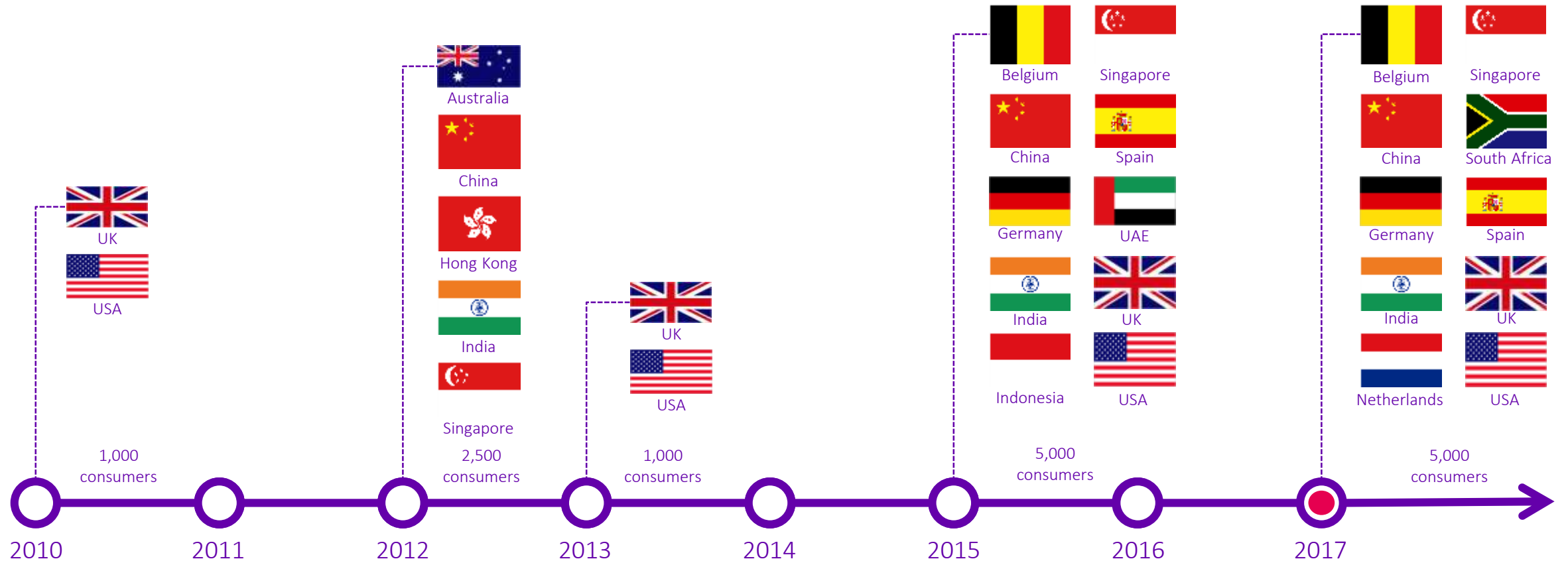


Chat, tap, talk: trends to transform your digital customer experience

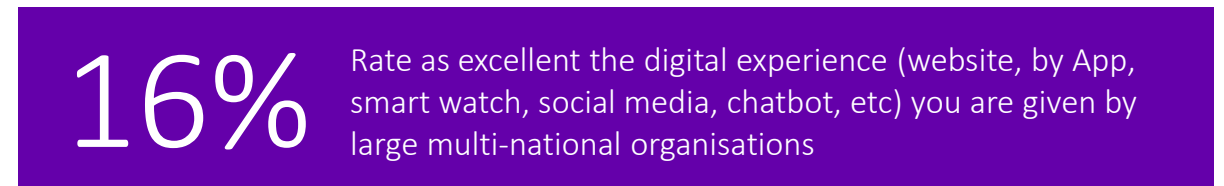
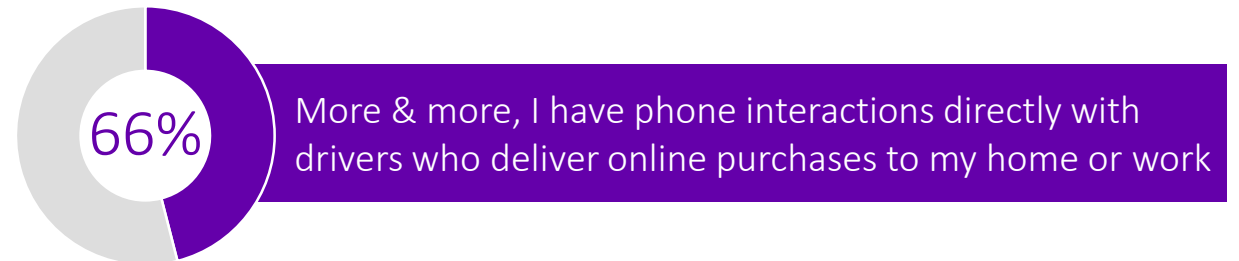
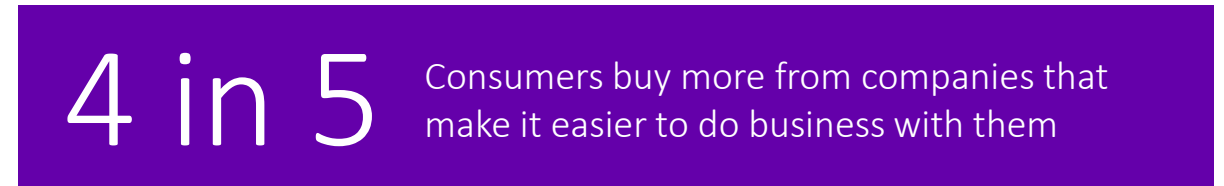
