

Tomorrow's Contact Centre

Survey Report



Executive Summary

Contact centre managers are facing the same challenges today that they always have, from budget constraints and systems limitations to staffing and customer retention. What is changing, however, is how they respond to those challenges.

Controlling costs used to be the prime issue. But today, the customer takes centre-stage, and contact centre managers consistently assert the importance of customer experience over all.

Limitations of some existing systems can impair the customer experience significantly, leaving the contact centre struggling to compete. Innovative contact centre managers have responded by developing smartphone apps and integrating video channels into their offering. Doing so means they can offer better service, proactively, through the media and channels that modern consumers genuinely want to use.

But the path to tomorrow's contact centre won't be entirely straightforward. Some contact centre managers feel deploying new technology can bring undue disruption and thereby detract from the customer experience; others have doubts about the ability of their existing solution providers to meet the needs of tomorrow's contact centre.

Offered the choice, 65 per cent would change supplier and only 35 per cent would add new capabilities and functionality from their existing provider. Contact centre managers need simple, agile solutions that better connect the customer with the contact centre; it's now up to suppliers to find ways of delivering those solutions quickly and on-budget.

As our report reveals, it's this union of innovative thinking and effective technology that will form the essence of tomorrow's contact centre.

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In December 2013, Call Centre Helper readers were invited to have their say in defining what the contact centre of tomorrow might look like. One hundred and seventy five Contact Centre Professionals kindly gave their time to explain in detail, their views and opinions.

We are delighted to be able to share this summary with you.

The survey, combined with an earlier study undertaken in conjunction with the Customer Contact Association provides valuable insights into the complex patterns of change, change drivers and inhibitors that combine to challenge business managers as they strive to improve contact centre performance.

Full details of the CCA research and other useful resources are available from www.cisco.co.uk/contactcentresolutions

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Editor Call Centre Helper

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Head Of Customer Collaboration
UK & Ireland, Cisco

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Connected Customer Journeys

Connected Customer Journeys

Through my role as Editor of Call Centre Helper, I am constantly in touch with the contact centre industry. I am therefore pleased that some of the areas I have been following lately have emerged at the forefront of the 'Tomorrow's Contact Centre' survey findings. Specifically the ever-growing need for a single view of the customer, the development of web self-service and the emergence of video.

Achieving a single view of the customer is more important than ever.

The report findings show that there is still an on-going struggle around the agent desktop and the need to provide a single solution that can capture every interaction across all media. Unfortunately this has been the case for the last 10 years, so it may still be some time before a true single view of the customer becomes a reality.

Yet achieving this has never been more important, as we now live in a world where 7 out of 10 people own a smartphone. This means that the average customer has Twitter, Facebook, Email, web-chat and (let's not forget) a phone in the palm of their hands.

Web self-service will allow agents to focus on more complex queries.

The development of web self-service has been particularly interesting, as this is likely to redefine the role of a contact centre agent in the years to come.

The report findings show that 80% of respondents included self-service on their operational to-do list over the next two years. It is therefore likely that we will witness a profound shift in the industry, as customers begin to resolve simple queries themselves and only direct their complex issues at the contact centre.

Video is finally an exciting new channel.

It is surprising to think that five years ago we had written video off as an emerging channel, as it is now beginning to take off in ways we never could have imagined.

As with all contact centre based research, I am glad to get behind it in an effort to provide some clarity in the ever-changing world of the contact centre industry. This survey clearly indicates that there are exciting times ahead for contact centres, and that contact centre managers are ready to embark on this transformation.

Q.1

Contact Centre Priorities

We asked 175 contact centre managers to compare a series of strategic objectives so that we might understand the likely changes in priority over the next two years.

