AGE OF EXPERIENCE

TRENDS RESHAPING THE FUTURE OF CUSTOMER SERVICE

Gesner Filoso
Sitel Global Marketing & Brand Director

Experience shared.

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This report is the result of collaboration between Sitel's employees and stakeholders from around the globe. Our company is now providing services through more than 61,000 employees in 21 countries on behalf of some of the best known brands in the world in the most diverse number of industries with global solutions that include customer acquisition, customer care, technical support and social media programs.

The question we try to address in this report is: how is the Customer Relations responding in 2015 to continued pressure on cost, expectation for higher quality, rising complexity, and decreasing cycle-time to respond to clients? This report will address the drivers of trends we are observing – evolving channels and customer experience expectations – and will provide insight into methods for addressing the customer relationship evolution.

Who should read this document?
Customer Care and CRM Professionals, Contact Center and CRM Leaders, Marketing Strategy VP & Directors.

THE EXPERIENCE ECONOMY

"Today the concept of selling experiences is spreading beyond theaters and theme parks."

When 1,500+ consumers were tested under laboratory conditions, more than 60 % said they felt their heart rate increase when they thought about receiving great customer service. For more than 50 % of those tested, receiving great service triggered the same cerebral reactions as feeling loved[I].

The takeaway? When it comes to customer service, it's not about what consumers think, touch points, or contact length. Great service is about feelings, it's about experiences.

And this is not new in our industry. Intuitively, most people recognize the value of a great customer experience. Brands that deliver them are ones that we want to interact with as customers — that we become loyal to, and that we recommend to our friends and family.

Our research and consulting on customer journeys shows that the most important trend is that we have reached the time to stop the philosophical debate about whether investing in the experience of your customers is the right business decision. Almost 70 % of companies plan to increase their customer management spend[II] and 62 % of organizations view customer experience provided through customer service as a competitive differentiator[III].

This isn't a question of beliefs anymore —the solution to broken service delivery chains isn't to focus on touchpoint management. Instead, companies agree on the need to embed customer behaviors and journeys into their strategic and operating models[IV].

Delivering successful journeys brings about an investment in technology, a truly omnichannel approach, and exploring near adjacent opportunities. But more importantly, it causes an operational and cultural shift that engages the organization across functions and from top to bottom, generating excitement, innovation, and a focus on continuous improvement. Many of the previous year's trends have now been gathered with one single purpose – enhancing customer experience.

THE PROGRESSION OF ECONOMIC VALUE

COMMODITIES

GOODS

SERVICES

EXPERIENCES

UNDIFFERENTIATED

COMPETITIVE POSITION

DIFFERENTIATED

According to an article from B. Joseph Pine II and James H. Gilmore published in the Harvard Business Review Magazine, this transition from selling services to selling experiences will be no easier for established companies to undertake and weather than the last great economic shift, from the industrial to the service economy.

THE ERA OF THE CUSTOMER

DISTRIBUTION AND INFORMATION

MASS MANUFACTURING

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In this context, customer services continue to grow in size and strategic importance, creating a need for structured operations and processes and flexible technology to adapt to change.

Of course, these trends offer just a glimpse of THE FUTURE OF CUSTOMER SERVICE, not the entire picture. But they're manifestations of the shifting consumer expectation, technology movements, ideas, and outcomes that will redefine great service in 2015 and beyond.

Technology & Innovation

The customer experience center of the future will be a confluence of the cloud, hardware innovation, shorter release cycles, and IT's alignment with the experience journey.

As human lives become increasingly entrenched and interconnected with the solutions, the consumer demand for simplified service and support will continue to increase exponentially.

Customer Service Operations

What will the operations of the future look like? What roles will third-party providers, continuous improvement and remote management tools play?

Employee Management

Explore the future of employment, including acquiring and retaining talent and performance management, gamification, and what it will mean to be an employee of tomorrow's customer service.

Global Sourcing

How will our industry change by 2020? What is the real cost-benefit of a multi-sourcing model? Can a multi-sourcing strategy protect customer experience? What role will Work@Home play in the new environment?

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One of the biggest changes to affect the contact center has been the shift in control from organization to consumer. This transition is fueled by the ways that interactions are handled and the increased reach and influence of the customer voice. Empowered by the continually growing number of faster and more dynamic web and mobile channels, consumers are more interconnected and freely share their experiences with businesses than ever before. The increase in customers' control of their experience will continue to challenge the processes, organizational structures, and systems that companies have put in place to communicate with customers, and will require a change in corporate mindsets as well.

