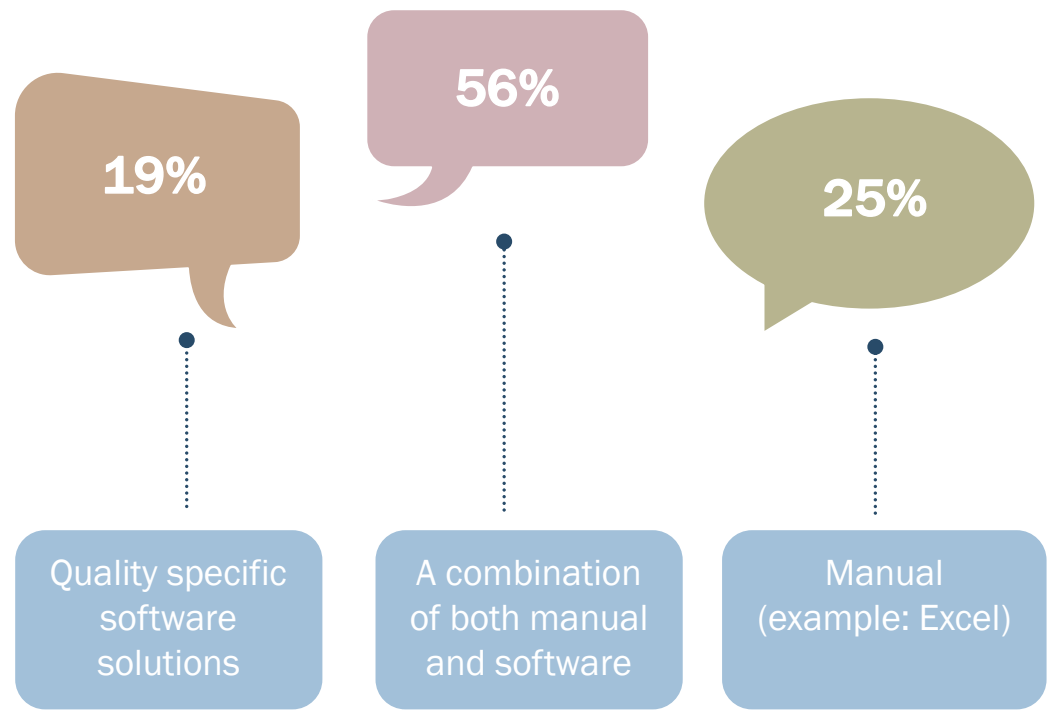
Solutions for Contacts Centers – Current Adoption Levels among BPOs




- Call Recording
- Telephony Platforms
- Chatbot
- Knowledge Management Systems
- CRM
- Internal Collaboration Tool
- Customer Service Mobile App
- Speech Analytics/Natural Language Processing/ Speech Analysis

Adoption of Technology for Quality Assurance (QA) Programs among BPOs

Which systems or tools do you use to conduct your Quality Assurance Program?

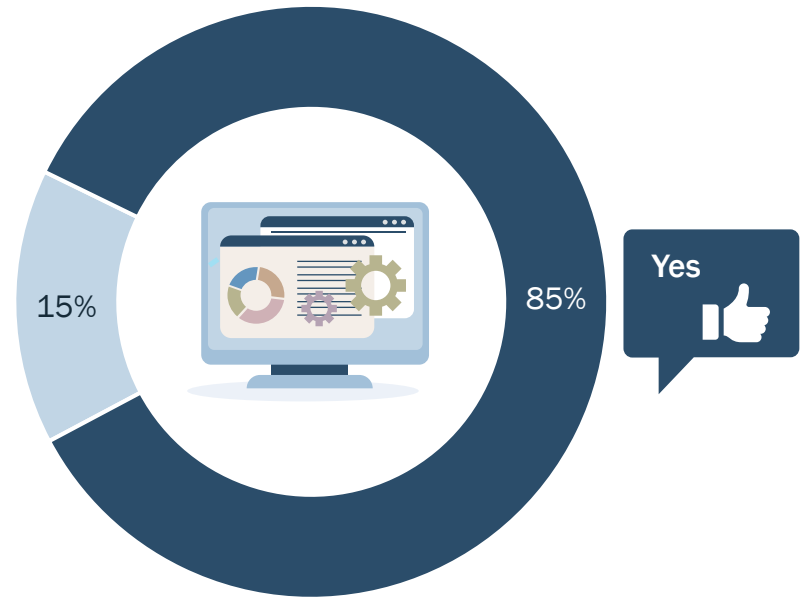


25% of respondents stated their organizations use only a manual tool for their QA programs 

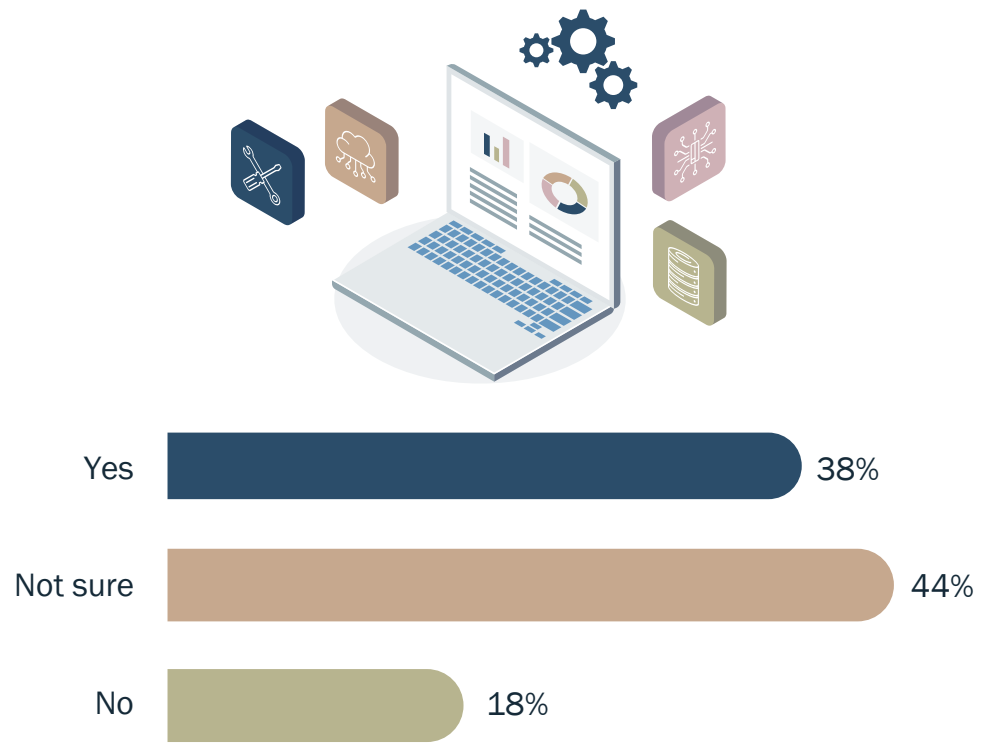


Adoption of Technology for Workforce Management among BPOs

Does your organization use any tool/software for Workforce Management (WFM)?



Do you have plans to refresh/change/upgrade your WFM tool/software?