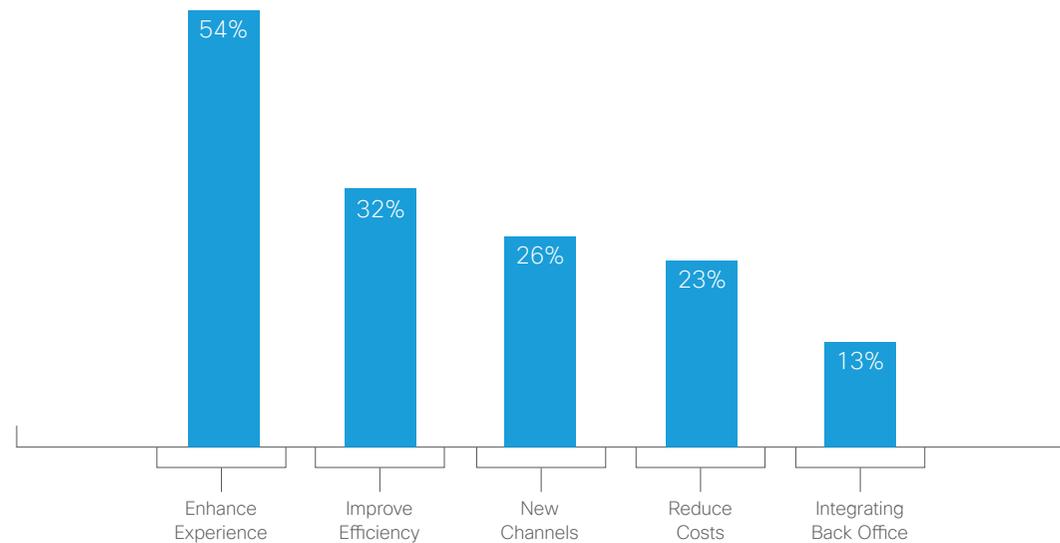
“Customer Experience” stands out as the priority, with 54% of respondents saying that it is becoming critical within their contact centre.

What is particularly interesting here is the contrast between the priorities of “Customer Experience” and “Cost Reduction”.

Only 23% of respondents ranked “Cost Reduction” as becoming critical. Whilst budgets and cost have been a high priority in recent years, our survey indicates a noticeable shift away from purely cost-control considerations in favour of customer experience management.

Customer Experience Is Top Priority

While also improving efficiency



■ The percentage of respondents for whom these priorities are “becoming critical”

Q.2

Pressures and Risks

We asked respondents to rank a list of five influencing factors; based on which ones they thought would impact most on their ability to respond to the changes in priority identified in Question 1.

Respondents indicated that all factors were likely to have an impact; however, “Limitation in Technology Being Used” was the factor causing most concern.

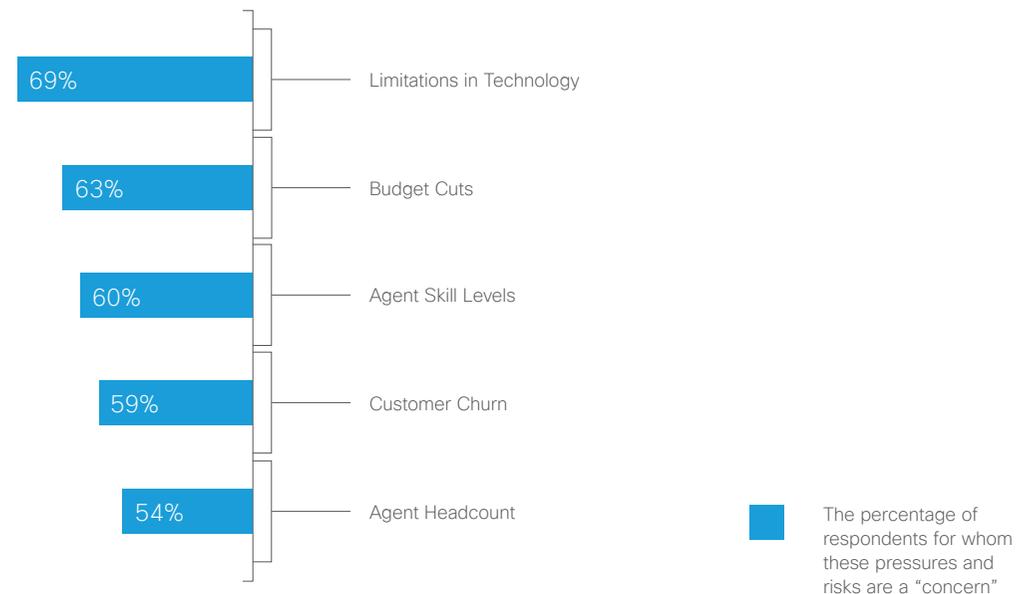
This may be the result of a lack of investment in recent years and suggests that contact centres have either failed to keep up with the latest technological advances or have out grown their current contact centre platform.