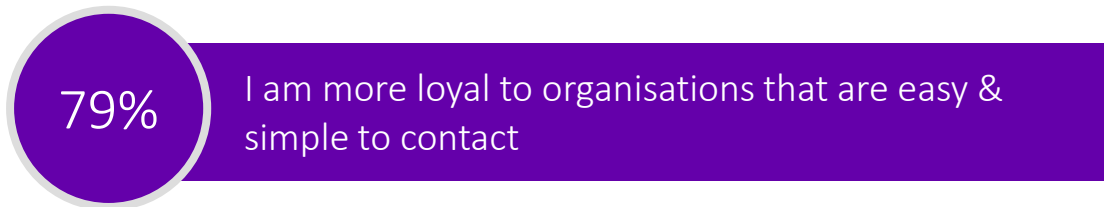
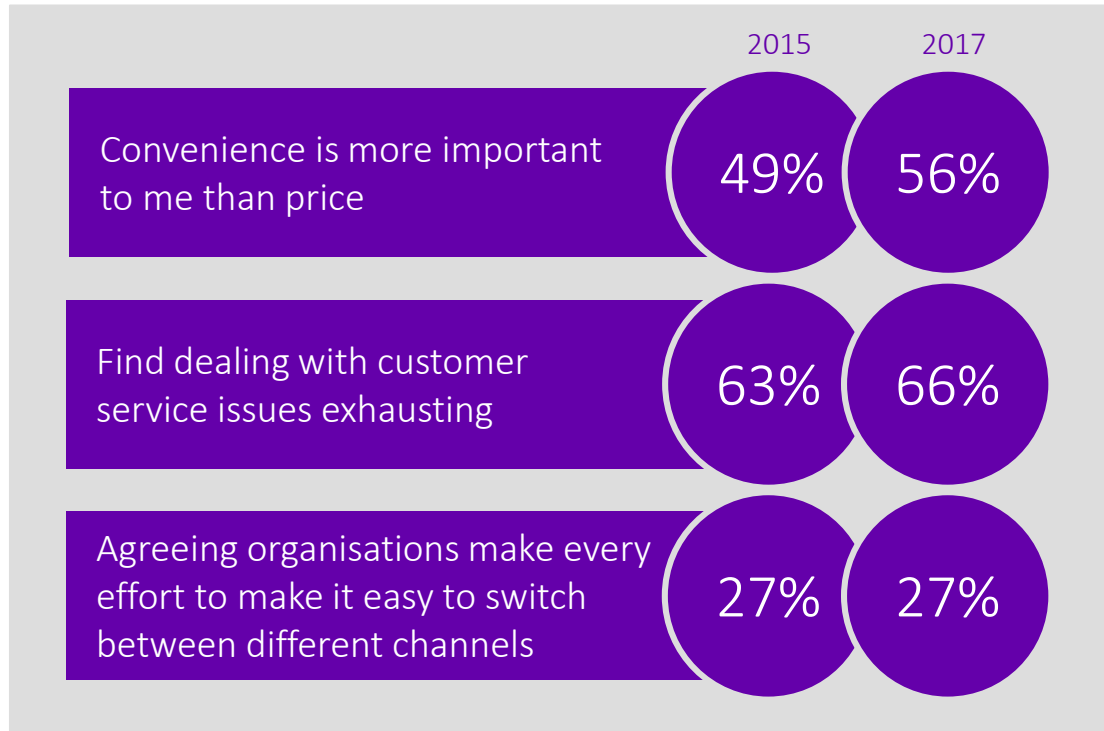
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Timeline - 7 years of trend data explaining the rise of the global Digital Customer