05

People Management

Full Time Employees (FTEs)

Spans and Layers

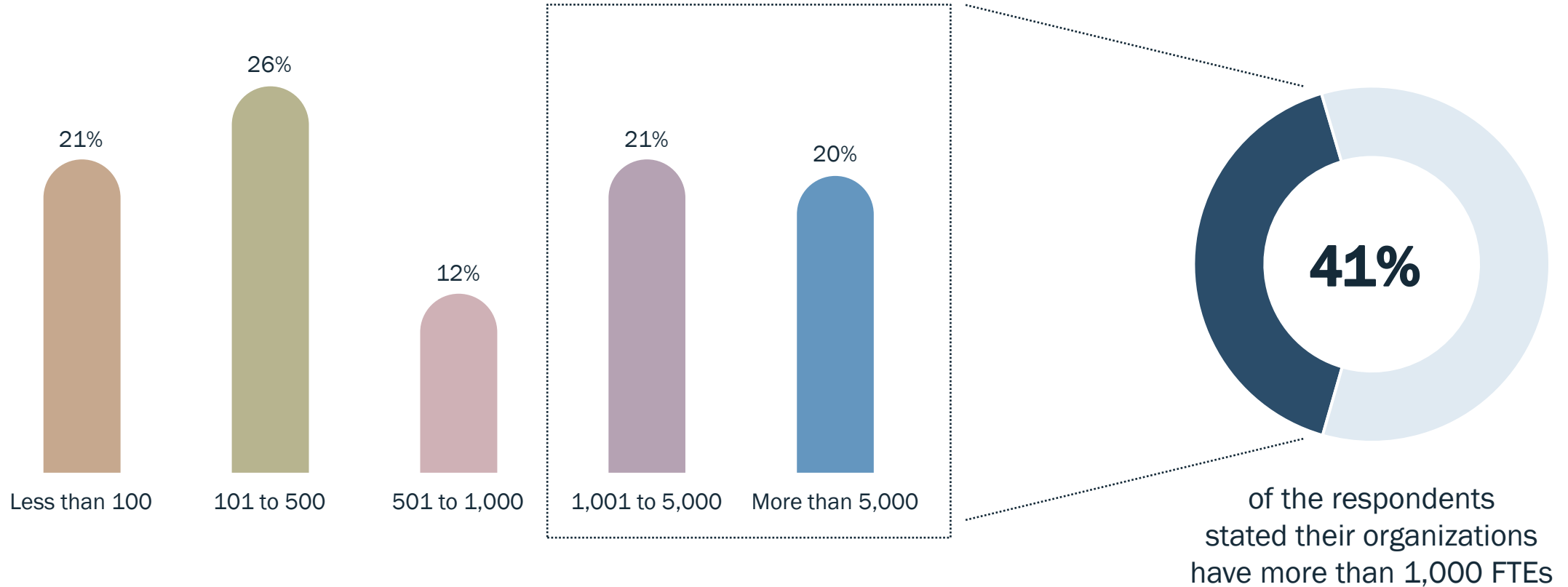
Attrition

Absenteeism

Work at Home

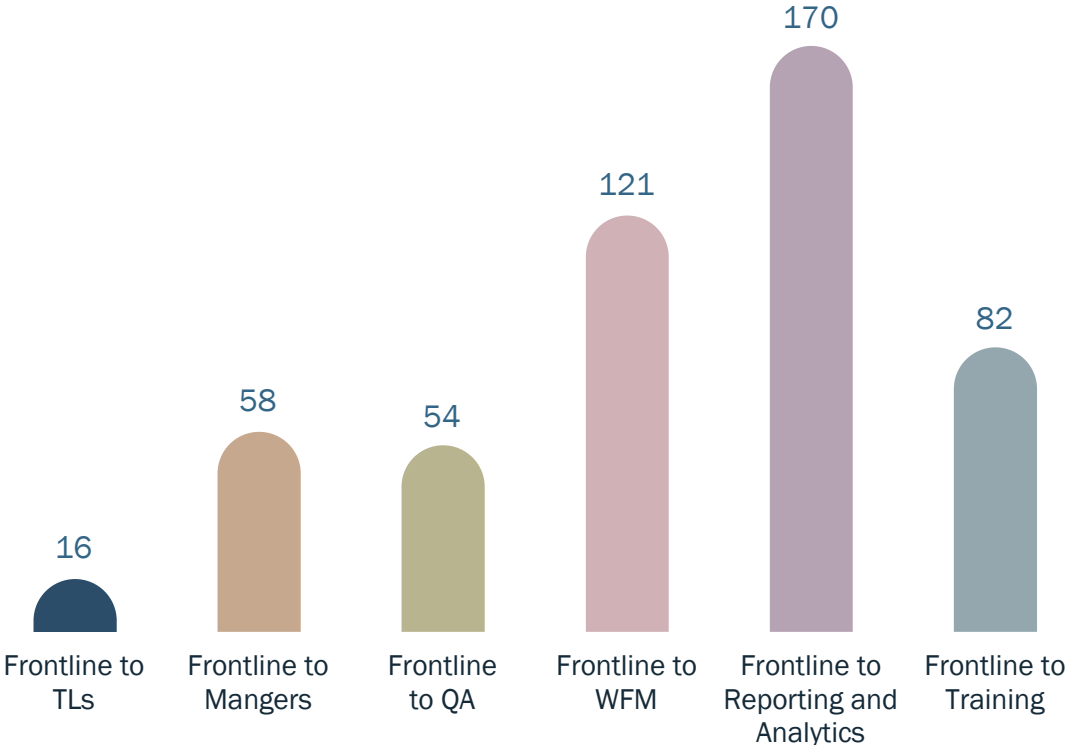
Employee Engagement

FTE Headcount



Spans and Layers

Ratio of frontline staff to other roles



Typically, a 100 seat outsourced contact center has:

-  6 Team Leaders (TL)

-  2 Managers

-  2 Quality Assurance Staff (QA)

-  1 Workforce Manager (WFM)

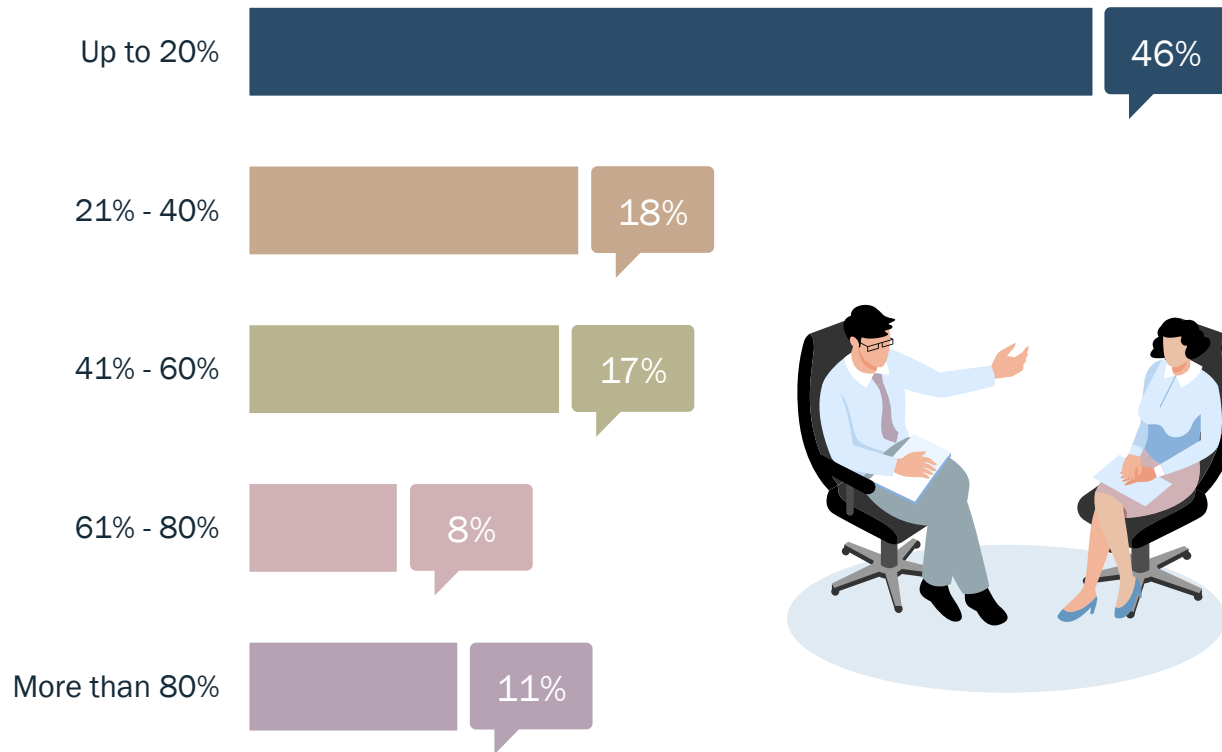
-  0.5 Reporting and Analytics Staff

-  1 Trainer

To put it in different words, typically for every 100-frontline staff in an outsourced contact center, there are 12.5 staff members in overhead roles. It is important to note that there is a variation in the ratios. For example, some centers run at 1 TL to 10 frontline staff while another one runs at 1 TL to 50 frontline staff.