Interestingly, “Agent Skill Levels” featured as a concern for 60% of respondents.

Self-service and other call avoidance strategies are taking the simple calls out of the contact centre, leaving the more complex calls to be handled by agents. This has implications for both agent training and first call resolution.

Limitations In Technology Is The Primary Concern

Followed by budget cuts & agent skill levels



Q.3

Operational Changes

Contact centre managers were presented with a list of ten operational changes and asked to identify which, if any, were likely to be implemented in their contact centre over the next two years.

Over 80% of respondents included “Self-service” on their operational agenda indicating a focus on call avoidance and a desire to free agents to deal with more complex enquiries.

More than three quarters of all respondents identified “Improvements in Agent Desktop, Quality Management and Workforce Optimisation” as a priority for the next two years

This reflects an industry trend to push simple transactions to the self-service channels and to equip agents with the tools and training necessary to provide superior service on increasingly complex calls.

These observations are consistent with the Pressures & Risks highlighted in Question 2 where contact centre managers expressed concern regarding “Agent Skill Levels”.

Self-Service Is High On The Agenda

Agent desktop and workforce optimisation also feature



Q.4

New Channels

To gain an insight into the likely impact of emerging channels on contact centre operations, we presented respondents with a list of channels and asked which were already introduced and which are likely to be introduced over the next two years.

“Smartphone Apps” are set to play a major role in the immediate future. Less than one in five contact centres are currently utilising “Smartphone Apps” but 63% have plans to introduce them over the next two years.

This may be partly explained by the fact that “Web-chat” and “Social Media” are already introduced at over 40% of our contact centres.

It is also clear however, that “Smartphone Apps” offer further call avoidance benefits as interactions can be automated via self-service and users can be securely identified and verified using their mobile devices. It is, therefore, not surprising that the majority of respondents have plans for greater use of “Smartphone Apps” in the future.

There are indications that “Video” is becoming a viable contact centre channel sooner than we might have expected. Although just 5% of respondents told us that “Video” is already introduced, 40% expect to introduce it over the next two years.

Smartphone Apps Will Be The Major New Channel

And we cannot afford to ignore video

	Already Introduced	Next Two Years
Smartphone Apps	19%	63%
Web-chat	42%	52%
Social Media	44%	47%
Video	5%	40%

Q.5

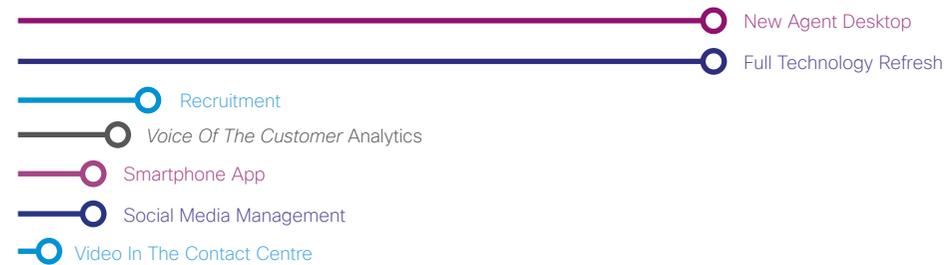
Unlimited Budgets

We offered respondents the opportunity to compile a limitless-budget priority list, identifying how they would spend their budget if they had won “the business equivalent of the lottery”.

The results were surprising. “New Agent Desktop” and a “Full Technology Refresh” were the two stand-out priorities, with all other alternatives falling way behind.

