odigo

Managing expectations on effort
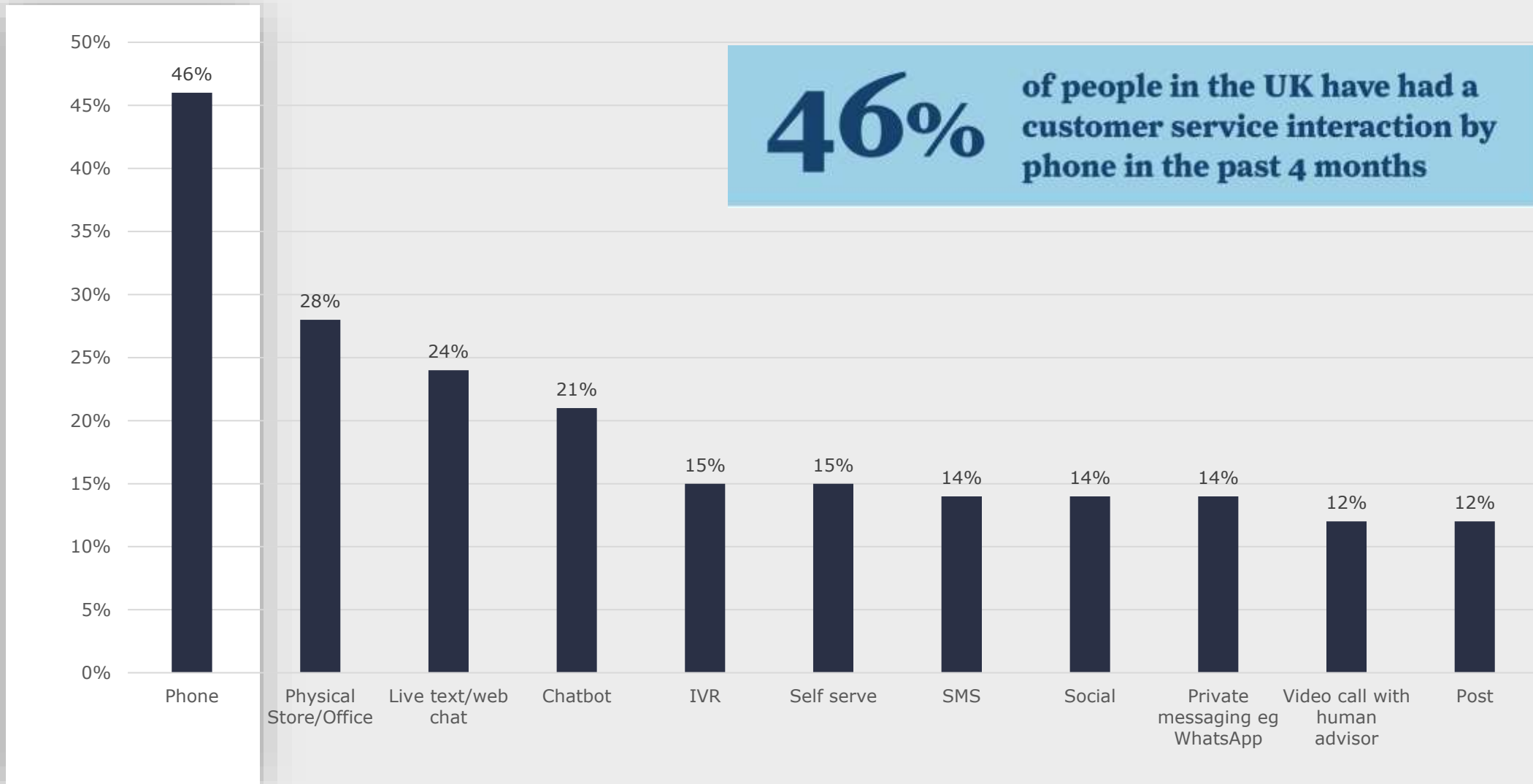
**Customer experience
as it was meant to be**

New research…

- Nationally representative survey of 500 people 24-27 September
- Roundtable discussions with contact centre leaders 6-7 October

Phone is still dominant.....