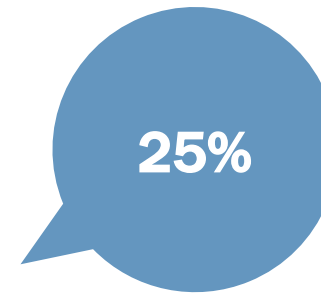
Attrition – Frontline Staff

On average, what proportion (%) of full-time frontline staff leave each year and need to be replaced (i.e., what is your full-time staffing turnover)?

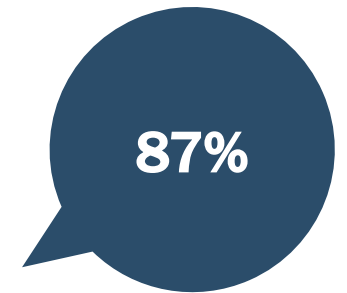


Attrition rates – median

As stated by executives from BPOs



COPC Benchmarks*



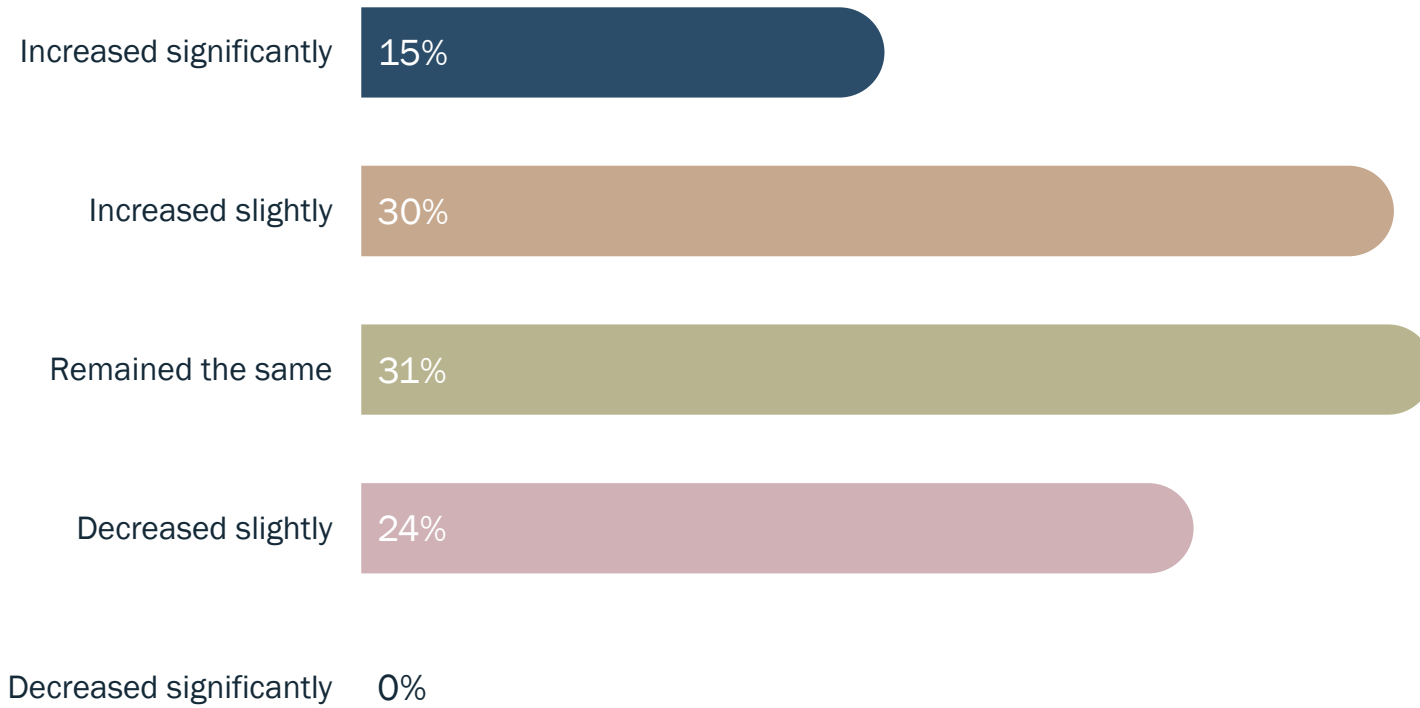
There is a major disconnect between what executives from BPOs state as their attrition rates for frontline staff vs attrition rates per COPC Benchmarks

Only 11% of the respondents stated their frontline attrition was more than 80% against a median of 87% agent attrition per COPC Benchmarks

* Based on aggregation of results and findings from COPC Inc's certification programs across regions.

Attrition – Trends (Frontline Staff)

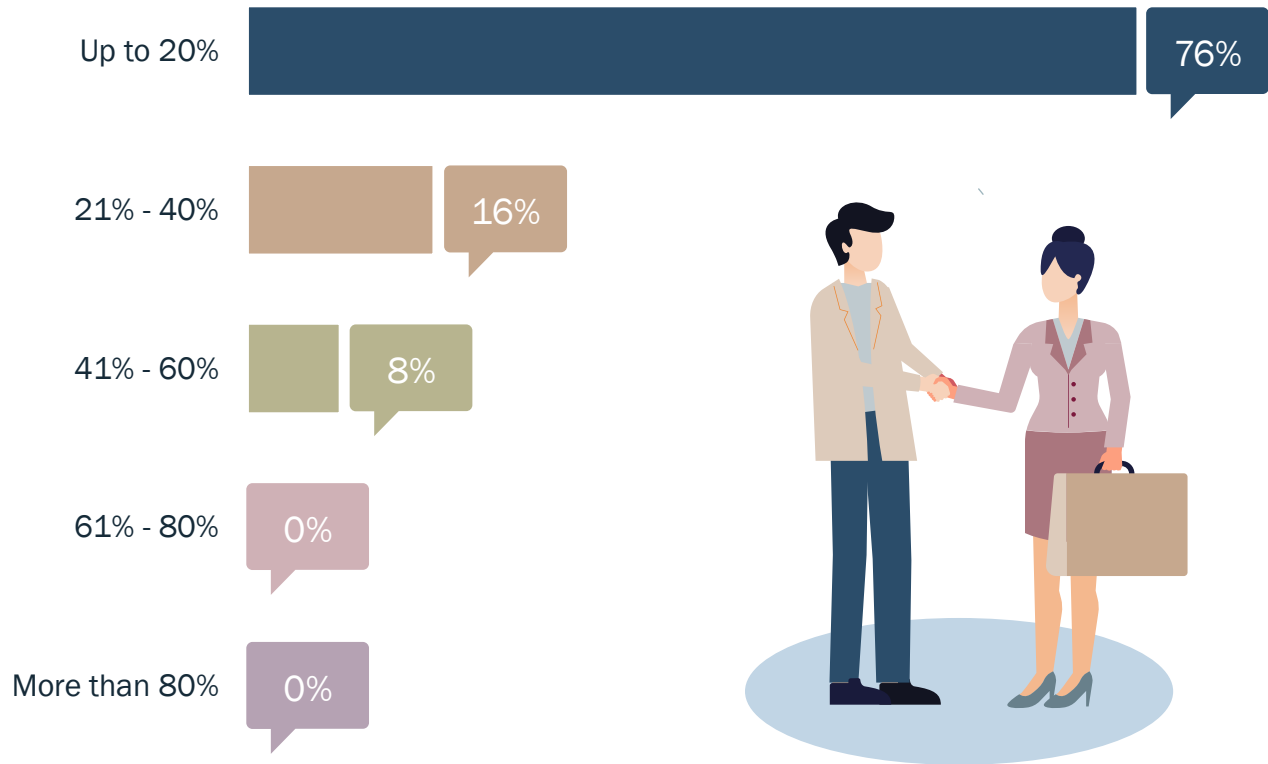
Over the last 12 months the attrition for the frontline staff has:



45% of the executives representing BPOs stated their organizations have witnessed an increase in attrition for the frontline staff

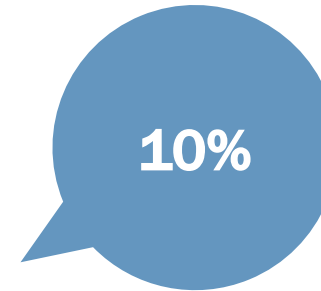
Attrition – Team Leaders (Supervisors)

On average, what proportion (%) of Team Leaders leave each year and need to be replaced (i.e., what is your Team Leader turnover)?