Consumer research to understand the customer journey



Seeking simplicity: digital customers want easy journeys



Smartphones are becoming more important in digital experience

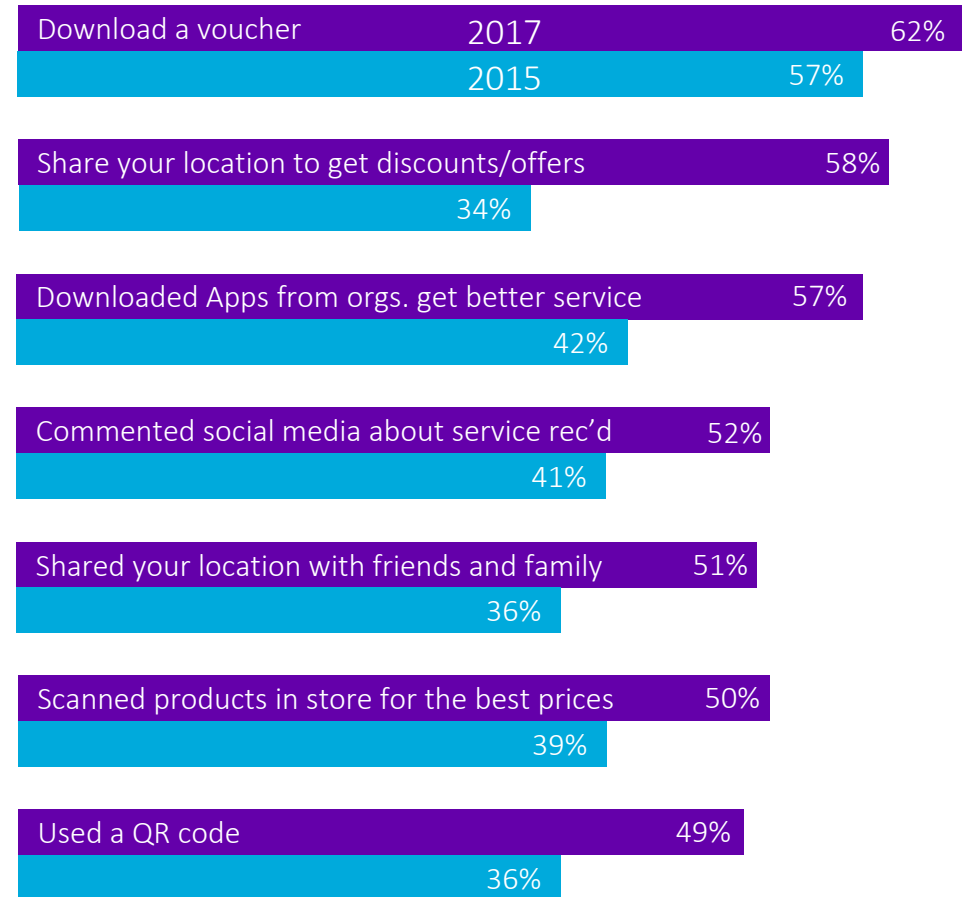
Used in the last 6 months	2015		2017
Android smartphone	57%	↑	59%
iPhone	26%	↑	31%
Home PC/Lap-top	80%	↓	63%
Android tablet	30%	↓	28%
iPad	27%	↓	23%
Apps on your smart phone which link to your location	34%	↑	52%

46% have used chat on smartphone to contact orgs.

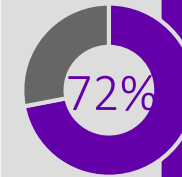
Currently use a smartphone App of an organisation to contact that org.

21%

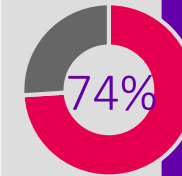
Often or sometimes...



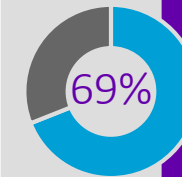
Agreeing they would like...



Visual options on smartphone - when you call an org you can see the dept. options on your screen and select by touching the screen



If organisations made it cheaper to call them from a mobile/cell/smartphone



If organisations had the data/information that I give them in one place (eg via their website) available in another (eg shop, smartphone App or call centre)

Omni-channel shifts human channels towards complexity

Channel choice

Want “Immediate access to a well-trained employee e.g. someone to talk to on the phone or face to face...” if...

24%

You want to complete a routine, mundane task e.g. paying a bill

30%

You are looking to improve your lifestyles by the purchase of a product or service

52%

There is a crisis and you need a solution to a problem with a product or service e.g. reporting a fault

How interested would you be in the following initiatives from organisations?

If organisations always offered different channels to meet my needs

81%

Start a customer service conversation in social media but then transfer to a phone call if you choose, without having to dial

69%

Make a call to an organisation using Skype from an internet enabled device

58%

If I could order products and get customer service through organisations' Facebook pages

57%

Sharing your social media profile with your bank/supermarket/utility so they had better information about you and can give you better customer service

48%

61%

I change how I contact an organisation depending on my situation (65%, 2015)

62%

I do simple things via website or app, and call for more complex issues (60%, 2015)

Context drives channel behaviours

	Visionary.	Utilitarian.	Customer in crisis.
	You are looking to improve your lifestyle by the purchase of a product or service e.g. moving house or booking a holiday. You're in a positive and motivated state of mind, and willing to invest time. You may even enjoy the experience	You want to complete a routine, mundane task e.g. paying a bill or buying everyday products and services. It is low value in terms of your time, you're not looking for the "wow" factor or enjoyment	There is a crisis and you need a solution to a problem with a product or service e.g. reporting a fault or getting advice. You might be frustrated, angry or worried.