50% |
45% | 46%
40% |
35% |
30% | 28%
25% | 24%
20% | 21%
15% | 15% 15% 14% 14% 14% 12% 12%
10% |
5% |
0% |

Phone | Physical Store/Office | Live text/web chat | Chatbot | IVR | Self serve | SMS | Social | Private messaging eg WhatsApp | Video call with human advisor | Post

46% of people in the UK have had a customer service interaction by phone in the past 4 months

Q. How have you been contacting organisations across the last 4 months?
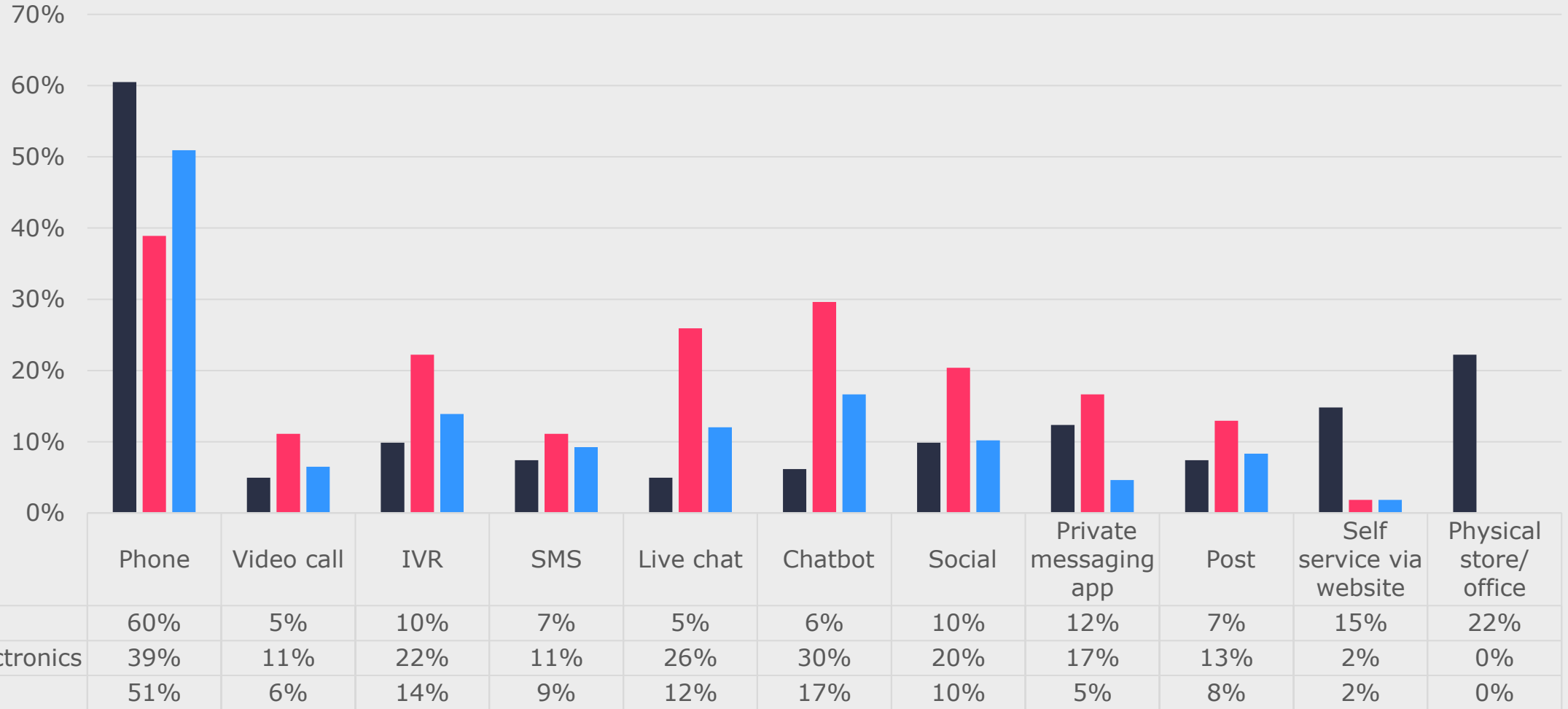
call centre management association