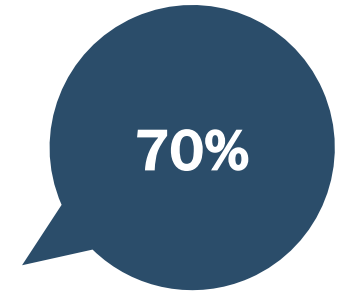


Attrition rates – median

As stated by executives from BPOs



COPC Benchmarks*



Again, there is a major disconnect between what executives from BPOs state as their attrition rates for Team Leaders / Supervisors vs attrition rates per COPC Benchmarks

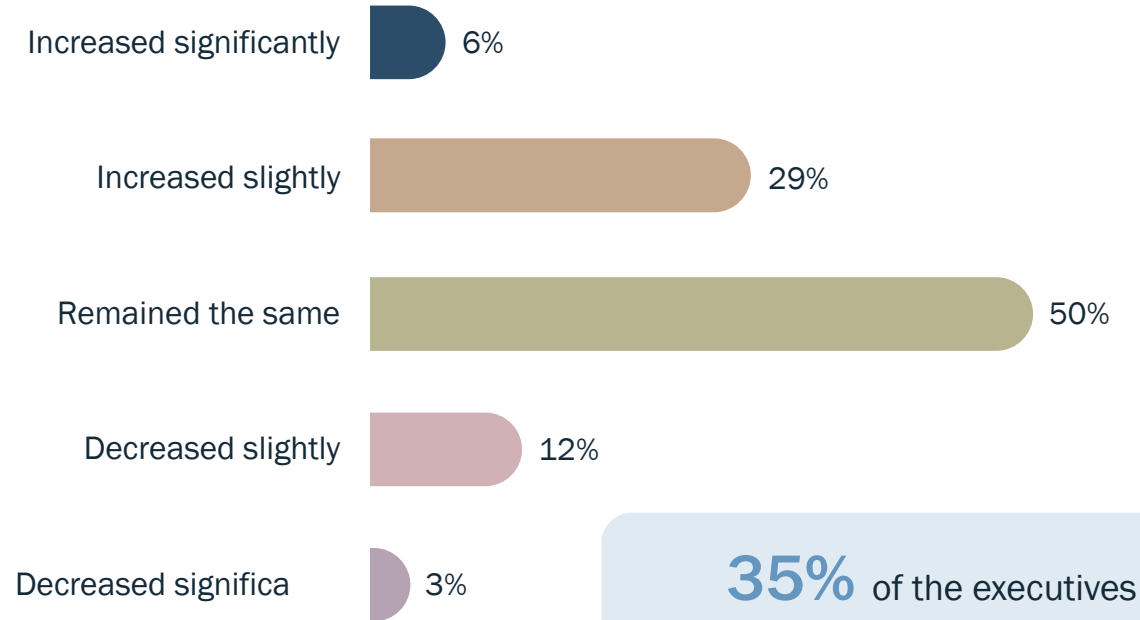
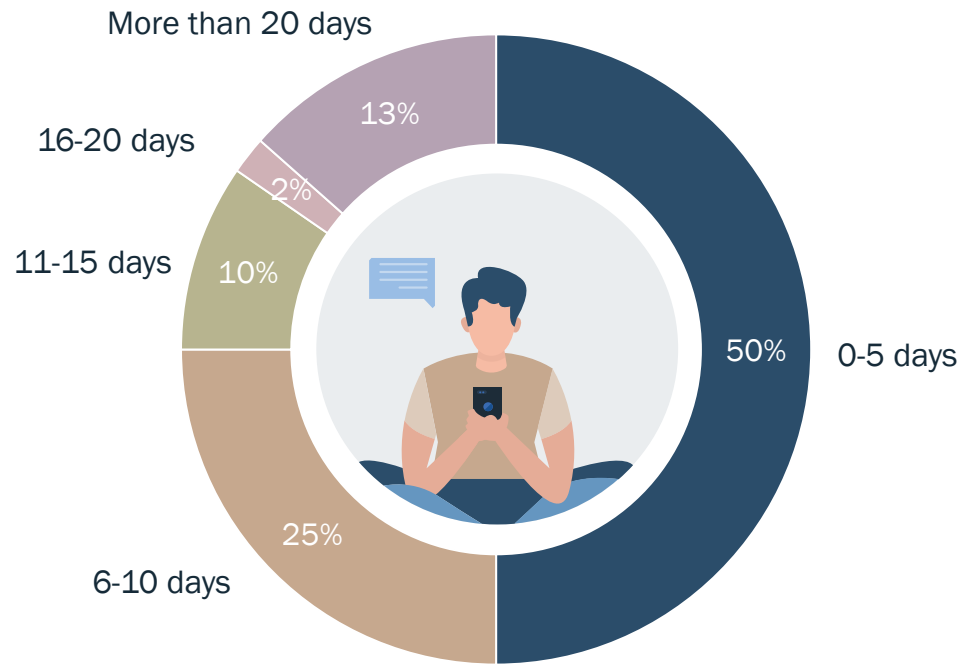
None of the respondents stated their Team Leader / Supervisor attrition was more than 60% against a median of 70% per COPC Benchmarks

* Based on aggregation of results and findings from COPC Inc's certification programs across regions.

Absenteeism – Frontline Staff

Per person, what is your average frontline unscheduled leave (absenteeism/UPL) over the last 12 months? (in number of days)

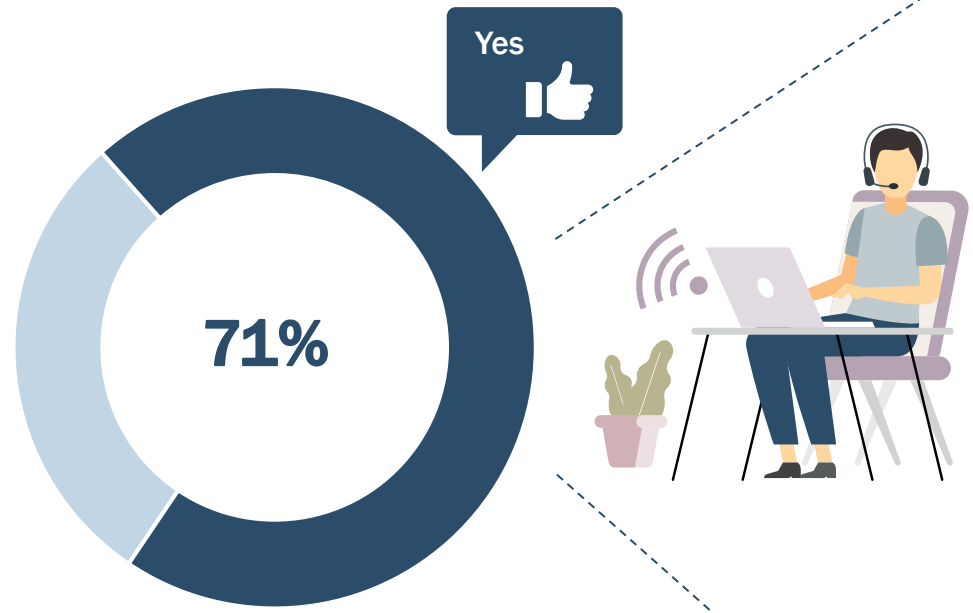
Over the last 12 months have the unscheduled leave (absenteeism/UPL) for the frontline staff:



35% of the executives representing BPOs stated their organizations have witnessed an increase in absenteeism for the frontline staff

Work at Home (WAH)

Do you have contact center employees working at home?