Invest In A New Agent Desktop & A Full Technology Refresh

With other investment priorities falling way behind



The Challenge to Contact Centre Solution Providers

The Challenge To Contact Centre Solution Providers

As one of the world's leading providers of contact centre technology and applications, the 'Tomorrow's Contact Centre' Survey gives us the perfect opportunity to understand what is front of mind for contact centre managers – their priorities and what they look for from a solution vendor such as Cisco.

The findings of the survey are enlightening. Section One, Connected Customer Journeys, clearly shows that we are facing the next stage of transformation in our contact centres. In this next stage of transformation, we will see a real focus on reducing customer effort by creating connected customer journeys across a much broader range of interaction channels.

In Section Two, contact centre managers were asked what they want from their contact centre technology and the survey shows two common themes.

Contact centre managers want greater agility; they want a contact centre environment that they can adapt, with applications that can easily be changed and managed by the contact centre team. Secondly, in keeping with the increased focus on customer experience and the connected customer journey, they are looking to make it easier for customers to contact them.

The survey indicates that contact centre managers do not feel their requirements are being met by their existing platforms and applications. Only a third of respondents said they would upgrade their existing platform to get access to new capabilities and functionality. The remainder would perform a full review of the market, with a likely migration to a new platform (on-premise or cloud).

Like Jonty, I am excited by the findings of this survey. It clearly shows that a focus on transformational change will allow us to become more relevant to our customers and their desire for effortless and connected customer care engagements.

Q.6

Upgrade or Replace?

We were keen to understand the extent to which respondents believe their needs are being met by existing platforms. So we offered contact centre managers a simple choice; “Upgrade” or “Replace”?

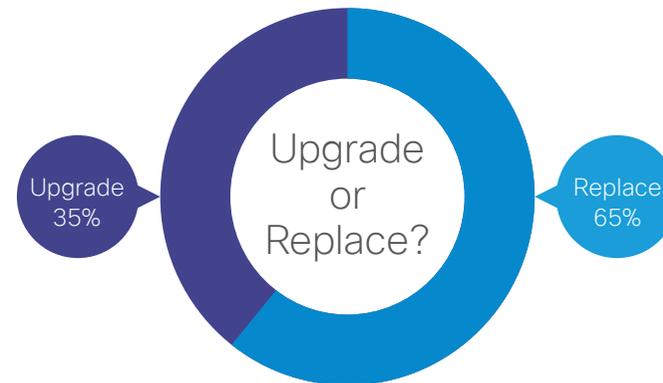
Just one third of contact centre managers polled said they would opt to upgrade their existing platform to gain access to new capabilities and functionality.

The majority (65%) would look at alternatives to their existing platform; with 21% indicating a preference for a cloud-based solution.

Responses to this question are consistent with the “Full Technology Refresh” responses we received to our earlier “Lottery” question. When combined, the responses suggest that traditional contact centre solution providers are failing to address the changing needs of the contact centre.

Only A Third Of Managers Would Upgrade Their Existing System

The rest will look for a change, with many considering cloud solutions



Q.7

Solution Characteristics

Comparisons of contact centre solutions all too often focus on features and functionality. In order to focus more on usability, we asked respondents to consider a series of solution characteristics and to tell us what they expect from their contact centre solutions.

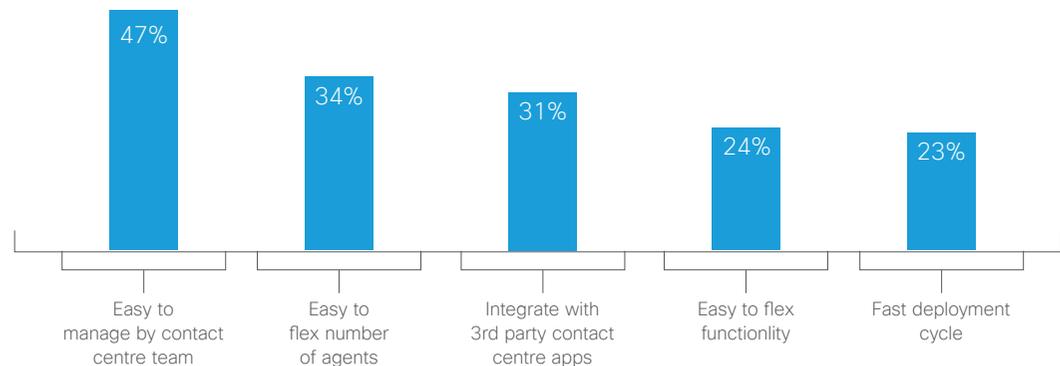
“Easy to Manage by the Contact Centre Team” was the most important characteristic with 47% of respondents rating it as very important.