Allow me to explore, research and get advice using a wide range of resources e.g. online, webchat, face to face/in-store advice

40%

19%

23%

Make the transaction fast and easy e.g. an App, online self-service technology

24%

52%

21%

Give me immediate and straightforward access to a well-trained employee e.g. someone to talk to on the phone or face to face who can sort my problem

30%

23%

52%

Phone is still popular: a key part of digital strategy

84%

Have phoned a call centre in the last 6 months (86% in 2015)

Experience problems getting customer service with....

85%

Apps of orgs.

92%

Websites of orgs.

There should be a phone number on every web-page or App...

77%
Age 16-34

81%
35-54

83%
Aged 55+

70%

Agents put me on hold as they don't know what to say (72%, 2015)

61%

I have known more about the product or service than the agent in the call centre (56%, 2015)

Would like it if...

I could share my screen so the agent can help you

67%

I could choose to be routed back to the same advisor I spoke to previously

87%

77%
2015

81%
2017

There should be a phone no on every web-page or App

90%
Spain

88%
India

85%
South Africa

82%
Belgium

81%
Germany

81%
China

77%
US

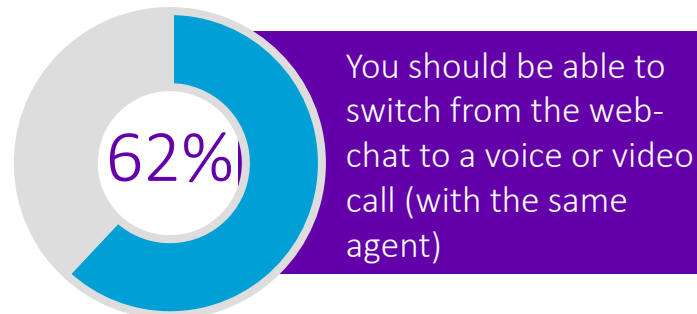
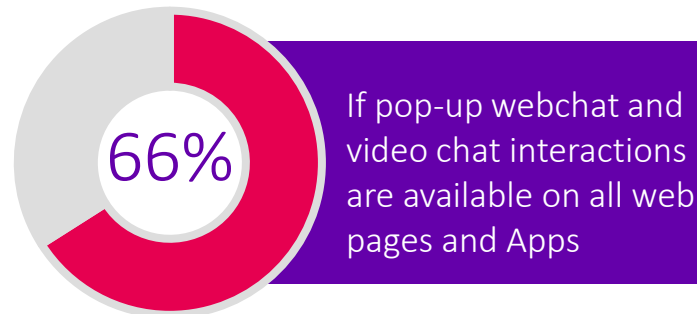
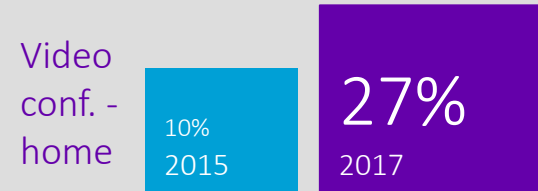
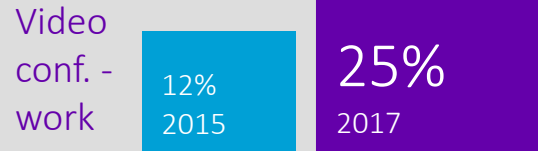
77%
Netherlands