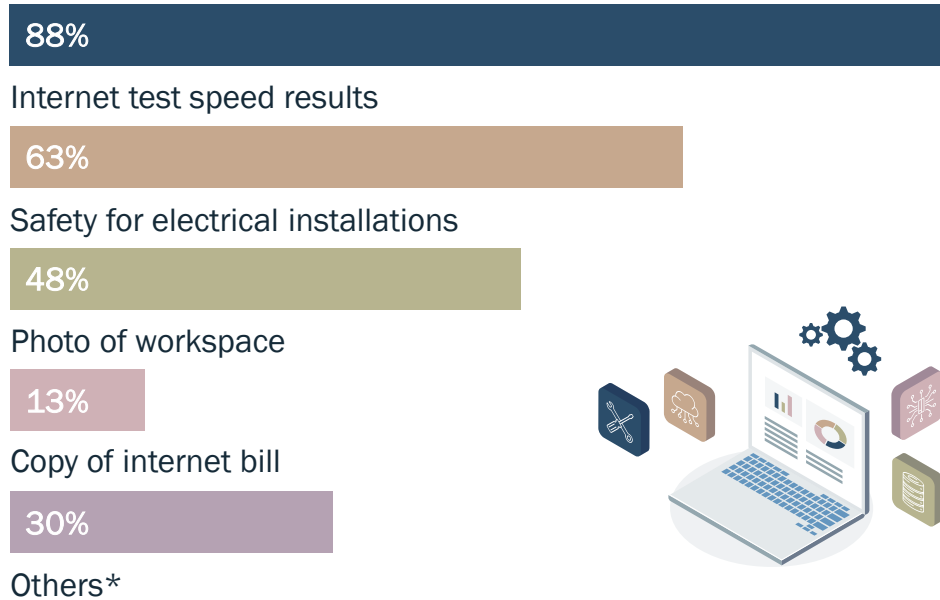
of the respondents representing BPOs stated their organizations have WAH employees – with a high proportion of respondents stating they allowed frontline staff to WAH

Who can work at home? (Select all that apply)



Work at Home (WAH) – Minimum Requirements and Challenges

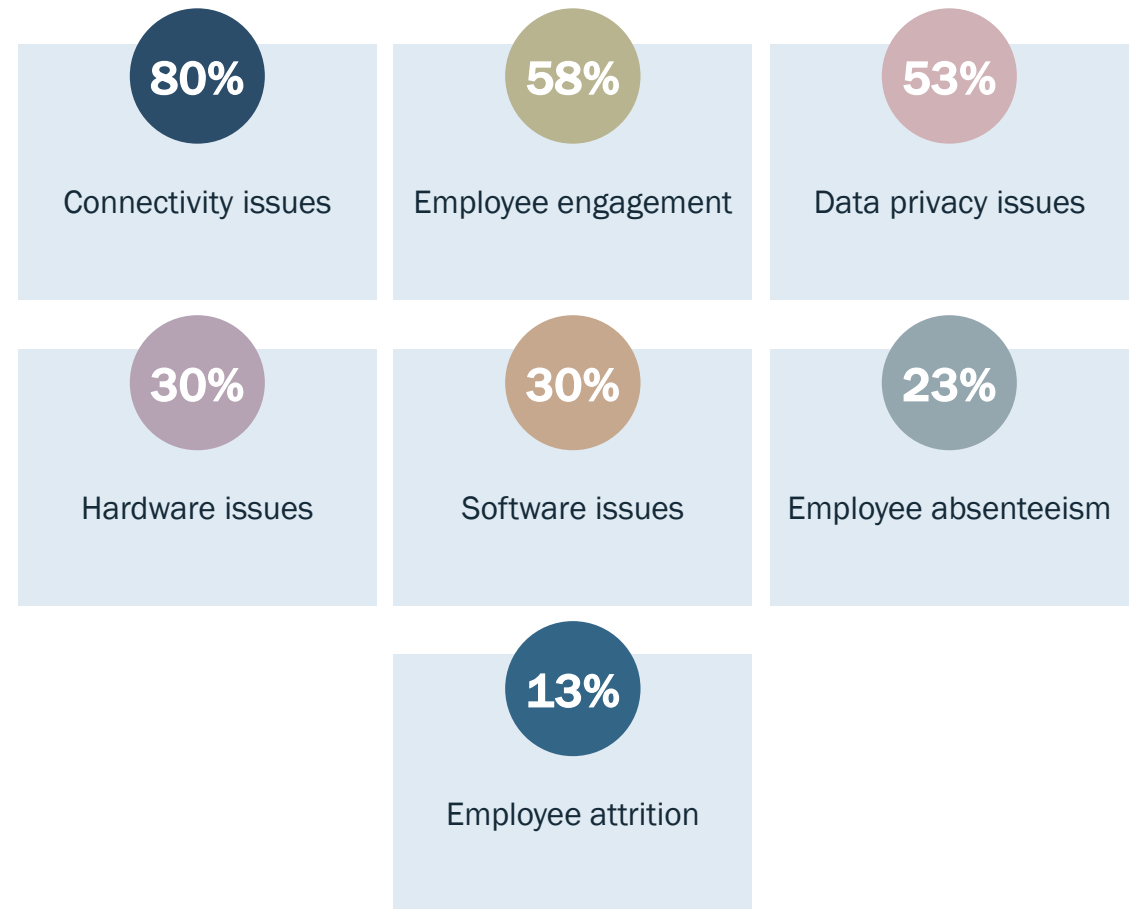
What are your minimum requirements for WAH? (Select all that apply)



Technology related aspects emerge as the areas with higher focus when hiring WAH staff and more commonly stated challenges faced while managing WAH staff

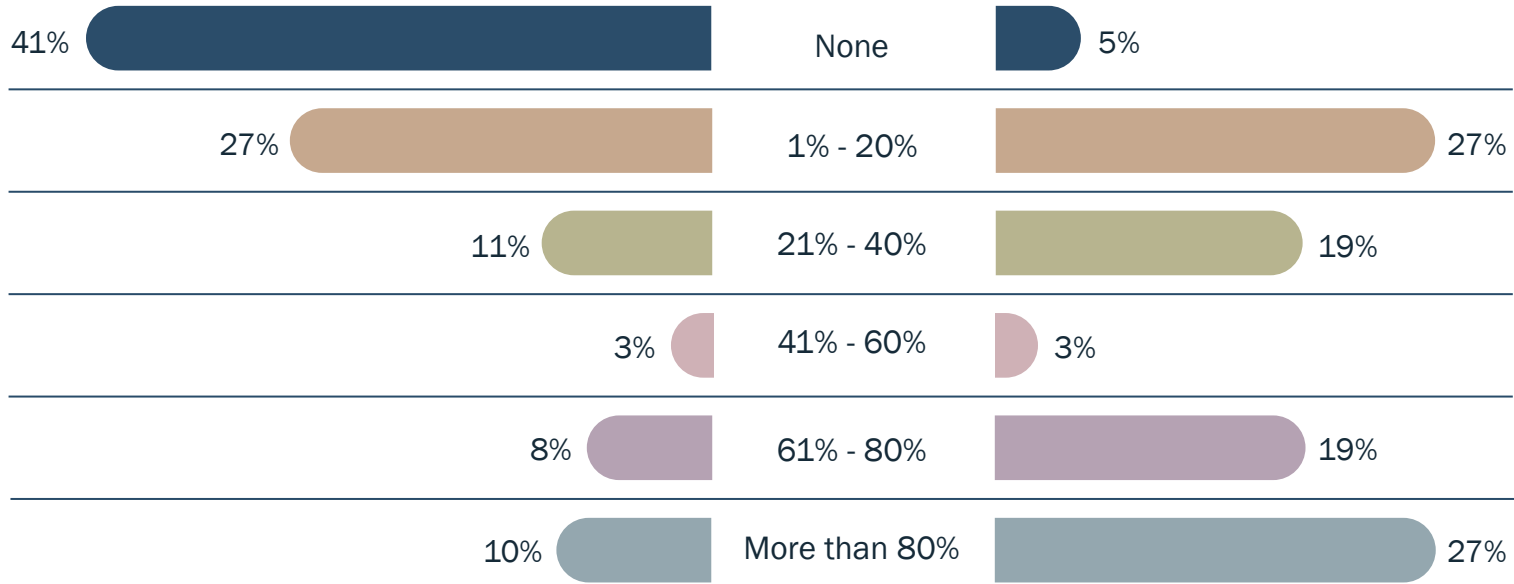
*Others include requirements around technologies for confidentiality and data handling, data security, independent and private working space.

