



Global Benchmarking Series, 2022

Customer Experience Understanding and Strategy

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01

Introduction

Preface

Key Findings

- Corporate Viewpoint
- Voice of Customers

Preface

In today's globalized world, information is vitally important. High quality information supports decision making and helps organizations to plan, to develop strategies and gives them an edge over their competition. It is for this reason that I am delighted to announce the launch of the COPC Inc. Global Benchmarking Series 2022 with this initial Report in the series focused on Customer Experience Understanding and Strategy.

For more than 25 years, COPC Inc. has been providing the global customer experience (CX) industry with high quality research, data and information about best practices in CX operations. Executives and managers around the world depend on COPC Inc. for our expert advice to help them to make informed decisions about how and where to run their operations.

Our Research Team and CX analysts are focused on bringing you the best information possible and the insights included in the Global Benchmarking Series, have been gathered through on-site operational assessments, interviews with executives working in the contact center and CX operations industry and also through surveys with consumers in the Asia Pacific Region, North America and Europe.

No other series of reports provides the same level of high-quality information and first-hand research about the worldwide contact center and customer experience industry as the COPC Inc. Global Benchmarking Series 2022. We hope that you find insights in these reports which will help you to make informed decisions about running your operations.

Ian Aitchison
CEO, Asia Pacific Region
COPC Inc.

iaitchison@copc.com



The 'Corporate Viewpoint'



Customer care organizations have initiatives in place that display their commitment towards 'Improving Customer Experience'

- **93%** of the respondents stated their organization have a 'Statement of Direction'
- **96%** of the respondents stated 'Customer Experience' is an integral part of the themes addressed by their Statement of Direction
- **82%** of the respondents stated their organizations developed an 'Annual Business Plan'
 - **'Performance Data'** and **'Cost Related Data'** emerged as the **top themes** included in the Annual Business Plans
- **78%** of the respondents stated their organizations **use benchmarking data** for setting targets for their contact centers
- **27%** of the respondents stated their organizations have a **'Chief Customer Officer'**

Focal points for 'Customer Experience Strategies' include:

- **Customer Feedback** is the top objective for customer care organizations over the next 24 months
- **Improving customer experiences** is the key challenge in delivering high quality customer experience
- **Outsourcing** - The top reason for outsourcing some operations is 'cost reduction'

Offering only 'Human Assisted Channels' will soon be redundant

- **29%** of corporate respondents stated their organizations offer only 'Human Assisted Channels'
- **Multichannel journeys are becoming common** – approximately **60%** of the corporate respondents stated that more than 40% of their customers use multiple channels to get a single customer care issue resolved
- **74%** of respondents **stated that they track a CX metric or KPI (such as CSAT, NPS or Customer Effort)** for the channels offered by them

Organizations' understanding of 'what matters to customer' includes

- **'An easy process'** is most important when dealing with organizations to get customer care issues resolved
- Need to focus on **'developing more self-service solutions'** to help customers avoid having to contact customer service to resolve an issue
- **Customers would be willing to pay more** for a product or a service if they are assured of world class services, with 81% of the respondents stating so

'Voice of Customer'

72% of the surveyed customers had contacted an organization to resolve a customer service/technical support question

What matters to customers?

Importance of customer service:

- **84%** of customers stated they place **high importance to an organization's customer service department** in **shaping their opinion** of that organization
- **71%** of customers are **willing to pay a little more** for a product or service if they know they would receive world-class customer service as a result

Customer-organization relationships

- **51%** of customers stated they have **avoided acting on a customer service issue** in the past 12 months – **'inconvenience/ no time'** and **'bad previous/ hassle'** being the top two reasons
- **67%** of customers **stated that an organization has lost their business** because they received poor customer service

Channel Preference and Usage

- **Phone** is the most preferred channel, closely followed by **Email**
 - Customer preference for Human Assisted channels is **9x** the preference for self-service technologies (SSTs)
- **47%** of customers have changed their **preferred channel** in recent years.
- **'Convenience / ease of use'** and **'prefer to speak to someone'** are the top two factors for customers choosing their preferred channel
- **82%** of customers had to use **multiple channels** (like phone, email and social media) to resolve a single customer service issue

Customer Inquiries

- **Technical support and billing issues are the most** common reasons for customers to contact organizations

Channel Level Insights

- **Phone - 91%** of customers had their **issues resolved when contacting by phone**, **46%** of customers stated their issues were resolved at **first contact**
- **Email - 91%** of customers who interacted through email had their **issues resolved**, for **34%** customers, resolution happened at **first contact**
- **Self-service technologies - 95%** of customers who interacted through SSTs had their **issues resolved**, with **40%** of these getting **resolution at first contact**
- **Chatbot - 83%** of customers who interacted through chatbot had their **issues resolved**





02

Leadership and Planning

Statement of Direction

Themes Included in 'Statement of Direction'

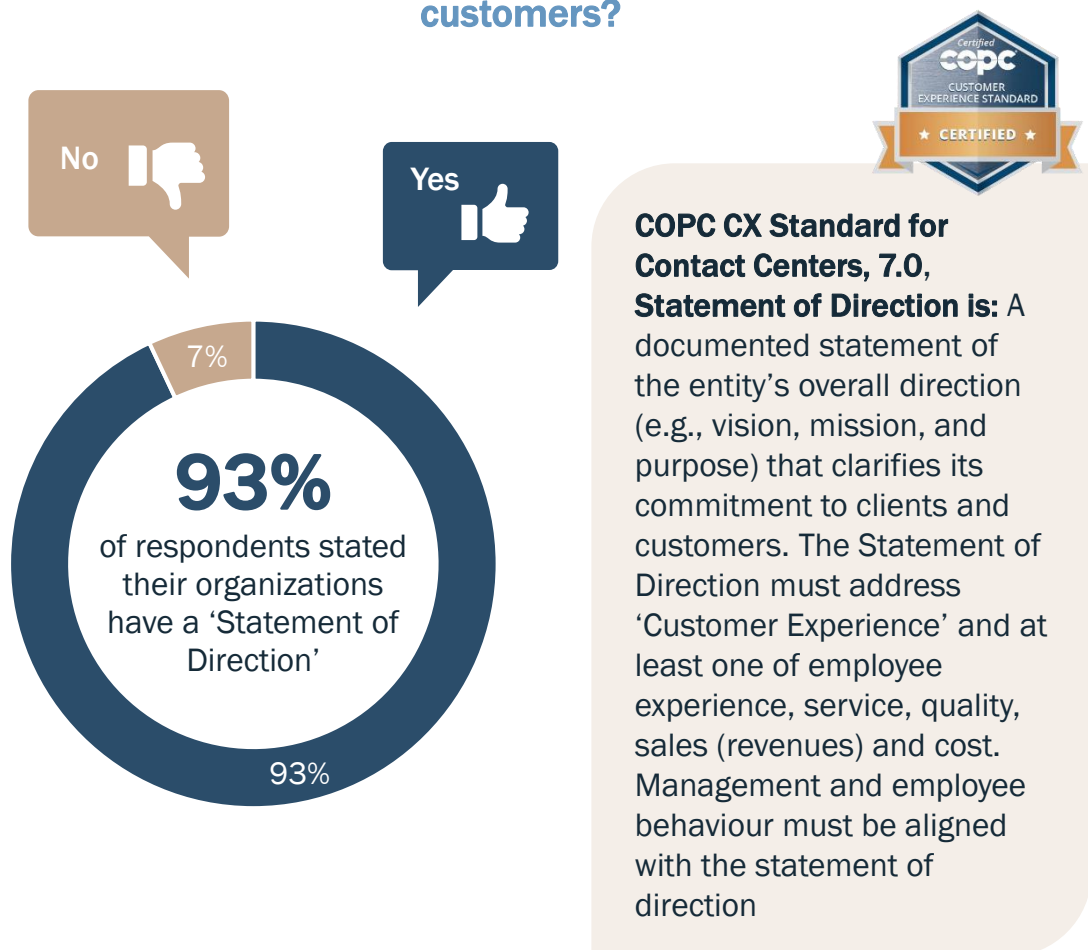
Annual Business Plan

Setting Targets and Analysing Performance

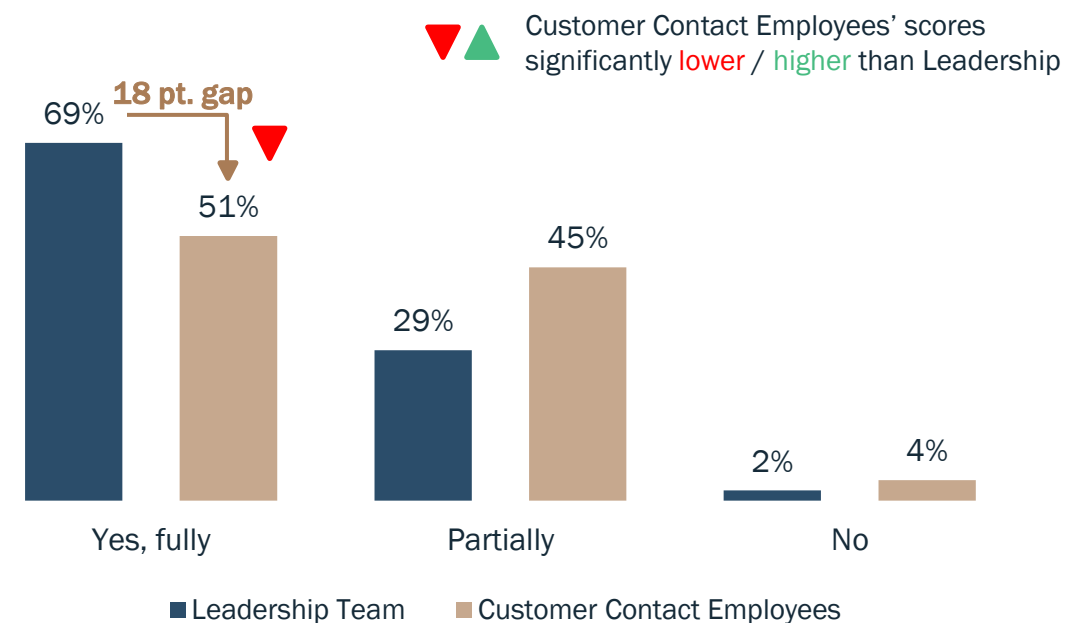
Chief Customer Officer

Statement of Direction

Does your organization have a Statement of Direction (e.g., a vision or mission statement) which clarifies your commitment to customers?



Do you believe your organization's leadership team/customer contact employees is/are committed to your Statement of Direction?

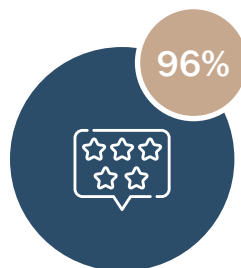


A significantly higher percentage of respondents stated the degree of commitment towards the 'Statement of Direction' is stronger among the 'Leadership' than among the 'Customer Contact Employees'. Given, the 'Customer Contact Employees' are the ones who interact with customers – their commitment towards Statement of Direction should be very strong

Themes Included in 'Statement of Direction'

Which of the following themes does your Statement of Direction address? (Please select all that apply)

'Customer Experience' and 'Quality' emerge as the top two themes included in the Statement of Direction by organizations



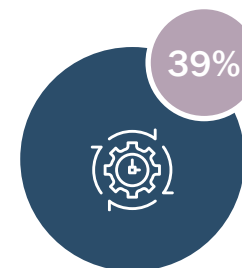
Customer Experience



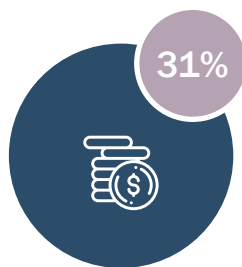
Quality



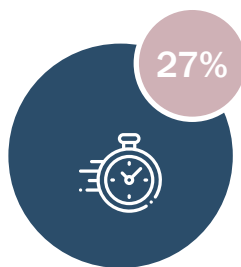
Employee Experience



Productivity



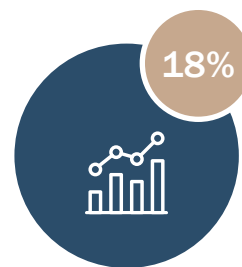
Cost



Service / Speed



Accessibility



Sales

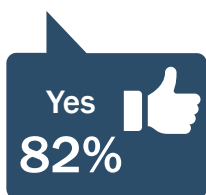
'Accessibility' emerged as the only theme which is addressed more by the In-house contact centers when compared to outsourcers (OSPs) (27% In-house vs 13% OSPs)



COPC CX Standard for Contact Centers, 7.0 requires customer care organizations to have the 'Statement of Direction' address 'Customer Experience' and at least one of employee experience, service, quality, sales (revenues) and cost **96%** of respondents mentioned 'Customer Experience' as a theme included in their 'Statement of Direction' **88%** of respondents stated their organization included at least one more theme, in their 'Statement of Direction'

Annual Business Plan

Does your organization develop an Annual Business Plan for your contact center operation?

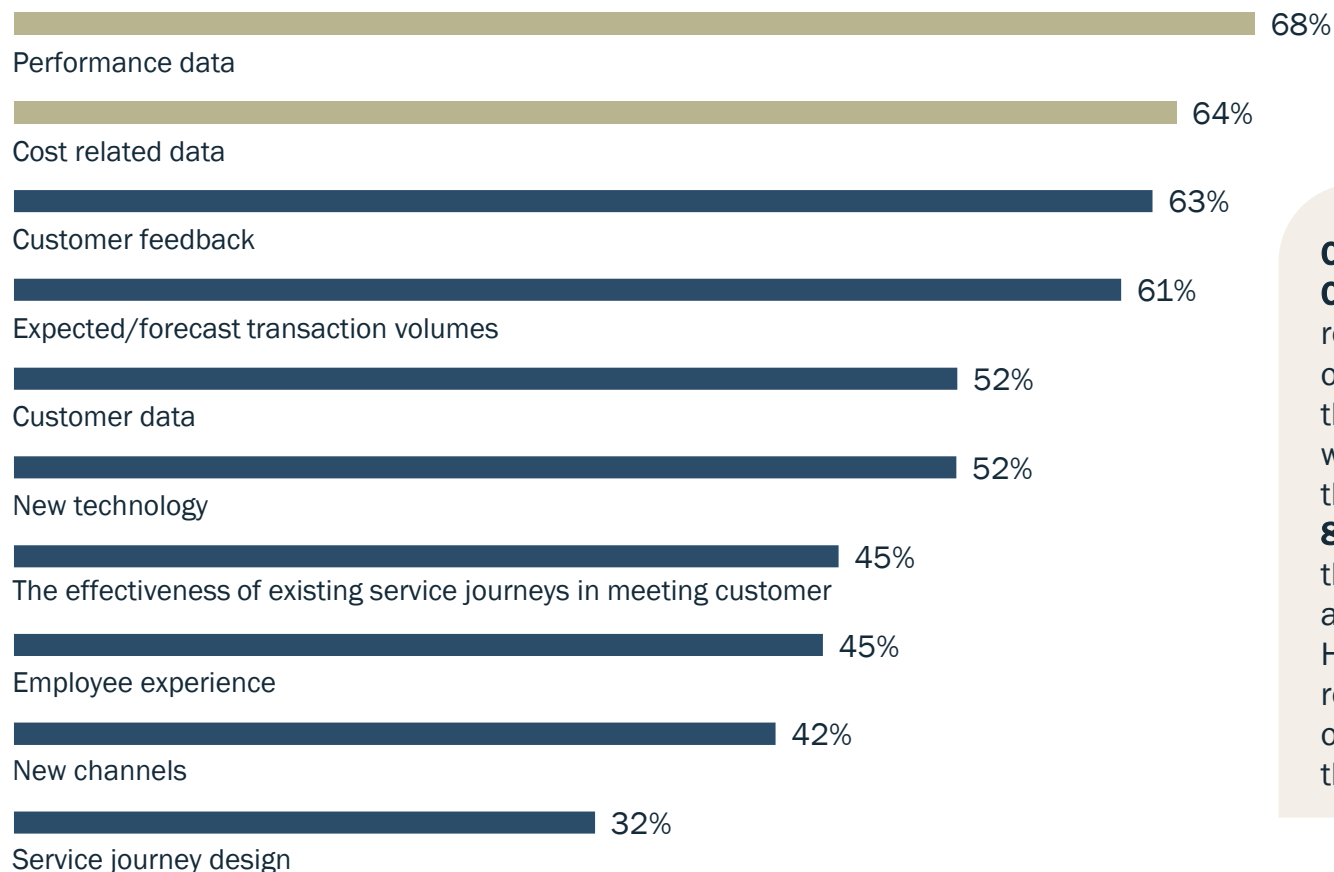


The majority of respondents stated their organizations develop an 'Annual Business Plan'

A slightly higher percentage of respondents representing OSPs stated they develop an 'Annual Business Plan' (86% OSPs vs 79% In-house)

A significantly lower percentage of respondents from In-house contact centers stated they analyse 'Cost Related' data while developing their Annual Business Plans – although this aspect emerged among the top two items reviewed overall

When developing Annual Business Plans for your contact center, which of the following aspects do you analyze? (Please select all that apply)

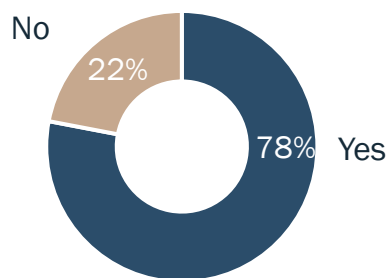


COPC CX Standard for Contact Centers, 7.0 requires customer care organizations to ensure they create a business plan with analysis on these themes

82% of respondents stated their organizations develop an 'Annual Business Plan' However, **only 6%** of respondents stated their organizations analysed all these aspects

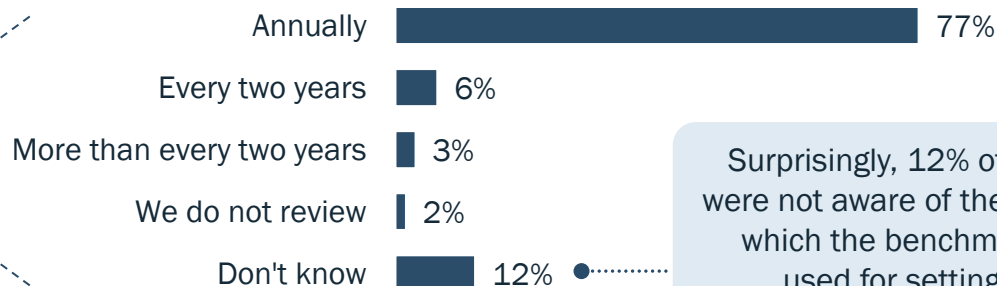
Setting Targets and Analysing Performance

Do you use benchmarking data to support target setting in your contact center(s)?



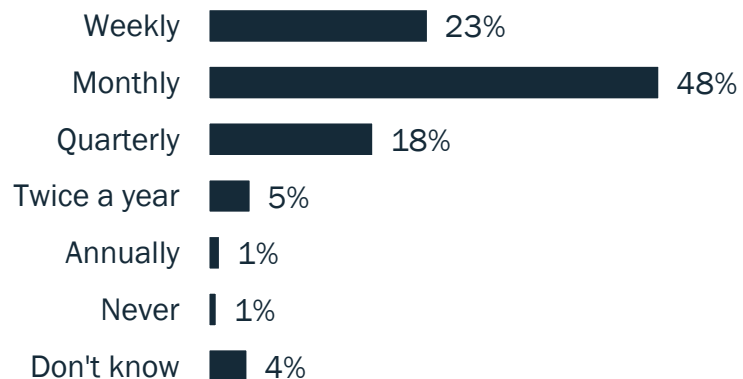
Directionally, a higher percentage of respondents from OSPs stated their organizations use benchmarking data to support target setting (83% OSP vs 74% In-house)

How frequently do you review the benchmarking data that is used to set your performance targets?



Surprisingly, 12% of respondents were not aware of the frequency at which the benchmarking data is used for setting performance targets at their organizations

How frequently do you formally analyze performance against targets?



COPC CX Standard for Contact Centers, 7.0 states:

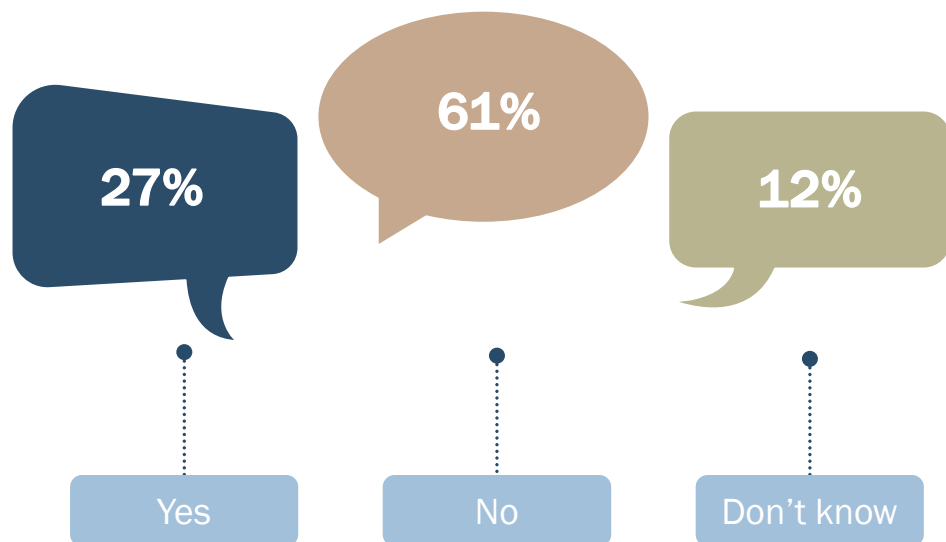
Set targets at high performance levels unless these conflict with entity's 'Statement of Direction' – **78%** of respondents stated their organizations do so

Comparative data must be updated every two years – **83%** of respondents stated their organizations do so

Include formal monthly analysis of performance to business plans and targets for all required metrics – **71%** of respondents stated their organizations analyse performance against targets, at least once a month

Chief Customer Officer

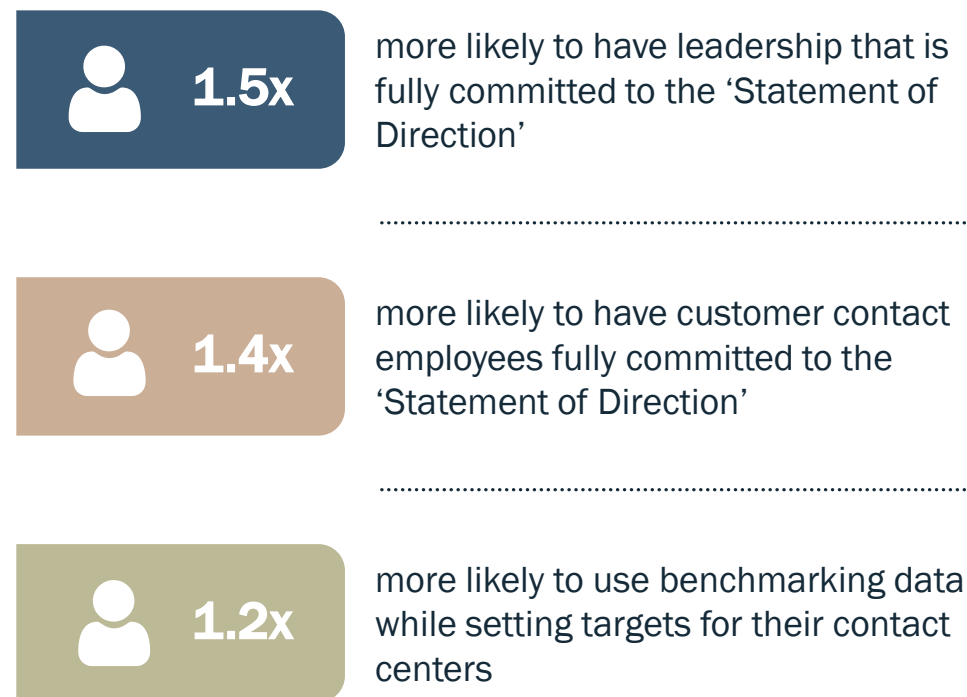
Does your organization have an individual in a Chief Customer Officer position?