Consumers prefer word-of-mouth and distrust corporate communications; more than 70 % trust online reviews, while less than 14 % trust advertising. This communication evolution has served to not only increase consumer expectation, but contact management complexity as well. Since customers expect a consistent level of service from an organization at any given time, regardless of their initial point of entry, companies need to provide a holistic view of the customer across all divisions, business areas, and even branches. Companies must be at the right place, at the right time, on the right channel.

Here are some of the top trends that customer service leaders need to understand and address in order to stay competitive and deliver a great customer experience.

Info-sense
Customers are demanding new levels of quality experiences, based on the technology available. In 2014, 36 %[xx] of global consumers were willing to share their current location with retailers via GPS – that's almost double the number in 2013. With the evolution of Big Data initiatives and new technologies, consumers will increasingly expect the use of real-time data to shape and enhance the service they receive.

Connected Experience Ecosystem
On other hand, the Internet of Connected Products (IoCP) is enabling digital connectivity among companies' customers, partners, and employees.

36%

"In 2014, 36% of global consumers were willing to share their current location with retailers via GPS"

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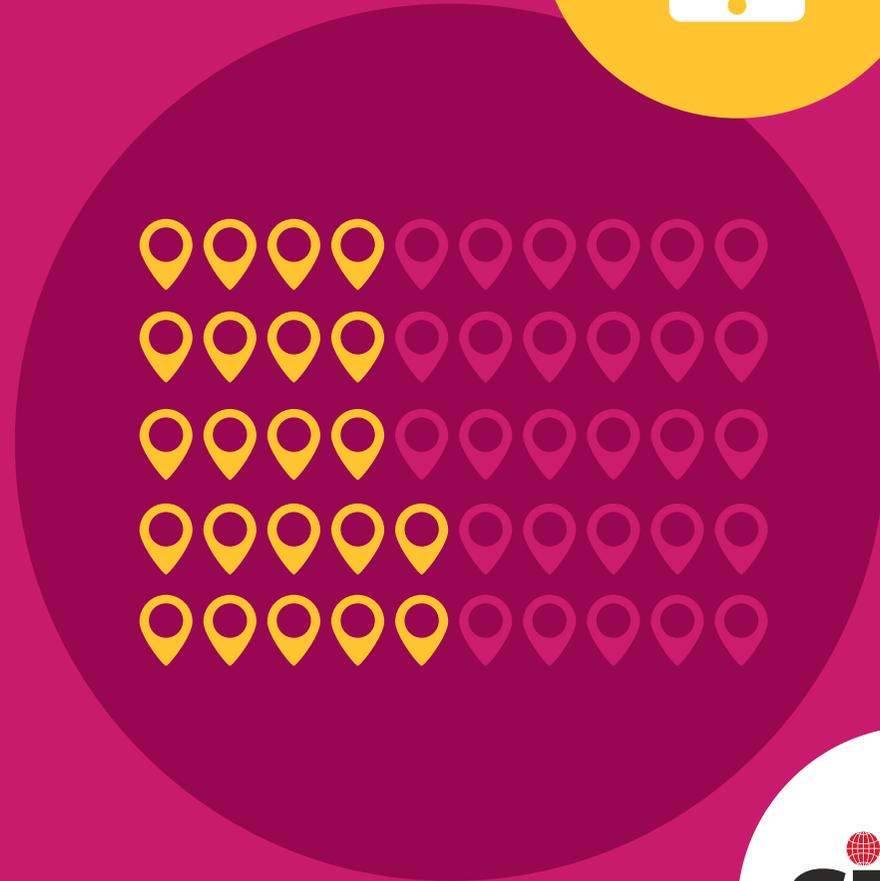
Social media, omnichannel, mobility, and other trends come together with connected products driving deeper engagement, enabling companies to gain better business insight, and enable never-imagined experience opportunities and revenue growth.

Enterprises are embracing technology as a catalyst to create new business opportunities — new markets, new products, new services, and new areas of growth. In this context, the Internet of Things (IoT) represents an evolution in which factories are instantly addressing production line problems, hospitals are monitoring and regulating pacemakers and utilities companies are proactively adjusting temperature and lighting according to a customer's requests and preferences, to name just a few examples.

Furthermore, as the number of connected internet devices continues to grow exponentially (by 2020, there will be 75 billion internet-connected devices according to Morgan Stanley), organizations like Sitel will be able to send, receive, gather, analyze, and respond to events from any connected device, increasing sensibly the chance to enhance their experience, build trust and strengthen customer relationships.

Key Takeaways:

- While social, mobile, analytics, and cloud still drive customer relations' trends, the focus now is on new ways that emerging technologies like IoT are being woven into the next generation of business strategies across almost every industry.