What have been your biggest challenges in managing work from home employees? (Select all that apply)



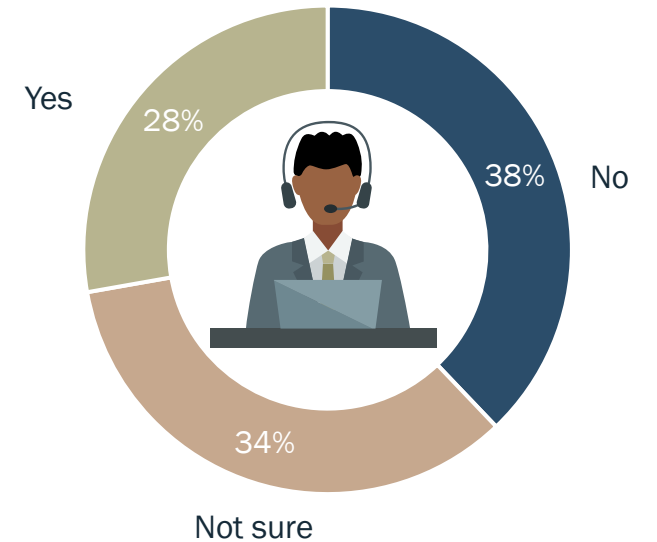
Work at Home (WAH) and Impact of COVID-19

What proportion (%) of your frontline staff worked at home before COVID-19?



What proportion (%) of your frontline staff works at home currently?

Do you believe once things go back to 'normal', you will revert to your pre-COVID-19 staffing model?

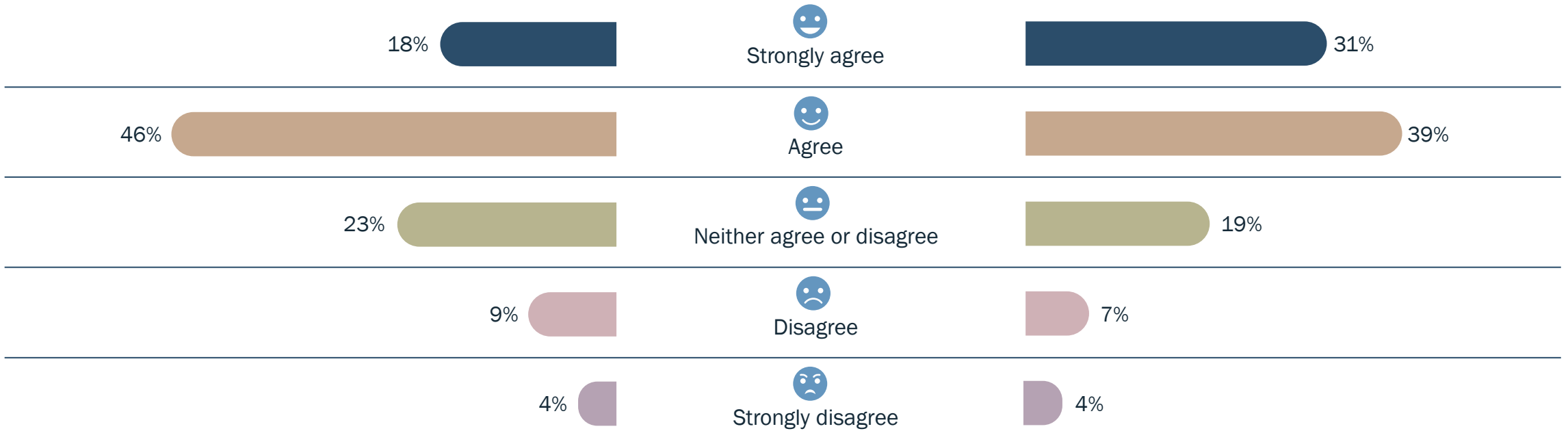


There has been a big shift in the proportion of WAH frontline staff from pre-pandemic days to now – with only 5% of the respondents stating they have no WAH frontline staff, down from 41% during pre-pandemic times
 Almost a third of the respondents also stated their organizations do not plan to revert to the pre-pandemic staffing models

Employee Engagement* – Satisfaction and Retention (Frontline Roles)

Overall, I feel satisfied with my current job. **(SATISFACTION)**

I am very likely to continue working with my current organization over the next 12 months. **(RETENTION)**



64%
of the interviewed frontline staff stated they are satisfied with the current jobs

70%
of the interviewed frontline staff stated they are likely to continue with their current organization over the next 12 months

* Based on the Annual Employee Engagement Benchmarks for Contact Centers, 2021 by COPC Inc..

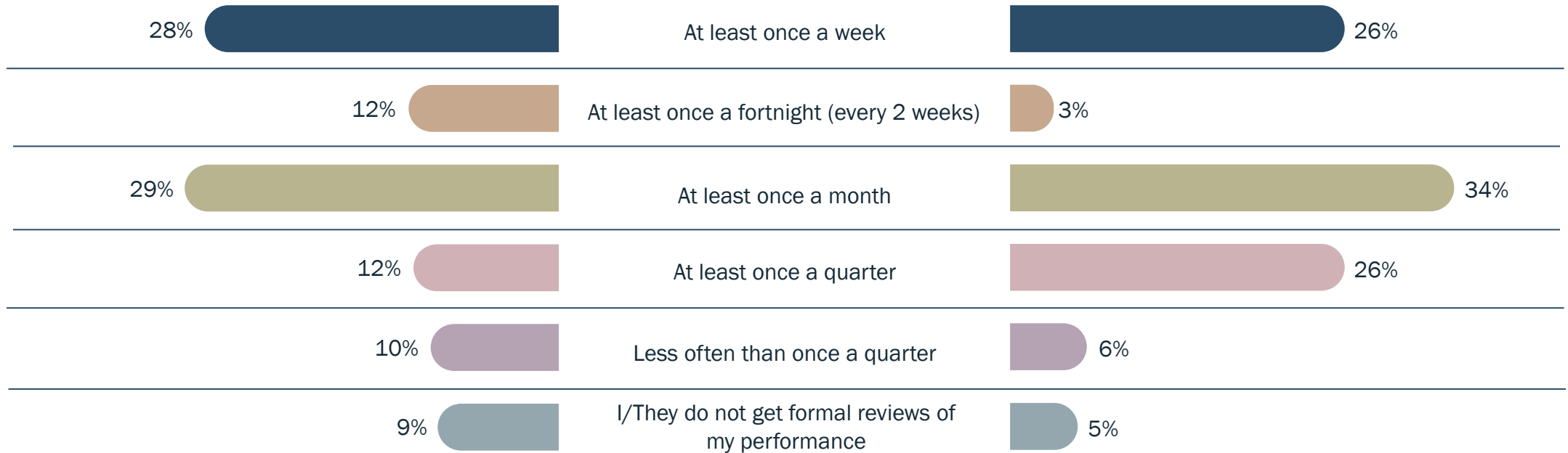
Employee Engagement – Frequency of One-on-Ones (Frontline Roles)