73%
UK

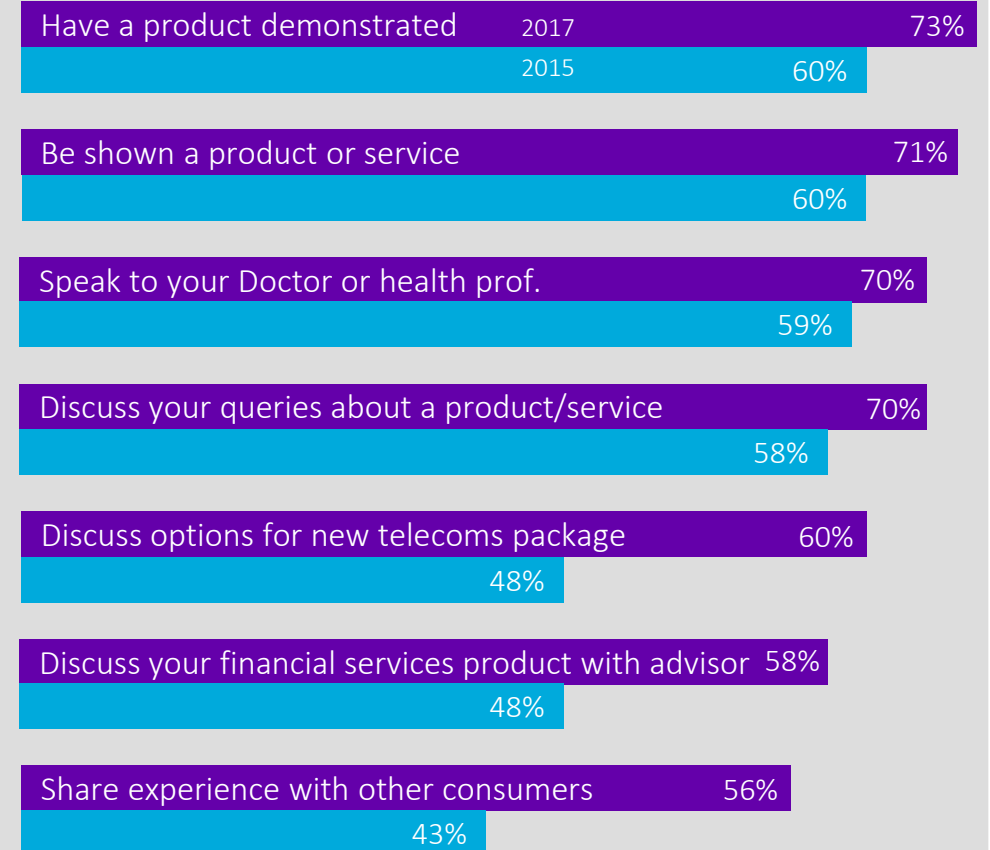
69%
Singapore

Seeing is believing: video can transform the customer experience

Using 2 to 3 times a week or more



In which of these situations would you want to be able to use video-chat to COMMUNICATE with an organisation on their website? Definitely and possibly



47%



Use video to resolve problems with products and services (2015, 42%)

Chat is where it's at

58% Issues can be resolved on chat without referring me to e-mail, a shop or a contact centre

50% The option to chat makes me more likely to use the organisation again / talk favourably about them

58% I get a quicker / more instant response with chat than when I email or call the contact centre

48% I get frustrated when chat is not available

Being able to look at the screen makes chat more useful (49%, 2015)

59%

Like chat because you have a record of the conversation (48%, 2015)

54%

If you have a problem how do you want support?

65%



Chat
(45%,
2015)

38%



E-mail
(34%,
2015)

29%



Social media
(22%,
2015)

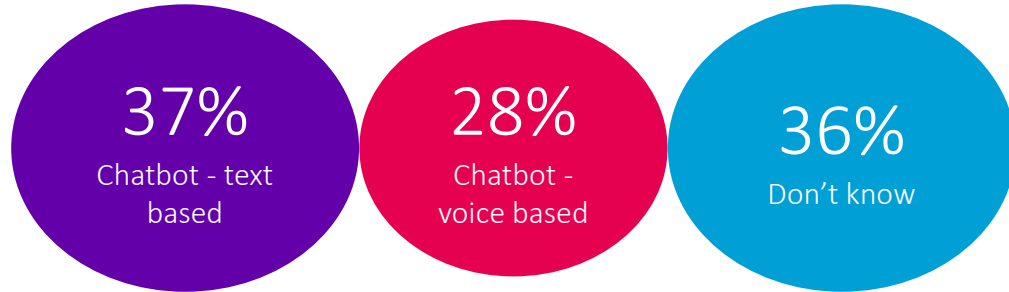
9%



Web FAQs
(21%,
2015)

Chatbots have appeal – but with ‘checks and balances’ from human agents

A Chatbot (a computer program which conducts a conversation via voice e.g. Siri or text methods eg messenger using artificial intelligence). Which do you think would be most effective?"