The survey makes it clear that respondents value agility. Contact centre managers need to be able to make operational configuration changes themselves and rapidly scale agent numbers and systems functionality to meet changing demand.

Having to rely on IT or on external suppliers to make these routine changes restricts the contact centre’s ability to respond to changing customer behaviours.

Contact Centre Managers Want Agility

A platform that is easy to manage and change



 The percentage of respondents for whom these characteristics are "very important"

Q.8

What “Simple” Looks Like

While contact centre technology was once reserved exclusively for large enterprises with well-resourced IT functions, it has now become accessible by a much wider range of organisations. This places a responsibility on contact centre solution providers to keep their solutions simple.

We asked contact centre managers to consider what “Simple” looks like and to compare priorities including implementation, user adoption and customer value.

The results clearly show that the mandate for contact centre solution providers is to ensure that their solutions make it “Easier For Customers To Connect With You”.

“Simple” Makes It Easier For Customers To Connect With You

This is the mandate for new contact centre solutions

	Very Important	Important	Would be Nice	Not Important
Easier for customer to connect with you	73%	23%	4%	0%
Easy to use tech, improved user adoption	48%	44%	7%	1%
Easy to implement apps	40%	50%	8%	2%

Q.9

The Ideal Solution Provider

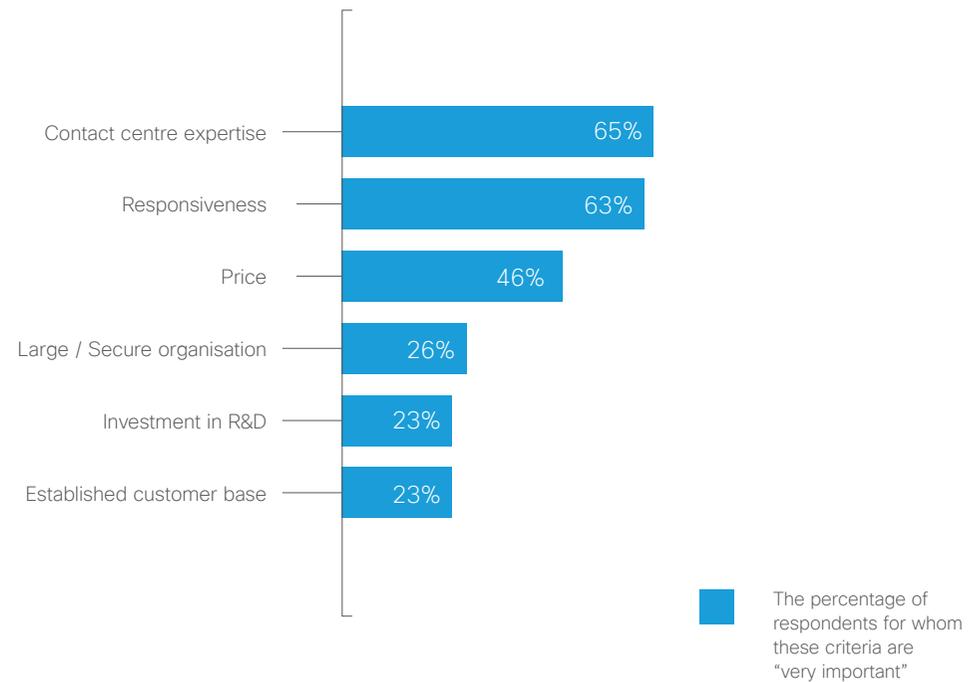
We asked contact centre managers to identify what is important when selecting a contact centre solution provider.