How often do you receive a structured review of your performance compared to targets with your manager (e.g. a one-on-one)? – **EMPLOYEE VIEW**

How often do frontline staff receive a structured review of their performance relative to their targets with their manager (e.g. a one-on-one)? – **CORPORATE VIEW**

↑
At least once a quarter:
81%
↓

↑
At least once a quarter:
89%
↓



Directionally, a lower proportion of frontline staff engaged in outsourced operations stated they receive a structured review of performance at least once a quarter vs executives stating they provide structured reviews once a quarter to frontline staff

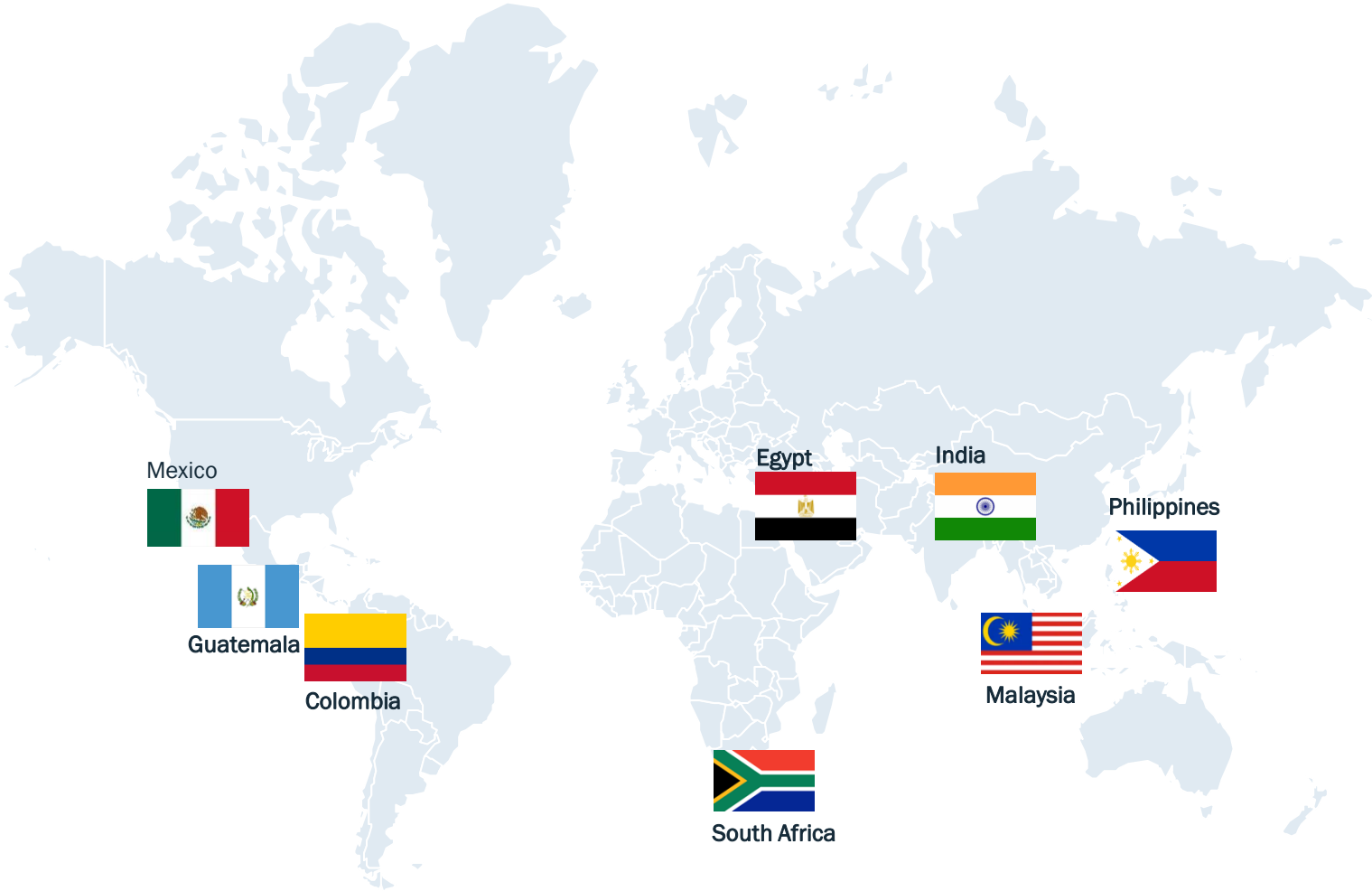
‘Employee Engagement Benchmarks’ by COPC Inc., an annual employee engagement study, identifies a strong relationship between employee satisfaction and frequency of structured reviews – more regular the reviews, higher the employee satisfaction

06

Key Offshoring Destinations



Popular Offshoring Destinations



Access to language skills, lower costs (through labor arbitrage) and large labor pools are still the primary drivers for making decisions about offshore destinations.

India and Philippines were the most frequently stated offshore destinations, with 58% and 42% of the respondents highlighting these two countries.



07

COPC CX Standard for Contact Centers

Framework

COPC Certified BPOs



COPC CX Standard for Contact Centers, Release 7.0 Framework



The COPC CX Standard for Contact Centers is a comprehensive and integrated system for managing a customer-centric service operation with an emphasis on contact center applications.

- The COPC CX Standard for Contact Centers begins with the **drivers** of customer-focused performance management embodied in the leadership characteristics and activities described in *Category 1.0 Leadership and Planning*
- Taken together, *Category 2.0 Processes and Category 3.0 People* represent the organization's **enablers**: a skilled and motivated work force using well-designed technology and processes and managing these to optimal levels of performance.
- The **goal** of the system is a balanced composite of customer experience, quality, and cost/efficiency performance addressed in *Category 4.0 Performance*.

08

Conclusion



Conclusion

Today, shifting customer service to a third-party service provider is a common move by organizations. Almost half of the CX practitioners that we surveyed stated their organizations outsource the customer care operations. An organization’s decision to outsource is driven by multiple factors, such as cost reduction, ability to ramp up or down quickly, technology capabilities of BPOs etc. Whatever may be the reason, outsourcing can be a highly flexible option making customer care strategy work more efficiently.

This report captures the views of both BPOs and organizations that outsource, with respect to the aspects mentioned above. It brings to light what organizations attach importance to when outsourcing customer care. It also shares corporate input on strategy, technologies and manpower structures that BPOs have in place to deliver on the expectations of their clients.

01

Cost reduction and flexibility in ramping up / down of operations are the most important drivers of outsourcing. Both organizations that outsource and BPOs have a clear consensus on these aspects. This is going to keep a constant pressure on the BPOs to offer capabilities which minimize costs while maximizing the quality of customer care delivery by working on the right combinations of cost, locations, languages and industries supported.

02

BPOs are high on adoption of technologies for contact centers. It includes high penetration of self-service solutions such as chatbots. BPOs’ technology capabilities is the third most stated reason by organizations to outsource – per the surveyed executives.

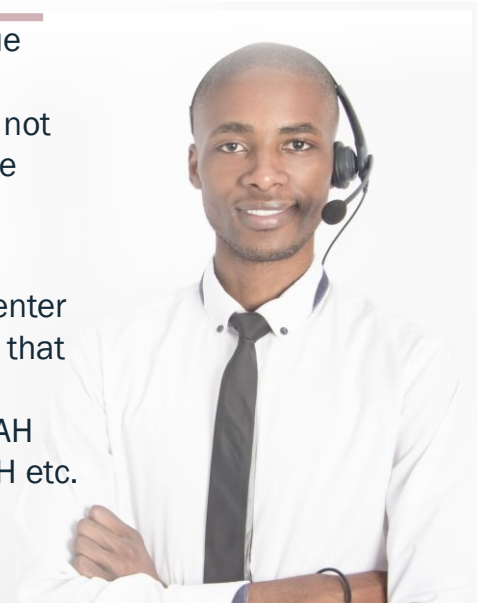
Organizations also appreciate the importance of enabling their BPO providers with the right platforms to deliver. This is confirmed by the fact that several executives representing BPOs stated their clients provided them with platforms for quality assurance purposes.