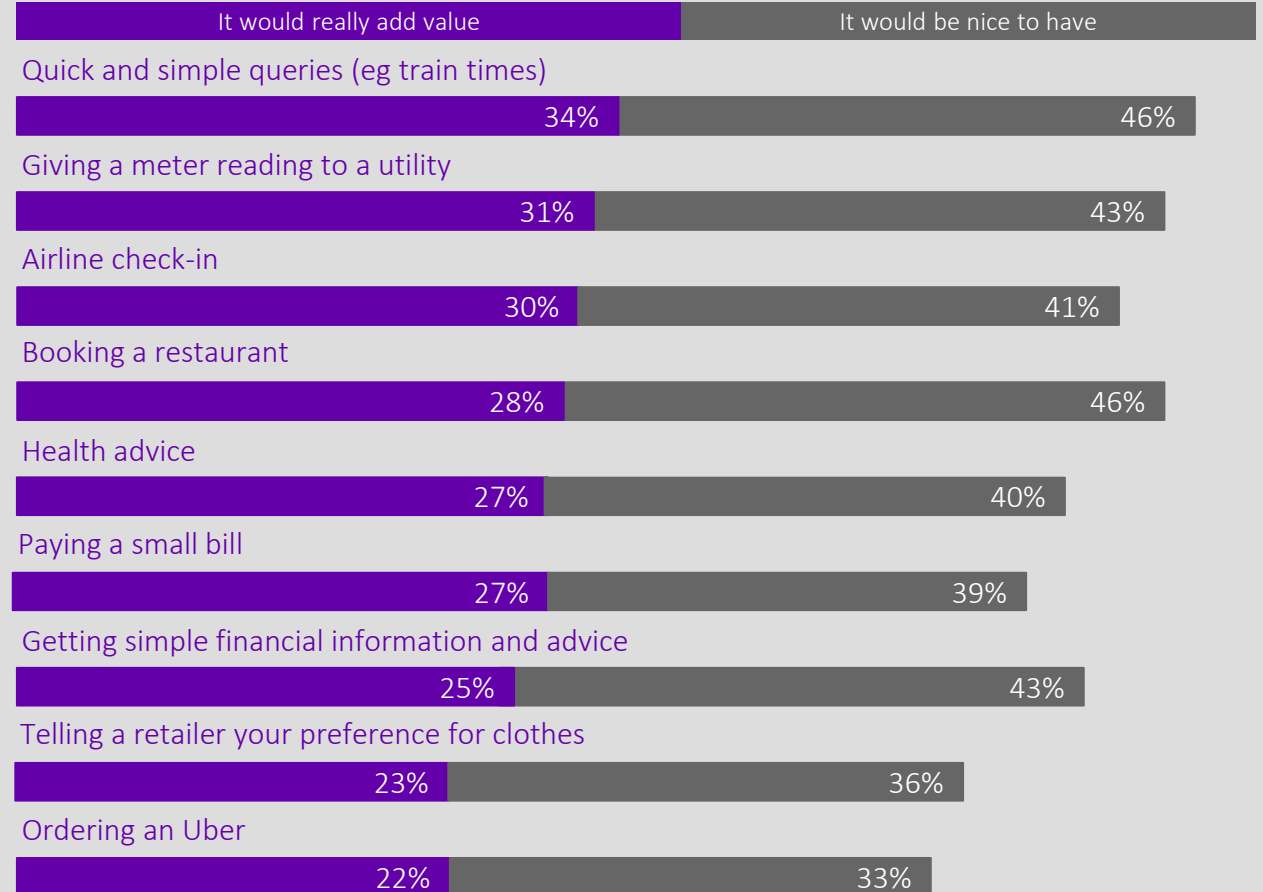
2 in 3
The benefit of chatbots would be in getting an immediate response

73%
Chatbots will help companies improve their customer service

60%
Responses should be available as notifications on my smartphone

74%
Human agents should check the more complicated responses of chatbots

How interested would you be in the following initiatives from organisations?



Chat is where it's at: are chatbots "IVR for digital"?

Challenges:

Works for simple queries – effectively steering the customer through the “known knowns”, i.e. GIGO.

More difficult for complaints/complexity - if we get angry, we tend to tell long, rambling stories which are hard to parse.

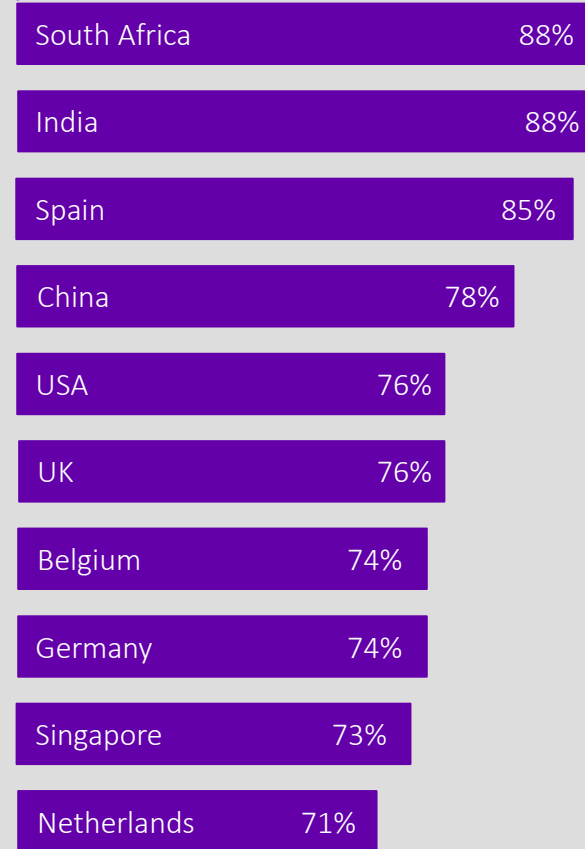
Sarcasm tends to throw algorithms: e.g. “Thanks, @TrainCo for my free sauna this morning”; “It was so good to see that your maintenance department hadn't spoiled things by making unnecessary repairs”; “I would have cheerfully strangled them”.