A study from 2018 - 2019
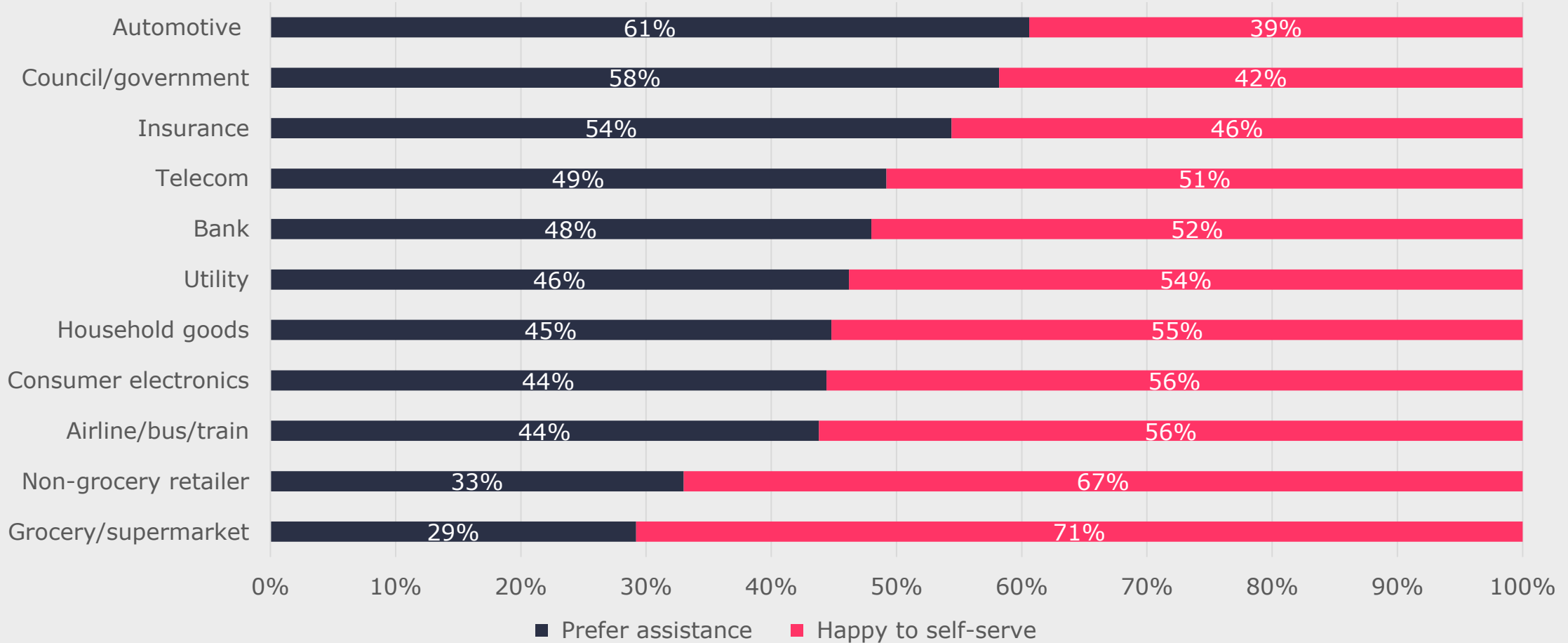
How do you communicate with customer services ?
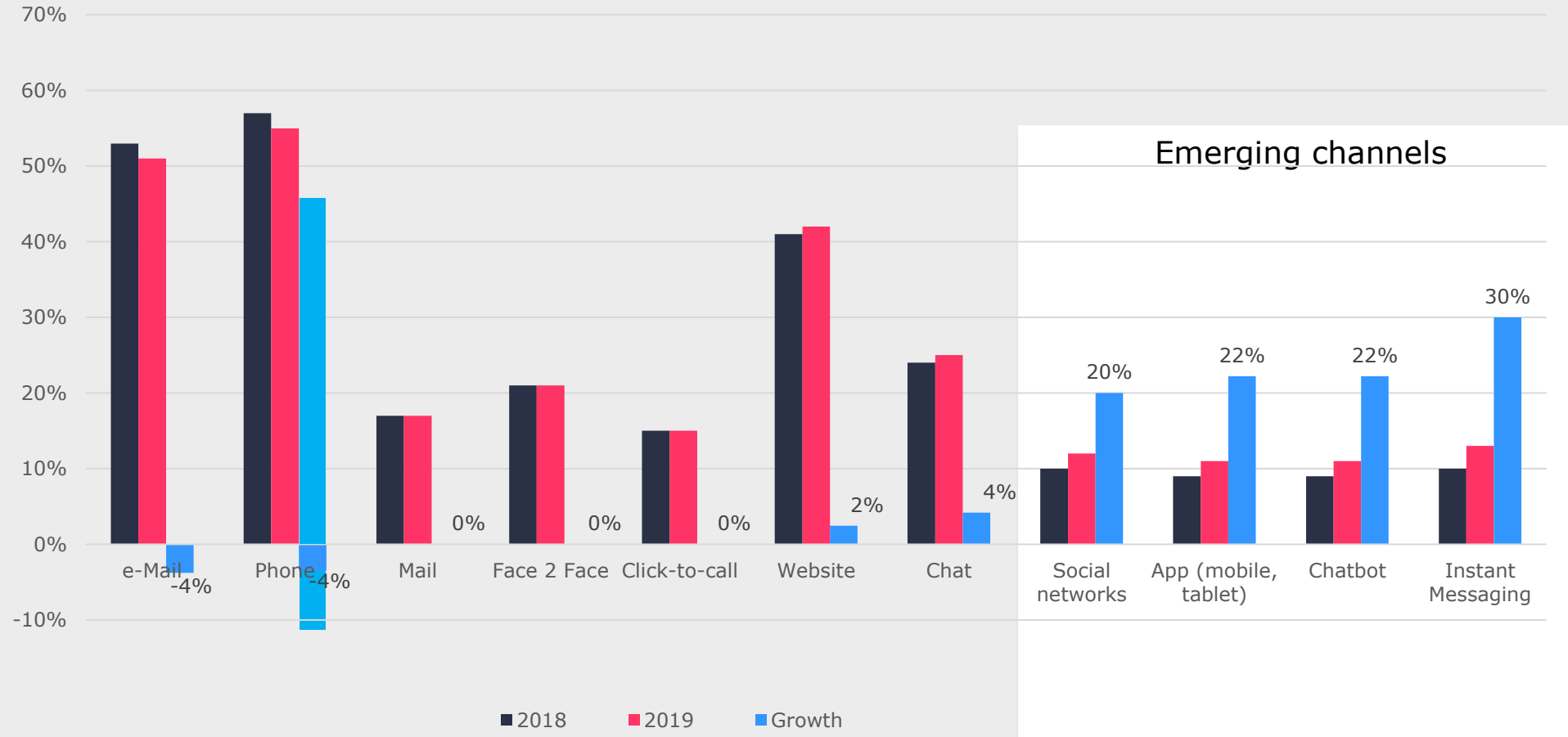
- Phone has always been dominant
- Emerging channels continue to grow