27%

of respondents stated their organizations have a 'Chief Customer Officer'

Organizations with a Chief Customer Officer are:



03

Customer Experience Strategy

Objectives

Challenges to be Addressed

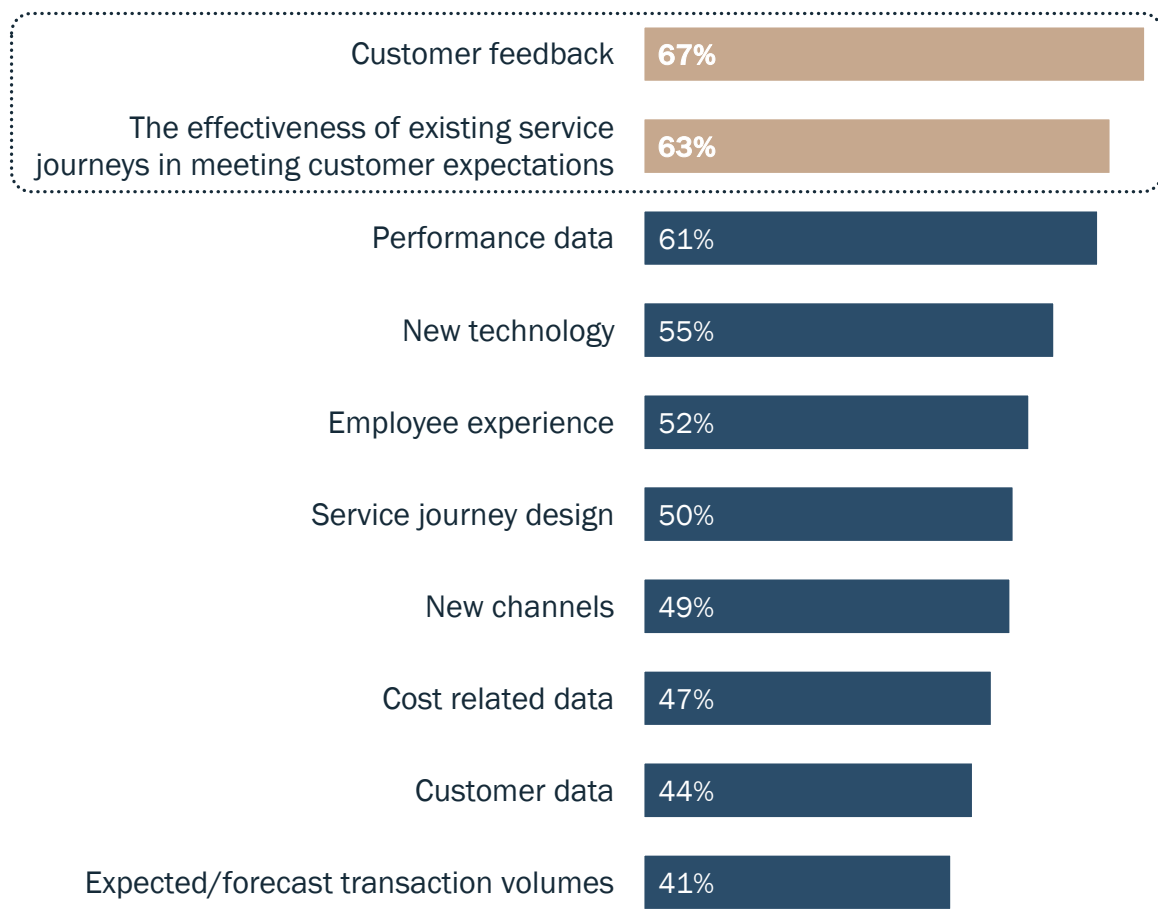
Outsourcing Strategy

OSP) Input



Objectives

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



Top objectives for:

In-house contact centers include:

1. Customer feedback
2. The effectiveness of existing service journeys in meeting customer expectations
3. Performance data

OSPs include:

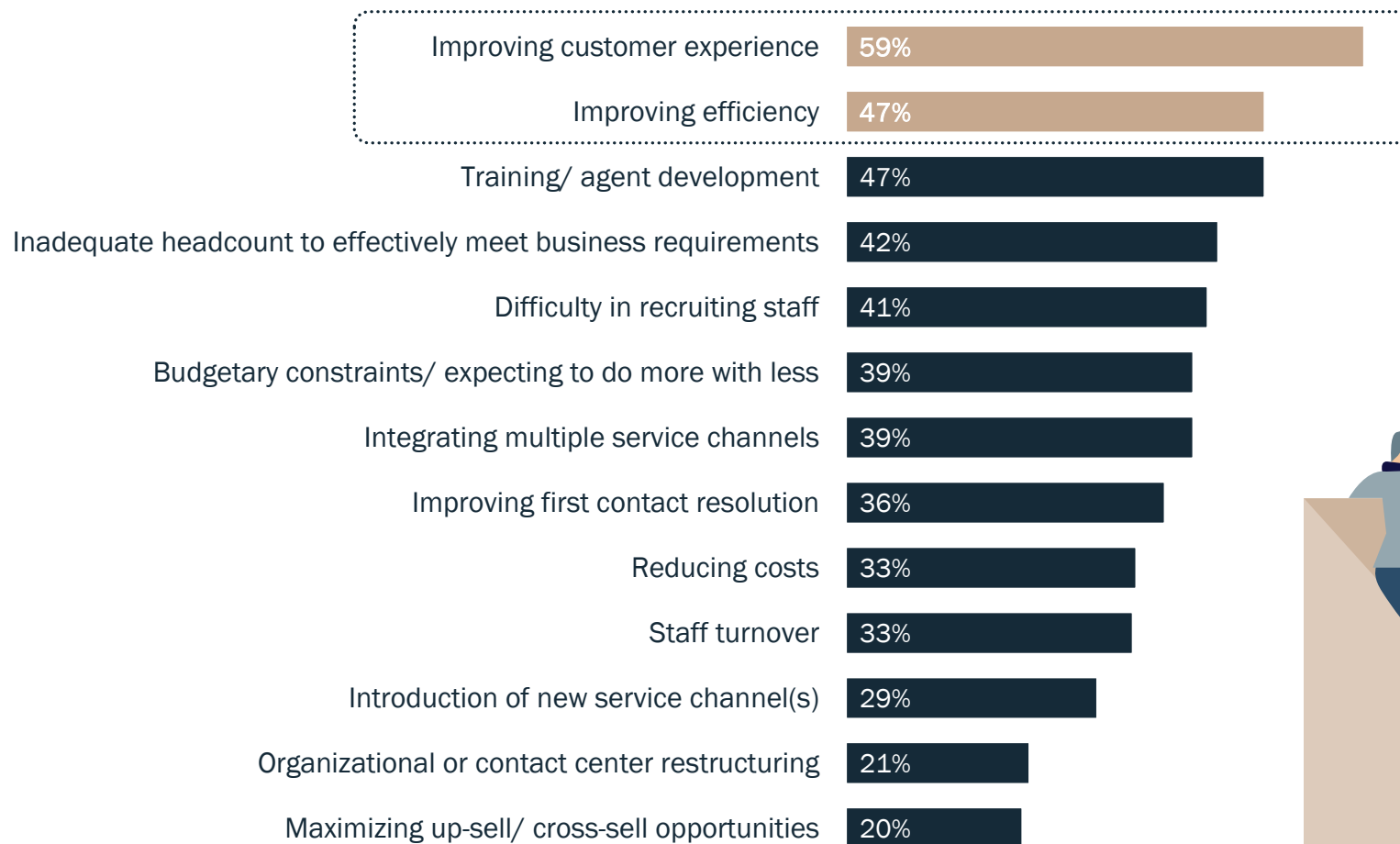
1. The effectiveness of existing service journeys in meeting customer expectations
2. Performance data
3. New technology

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

- In-house Contact Centers - 'Cost related'
- OSPs - 'Customer data'

Challenges to be Addressed

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



Top challenges for:

In-house contact centers include:

1. Improving customer experience
2. Integrating multiple service channels
3. Improving efficiency

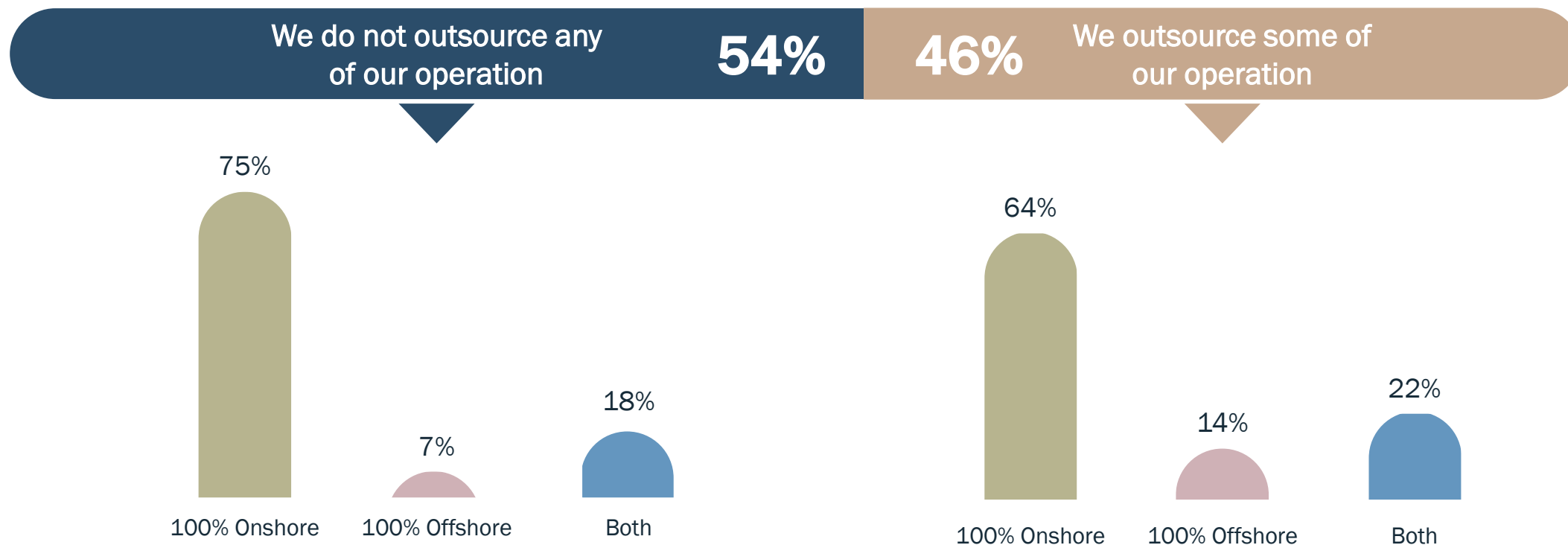
OSPs include:

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



Outsourcing Strategy

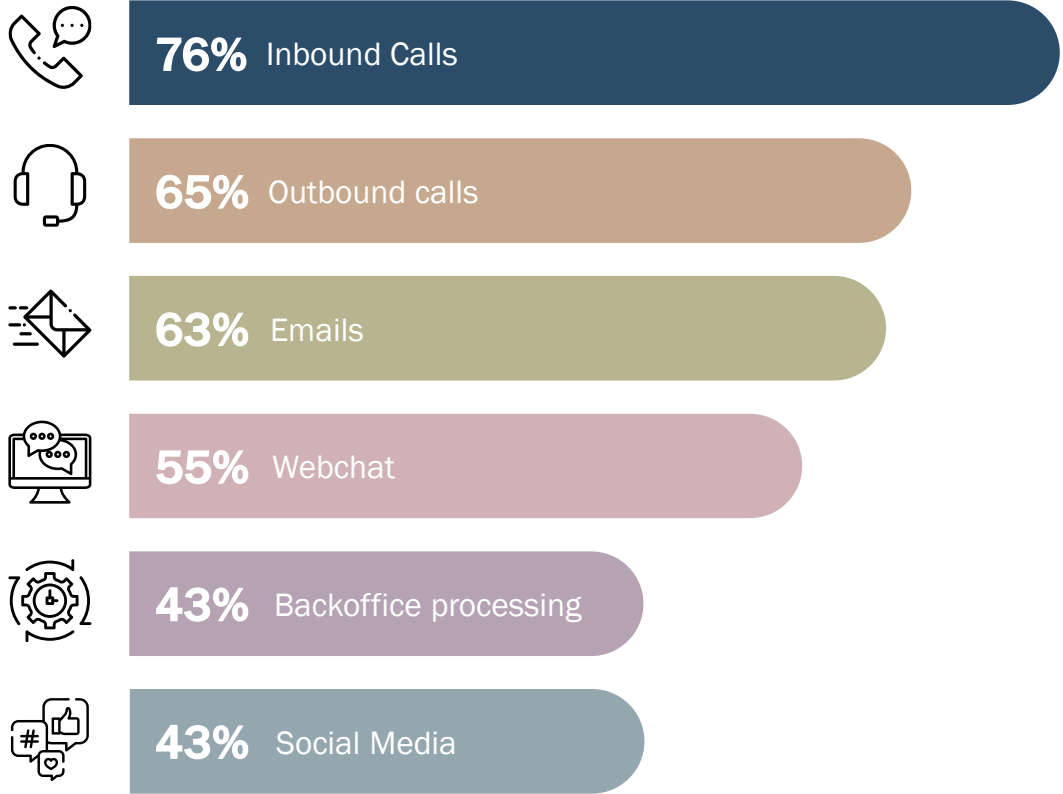
Which of the following best describes your operations?



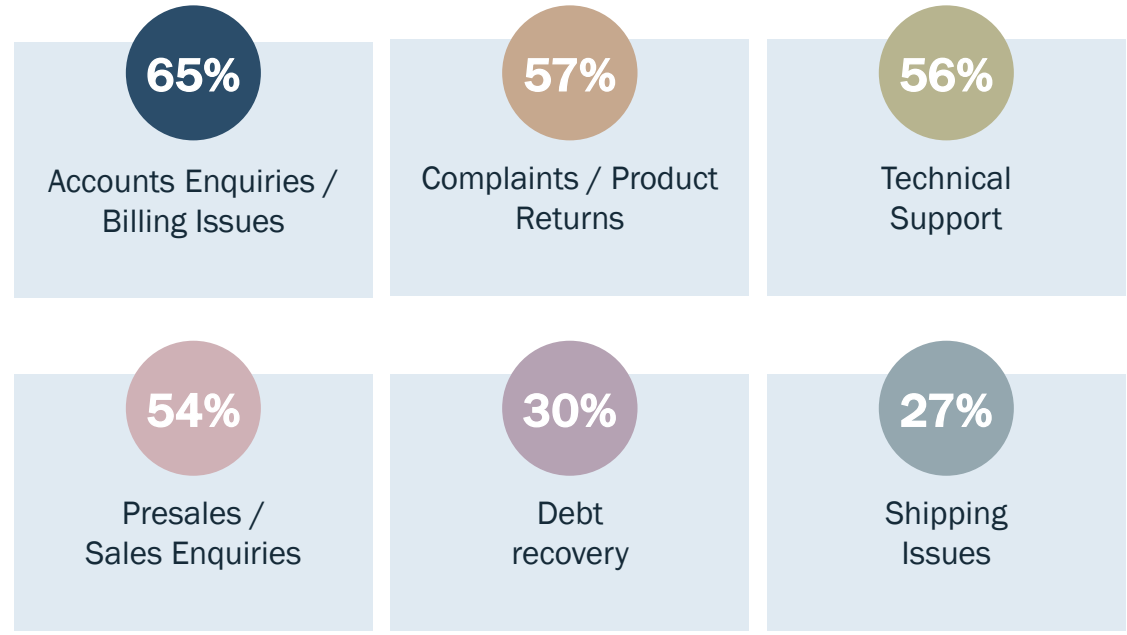
46% of respondents stated **their organizations outsource** - for organizations that do outsource, 64% of the workload is completely onshore versus 75% for organizations that do not outsource

In-house Contact Centers – Onshore Operations

Channels Managed Onshore



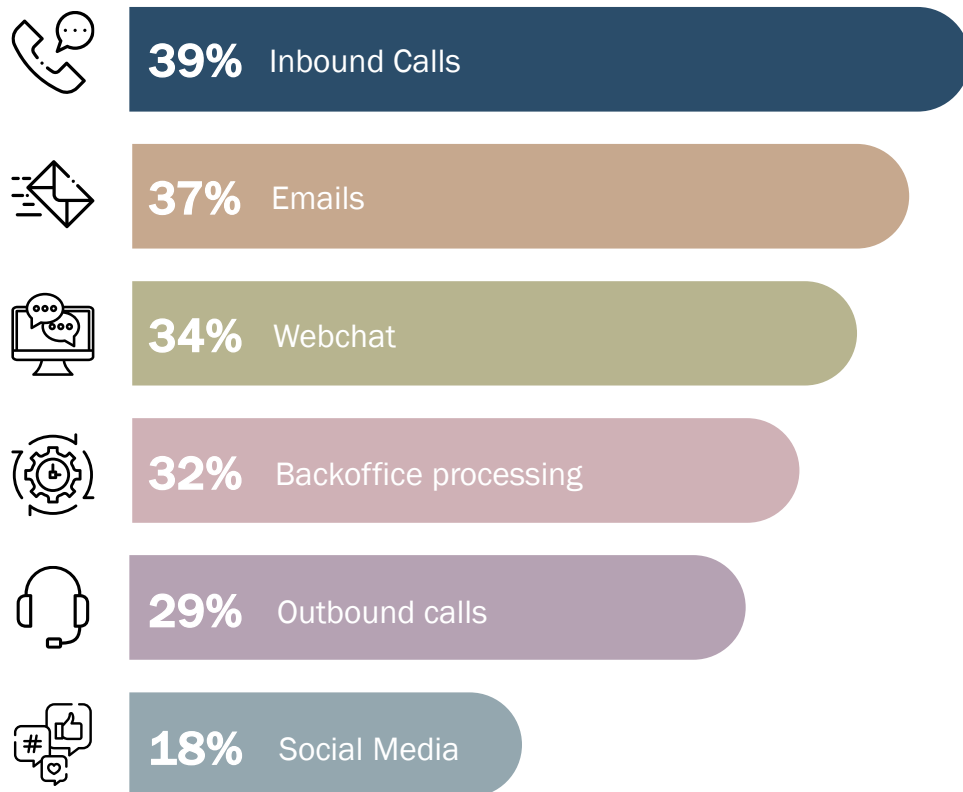
Transactions Managed Onshore



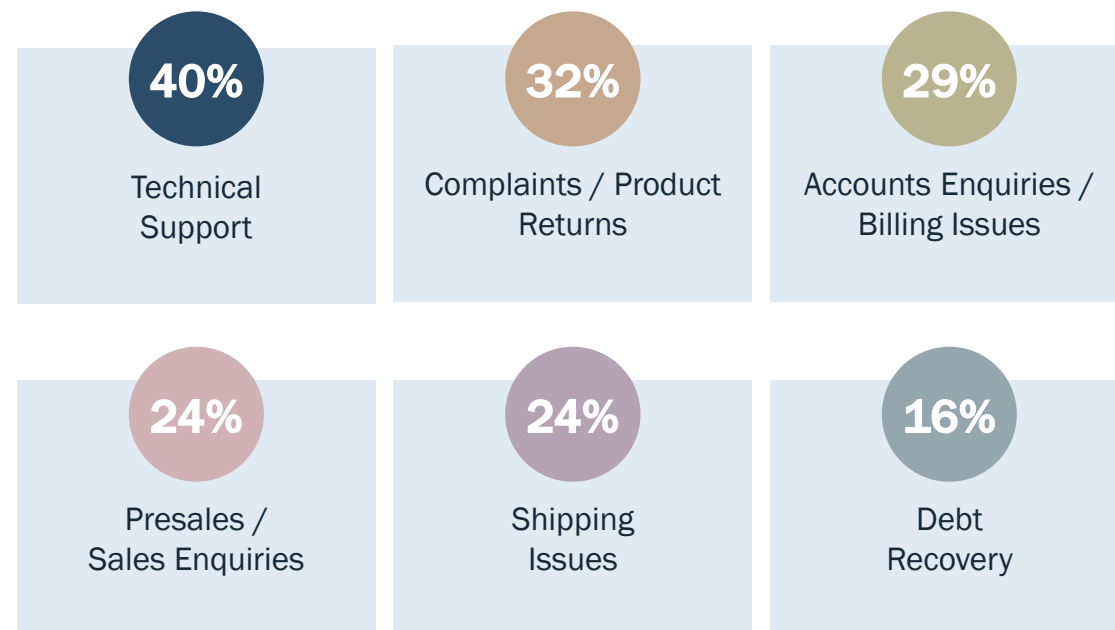
65%
 respondents stated their organizations have onshore operations related to **'Accounts Enquiries / Billing Issues'**

In-house Contact Centers – Offshore Operations

Channels Managed Offshore



Transactions Managed Offshore



40%

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

Reasons for Outsourcing

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

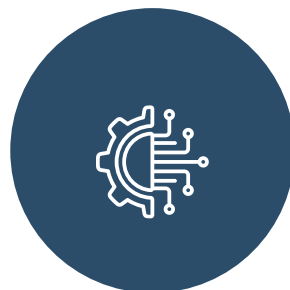
#1 → #2 → #3 → #4 → #5 → #6



Cost reduction



Flexibility to ramp up
or down quickly



Technology
capability



Performance Management
(outsourcers are experts in
contact centers)



Out of hours
support

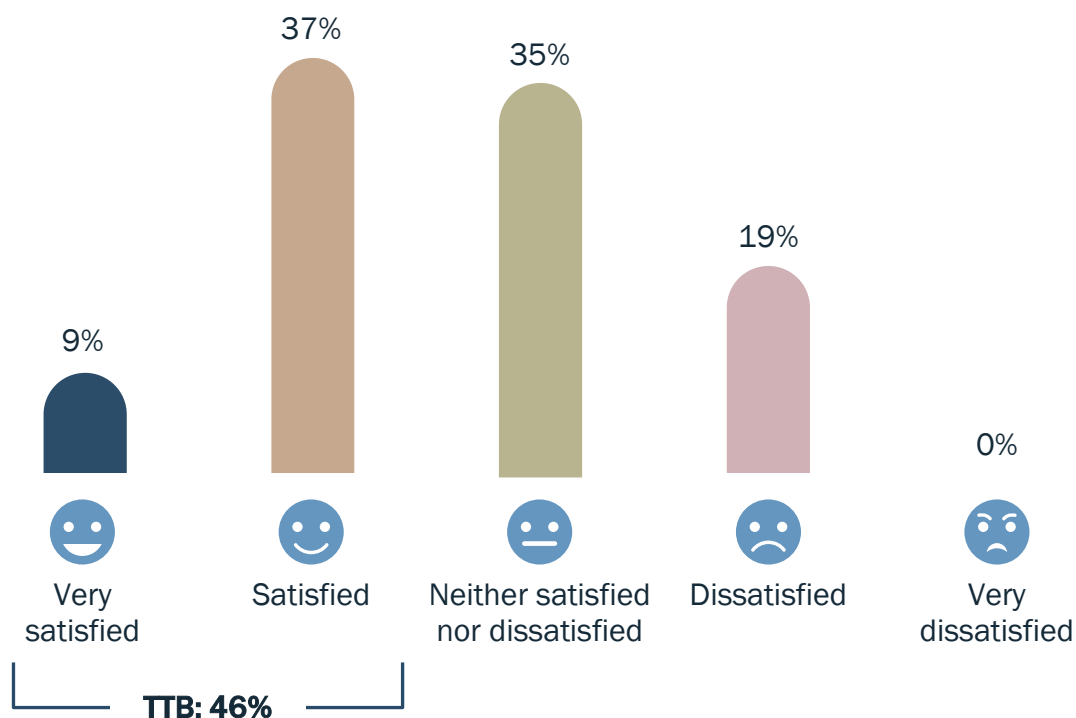


Multi language
support

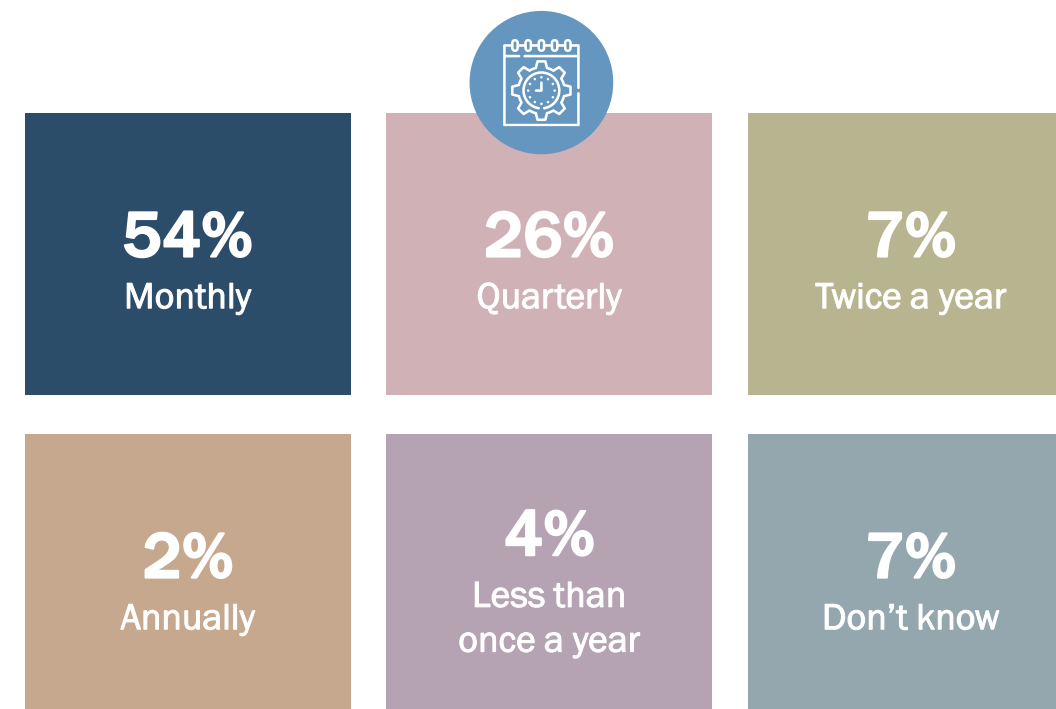
Unsurprisingly, '**Cost Reduction**' emerges as the top reason for organizations to outsource

Managing OSPs – 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)

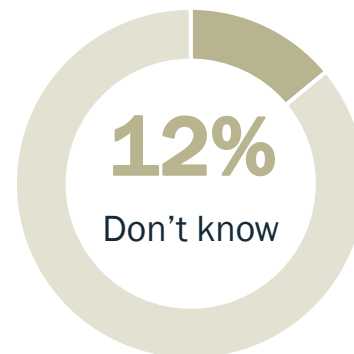
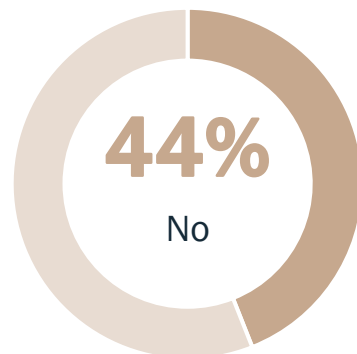
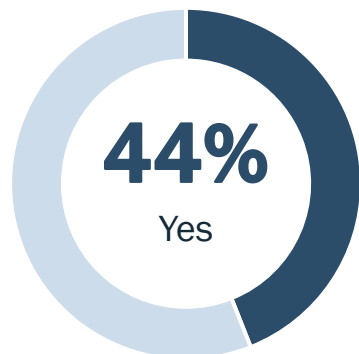


46% of respondents from organizations that outsource stated they were satisfied (TTB%) with their OSPs, a low satisfaction score. We also observed, organizations that have **frequent (monthly) formal business** reviews with their OSPs, were **1.3x more satisfied**.