- Organizations looking to reimagine themselves in a technology-driven world set forth on their journey to becoming digital businesses. Many organizations were experimenting, while others were making larger investments. But all are now counting on technology to create stronger customer relationships and fuel their next wave of growth.

- BPO companies like Sitel are investing in research and solutions

to help put the Internet of Things to work for our clients by giving them the ability to:

- *Figure out how to connect millions of contacts, objects and events, converting the data into tangible business results with local decision making.*

- *Support the development of new processes and systems of interaction with people, mobile devices, sensors, machines and applications, creating a truly omnichannel environment.*

- *Reimagine our business and improve customer experiences by receiving and responding to events in near-real time (e.g; Disney MagicBand business case)*

Mobility

According to a leading research firm, the incremental amount of traffic being added to the mobile internet by 2016 alone is approximately three times the estimated size of the entire mobile internet in 2012. Today, more than 50 % of internet users in the U.S., U.K. and Japan access the web via a mobile device. Just four years from now, one billion consumers will have smartphones.

The proliferation of smartphones and mobile devices will continue to super-charge customers' expectations for anytime, anywhere, on-demand support for any problem. The first one to effectively solve a customer's problem will win. Mobile will also present new and unique opportunities for marketers to take advantage of location data to provide timely and compelling offers. This should provide for proactive service notifications based on proximity as well a improve customer experience by reducing effort. Businesses must be prepared to both support and innovate as mobile customer expectations grow.

With more than half of users adopting smartphones around the world, customers are gravitating to mobile web and custom applications (apps) as their primary portal for services and the main method of communication. Interestingly, new challenges spring up around integration of the devices with other systems, carrier issues, hardware

50%

"Today, more than 50% of internet users in the U.S., U.K. and Japan access the web via mobile device"

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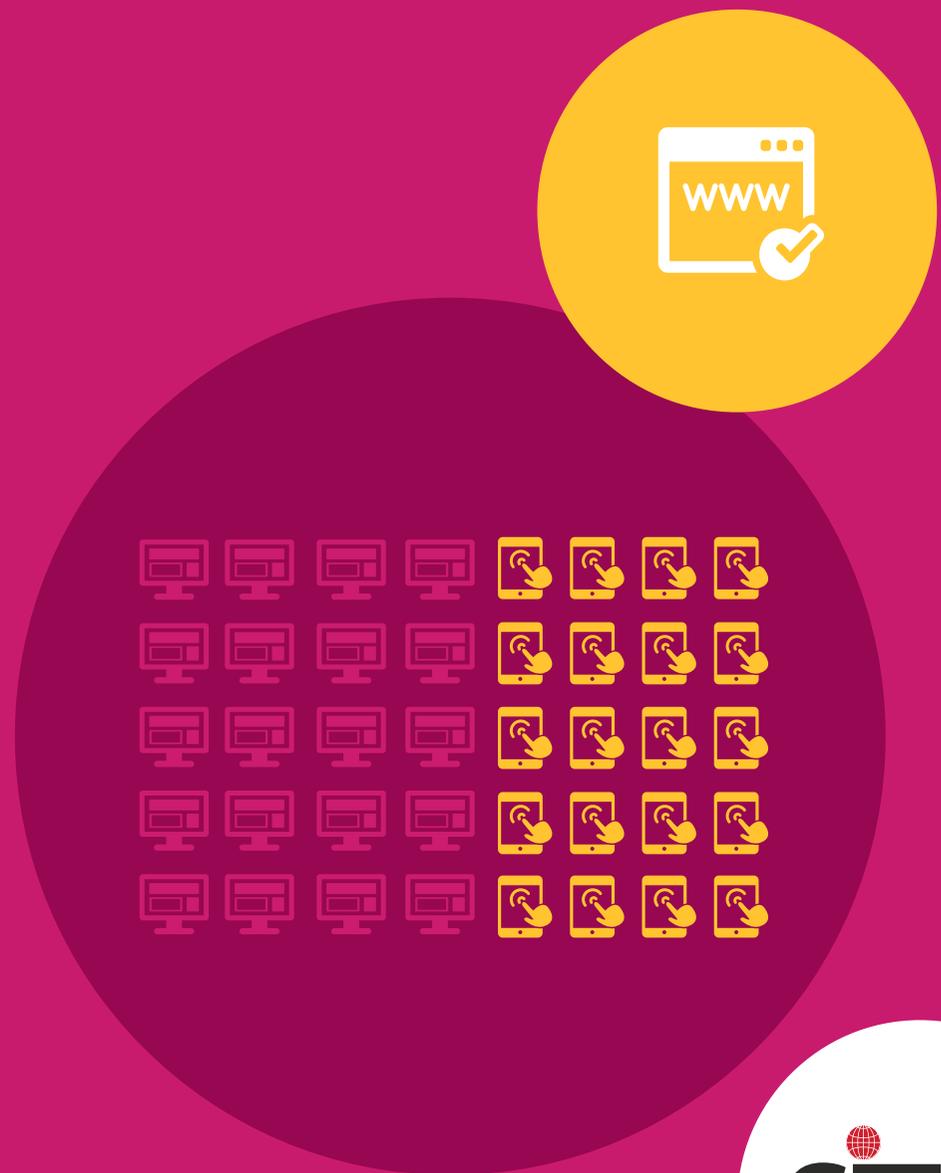
and software issues and point-of-sale issues, etc. All of these new issues are increasingly complex and in many cases cross-ownership between device manufacturer, carrier, app designer or reseller. It is still unclear who will own the resolution for technical issues.