Limited ability to parse emotional context - YET!



Security matters: safer, simpler interactions drive sales

I worry about security when giving organisations my card details over the phone



Would like voice biometrics and ID&V



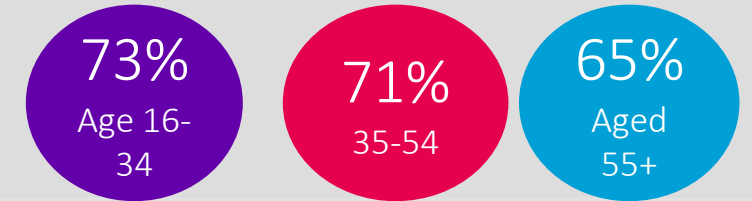
It takes too long to identify me when I phone the call centre



Want technology to secure card payments over the phone



Would like it if I could bypass security questions but still be sure of a secure experience by using voice analytics or biometrics where my voice would act like a fingerprint to authenticate me...



Would have bought more over the phone if the payments were secure



52%

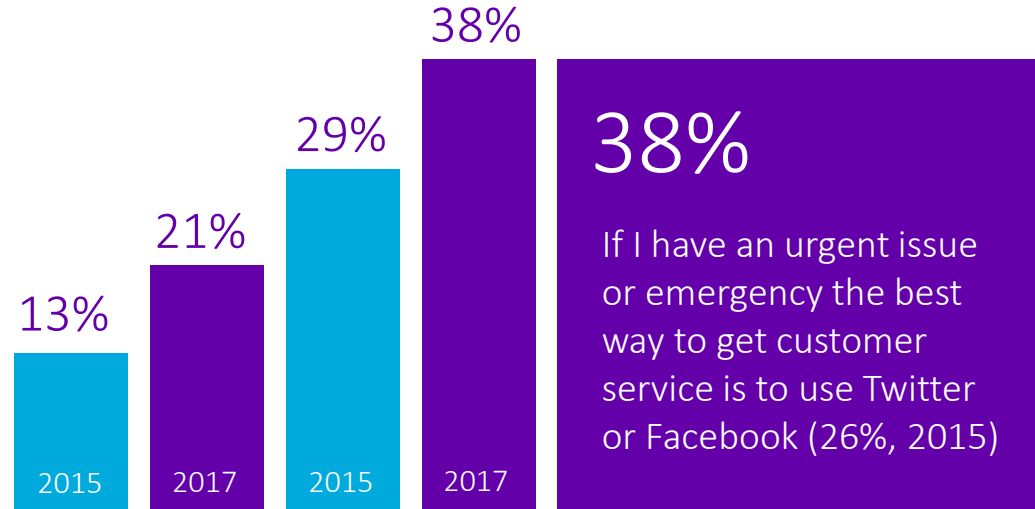
I wouldn't use Facebook or Twitter for customer service with an organisation as it is not secure

40%

say they are confident about sharing my personal data during a web-chat

Social media momentum: time to bring it into your strategy

Have you ever used a social media site to?



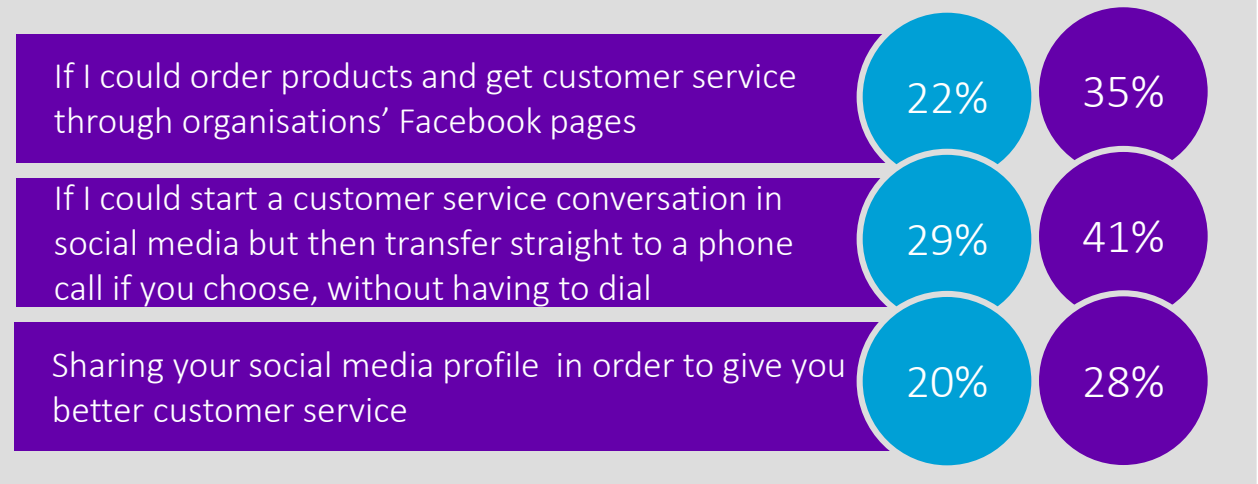
Make a complaint about a company
Read other people's comments about brands, products and services

When you used social media to make a complaint to a company, how satisfied were you with the experience?