TTB% - Very satisfied % + Satisfied %

Using Vendor Management Organizations (VMOs) for Outsourcing

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



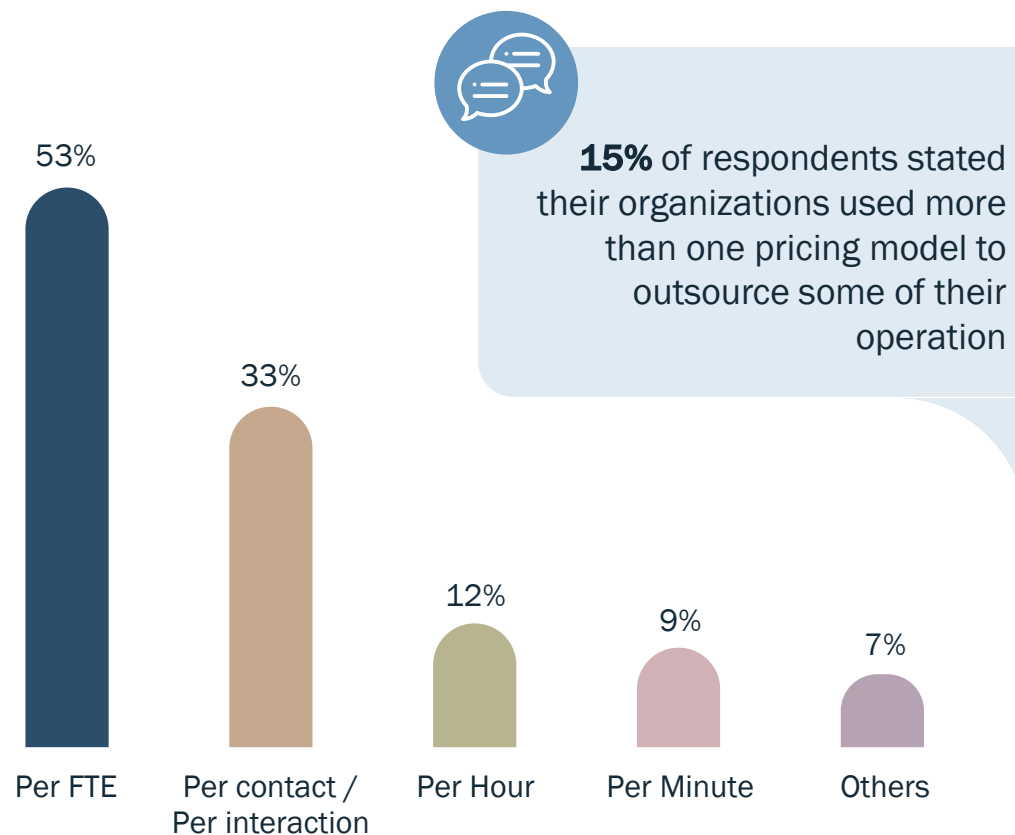
An equal proportion of respondents from organizations that outsource, stated they have / do not have a formal VMO to manage OSPs

Some more interesting observations include:

- Organizations with a **'Chief Customer Officer'** are **2x more likely to have a formal VMO**
- Organizations with a formal VMO are **1.2x more likely to be satisfied** with their OSPs

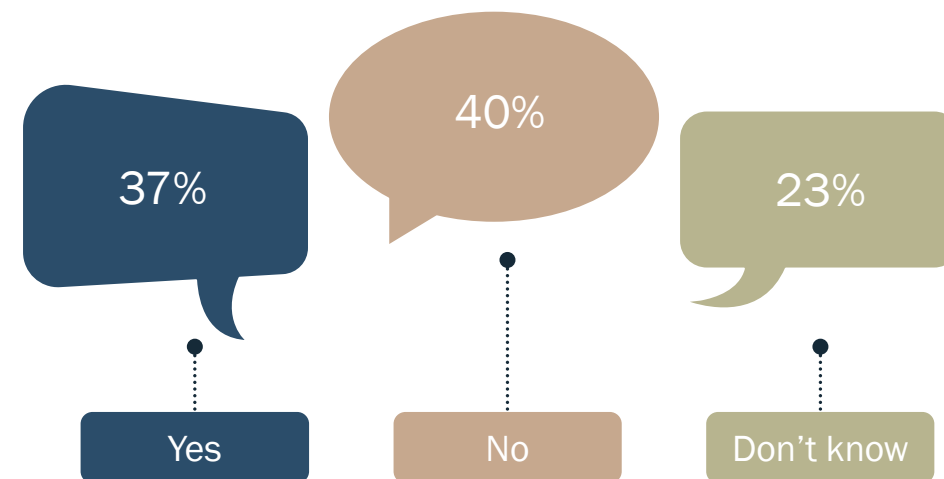
Commercial Models Used While Outsourcing

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



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

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

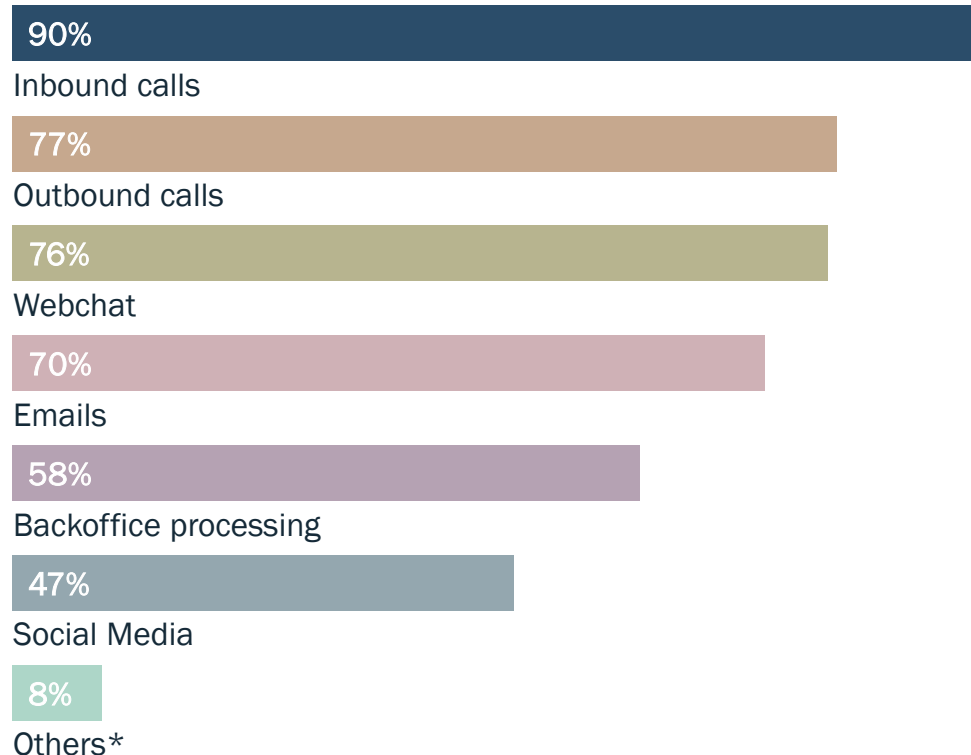


A similar proportion of respondents stated they also use / do not use 'risk/reward' model in combination with commercial models used to outsource

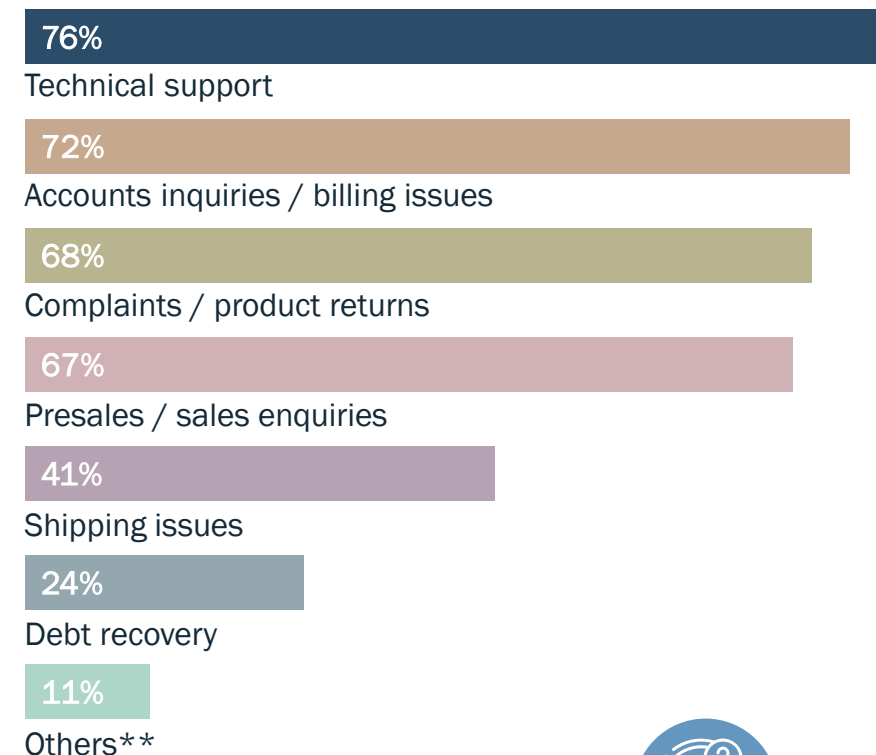
Organizations with a VMO are 2x more likely to use a 'risk/reward' model in combination with other commercial models

OSPs – Channels and Transactions Supported

Channels Supported



Transactions Supported



90% of OSPs provide support for inbound calls

Most common types of transactions supported include 'Technical Support' and 'Accounts Inquiries / Billing Issues'

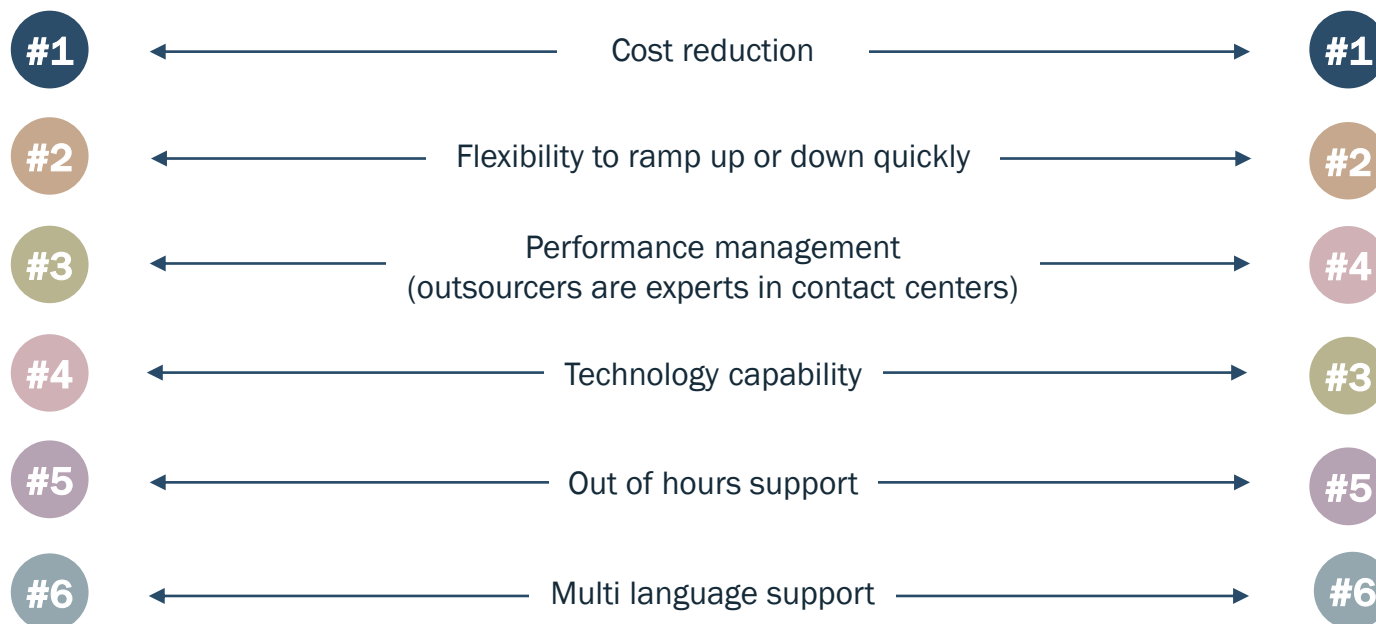


* Others include Messengers (WhatsApp), SMS, Mail etc.) ** Others include Order Management, Surveys, Insurance Claims, After Sales, Dispute Management etc.

OSPs – Why Clients Outsource?

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

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

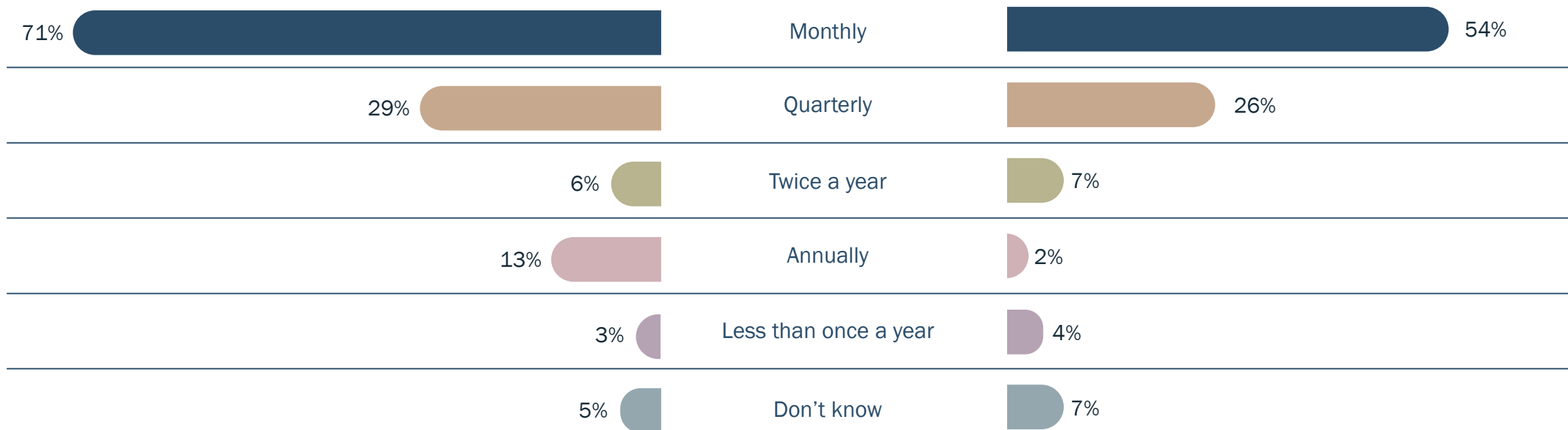


The understanding of why organizations outsource their customer care operations – is similar among OSPs and organizations that outsource
‘Cost reduction’ and **‘flexibility to ramp up or down’** are the top reasons stated by both the OSPs and the users of outsourcing services

OSPs – Formal Reviews with Clients

How often do your clients perform formal business reviews with you? (Select all that apply) (OSP 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 OSPs is on a **monthly basis**





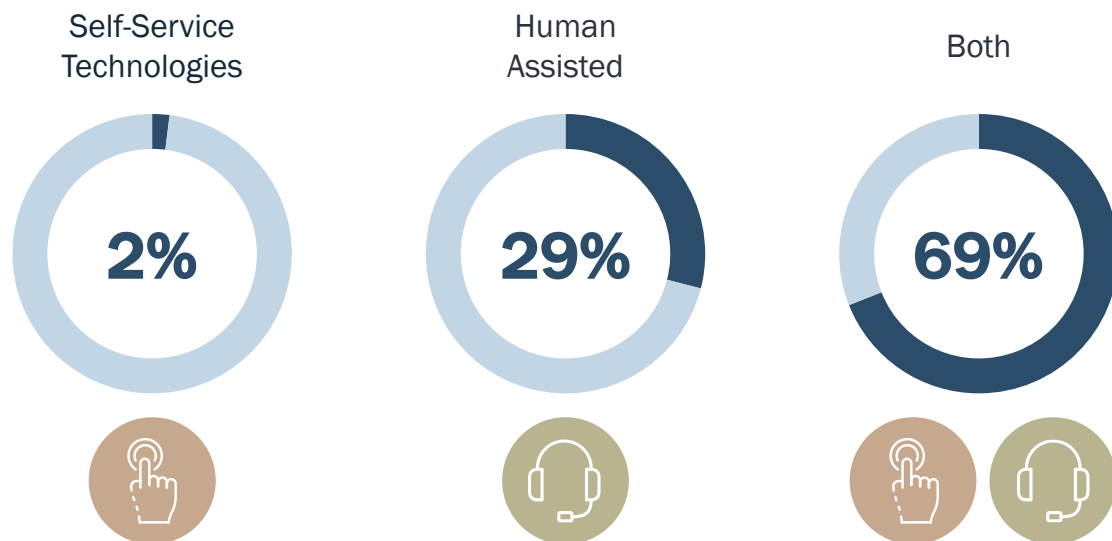
04

Channels

Channels Offered and Multichannel Journeys
Measuring Customer Experience | Metrics and KPIs

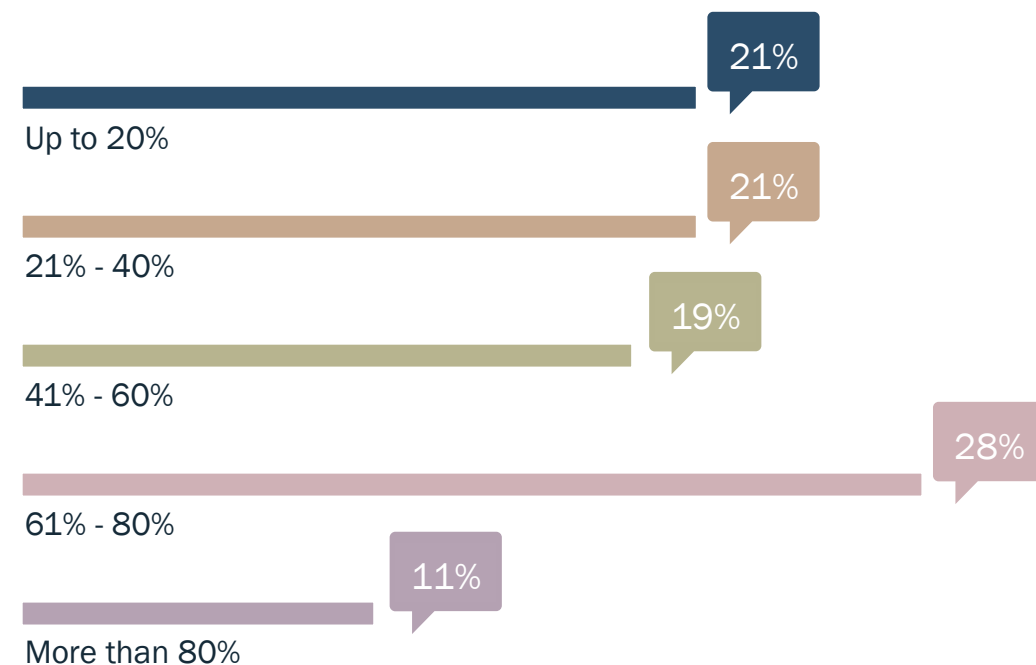
Channels Offered and Multichannel Journeys

Which of the following channels does your organization offer?



69% of respondents stated their organizations provide both channels to their customers – Human Assisted as and Self-Service Technologies

What proportion (%) of your customers do you believe need to use multiple channels (like phone, email and social media) to resolve a single customer service issue?



Multichannel journeys are becoming common among customers reaching out to organizations for customer care. **39% respondents** stated that **more than 60% of their customers use a multichannel journey** to get a single customer care issue resolved

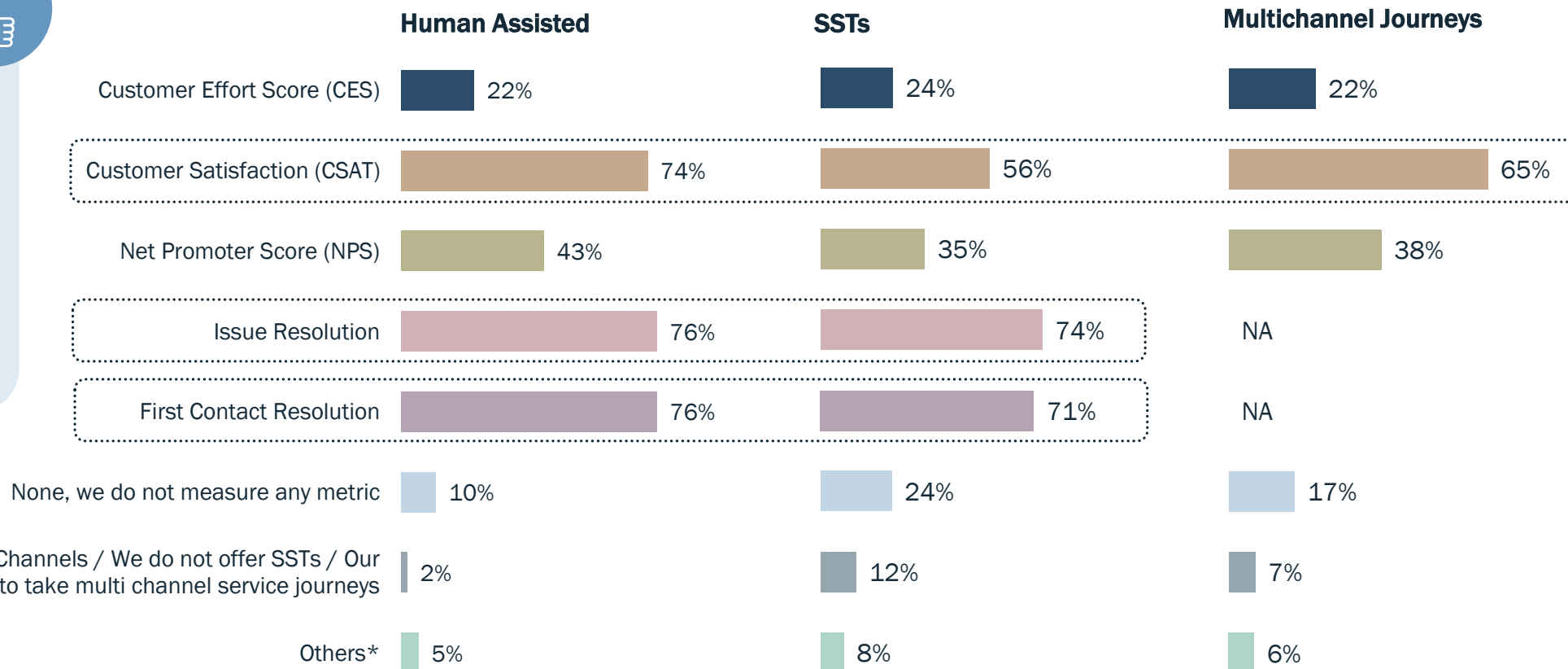
Measuring Customer Experience | Metrics and KPIs

Which of the following Customer Experience metrics do you actively measure and report on for Human Assisted Channels / Self-Service Technologies (SSTs) / Multichannel Journeys?



Customer Satisfaction is the most commonly measured CX metric across channels

More than 70% of respondents stated their organizations measure 'Issue Resolution Rate' and 'First Contact Resolution' for support through their Human Assisted Channels and SSTs



* Others include Critical Errors, Return Visit Satisfaction, Effective Close Rate etc.



05

Understanding Customer Experience

What Execs think Matters to Customers?