65% of respondents ranked “Contact Centre Expertise” as very important followed closely by “Responsiveness” at 63%.

It is useful to consider these responses in conjunction with our “Upgrade or Replace” question where 65% said they would review the market for alternative suppliers. Contact centre managers want expertise and responsiveness but it seems that traditional contact centre solutions providers are failing to deliver these basic requirements.

Contact Centre Expertise Is Key

When selecting a contact centre solution provider



Q.10

The Risks Associated With New Technology

Finally we asked contact centre managers about risk factors when implementing new technology.

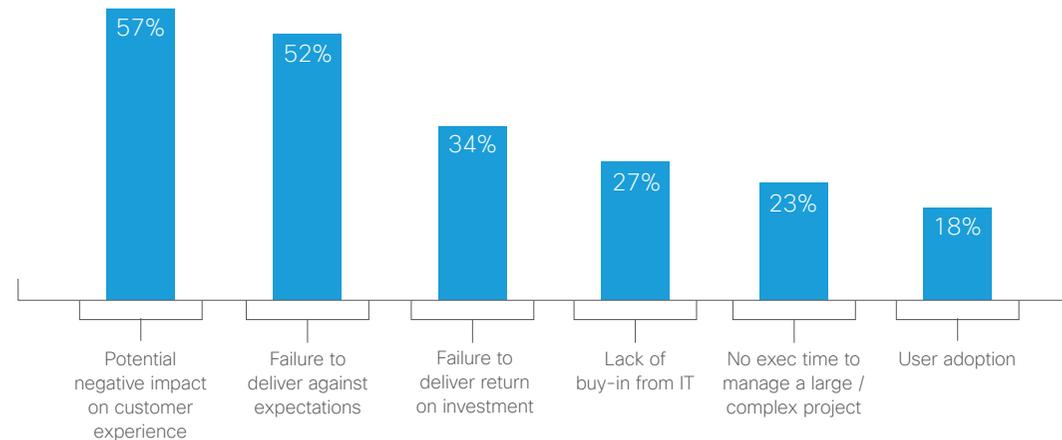
The risk identified most commonly was the “Negative Impact On Customer Experience”.

We saw in Question 1 that “Customer Experience” is the contact centre’s top priority. That this might be put at risk by a new technology implementation makes it imperative that solution providers have experience of the particular requirements of the contact centre.

Without this domain expertise, they cannot implement solutions that enable contact centre managers to provide effortless and connected customer care engagements.

Negative Impact On Customer Experience

And a failure to deliver on expectations



■ The percentage of respondents for whom these are considered to be a “major risk”

Tomorrow's Contact Centre starts today with Cisco Customer Collaboration

Businesses around the world are using Cisco contact centre solutions to improve contact centre and financial performance. Cisco was ranked first in "Ability to Execute" in the 2012 and 2013 Gartner Contact Centre Infrastructure Magic Quadrant, making Cisco the smart, safe choice for business contact centres.

Simple

Customers want it to be easy to connect with you and interact with the right person, first time. Contact centres want a single, familiar and intuitive system to deal with any type of customer interaction. IT wants a single enterprise-wide infrastructure that embraces the needs of the contact centre.

Agile

Customers want the flexibility to connect with you using whatever method happens to be convenient for them at that particular moment in time. Contact Centres need the ability to drive efficiencies and the agility to rapidly respond to changing customer needs, behaviours and expectations. IT needs flexibility to deploy solutions quickly and in the manner they choose - on premise or in the cloud.

Connected

Customers want a consistent experience across all interactions and all media. Organisations want to deliver a consistent branded experience across every customer touch point - both within and beyond the contact centre. IT wants a single collaboration architecture across the entire organisation that is easy to deploy, manage and scale.

For More Information

For more information about Cisco contact centre solutions, please visit: www.cisco.co.uk/contactcentresolutions