That said, well beyond the bespoke traditional outbound telemarketing campaign, the years ahead will see many businesses transforming core support processes to optimize them for creating revenue in the mobile world. 69 % of business-to-consumer (B2C) organizations surveyed consider contact centers to be critical to revenue generation[V].

Consumers have amazing options at their fingertips, enabled by information, services, and the ability to shop from anywhere via any number of personal technology devices. According to Forrester Research, more than 40 % of Western Europeans purchase goods online, with Germany, Switzerland and France all reporting more than 50 % of consumers doing so. In the US, 67 % of consumers currently shop online, using four or five web outlets[VI].

Executives across the enterprise are recognizing that every touchpoint must first retain a customer and then turn positive experiences into improvements to the bottom line. In recent research[VII], it was noted that companies need to become far more innovative, rebooting their strategy to emphasize quality and customer experience, not price. In a fast-moving and ultra-competitive marketplace, the customer service agents who are listening and engaging are the part of the business creating meaningful value at moments that matter.

Face time, any time.
Service interactions via video will also continue to grow as brands strive to induce a human element into the conversation. This doesn't have to be about dealing with customer questions or complaints in a more engaging way, but it's about make offering new experiences, trials and tests via webcam. According to some top tier retailers (e.g; Amazon) among tablet owners, 75 % of customer service interactions now come via the "Video" button.

Winds of Cloud
Gartner says the worldwide cloud services market surpassed $109 billion in 2012[VIII] and the demand for managed services keeps growing significantly, outpacing the traditional deployment model of buying and managing unified communications and collaboration technology onsite. A growing number of companies are choosing hosted collaboration services, letting providers host dedicated equipment for them, or paying a license fee to have collaboration services delivered by a service provider over the cloud.

The key to taking advantage of this growth will be understanding the nuances of the opportunity within service segments and geographic regions, and then prioritizing investments in line with the opportunities. The ability to dynamically provision, pay, and scale on-demand is changing how most businesses will deploy IT in the future. Cloud computing will make it possible to turn on services when needed and shut them down when they're not.

Social Media
One of the most significant trends over the last three years is the rise of social media outside marketing and inside customer service. Social media is moving beyond contacts and interactions to a culture of community and collaboration for the most progressive companies. More than 23 % of consumers from the age of 18-32 prefer social media when learning about products. Consumers are no longer relying solely on the traditional channels of phone and email. They are interacting online with peers over sponsored communities and over the public cloud via Facebook, Twitter, Instagram, and Pinterest.

Consumers and consumer groups are setting up social media and other online advice services themselves. Approximately 83 % of consumers tell their friends if they get a good deal, demonstrating that the demand for advice from fellow customers is present and strong enough to influence companies around the globe[IX].

23%

"More than 23% of consumers from the age of 18-32 prefer social media when learning about products.

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Customers want more than products and companies must deliver more than goods. By 2020, customer experience will overtake price and product as the key brand differentiator[x] and already by 2015 smart brands will see delivery as much more than functional.

Customer service ranks as the #1 factor influencing how much a consumer trusts a company, but 92 % of companies reported a decline in customer satisfaction, with consumers most disappointed by inconsistent service. New Customer Service Operations need to develop a culture of continuous improvement, in which everyone keeps a sharp watch for opportunities to improve the overall system – but what are the key elements to measure?

In a business environment where simplified marketing metrics have the strongest appeal in the boardroom, the Customer Effort Score (CES) follows Net Promoter Score (NPS) as a desirable way to quickly understand if the organization is delivering on the customer experience[XI] . However, there is no silver bullet; simplified metrics do not tell the whole story, and decision makers may ignore the blind spots at their peril. This is true of NPS and is also the case with CES.