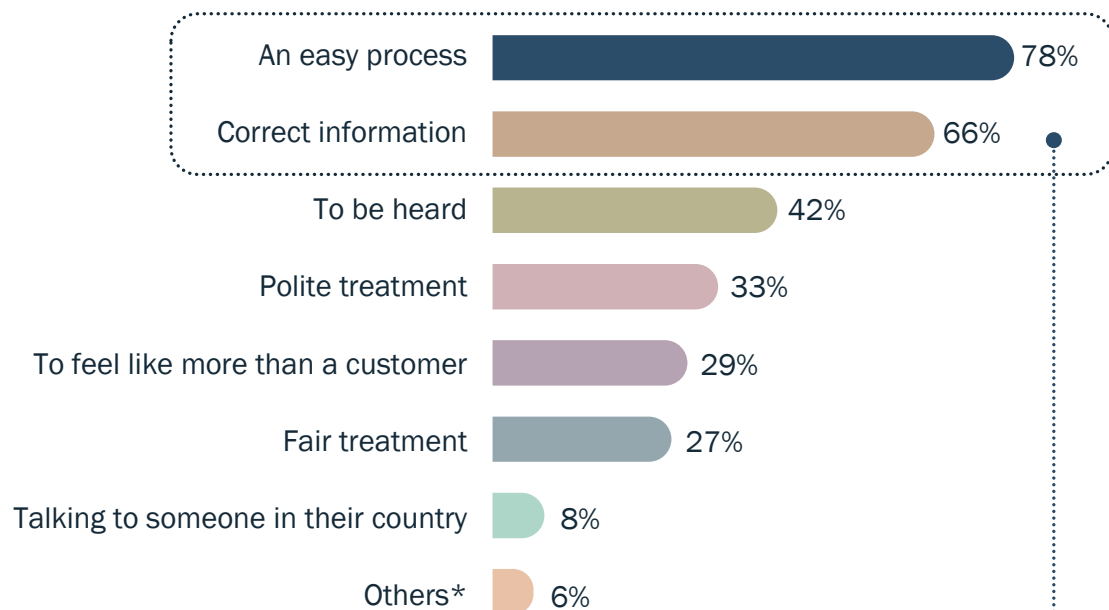
Would Customers be Willing to Pay More for
World-Class Service?

Measuring Customer Experience | Gathering
Feedback – Types and Timing

Service Journey Mapping

What Execs think Matters to Customers

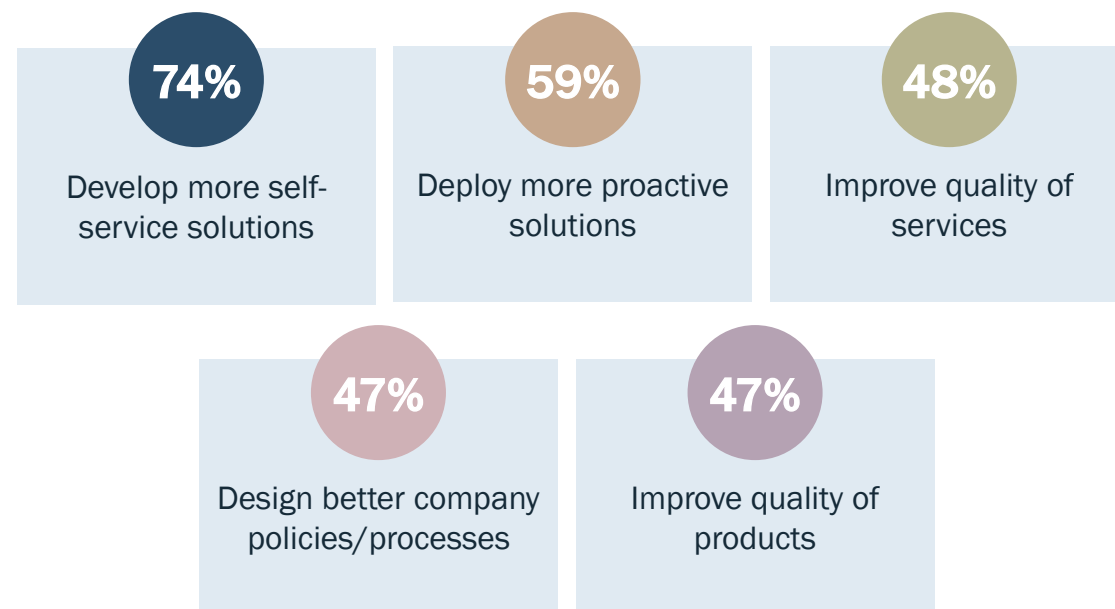
Aside from getting their issue resolved satisfactorily, we asked Execs in CX operations what they felt was important to their customers when dealing with an organization to resolve a customer service issue



The respondents stated that it was most important to be easy to deal with and to provide correct information – ‘an easy process’ also emerged as the factor customers thought was important while dealing with organizations (see page 37 for comparison)

* Others include Empathy, First Time Right, Quality of Service, Timely Information etc.

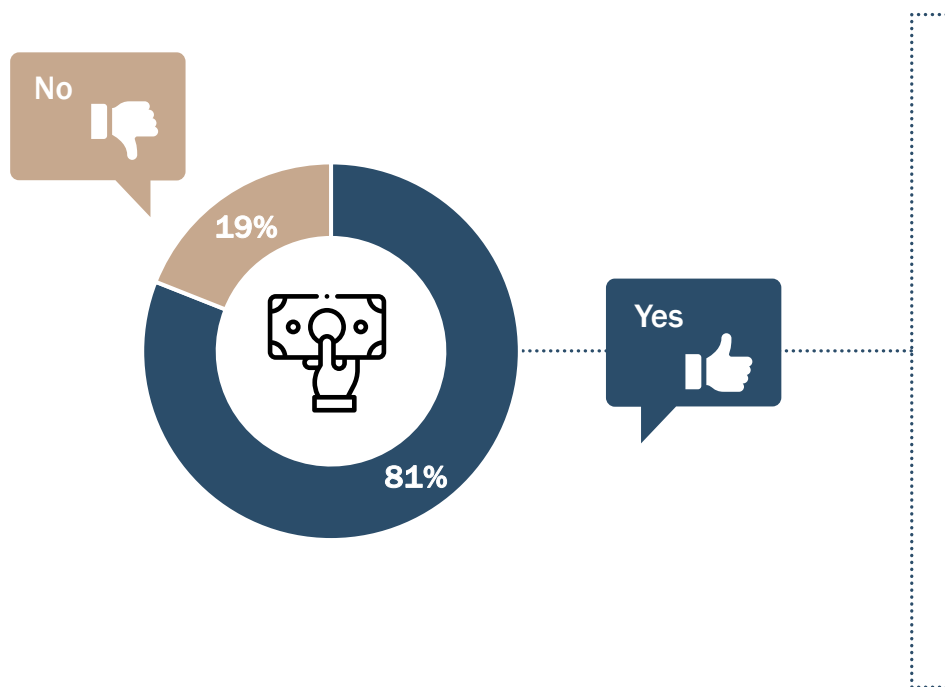
What do Execs feel organizations should do differently to help customers avoid having to contact customer service to resolve an issue?



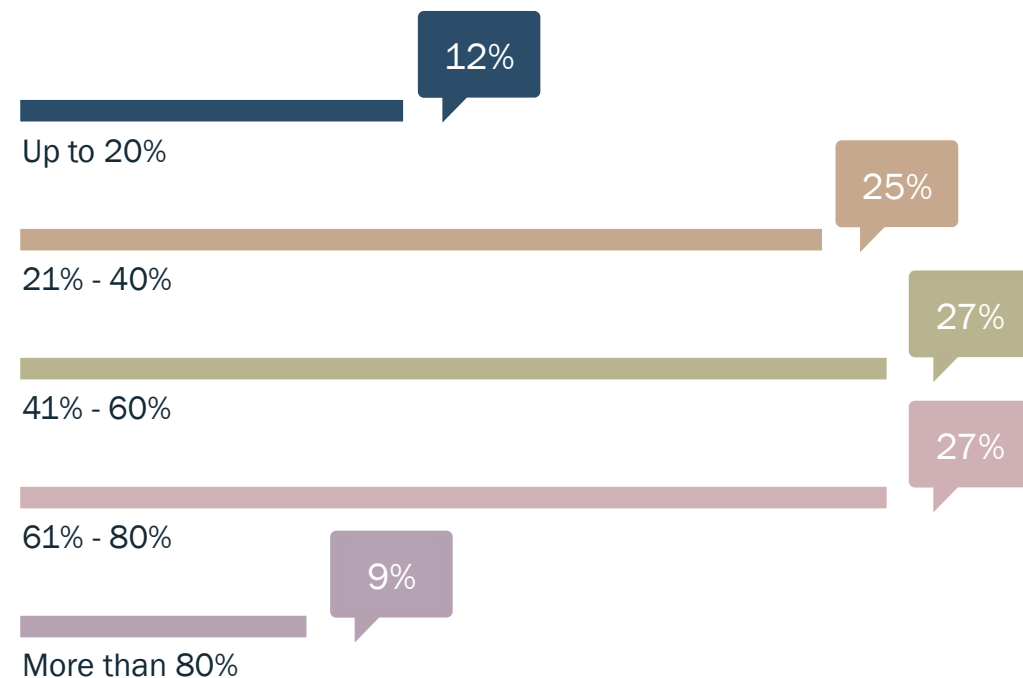
The respondents stated they should focus more on self-service technologies to ensure customers do not have to reach out to customer service for getting their issues resolved. This was not the same as customers felt (see page 39 for comparison)

Would Customers be Willing to Pay More for World-Class Service?

Do you believe customers will be willing to pay a little more for a product or service if they knew they would receive world-class customer service as a result?



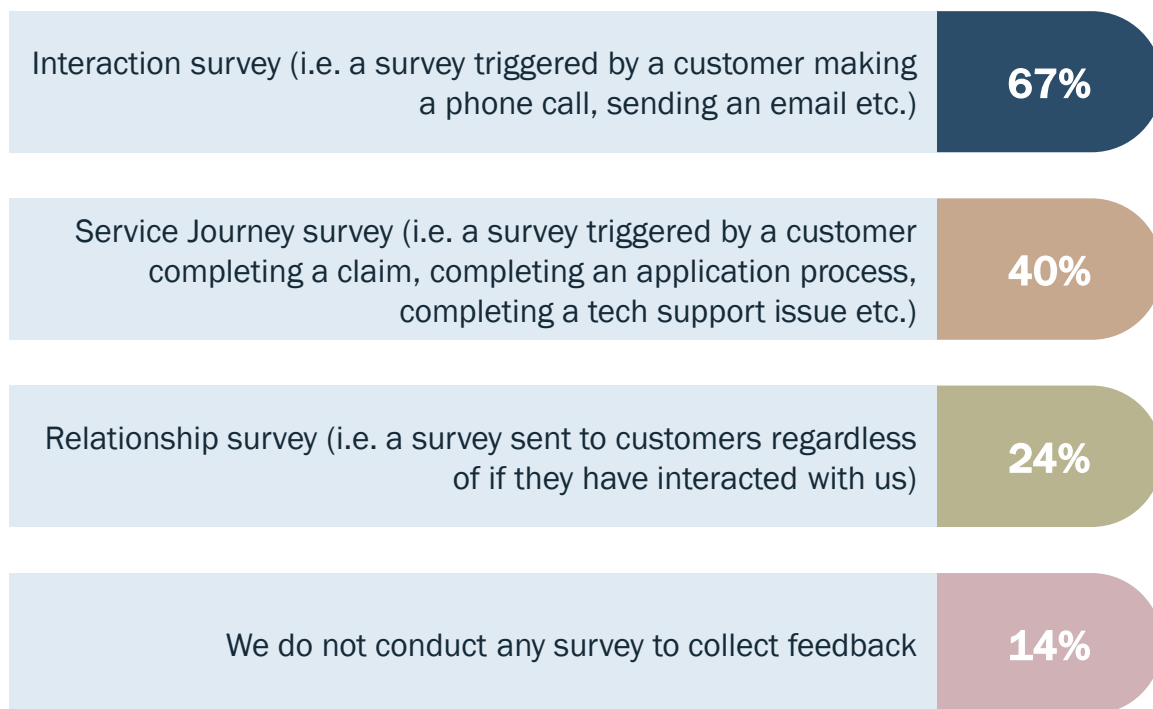
What proportion of customers do you think would you be willing to pay a little more for a product or service if they knew they would receive world-class customer service as a result?



81% of respondents believe that customers would be willing to pay a little more if they are provided world-class customer service
36% of these respondents also stated that more than 60% of their customers would be willing to pay more if assured better support

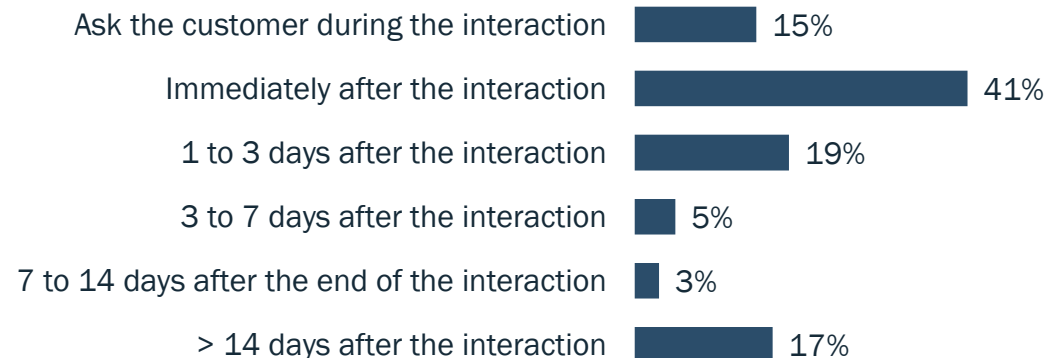
Measuring Customer Experience | Gathering Feedback – Types and Timing

Which of the following survey types does your organization use to collect feedback from customers? (Select all that apply)



Interaction surveys are the most popular method of collecting feedback among organizations

How long after an interaction (e.g., call, email etc.) do you survey customers about their experience?



17% of respondents stated they collect the feedback >14 days after the interaction with the customer

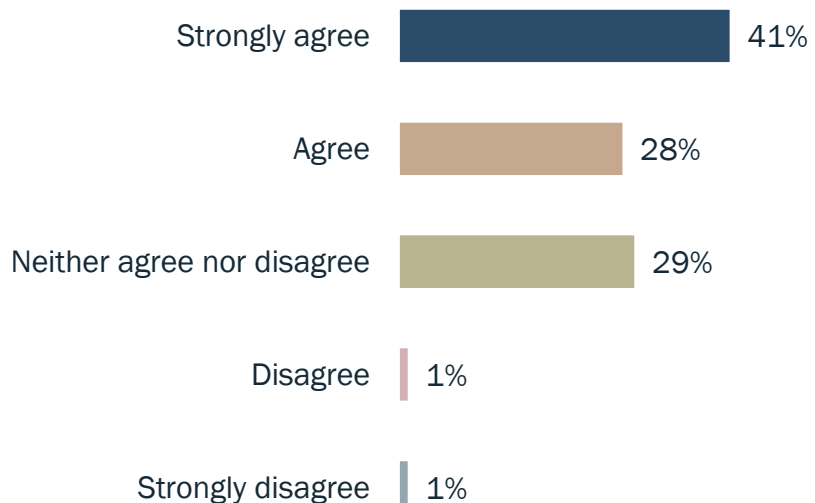


Service Journey Mapping

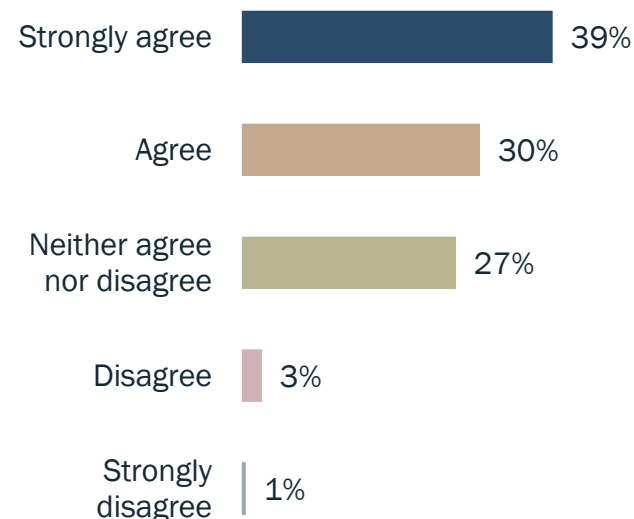
Has your company conducted any service journey or customer journey mapping projects in the last 12 months?



How strongly do you agree that the journey mapping project has helped your organization to improve internal efficiencies?



How strongly do you agree that the journey mapping project has helped your organization to improve the customer experience?



59% of respondents stated their organizations have conducted a Service Journey Mapping Project recently:

- **40%** of respondents who stated their organizations have conducted a Service Journey Mapping Project recently, also stated they **have a Chief Customer Officer** position **vs. 14%** for organizations that have not undertaken a Service Journey Mapping Project
- **30%** of respondents who stated their organizations were **facing challenges relating to 'Improving efficiency and customer experience'**, have also stated their organizations have undertaken a Service Journey Mapping Project in last 12 months

06

Voice of Customer

Customer Contact

What Matters to Customers?

Channel Preference and Usage

Inquiries

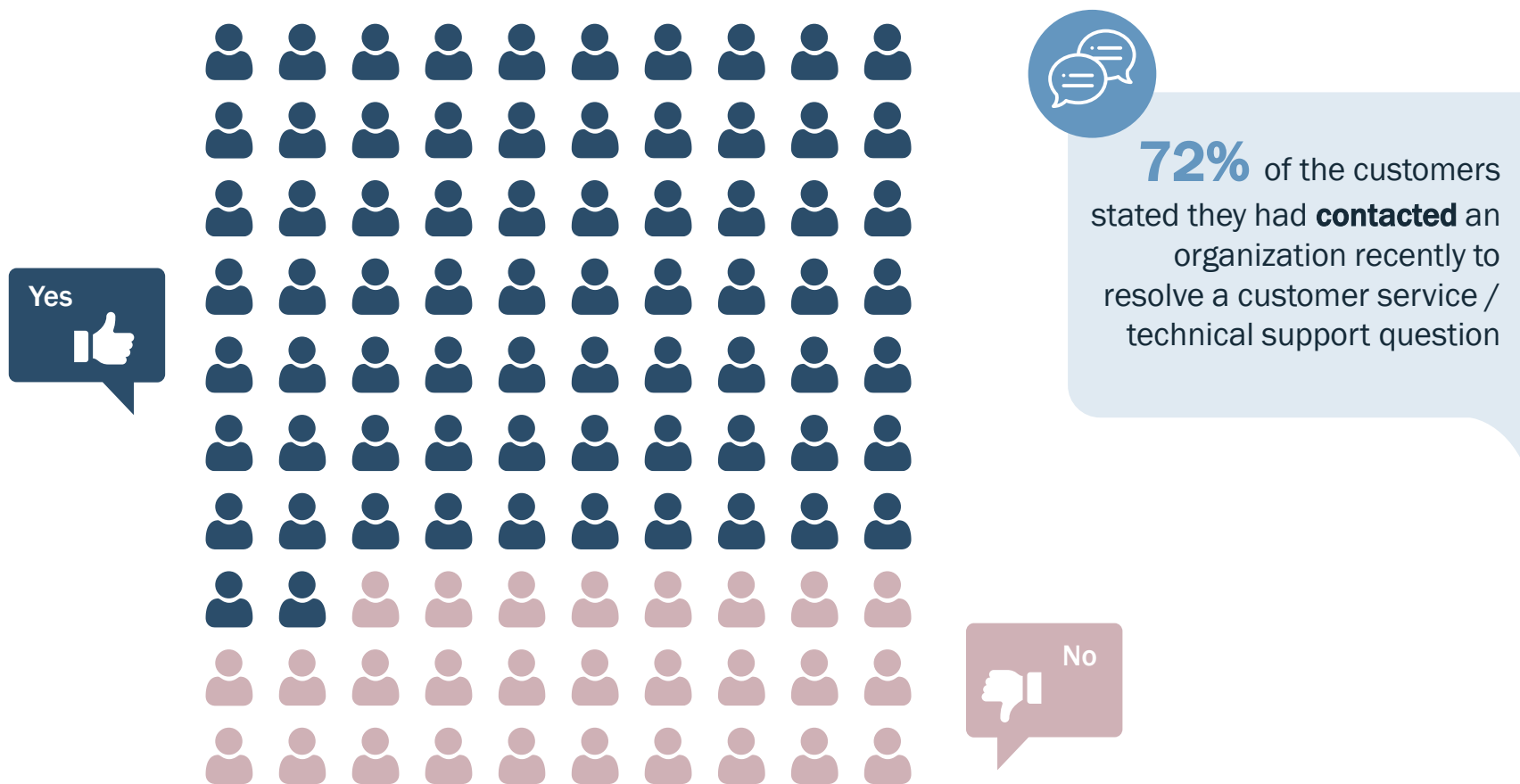
Customer experience with:

- Phone
- Email
- Self-service Technologies (SSTs)



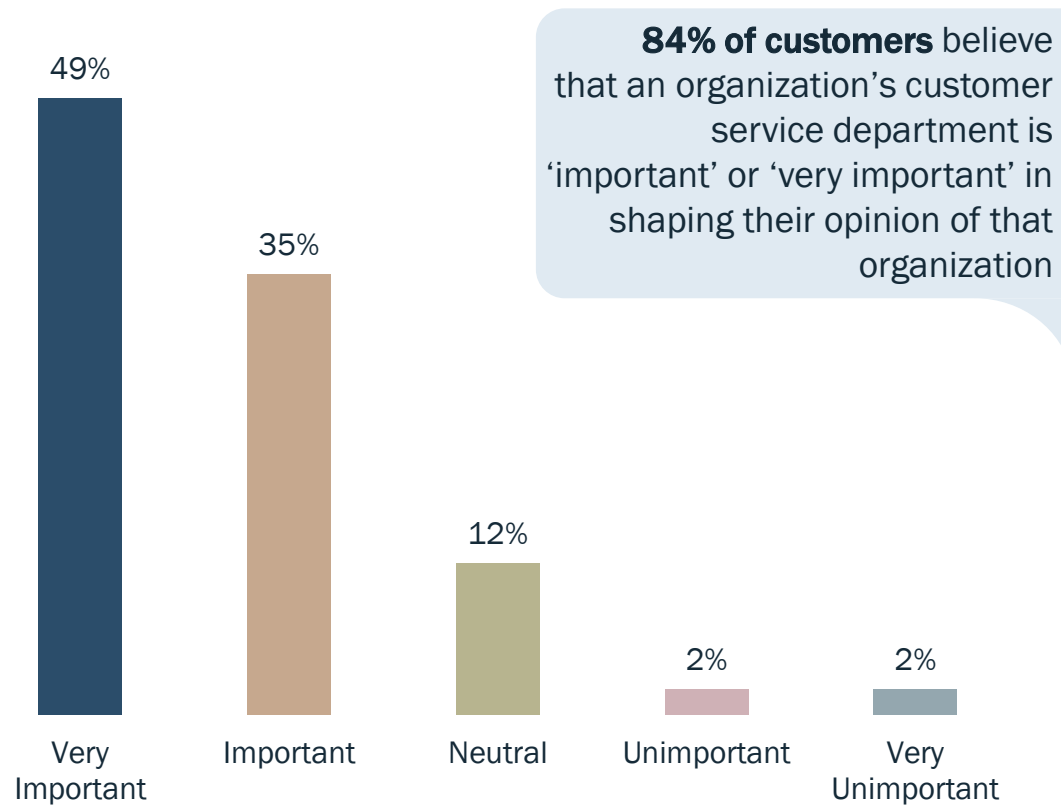
Customer Contact

Within the past three months, have you contacted an organization to resolve a customer service/technical support question?

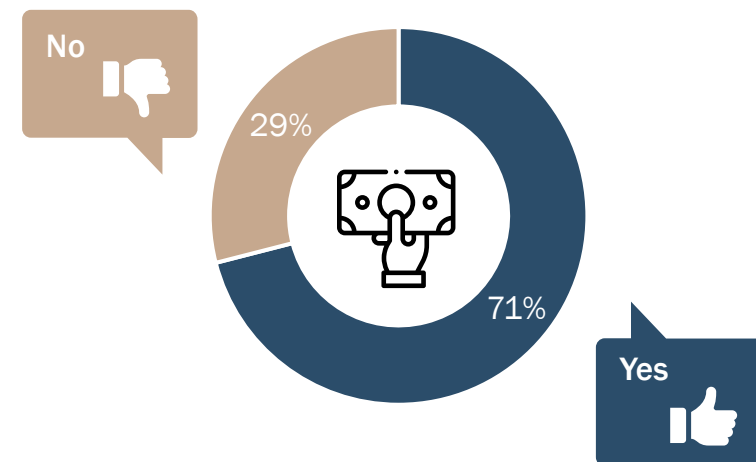


What Matters to Customers?

How important is your experience with an organization's customer service department in shaping your opinion of that organization?



Would you be willing to pay a little more for a product or service if you knew you would receive world-class customer service as a result?