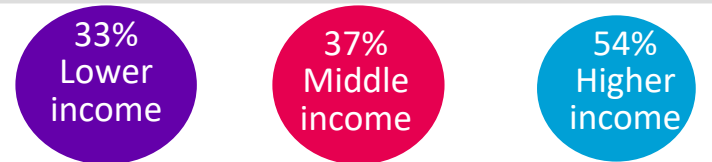


Agreeing...

It would really add value
It would be nice to have



The best way to get customer service in the case of an emergency is via social media



If I could order products and get customer service through organisations' Facebook pages (It would really add value & It would be nice to have)



One step ahead: consumers are impressed by proactive service

78%

I like it when organisations notice I have been having difficulty with a website/completing an order and contact me directly to try and help

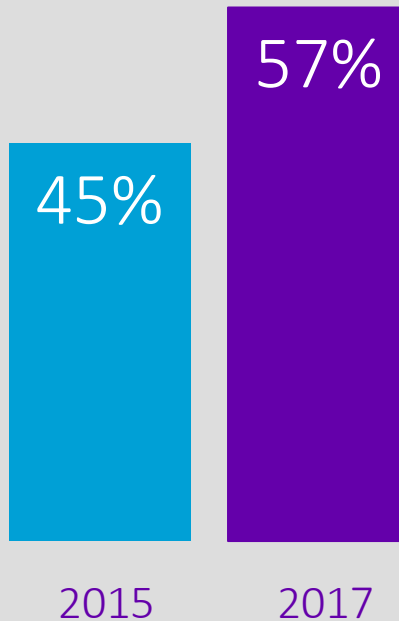
70%

Personalisation of pages depending on the preferences, behaviours, location and device being used by the customer

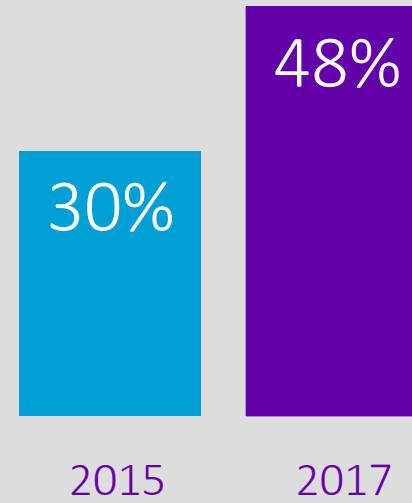
68%

Like organisations using the internet to monitor the condition of products and services you use

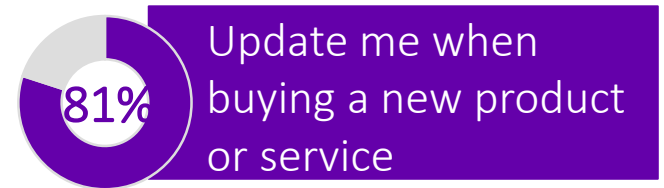
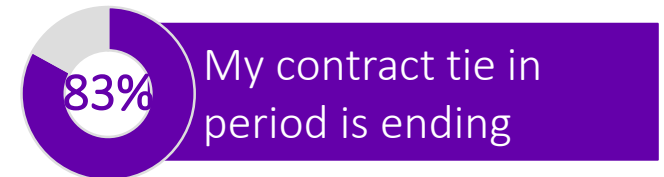
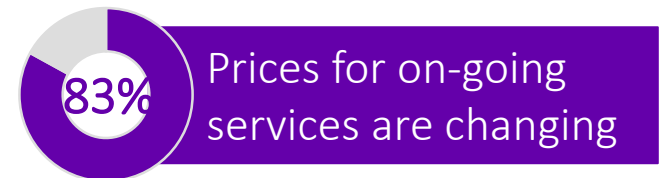
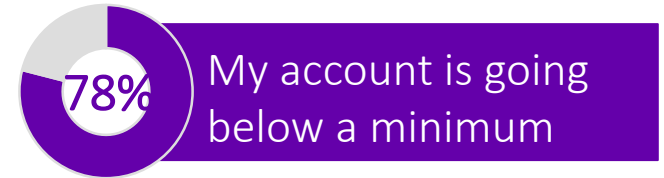
Open to sharing my location automatically with companies using GPS if it means I get good offers or better customer service



Open to sharing your social media profile with your bank/supermarket/utility provider so they had better information about you and can give you better customer service



I would like a notification when...



Thank You

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