Customer Effort
One of the key oversights organizations face when applying Key Performance Indicators (KPIs) is that the customer metrics end up defining the customer experience strategy. This paper aims to explain Customer Effort and how it applies to service delivery in organizations, its role in the constellation of customer metrics, and generally how to ensure customer experience metrics are enablers of the business strategy rather than an end in themselves.

Customer Effort tends to only apply to customer interactions and not to the whole customer experience, leading to a raft of reasons why a Customer Effort Score may not be appropriate as the only customer experience measure on which to rely.

Rather, Customer Effort is a concept and if CES is used, it should be seen as complementary to core metrics like Customer Satisfaction (CSAT) and

NPS, but by itself it is not the answer to effective management of the entire customer experience.

Proactive Customer Service

Financier Warren Buffett has noted, "Price is what you pay; value is what you get." Customers have shown time and time again that they are willing to pay more for higher perceived value in any market sector and companies are planning to monetize this trend. Proactive customer service providers are anticipating needs, allowing companies to provide greatly differentiated, high-touch services that reinforce the company's brand identity and customer value proposition. 2015 will continue to see companies increasing their spend on proactive customer service to delight customers with convenient, useful information at their moment of greatest need.

Customer Experience is Moving to Recentralization

Multi-channel is quickly becoming passé as omni-channel gives way to the power of the customer to drive interactions. For 10 years, businesses have aggressively been chasing new channels and layering them on operationally, trying to engineer to the lowest cost to serve. Expect customer service organizations to better align their channel strategy this year to support their customers' needs. Expect them to also work on guiding customers to the right channel based on the complexity and time sensitivity of interactions.

Logic has dictated that the more calls we push to IVR, web self-service, and automation the lower our cost and the better our business. This logical approach, however, has been flipped on its head with the new customer experiences pressure that now exists. In a recent research report, 86 % of customers said that they will pay MORE for a better customer experience[XII]. This means that each interaction across channels and over time must be consistent, positive and on target with a company's brand promise.

Social customer communities, multichannel knowledge management, mobile virtual agents, and natural language processing will have the

the biggest impact on the customer service experience in the coming years. Brands that don't innovate around these trends—and that fail to serve customers where, when, and how they want to be served—will suffer. The winners will be the businesses that learn to run a thread through all channels and experiences by centralizing with omni-channel strategies.

Self-support

The Forrester survey found that 44 % of respondents believe the ability to get quick answers from a live chat representative during an online purchase is "one of the most important features a website can offer." But this is not about "online chat." Across all demographics, voice is still the primary communication channel used, but is quickly followed by self-service channels. Expect companies to keep investing to streamline development and reduce ongoing maintenance efforts with an architecture that enables reuse of core automation components across multiple self-service channels.

Advanced IVR applications and Visual IVRs enable companies to provide low-cost personalized multichannel self-service 24 hours a day, 7 days a week. Technologies such as speech recognition and personalization serve to offer a more natural, effective, and less frustrating interaction than traditional touch-tone systems. Many customers prefer to complete account management tasks, pay bills, and place service orders via an automated system rather than wait for a live representative.

44%

"... 44% of people believe the ability to get quick answers from a live chat representative during an online purchase is "one of the most important features a website can offer"

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No matter your industry, or the size of your company, one tenet holds true: No customer service strategy can be effective unless the front-line people are motivated and trained to do so. Motivation and training is, of course, the natural domain of HR, which typically conducts annual, monthly and even hourly performance reviews, sets personal goals, and manages employee incentive and competency development programs.

However, we can also expect to see companies investing in a proprietary suite of technologies, training processes and tools in the areas of talent acquisition, learning services, knowledge management, workforce collaboration and performance optimization. Innovation in the field of human capital management is one of the key capabilities mapped by top tier companies in the industry to enable a consistent, scalable and flexible workforce.

Here are some of the top trends that customer service leaders are pointing as critical in order to stay attractive to employees and enhance their employee's satisfaction.

Analytics & Workforce Intelligence

In today's world, customer service and human resources leaders understand that data-driven solutions can improve decisions about talent, and, as a result, revenues and profits. Companies are now focusing on the use of data-driven insights to develop actionable plans to better recruit, retain and motivate employees.

Market demand for Workforce Intelligence is on the rise as business leaders increasingly recognize that recruiting, retaining, and motivating the right talent is critical to business growth and prosperity. Equally important is the ability to access and analyze the right information to support talent-related business decisions.