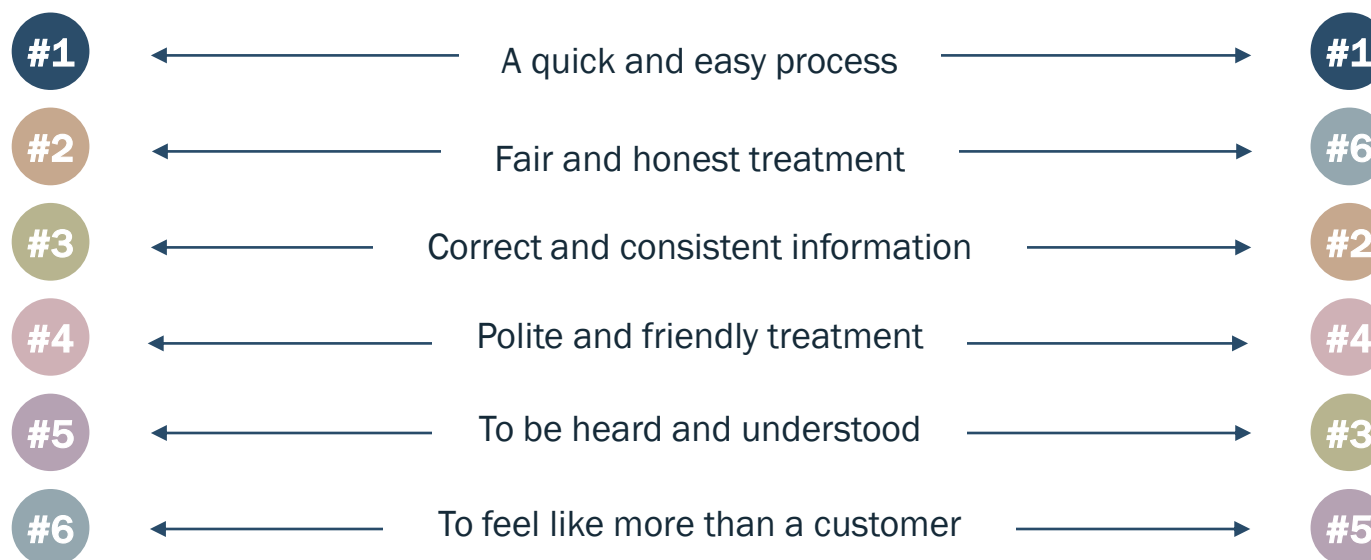
Customers who **had a contact with customer care, are 1.3x more likely to be willing to pay more** for "products/ services" compared to customer who have not contacted

Customers rating customer service as an important factor, display **1.3x more** willingness to pay more than those who do not consider customer services to be important

What Matters to Customers?

Aside from getting your issue resolved satisfactorily, what is most important to you when dealing with an organization to resolve a customer service issue? (CUSTOMER VIEW)

Aside from getting their issue resolved satisfactorily, what is important to your customers when dealing with an organization to resolve a customer service issue? (CORPORATE VIEW)

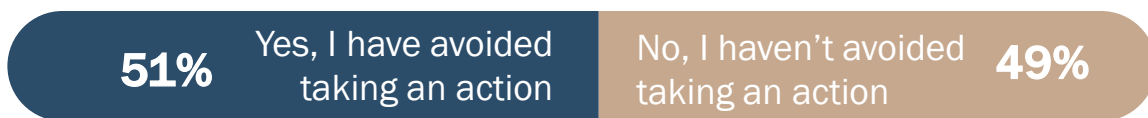


Beyond having their issue resolved, **customers** consider, ‘**a quick and easy process**’ and ‘**fair and honest treatment**’ as the top factors when reaching out to organizations with their customer care issues

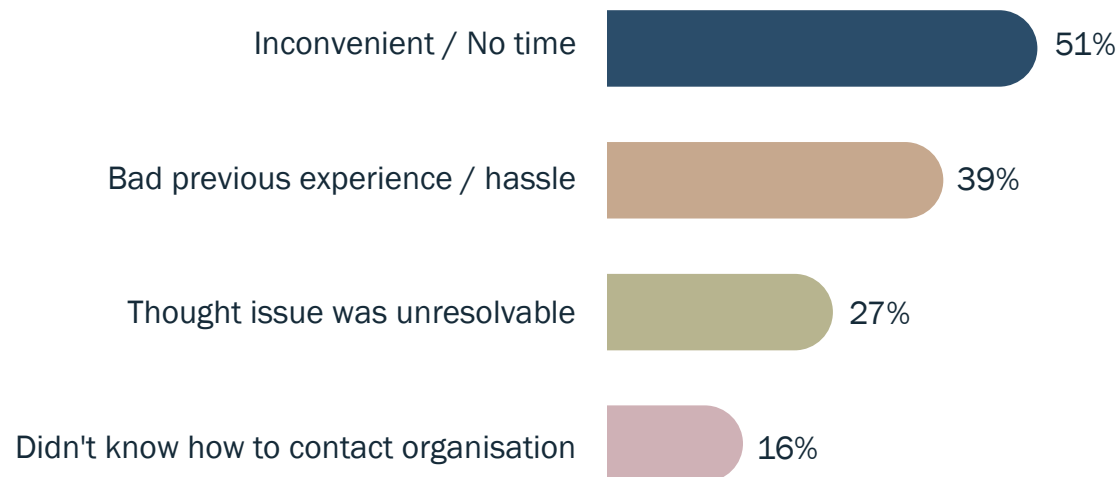
Organizations seem to **underestimate the importance of ‘fair treatment’** when customers reach out to organizations for support, as the former rate it lower than other factors

What Matters to Customers?

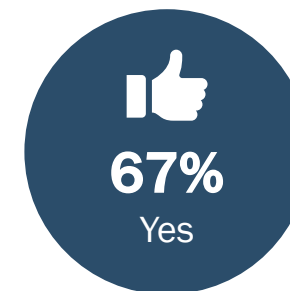
Within the past 12 months, have you avoided taking an action on a customer service issue?



Why have you avoided taking an action on a customer service issue?



Has an organization ever lost your business because you received poor customer care?



51% of customers stated they avoided acting on a customer service issue in the past 12 months

- Further, **51%** of these customers avoided an action due to 'inconvenience/ no time'

67% of customers stated an organization has lost business because they received poor customer service

What Matters to Customers?

What do you feel organizations should do differently to help customers avoid having to contact customer service to resolve an issue? (CUSTOMER VIEW)

What do you feel organizations should do differently to help customers avoid having to contact customer service to resolve an issue? (CORPORATE VIEW)

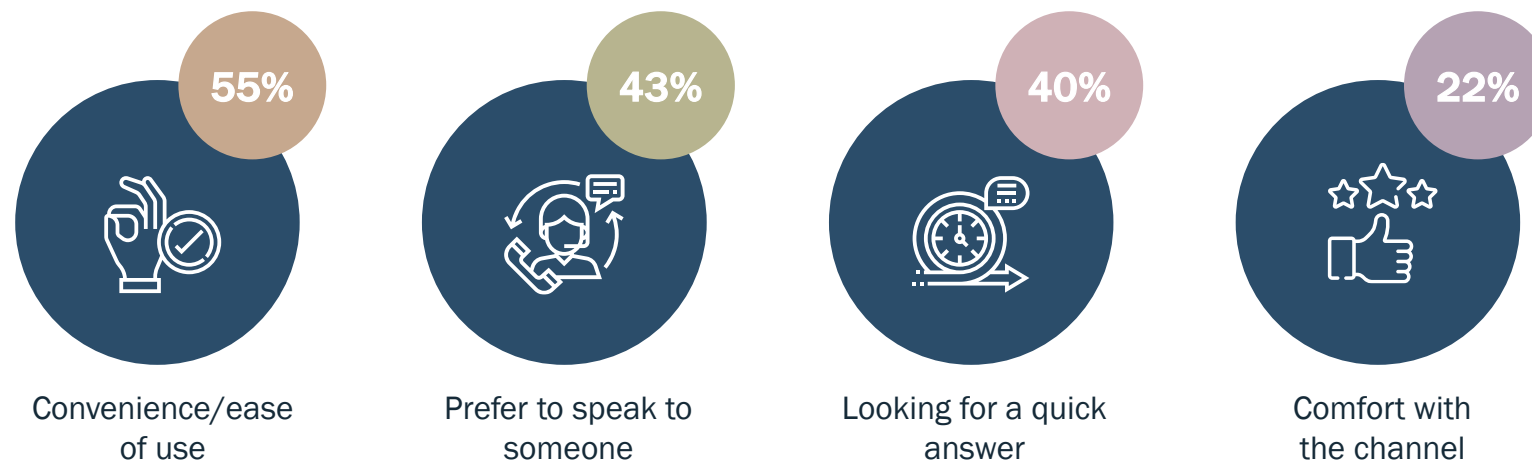


Per **customer view**, **improvements in the quality of products and services** are at the top of what organizations should do to help customers avoid having to contact customer service to resolve an issue

Per **corporate respondents**, developing more of **self-service and more proactive solutions** are the top-most 'to-do' items
 'Improving quality of products' and 'designing better company policies / processes' are ranked equally by the corporate respondents

Channel Preference and Usage

What are the biggest factors in determining your preferred channel when contacting customer care?



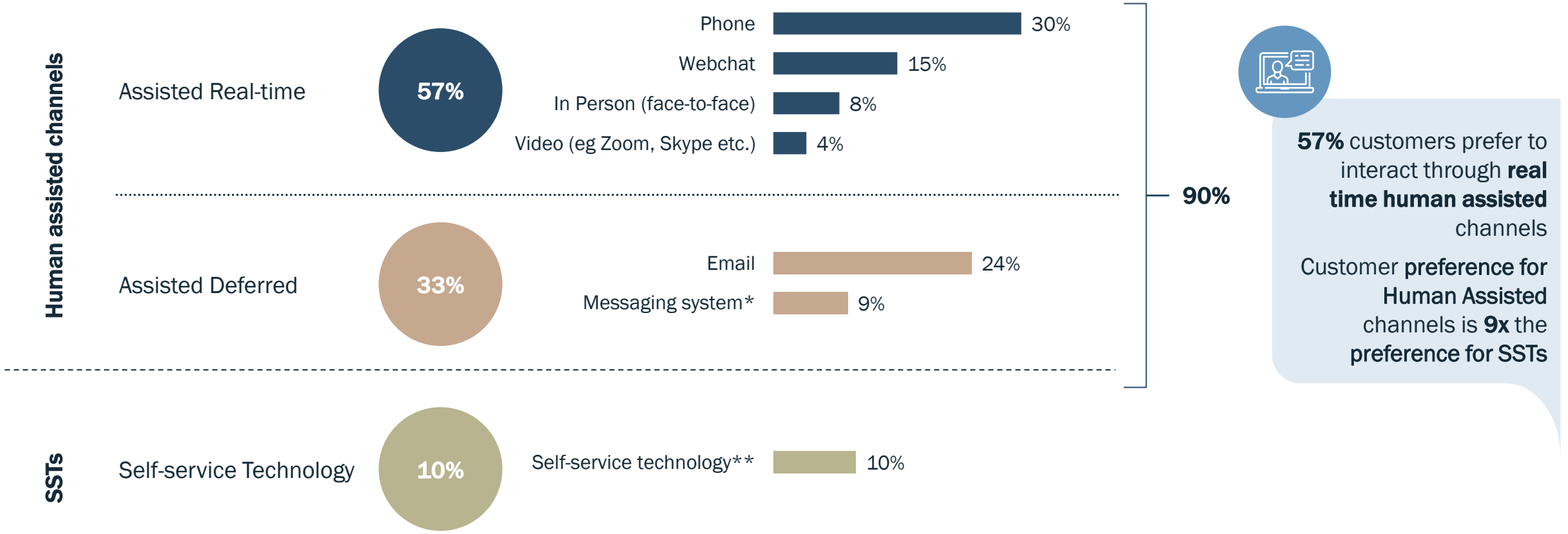
Customers looking for **convenience/ ease of use** have highest preference for **'Email' (28%)** when contacting customer care. This is closely followed by **'Phone' (26%)**

Customers looking for all the stated aspects display highest preference for **'Phone' (48%)**

For customers **who do not prefer to speak but seek convenience, quick answer and comfort**, **'Webchat', 'SSTs'** and **'Email'** are the top three preferred channels

Channel Preference and Usage – Preferred Channels

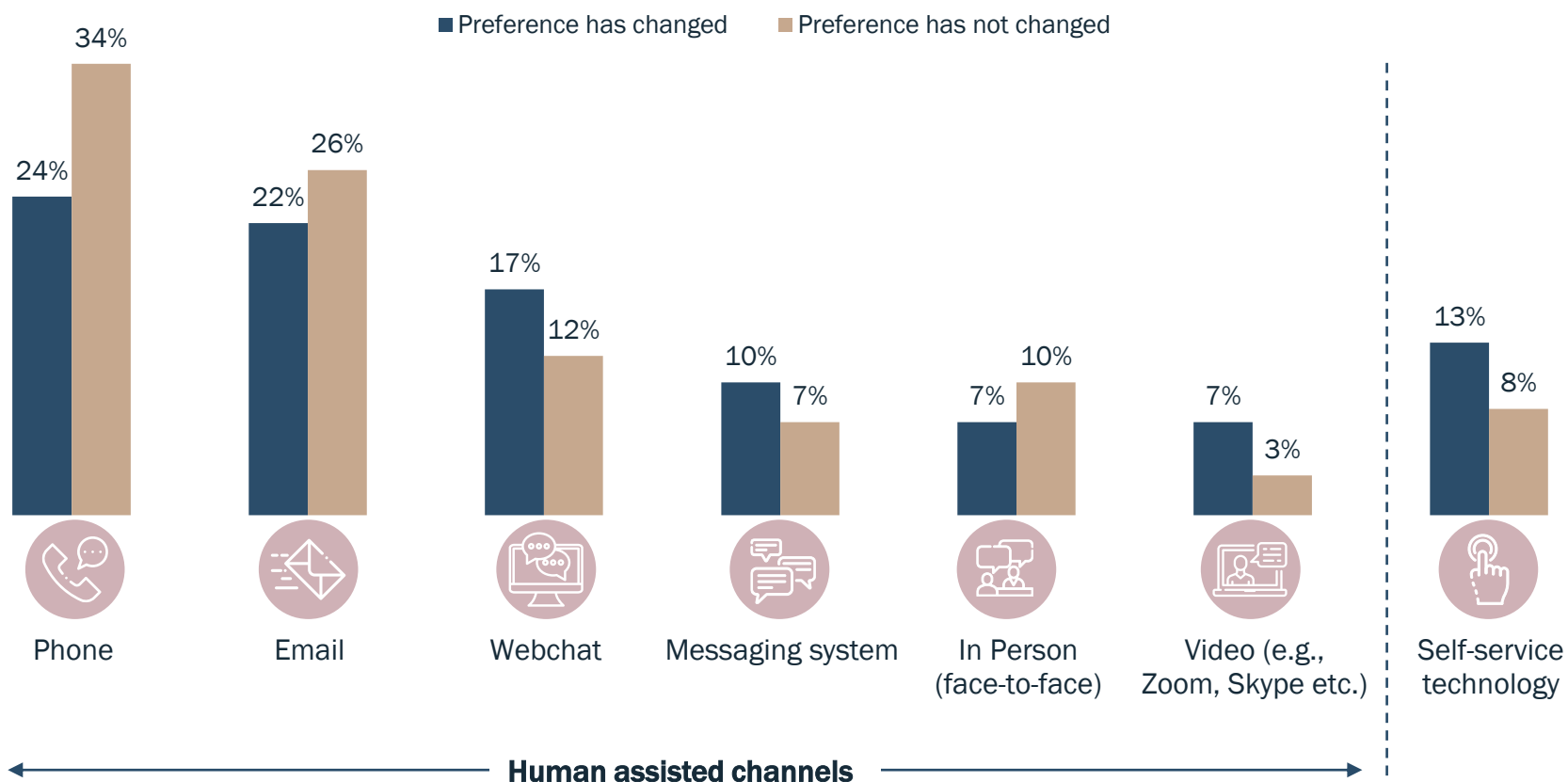
If you knew that your customer service issue would be resolved regardless of contact channel, which would be your preferred contact method?



* E.g., Facebook Messenger, WeChat, WhatsApp etc. ** E.g., mobile app, online self-service, chatbot etc.

Channel Preference and Usage – Change in Channel Preference

What is your preferred contact method?



For 47% of customers there has been a change in their preferred channel in recent years

- Within the human assisted channels, there has been a shift away from Phone and Email
- In general, preference has increased for SSTs in recent years

Channel Preference and Usage – Multichannel versus Single Channel Interactions

Did you have to use multiple channels (like phone, email and social media) to resolve this single customer service issue?

Yes **82%**

No **18%**

Which of the following contact channel(s) did you use to engage with the customer service department?

Multichannel usage

67%

Phone

59%

Email

34%

Messaging system

32%

Webchat

20%

In Person (face-to-face)

12%

Video (e.g., Zoom, Skype etc.)

24%

Self-service technology

Single channel usage

37%

Phone

27%

Email

20%

Webchat

6%

In Person (face-to-face)

4%

Messaging system

0%

Video (e.g., Zoom, Skype etc.)

6%

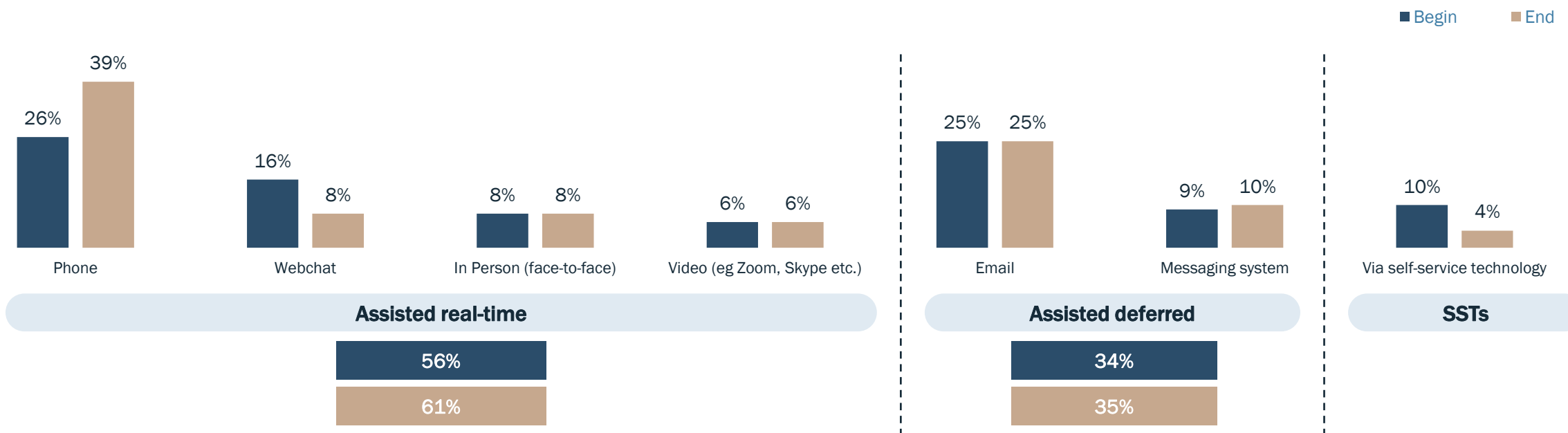
Self-service technology



Phone is the most used channel across single and multichannel users, followed by **Email**

Channel Preference and Usage – Multichannel Interaction | Channels Used

In which of the following channels did your engagement begin / end?



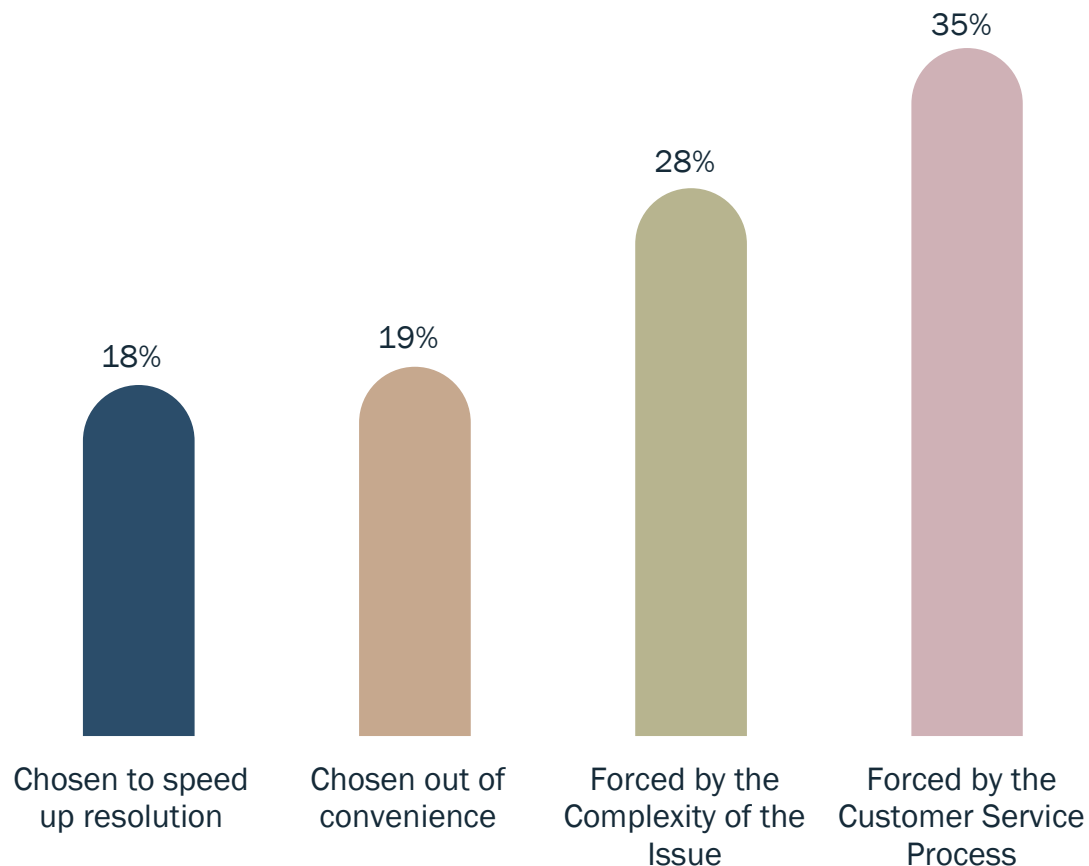
Around **26%** of customers **began their engagement through 'phone'**, while **39%** chose 'phone' as the finishing channel
'Email' is the second most used channel to begin and end interactions

Notes

- Assisted real-time = channels where the customer is communicating live with an agent assisting them (e.g., phone, webchat, video chat).
- Assisted deferred = channels where the customer communicates with the brand and awaits a response (e.g., via email or mail)
- Self-Service Technology = channels where the customer interfaces with technology to resolve their issue (e.g., websites, mobile apps, IVRs)

Channel Preference and Usage – Reasons for Multichannel Interactions

Why did the process take you across multiple channels?



63% of the customers who used multiple channels to resolve their issues were “forced” to do so due to either complexity of, or the customer care processes themselves

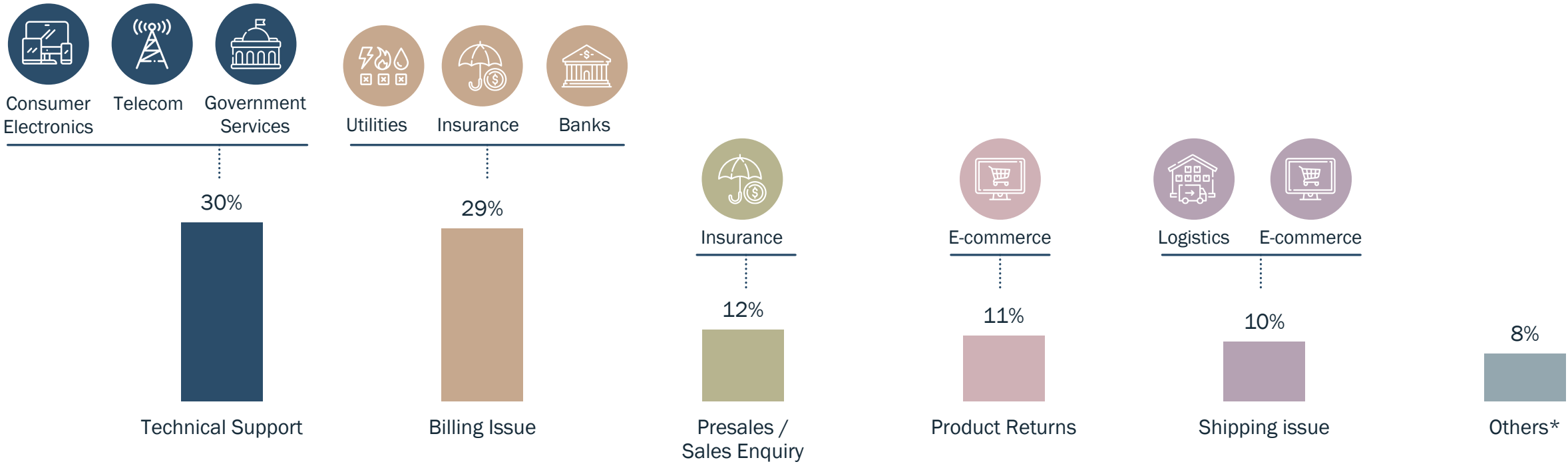
- The way the customer care processes are designed is the biggest reason for customers using multiple channels to resolve their issues

Customers who are **forced** to use multiple channels displayed **1.5x times higher dissatisfaction** with their experience compared to customers who **chose** multichannel usage

Inquiries – Common Inquiries

Thinking about your most recent experience, what was the nature of your customer service inquiry?

○ Industries with high instances of stated Inquiry types
 *Others include: account cancelled, poor customer service, poor products, etc.