(Please refer to our report ‘Technologies for Contact Centers’ for more details)

03

Organizations are not going to discontinue with WAH anytime soon. 38% of the executives stated their organizations will not return to pre-COVID staffing models, while 34% are still not sure about it.

Organizations are building a complete ecosystem for WAH to work for contact center operations – be it allowing multiple roles that can work at home, having minimum requirements and policies in place for WAH staff, managing challenges posed by WAH etc.



09

Appendix



Appendix

Since organizations follow different timeframes as financial years, the following list provides details of the same

Organisation	Financial year cycle	Revenue/ Net income provided for	Currency reported in
Teleperformance	January to December	January to December 2021 (FY'21) January to December 2020 (FY'20)	Euro
Concentrix	December to November	December 2020 to November 2021 (FY'21) December 2019 to November 2020 (FY'20)	USD
Conduent	January to December	January to December 2021 (FY'21) January to December 2020 (FY'20)	USD
Transcosmos	April to March	April 2020 to March 2021 (FY'21) April 2019 to March 2020 (FY'20)	Yen
TTEC	January to December	January to December 2021 (FY'21) January to December 2020 (FY'20)	USD
Telus International	January to December	January to December 2021 (FY'21) January to December 2020 (FY'20)	USD
Sykes*	January to December	January to December 2020 (FY'20) January to December 2019 (FY'19)	USD
Majorel	January to December	January to December 2021 (FY'21) January to December 2020 (FY'20)	Euro
Atento	January to December	January to December 2020 (FY'20) January to December 2019 (FY'19)	USD
Infosys BPM	April to March	April 2020 to March 2021 (FY'21) April 2019 to March 2020 (FY'20)	Indian Rupees

*In 2021, Sitel Group completed the acquisition of Sykes Enterprises, Inc.



10







Respondent Profile

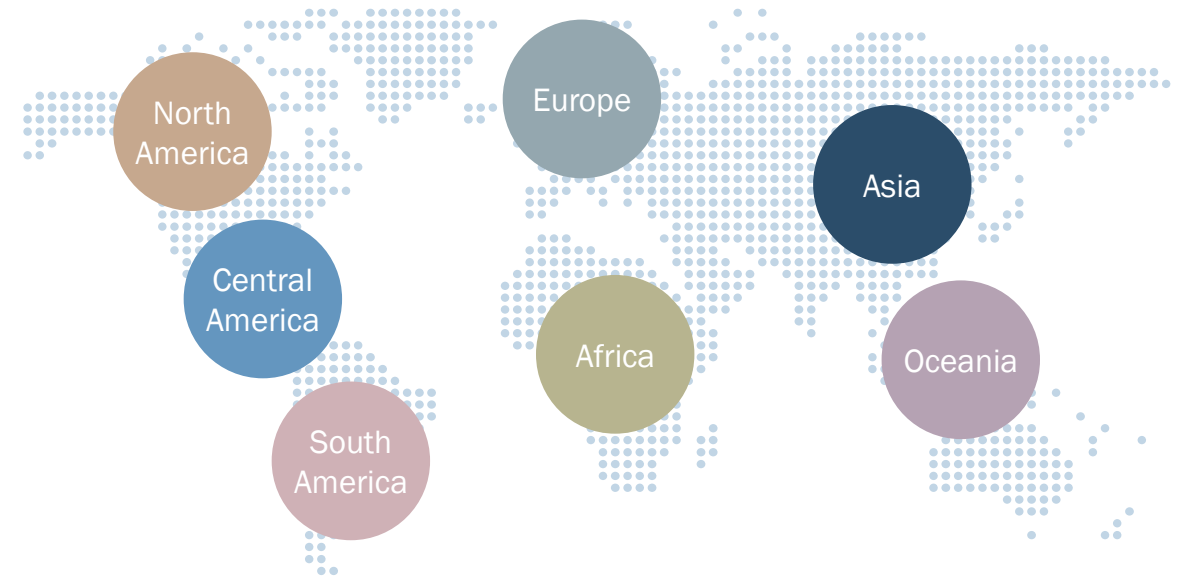
Respondent Profile – Corporate

Survey respondents included representatives from both in-house contact centers and BPOs

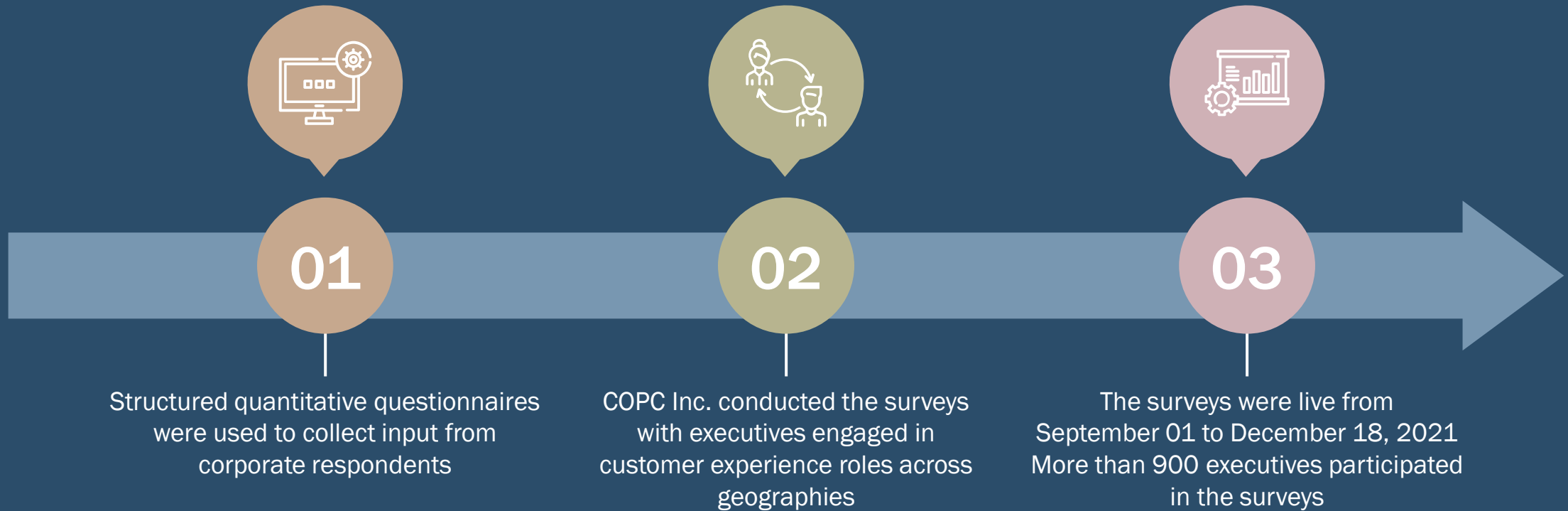
Industries represented include:

Contact Centers' locations for respondent organizations include:

 Automotive	 Consumer Electronics, Technology and Software	 Education, Healthcare and Government Services
 Insurance, Legal and Financial Services	 Outsourcing	 Retail
 Supplier, Business and Professional Services	 Telecom and Utilities	 Transportation and Logistics
 Other		



Corporate Segment – Methodology



Who We Are



Who We Are

COPC Inc. provides consulting, training, certification and research for operations that support the customer experience. The company created the COPC Standards, a collection of performance management systems for call center operations, customer experience management, vendor management, and procurement. Founded in 1996, COPC Inc. began by helping call centers improve their performance. Today, the company is an innovative global leader that empowers organizations to optimize operations for the delivery of a superior service journey. COPC Inc. is headquartered in Winter Park, FL, U.S. and with operations in Europe, Middle East, Africa, Asia Pacific, Latin America, India and Japan.

To learn more about COPC Inc., visit www.copc.com.