On other hand, linking employee training to companies' business strategies will still be critical. However, simply spending more on training programs won't automatically translate into enhanced productivity. Rather, Workforce Intelligence solutions will clearly define goals and measure the return on

69%

"... 69% of millennials believe office attendance is unnecessary on a regular basis."
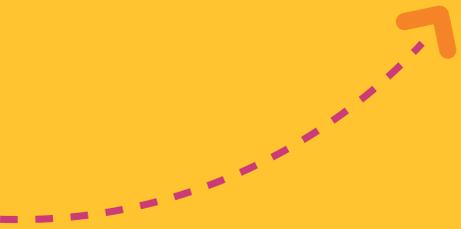
investment that companies expect from learning initiatives. By making program goals and program outcomes tangible, companies can ensure tangible improvements.

Generational Shift

By 2015, millennials will be the majority representation of the workforce, as baby boomers retire in greater and greater numbers[XIII].

Millennials are known to have significantly different expectations for their employment experience, forcing HR to face challenges of engaging and retaining a new profile of employees, while also ensuring the knowledge and skills of retiring baby boomers are maintained. For instance, 69 % of Millennials believe office attendance is unnecessary on a regular basis.

Companies will look to more sophisticated methodologies, tools and processes to better predict, incorporate and react quickly to the changing workforce in order to understand how to best motivate, train, and retain workers.

Gamification

Industry leaders recognize that contact centers typically have low levels of task discretion and mode rate levels of interaction task, and few contact centers use quality improvement teams and autonomous work groups extensively. This is the case regardless of the education level of the employees. Moreover, performance appraisal and performance monitoring are used extensively[XIV].

Yet, on the other hand, there is a much greater variability between contact centers in the extent to which they use other human resource practices, such as sophisticated selection, extensive training and performance-related pay. Furthermore, the use of these other human resource practices is not strongly associated with the way jobs are designed. But this scenario is rapidly changing.

Everywhere we turn, it seems there are experts claiming that the best path forward is to engage people with elements of competitive play.

Gamification has now been established as a valid engagement tool in the enterprise to drive workforce and customer engagement and drive business growth.

Customer service organizations have a lot of experience with goal setting, rules, and incentives. What the industry hasn't figured out is how to align work with personal passion and commitment. The big change on Employee Management practices is based on the result of some research that states we enjoy games and spend so much time playing them because it is our choice[XV]. We volunteer to enter their fray.

Meanwhile, the problem with work is that so much of it feels involuntary. Certainly no one forced us or a customer service employee to take a particular job, but whatever sense of excitement or mission we felt as a new recruit has been lost in the daily grind.

Applying game design in the workplace can bring back the thrill of putting points on the board, beating the odds, and accomplishing important goals. Leveraging game mechanics can unleash passion, potential, and personal commitment. Games can help transform the weak links of social media connections and conversations into purposeful networks.

The technology research firm Gartner predicts gamification will be used in 25 % of redesigned business processes by 2015. This will grow to more than a $2.8 billion business by 2016, and 70 % of Global 2000 businesses will be managing at least one "gamified" application or system in the following years.

25%

"... gamification will be used in 25% of redesigned business processes by 2015"