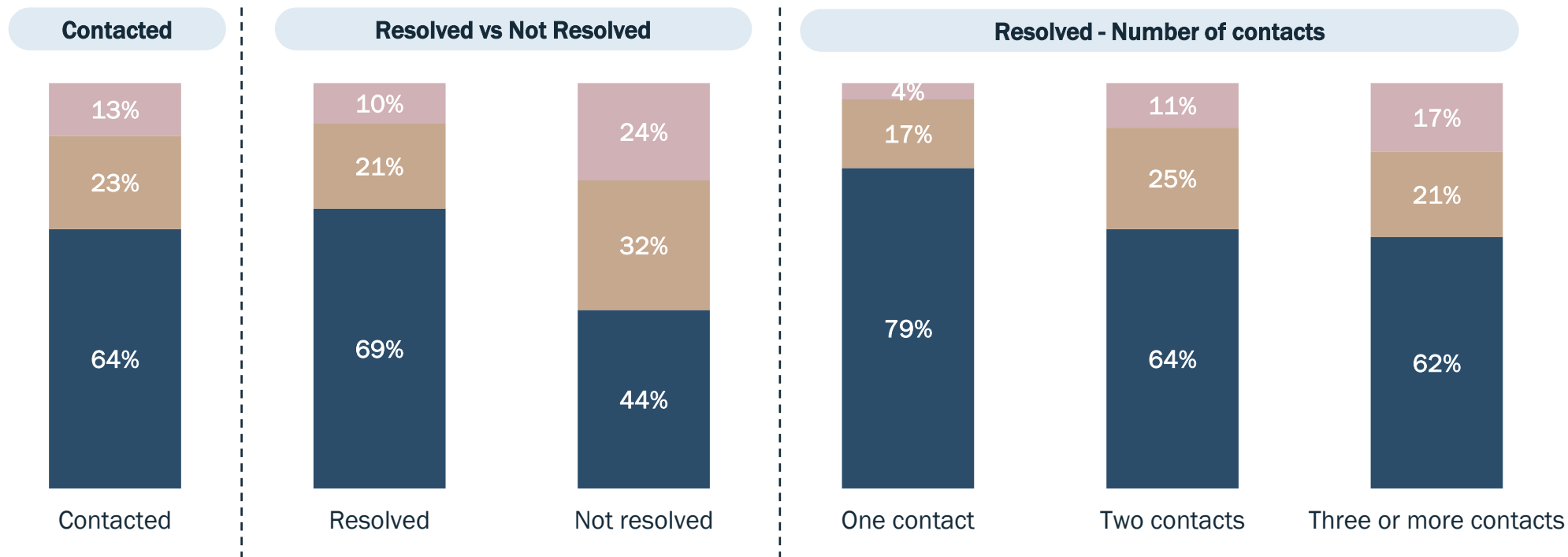
‘Technical support’ is the most common reason for customers to contact organizations – with customers stating it is most faced in their interactions with **Consumer Electronics, Telecom industry and Government services**

Almost similar proportion of customers state **‘billing issue’** as the reason for inquiry – faced more for interactions with **Utilities, Insurance and Banks**

Inquiries – Complexity and Resolution

Thinking specifically about your most recent customer service interaction with your organization, how complex was your issue?

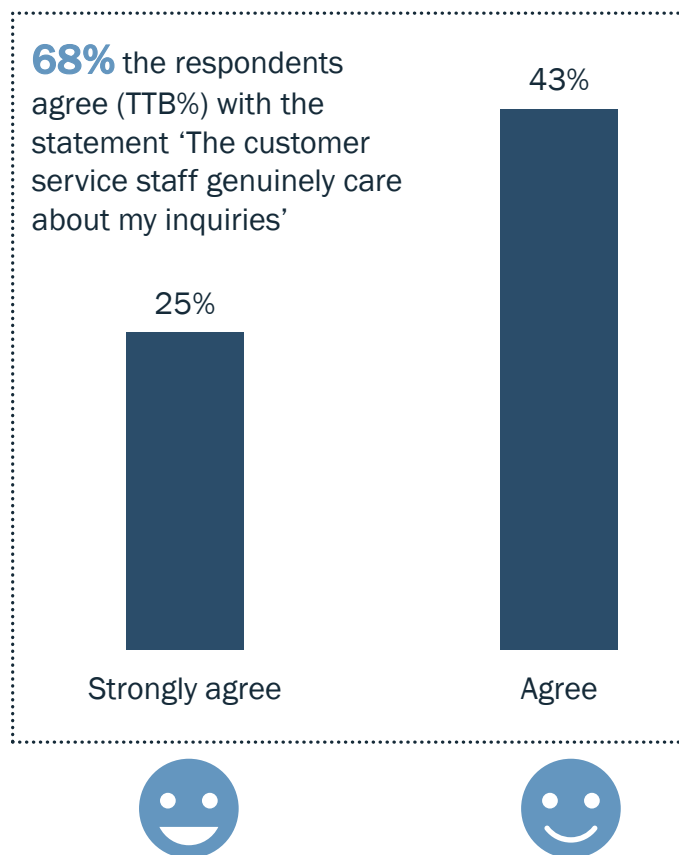
■ Simple (Very Simple + Simple) ■ Neither Simple nor Complicated ■ Complicated (Very Complicated + Complicated)



69% of customers with resolved issues considered their issues to be simple
The more complex the issue, the more contacts it takes to get it resolved

Inquiries – Does the Staff Genuinely Care for the Customer?

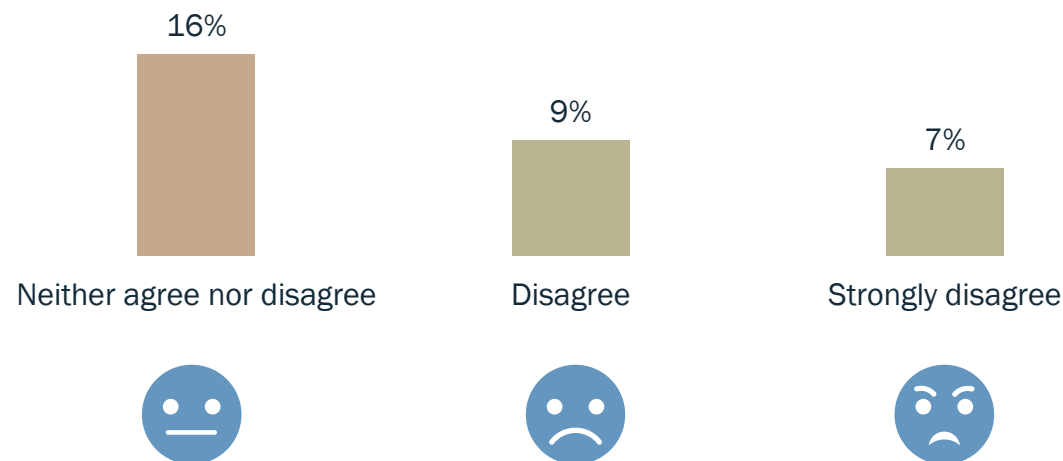
When thinking overall about your dealings with this organization, to what extent do you agree or disagree with the following statement:
"The customer service staff genuinely care about my inquiries"



Highest TTB%: Education (78%)

Lowest TTB%: Logistics (52%)

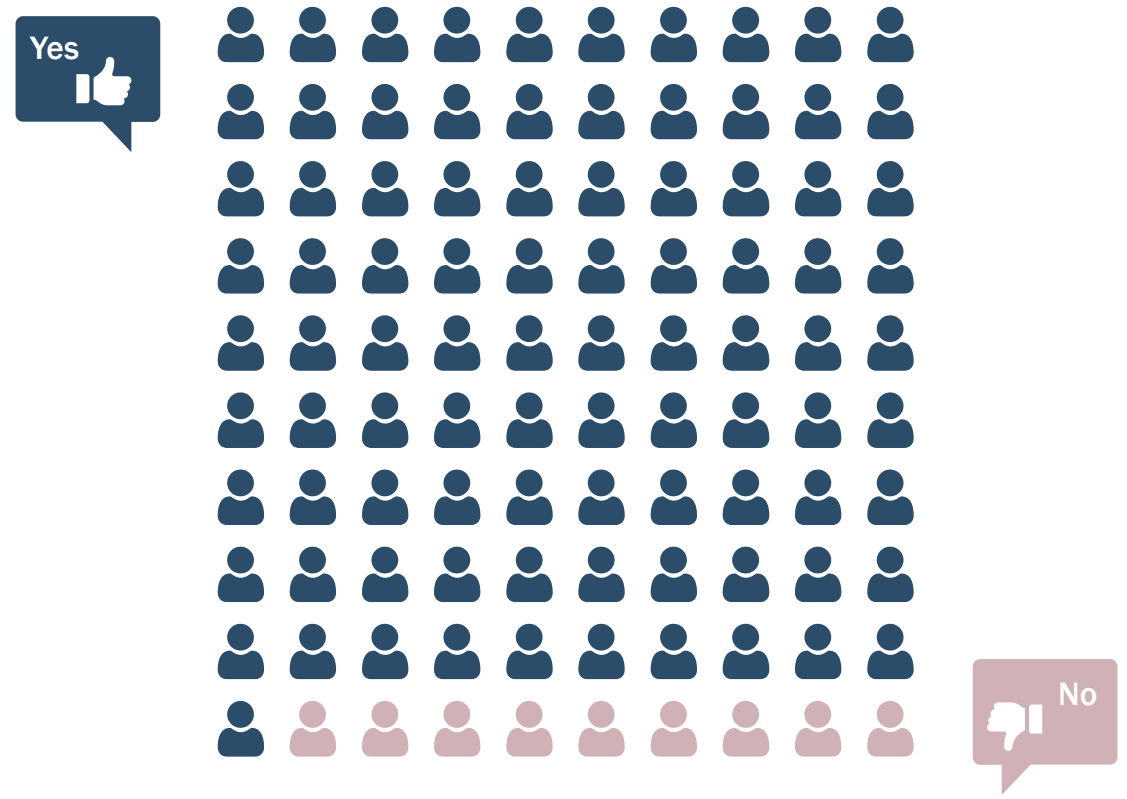
Customers whose **issues are resolved** are **3x more likely to agree** that the customer service staff cares about their inquiries



Note: TTB% - Strongly agree % + Agree %

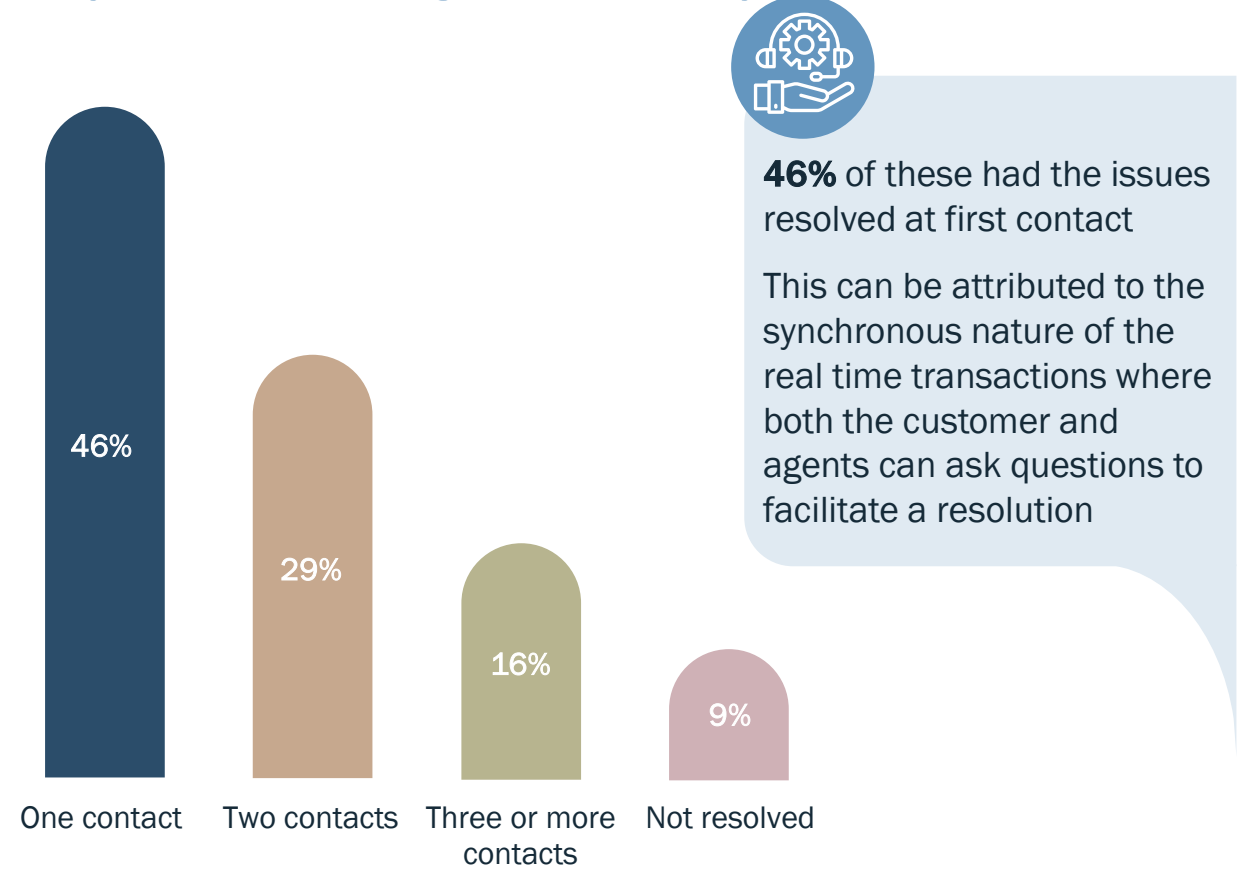
Customer Experience with Phone – Issue Resolution

Considering your most recent experience, has your issue been resolved?



91% of customers had their issues resolved

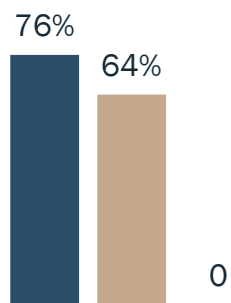
For your most recent experience, how many separate interactions did you have with the organization before your issue was resolved?



Customer Experience with Phone – CX Metrics

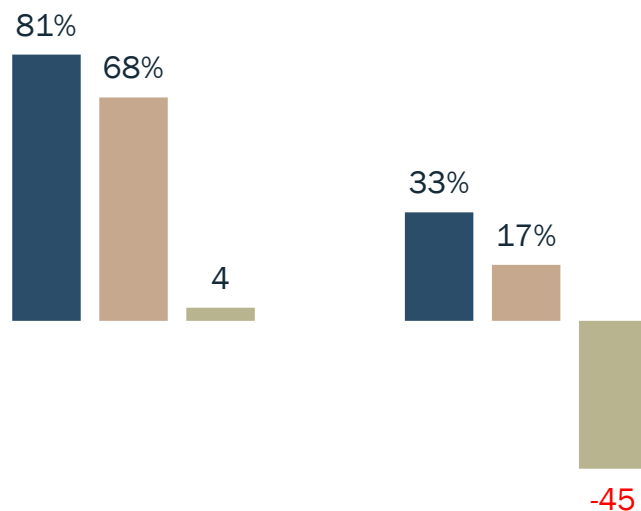
■ CSAT ■ CES ■ NPS

Contacted



Contacted

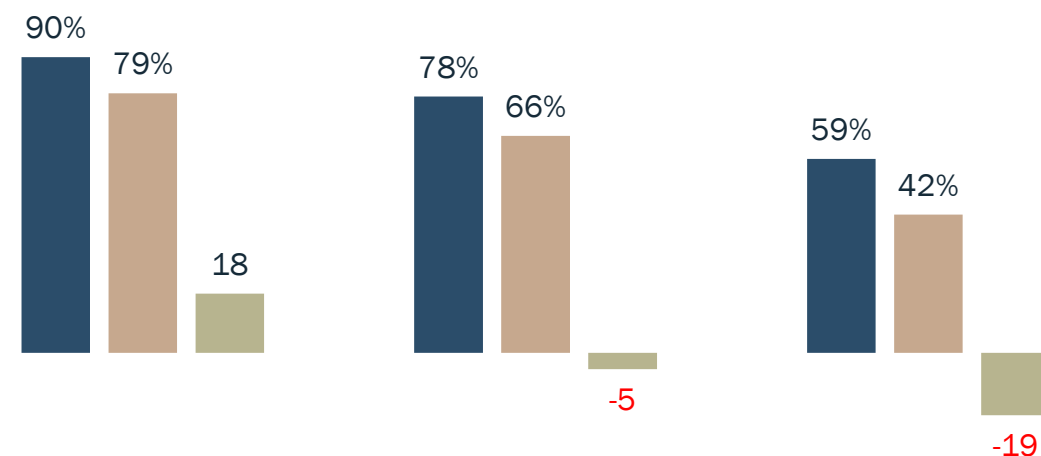
Resolved vs Not Resolved



Resolved

Not resolved

Resolved - Number of contacts



One contact

Two contacts

Three or more contacts

Data clearly suggests that issue resolution has positive impact on customer experience

Fewer the number of contacts that a customer must make to get the issues resolved, higher the CSAT, CES and NPS

Customer Experience with Phone – Drivers of Satisfaction



Top drivers of satisfaction



Speed of answer



Knowledge of the executive



Length of conversation



Clarity of communication / speech / accent



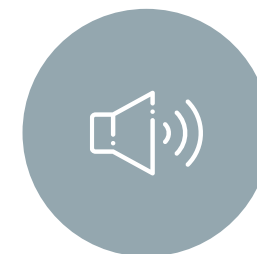
Willingness to help



Friendliness



Politeness



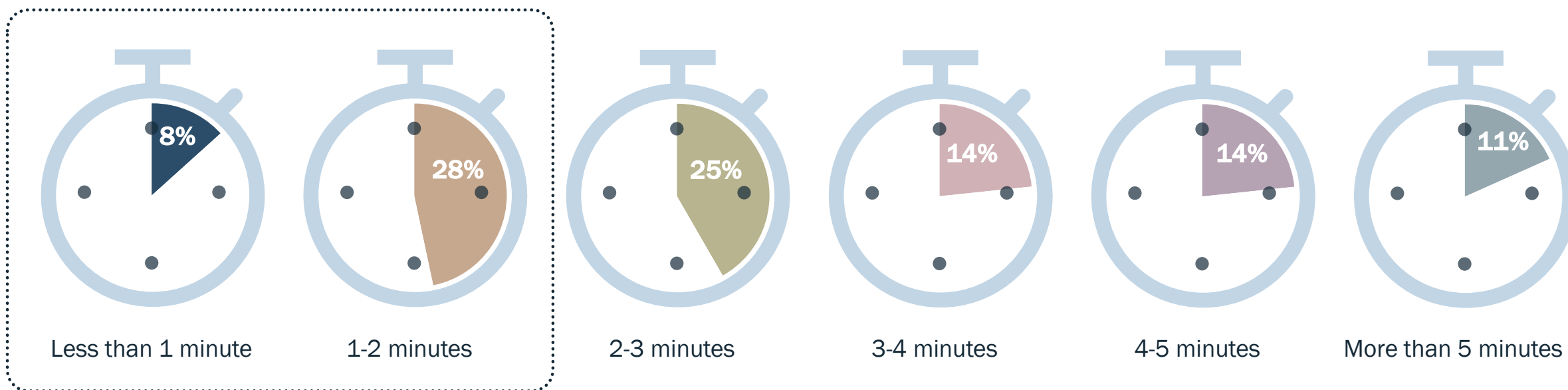
Audio quality

Speed of answer, knowledge of the executive and length of conversation emerge as the top drivers of satisfaction for customers with phone-based interactions

This does not mean the other attributes do not play a role in supporting customer satisfaction, but they have secondary importance when compared to three mentioned above

Customer Experience with Phone – Expected Speed of Answer

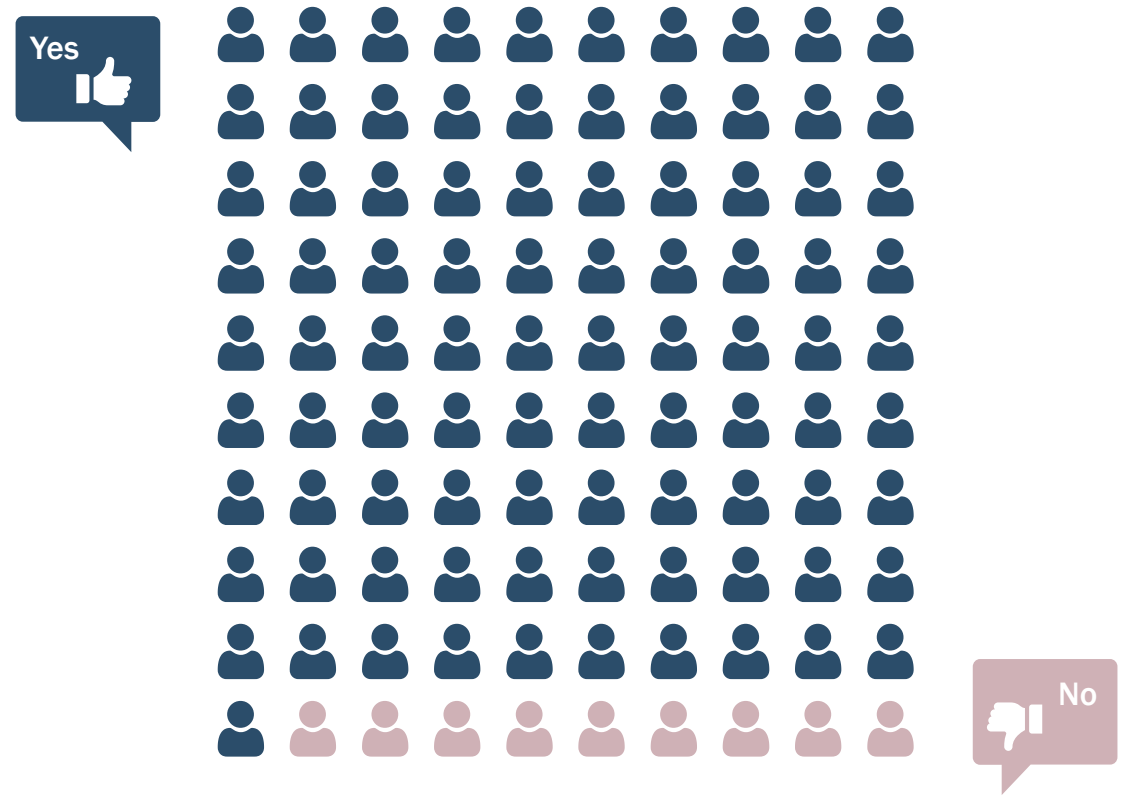
When interacting with an organization's customer care department through phone, how quickly do you expect them to initially answer your inquiry ?



36% of customers stated they would expect their phone call to be answered **within 2 minutes**

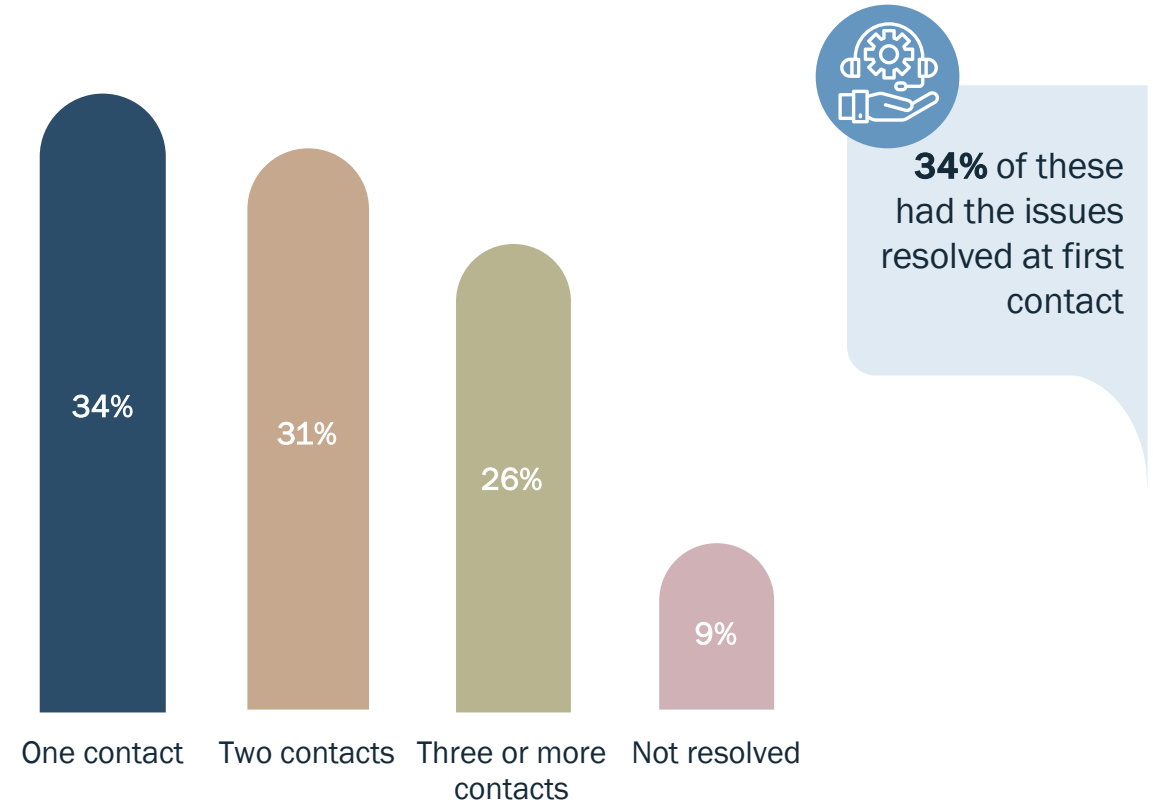
Customer Experience with Email – Issue Resolution

Considering your most recent experience, has your issue been resolved?



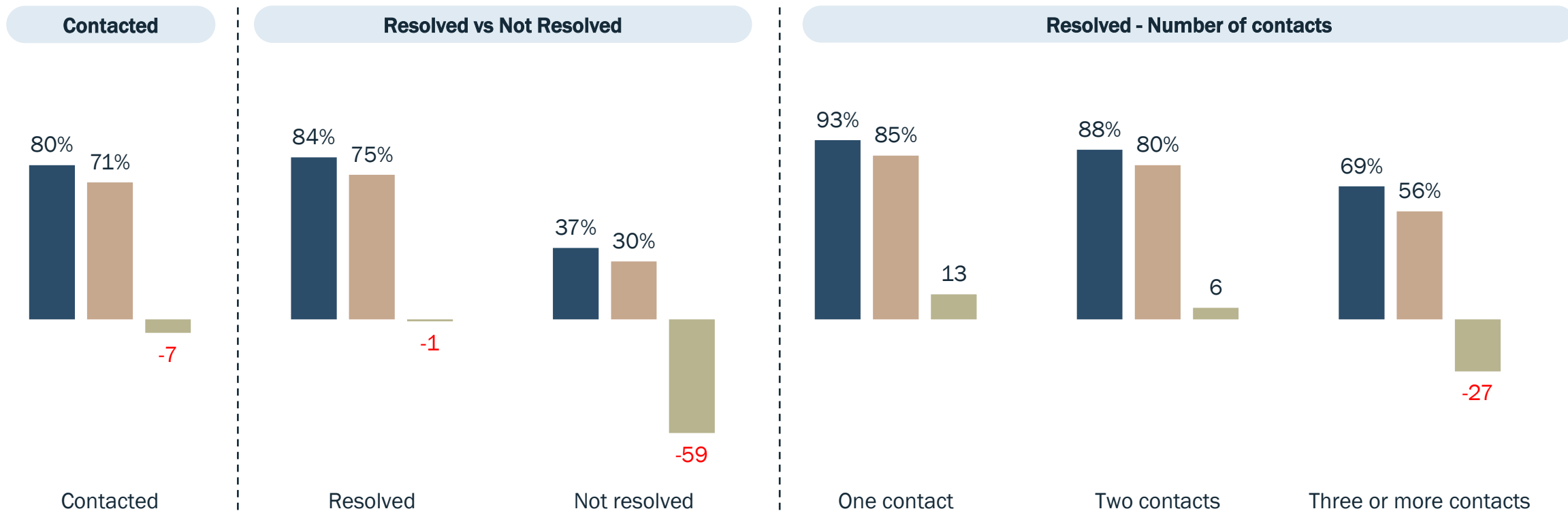
91% of customers had their issues resolved

For your most recent experience, how many separate interactions did you have with the organization before your issue was resolved?



Customer Experience with Email – CX Metrics

■ CSAT ■ CES ■ NPS



Data clearly suggests for email-based interactions, issue resolution has positive impact on customer experience. Fewer the number of contacts that a customer makes to get the issues resolved, higher the CSAT, CES and NPS.

Customer Experience with Email – Drivers of Satisfaction



Top drivers of satisfaction



Speed of
answer



Willingness
to help



Clarity of
communication



Knowledge of
the executive



Politeness



Friendliness



Length of
interaction

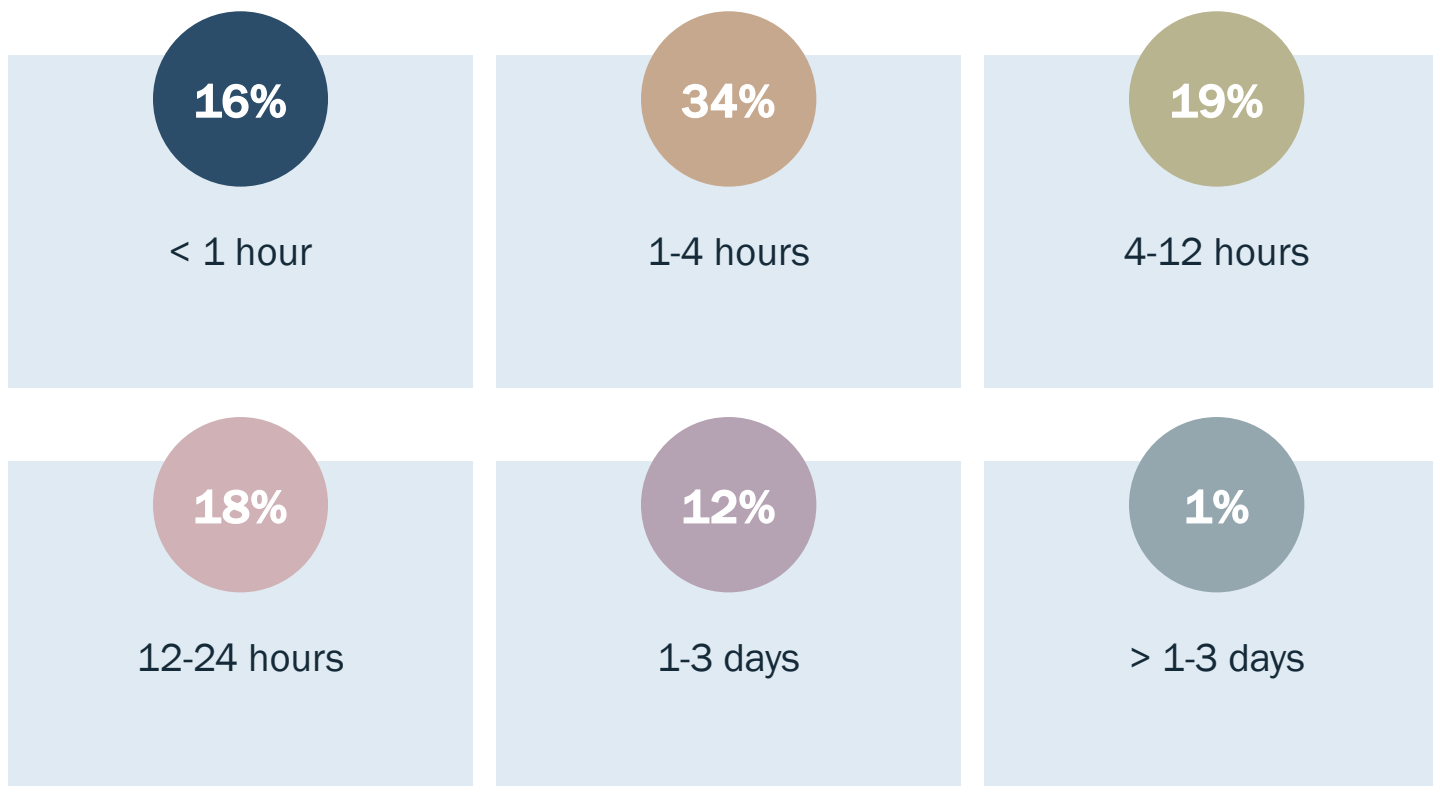


Speed of answer, willingness to help, clarity of communication and knowledge of the executive emerge as the top drivers of satisfaction for customers with email-based interactions.

As stated earlier, this does not mean the other attributes do not play a role in supporting customer satisfaction, but they have secondary importance when compared to the four mentioned above

Customer Experience with Email – Expected Speed of Answer

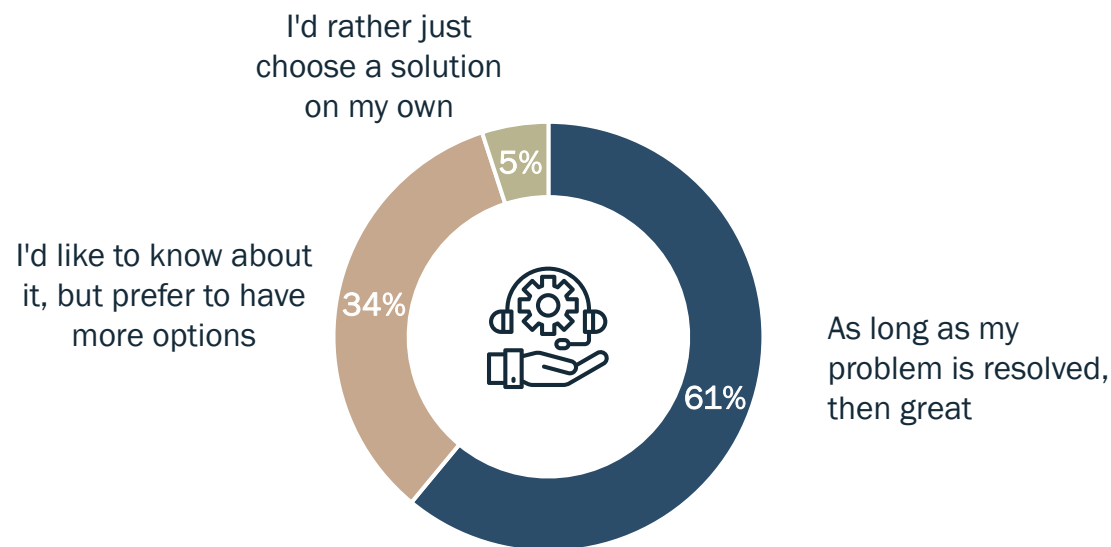
When interacting with an organization's customer care department through an email, how quickly do you expect them to initially answer your inquiry?



50% of customers stated they would expect their email request to be answered within **4 hours**

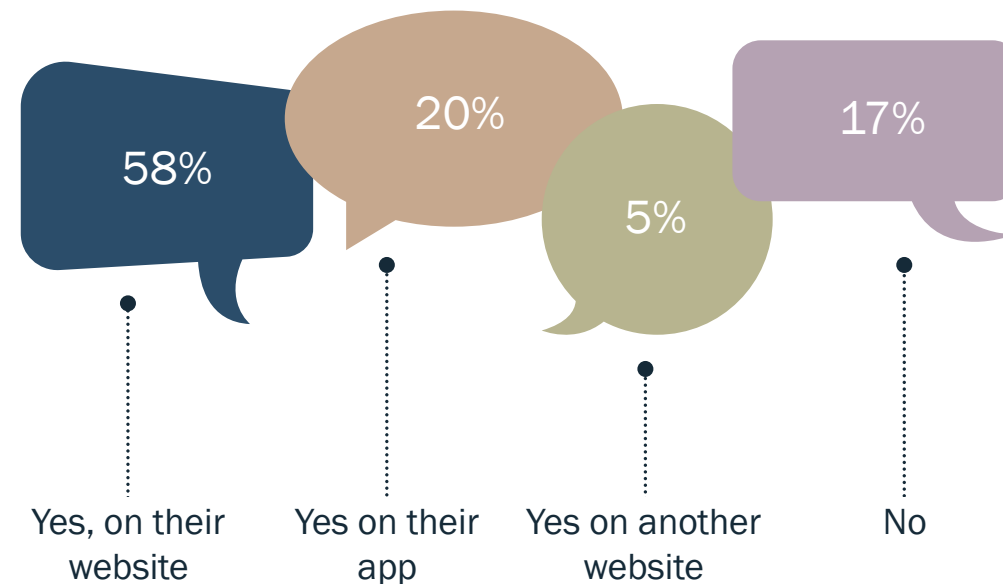
Customer Experience with Self-Service Technologies (SSTs)

If a company had a self-service technology solution that could easily and effectively resolve a future issue, how would you feel about that company guiding you to that solution?



61% of customers would be willing to consider an SST solution, if SSTs can resolve their issues

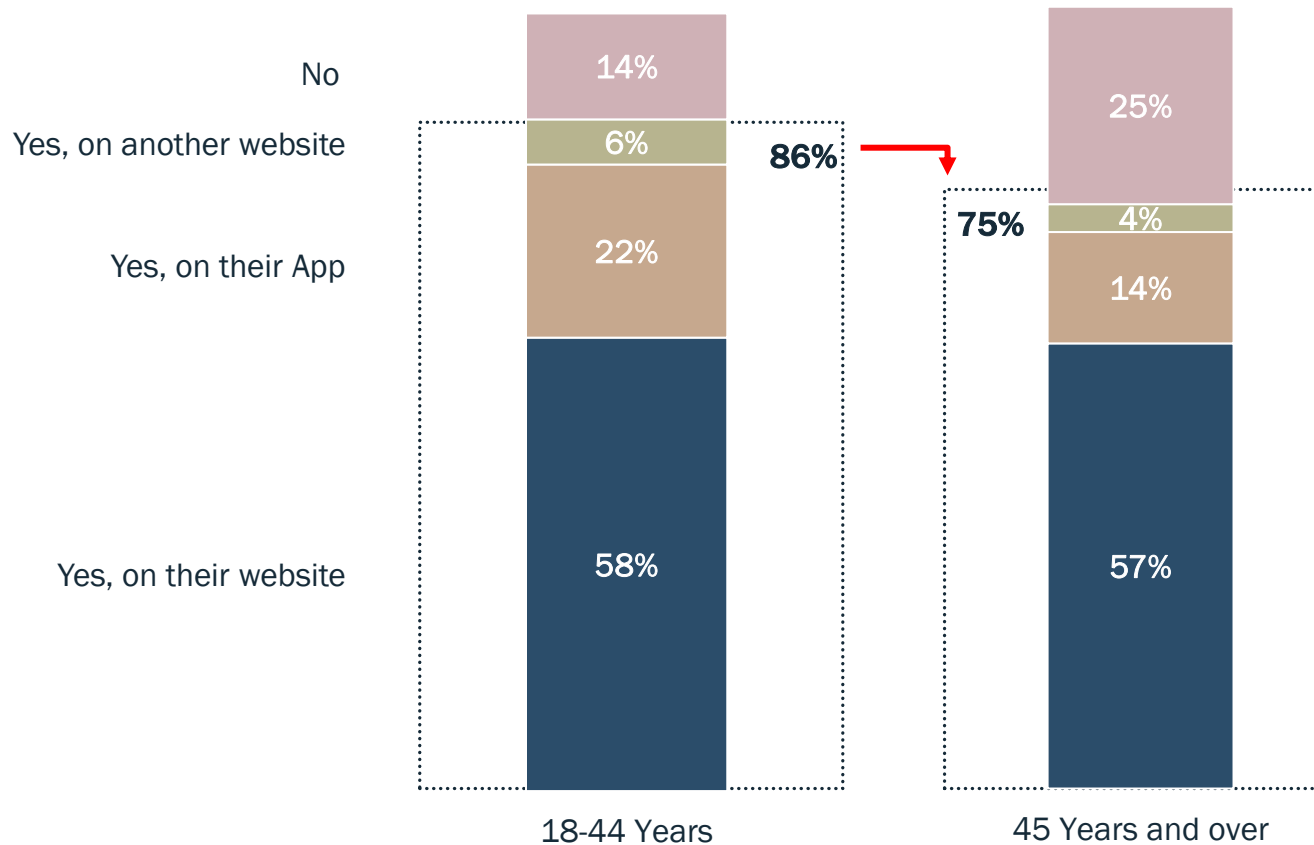
Did you attempt to find the answer to your question yourself online before contacting the organization?



83% of customers who contacted customer service have attempted to resolve the issue themselves online, through self-service channels – with ‘organization’s website’ being the most accessed channel. Few customers turn to a third-party website (5%)

Customer Experience with Self-Service Technologies (SSTs)

Did you attempt to find the answer to your question yourself online before contacting the organization?

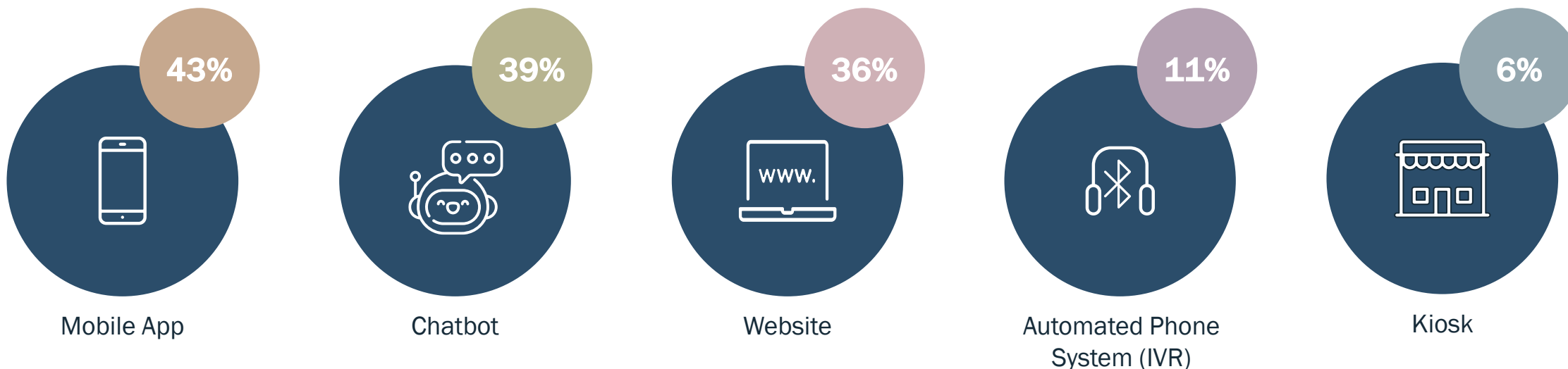


We observed, **age is also a variable which impacts SST usage**

A significantly lower proportion of customers in the age group of 45+ have attempted to resolve issues themselves online through self-service channels, when compared to customers in age group of 18 to 44 years

Customer Experience with Self-Service Technologies (SSTs) – Usage

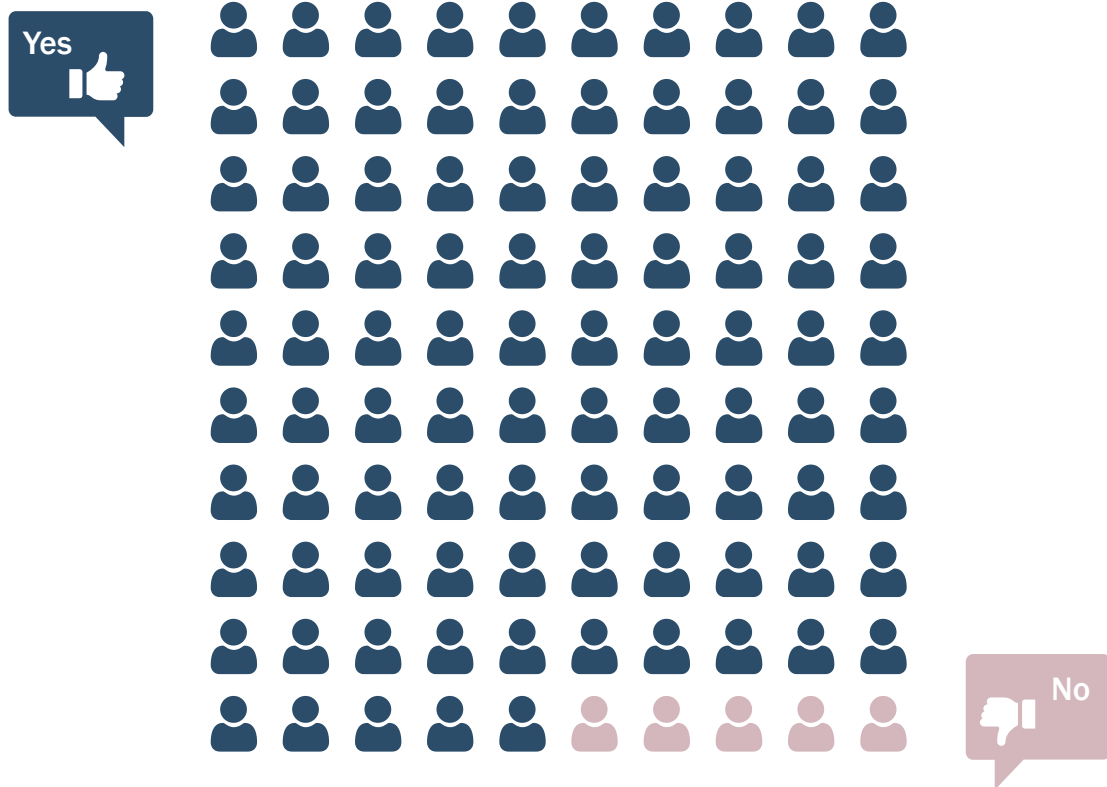
Thinking specifically about the organization you engaged with, which of the following self-service channels did you use for your interaction?



Mobile App is the most used self-service technology, followed by **Chatbots** and **Website**

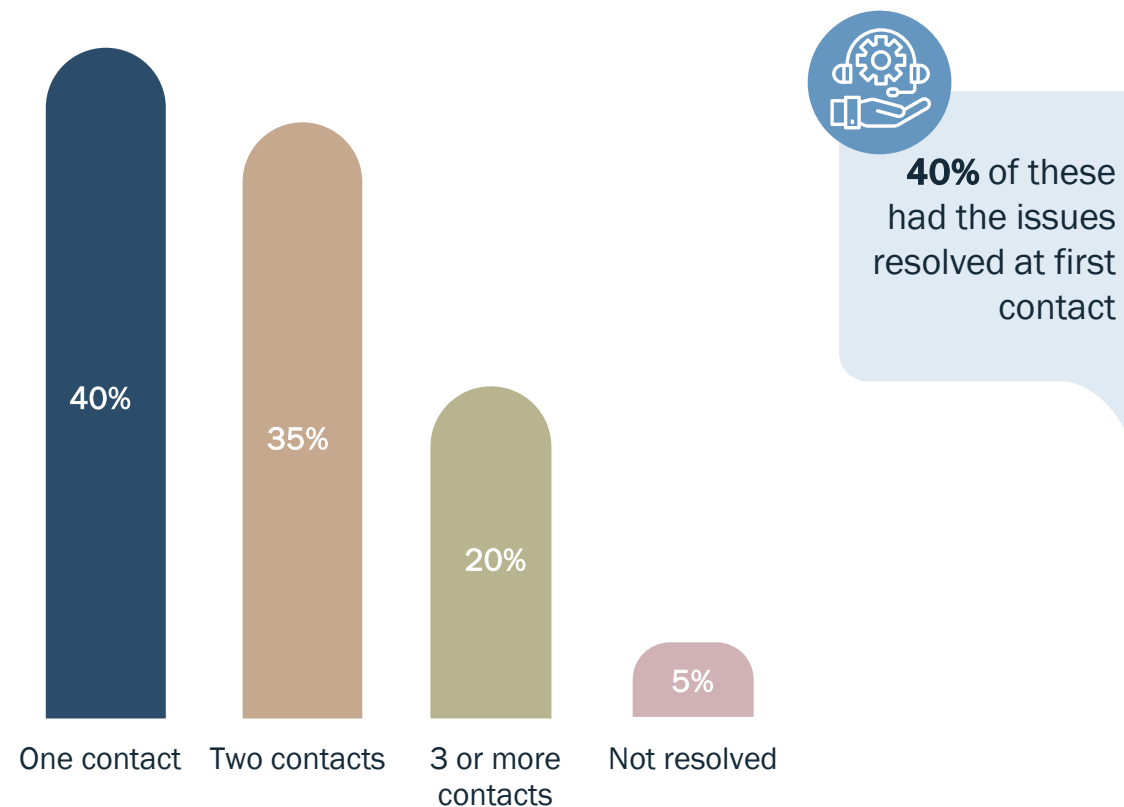
Customer Experience with Self-Service Technologies (SSTs) – Issue Resolution

Considering your most recent experience, has your issue been resolved?



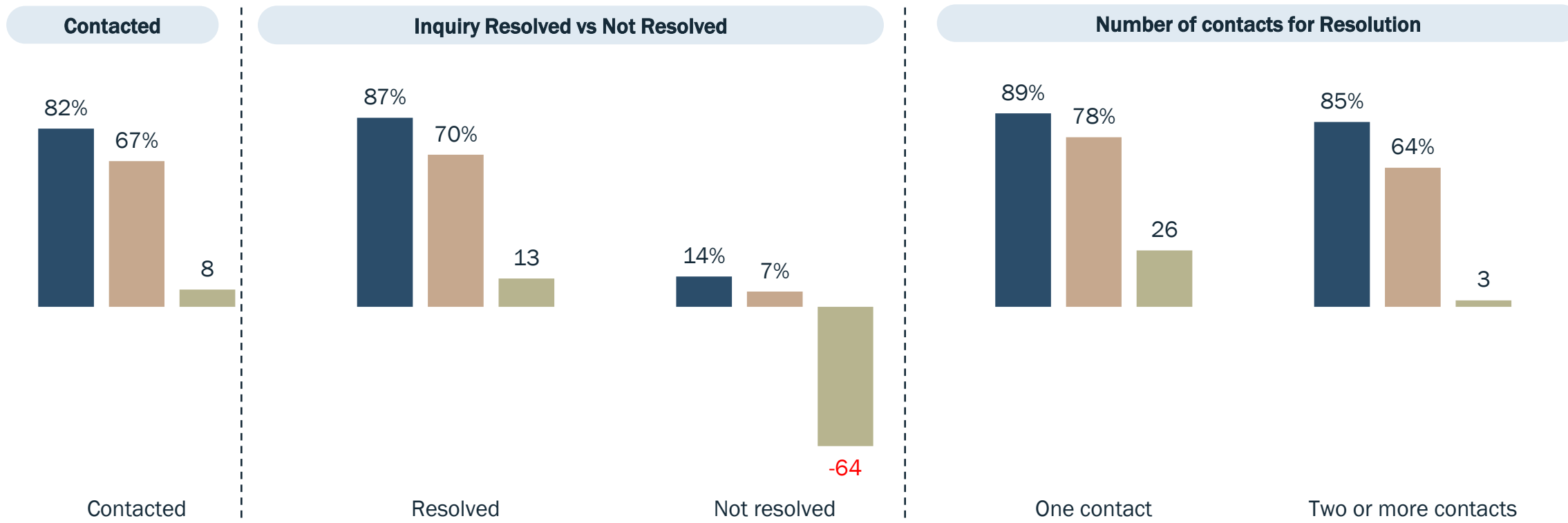
95% of customers had their issues resolved

For your most recent experience, how many separate interactions did you have with the organization before your issue was resolved?