25 %
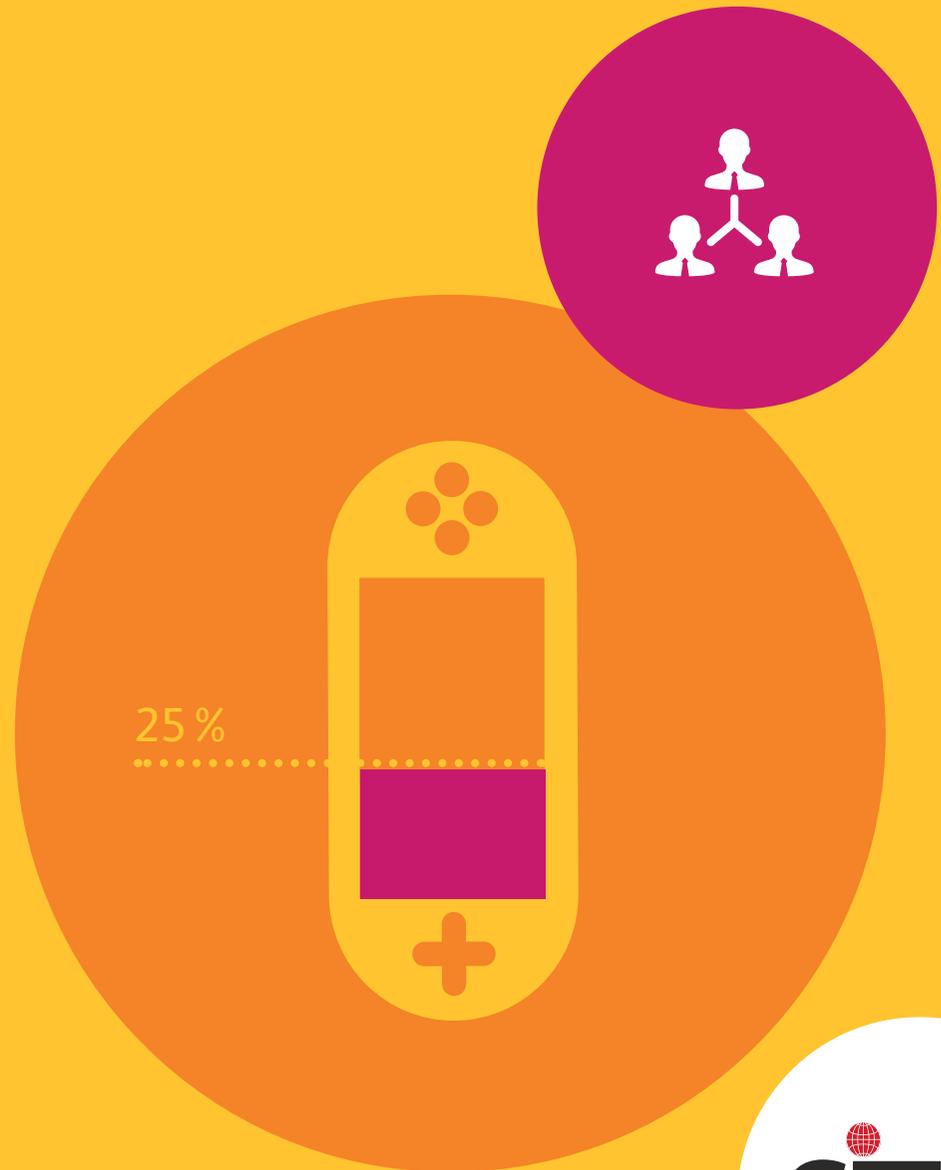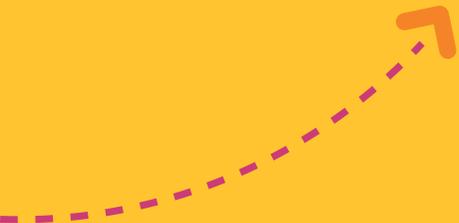
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Global sourcing (offshore services) is expected to grow to a $500 billion industry by 2020[XVI]. Despite the political pressure, the popularity of offshore outsourcing is still growing rapidly, spurring innovative relationship models with blended domestic, nearshore and offshore support. Companies that understand and embrace the research and investment required for successful offshore sourcing will reap great rewards, while minimizing risk.

The annual Offshoring Network Survey [XVII] results show increasing demand for engineering, product development, and research and development activities. Consequently, there will be a significant shift in the volume of service functions from developed to developing countries that have socioeconomic and political stability, access to a competent human resource base and rock-solid infrastructure. However, to most successful companies, outsourcing is not only about offshoring to one low-cost location, it's about blending onsite, home-based, offshore and nearshore capabilities, supported by a proven global operations model.

Automation-enabled Self-service the First line of Satisfaction
Customers expect to be able to self-serve on the web or in the IVR without human interaction/escalation.

Offshore is as Essential as Ever for Scale in a Cost Competitive world
With nearly 500 million Spanish speakers, 400 million English speakers, 100 million German and 100 million French speakers, it is important to have global language solutions that will scale cost effectively. Mature and proven operating centers exist in safe and secure countries. The sourcing of customer experience management jobs is driving the globalization that is enhancing the stability of economies and cultures by providing jobs and education.

Nearshore is Key to Business Continuity and Critical Language Support
In any operation of significant scale there is a need for geographic diversification to ensure operating stability with redundancy and separation. Nearshore solutions across the globe offer customer experience operations with close proximity that complement larger scale operations in lower cost offshore destinations. Central America, for example, is an ideal offshoring

12%

"... currently 12% of contact centers with formal workforce management programs are utilizing home-based agents"

53 %

12 %

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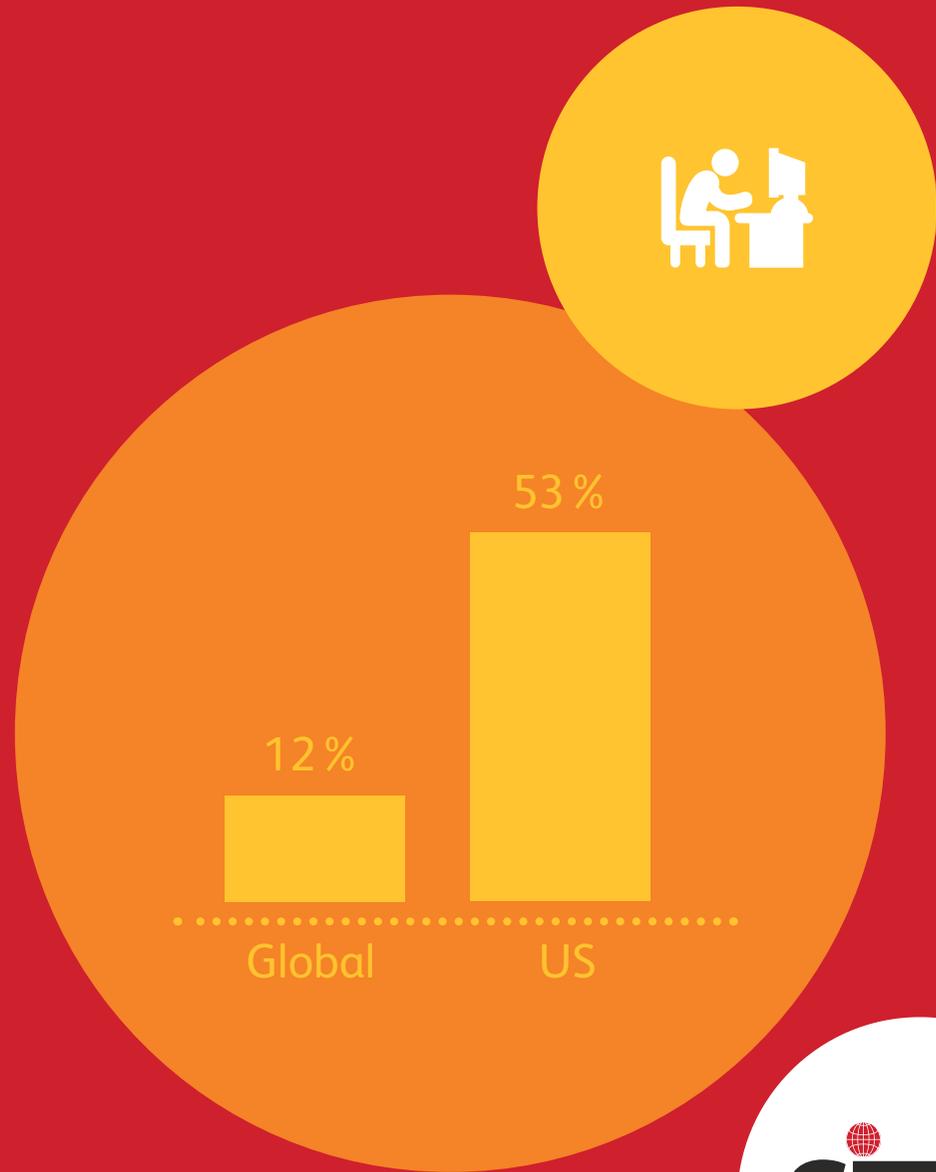
location for U.S. and Canadian businesses. With compatible time zones and short flight times, these locations can seamlessly provide quality, cost-effective customer experiences.

Homeshore capability must set the standard for service expectation. Domestic customer experience operations are vital to a large scale customer experience operation as a benchmark for global operations and as an enterprise leader to establish standards.

Home-Based Agents Complete the Chain

The time is right for home-based agents to massively take off and reach a new level of maturity. Technologies have addressed bandwidth, security and reliability concerns. It is becoming common for home-based agent positions to meet or exceed the security standards of a brick-and-mortar site. The adoption curve has reached a critical mass and work-at-home employees exceeded 100,000 in 2013. Added pressure to bring higher value service back from offshore locations is also a major driver for adding home agents.

As transformation initiatives evolve, many will include home-based agents to fill in the complex parts of a complete solution. Home-based agents will fill in the peak staffing requirements with part-time labor and will provide specialty agents with unique training and language capabilities. The more complicated the role to staff, the more likely home-based agents will fit the bill and fill the role.

A recent benchmark report[XVIII] shows that currently 12 % of contact centers with formal workforce management programs are utilizing home-based agents. According to the National Association of Call Centers, 53 % of US contact centers already have some portion of their agents working from home. As the job of an agent becomes more complex, moving to an home-based agents model is one way many companies are finding a more educated, stable workforce — wherever they live.

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ABOUT SITEL

Great customer experience starts with great people that are well trained and equipped to address the needs and add value to your customers. Keeping the promise of better experiences is how Sitel is helping the largest brands in the world retain and grow their customer base.

As a leading global outsourcing service providers, Sitel combines knowledge sharing, a 'people first' culture and unparalleled excellence at both the global and local level. Whether you partner with us or work for us, you will discover what it takes to deliver outstanding customer experiences.

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