Customer Experience with Self-Service Technologies (SSTs) – CX Metrics

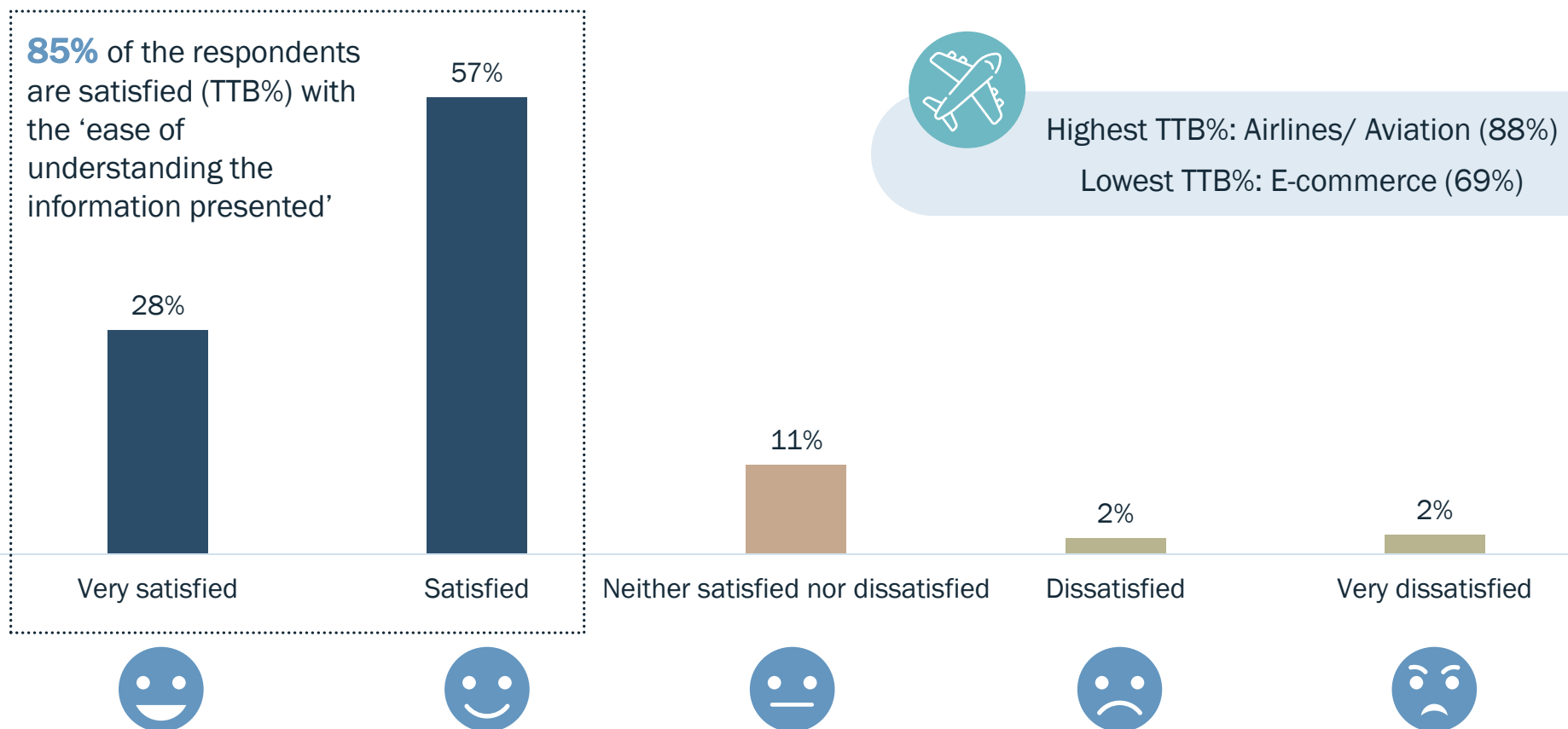
■ CSAT ■ CES ■ NPS



Issue resolution has positive impact on customer experience for SST users – with customers with resolved issues displaying higher CSAT, CES and NPS

Customer Experience with Self-Service Technologies (SSTs) – Attribute Level Satisfaction

How satisfied were you with the ease of understanding the information presented to you?



Note: TTB% - Very satisfied % + Satisfied %

Customer Experience with Chatbot – Issue Resolution and CX Metrics

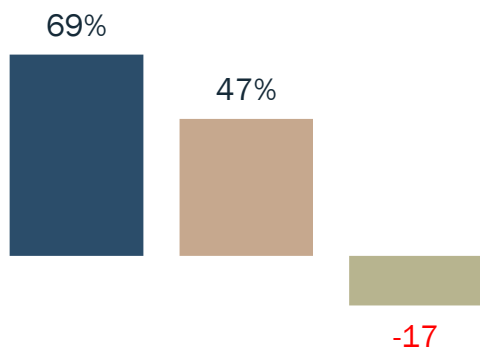
Considering your most recent experience, has your issue been resolved?

Yes **83%**

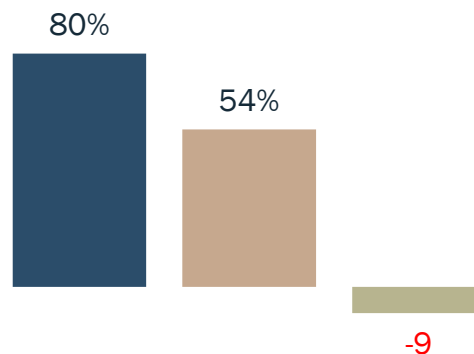
No **17%**

■ CSAT ■ CES ■ NPS

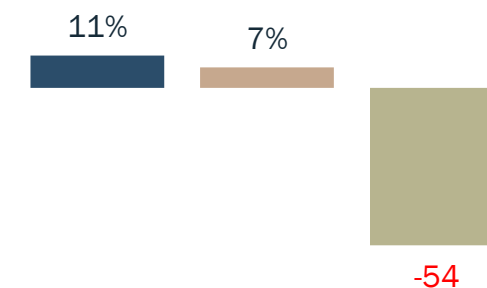
Contacted



Resolved



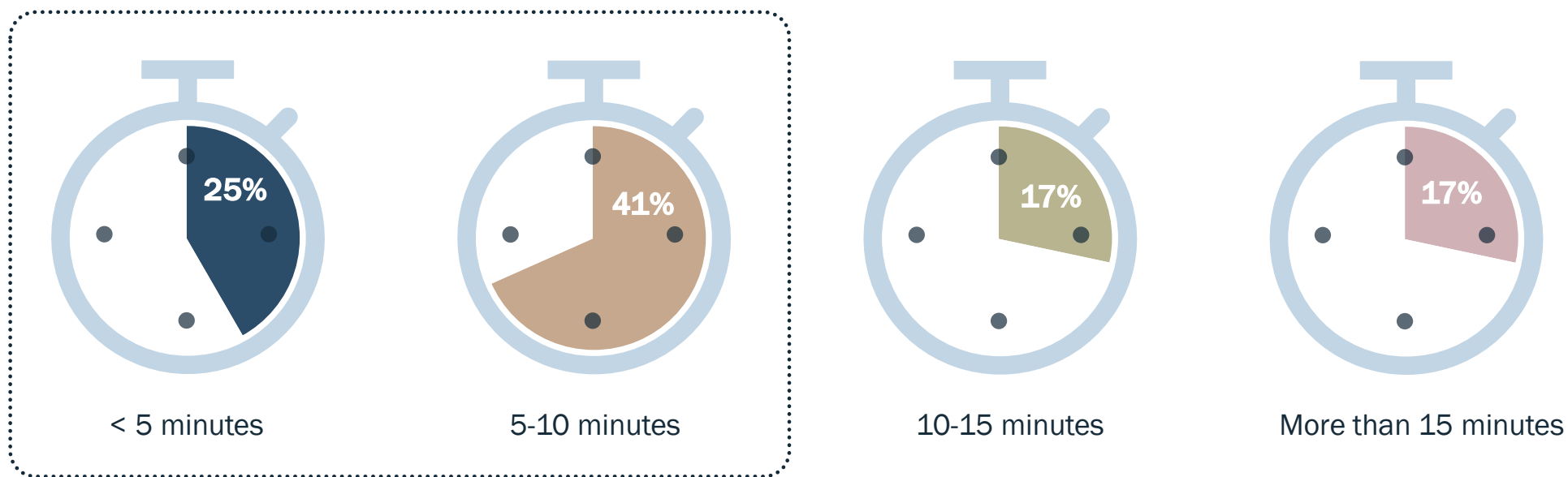
Not Resolved



CSAT and CES are higher for customers with resolved issues. However, likelihood to recommend is low for the chatbot users in general

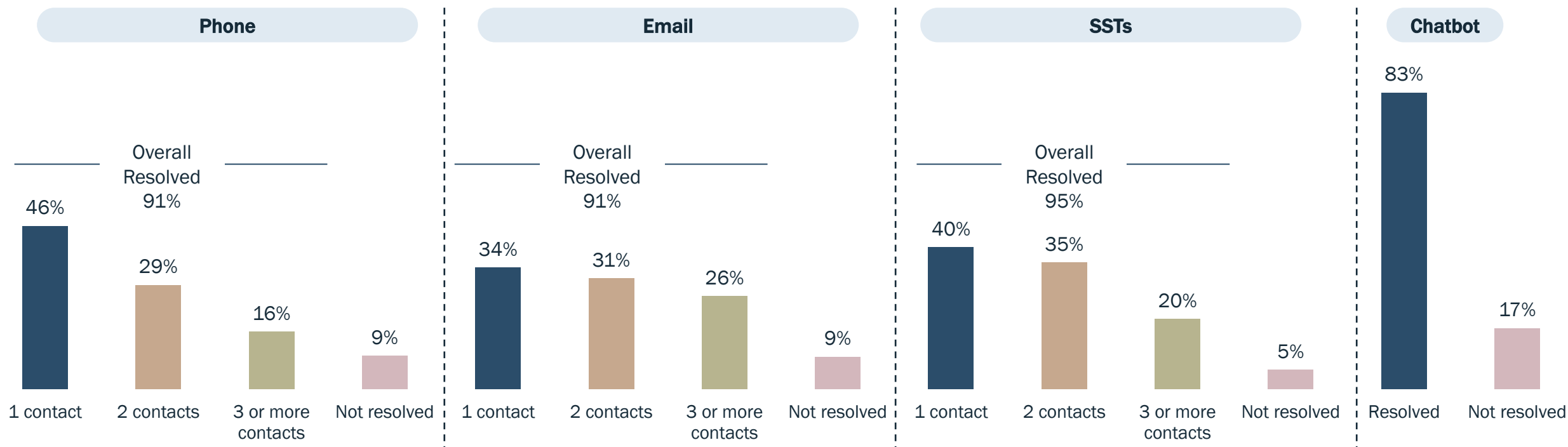
Customer Experiences with Chatbot – Length of Conversation

Approximately, how long did your session last with the chatbot?



66% of customers stated their chatbot session lasted not more than 10 minutes

Customer Experiences Across Channels – Issue Resolution and Number of Contacts



Issue resolution rate for **phone, email and SST based interactions is around 90%**, while it is slightly lower at **83% for chatbot users**

Highest first contact resolution (FCR) can be seen for customers who used **phone**

Instances of having to make **three or more contacts are higher** for customers who used **email, when compared to other channels**

07

Impact of COVID-19



What are the biggest changes that have happened in your operations as a result of COVID-19 pandemic? – CORPORATE VIEW

Shift to Work-At-Home (WAH)



- The single most mentioned change caused by the pandemic – *shift to WAH* or remote working models

Recruitments and On-boarding



- Virtual recruitments, training and coaching were commonly reported changes
- Adjustments in recruitment criteria was also reported – remotely located candidates being considered

Changes observed with respect to operations include



- Unforeseen increase in volumes – requirement for capacity planning to address the same
- Change in methods to monitor quality and productivity

Technology Related



- Increased focus on platforms being used by contact centers to ensure
 - Data security
 - Network security
 - Cloud based platforms for staff to facilitate remote working

Increased focus on SSTs



- There is an increased focus on SSTs
 - Inclusion of more self-help channels
 - Better understanding of why customers veer away from SSTs



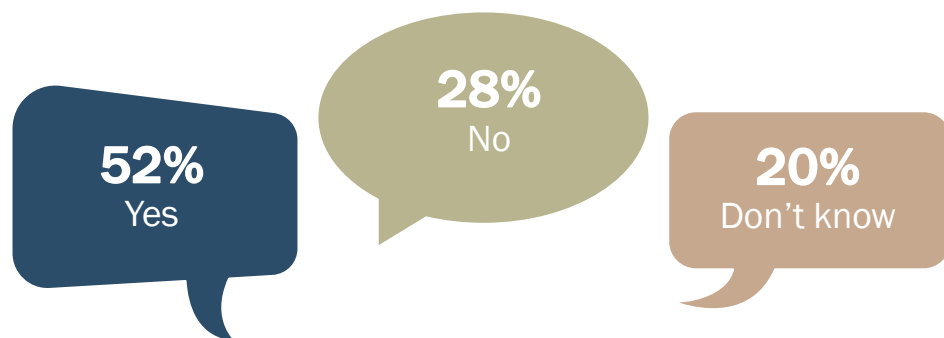
Impact of COVID-19 – CUSTOMER VIEW

Do you feel the COVID-19 pandemic and any associated restrictions have changed the way that you interact with organization?



Have these changes been positive for you?

What is your preferred contact method?



The pandemic and the associated restrictions have clearly had an impact on the way customers work and interact with organizations with **47% of respondents stating so 52% of these believed the changes were positive**

Channel preference for Webchat, messaging system video and SSTs saw an increase among customers who stated that **pandemic has changed the way they interact with organizations**

	Preference has changed	Preference has not changed
Phone	25%	38%
Email	24%	25%
Webchat	17%	7%
Messaging system	11%	9%
In person (face-to-face)	7%	8%
Video	4%	3%
Via self-service technology	12%	10%

08

Conclusion

Conclusion

The vast majority of contact centers state that they are focused on improving the customer experience, but it is clear that being a ‘high performance’ organization is not easy. Contact centers around the world continue to deal with challenges related to customer needs, channel management, data management, staff retention, etc., and they are further faced with challenges presented by pandemic – such as the switch to self- help tools, management of remote staff, inconsistent traffic volumes etc.

The report aims to provide you with a pulse check on the industry in terms of how organizations are working towards achieving high performance and insights to help you run your operations.

01

There are gaps between what organizations believe customers attach importance to versus the reality. An example:

Customers believe it is most important to improve the quality of products and services to help them avoid having to contact customer service. Organizations, however believe that ‘developing more self- service solutions’ is what is needed.

02

Multichannel journeys are going to increase, but customers should not be forced to take multichannel journeys.

Majority (80%) of the corporate respondents stated that more than 20% their customers take a multichannel journey to resolve a single customer care issue. 82% of customers stated the same.

When customers are forced into taking multichannel journeys, it translates into lower satisfaction.

03

Resolution is the most important driver of customer satisfaction.

The data clearly indicates that ‘issue resolution’ is highly correlated to all of the most commonly used CX metrics.

However, one quarter of corporate respondents stated their organizations do not capture issue resolution rates.

High performance organizations place a high importance on measuring issue resolution.

04

While preferences are shifting in favor of SSTs, Human Assisted channels are still the most commonly used channels.

The adoption of SSTs is increasing, but they are still far from replacing a majority of the traffic for Human Assisted channels as customers cannot yet resolve many of their issues via SST.

At the moment, the data shows that the proportion of multichannel journeys that end in a SST channel is much lower than the proportion that started in SSTs.



09

Respondent Profile

Corporate Segment
Customer Segment



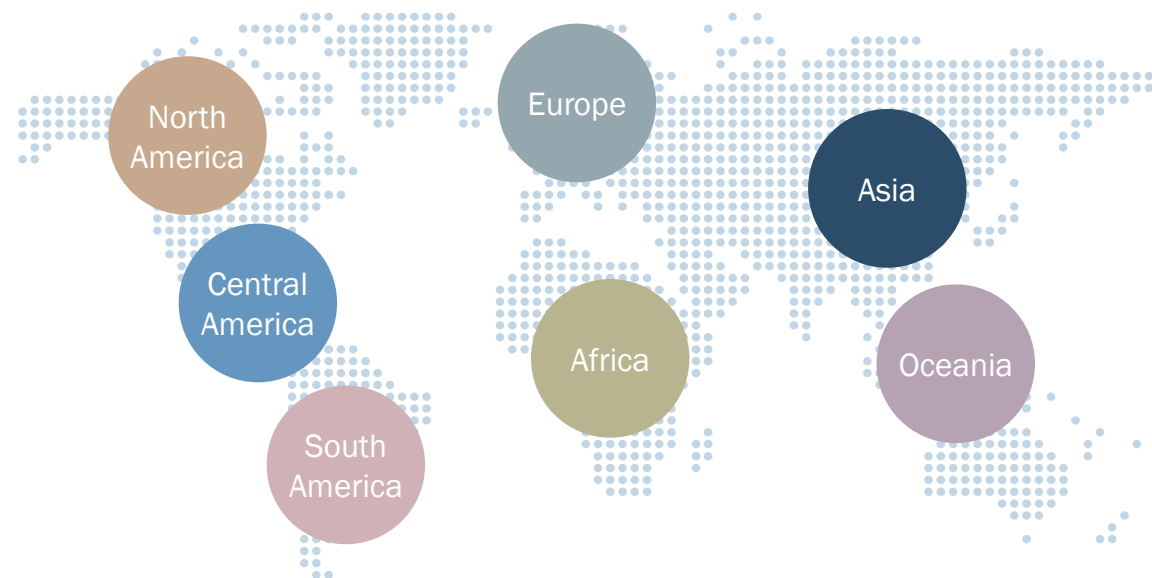
Respondent Profile – Corporate

Survey respondents included representatives from both In-house contact centers and OSPs

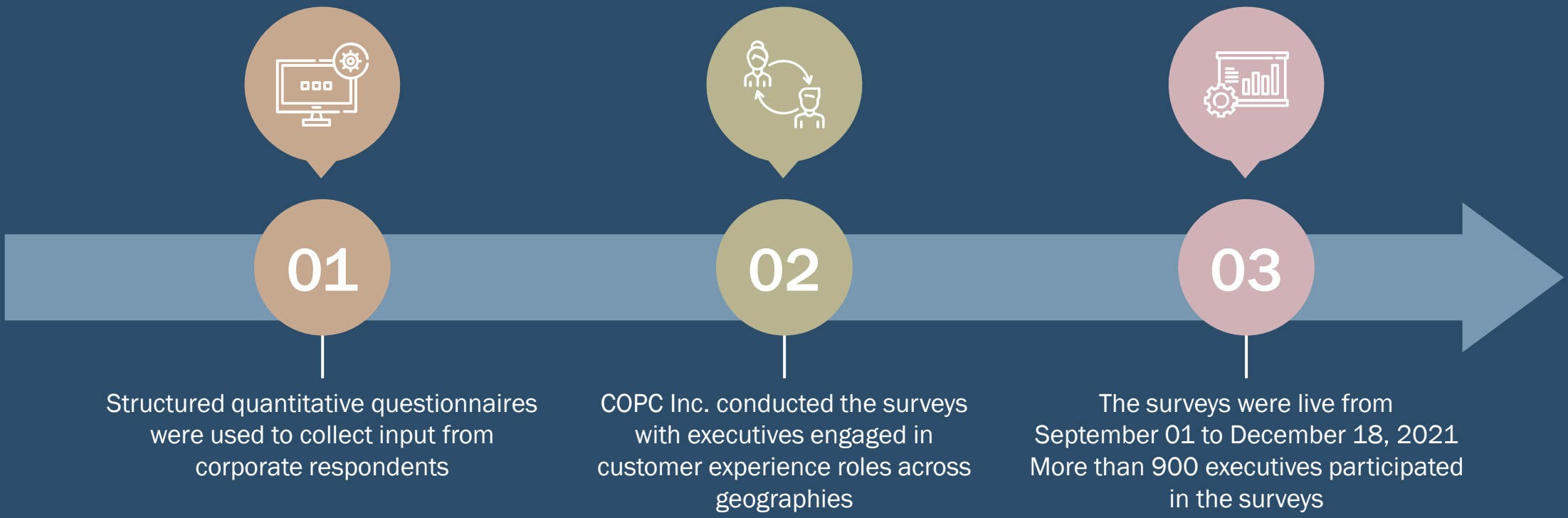
Industries represented include:



Contact Centers' locations for respondent organizations include:



Corporate Segment - Methodology



01

Structured quantitative questionnaires were used to collect input from corporate respondents

02

COPC Inc. conducted the surveys with executives engaged in customer experience roles across geographies

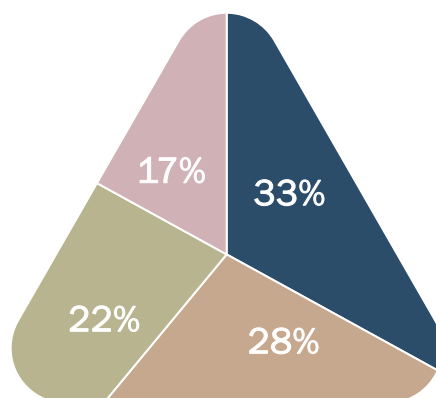
03

The surveys were live from September 01 to December 18, 2021. More than 900 executives participated in the surveys

'Voice of Customer' – Respondent Profile and Methodology

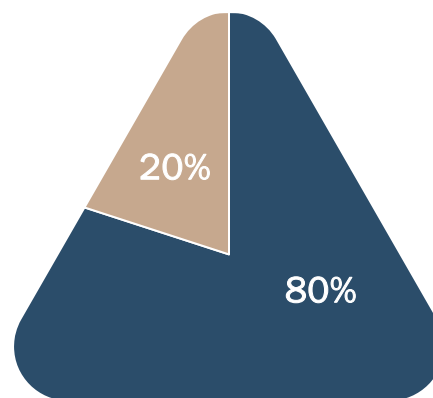
This research has been conducted independently by COPC Inc's CX Research Team. We surveyed more than 4,500 consumers across Australia, Malaysia, the UK and the USA. These respondents were recruited through SurveyMonkey panels which provide access to 144+ Mn people across 130+ countries

Respondents range from 18 to above 60 years



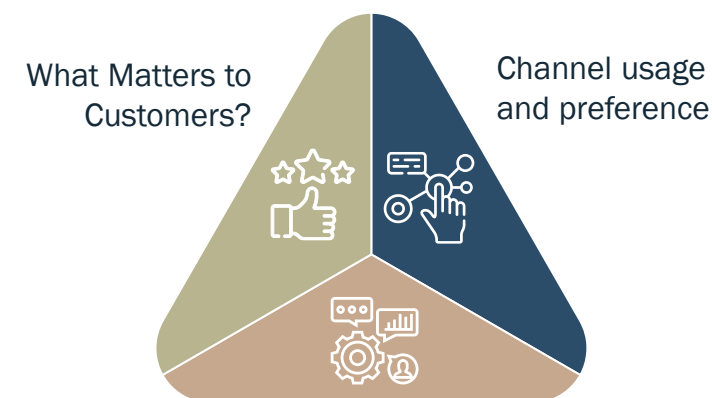
● 18-29 ● 30-44
● 45-60 ● 60+

14+ industries are represented



80% of respondents provided feedback for the following industries: Telecommunications, Banking, Utilities, Insurance, Government, Airlines, or Consumer Electronics

Feedback was gathered on a range of themes including



Respondents were asked about their experiences interacting with organizations across a range of channels including digital assisted, phone, email, face-to-face, webchat and more

About NPS[®] and the Customer Effort Score (CES)

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In 2010, researchers from CEB Inc. (now part of Gartner) found that reducing the amount of effort a customer has to do to get their problem solved is a higher indicator of customer loyalty than delight. By acting on this insight and removing obstacles for the customer, they found companies can reduce customer service costs and attrition rates. The Customer Effort Score (CES) is a single-item metric that measures how much effort a customer has to exert to get an issue resolved, a request fulfilled, a product purchased/returned or a question answered.



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.