Marked differences by sector in omni-channel usage and one approach does not fit all!

	Phone	Video call	IVR	SMS	Live chat	Chatbot	Social	Private messaging app	Post	Self service via website	Physical store/ office
Auto	60%	5%	10%	7%	5%	6%	10%	12%	7%	15%	22%
Consumer electronics	39%	11%	22%	11%	26%	30%	20%	17%	13%	2%	0%
Insurance	51%	6%	14%	9%	12%	17%	10%	5%	8%	2%	0%

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Where is there willingness to self serve?

	Prefer assistance	Happy to self-serve
Automotive	61%	39%
Council/government	58%	42%
Insurance	54%	46%
Telecom	49%	51%
Bank	48%	52%
Utility	46%	54%
Household goods	45%	55%
Consumer electronics	44%	56%
Airline/bus/train	44%	56%
Non-grocery retailer	33%	67%
Grocery/supermarket	29%	71%

■ Prefer assistance ■ Happy to self-serve

Generally speaking, when interacting with the following types of organisations would you prefer to be assisted, or would you be happy to serve yourself for example via information offered on the provider's website? Base: n=500 customers

call centre management association

Omni-channel adoption is being driven by phone wait times

30% of customers using the phone had to wait too long to be connected.

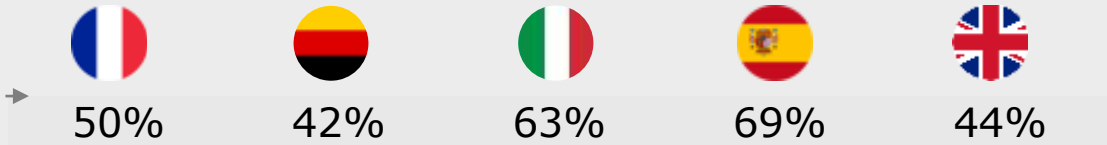call centre management association
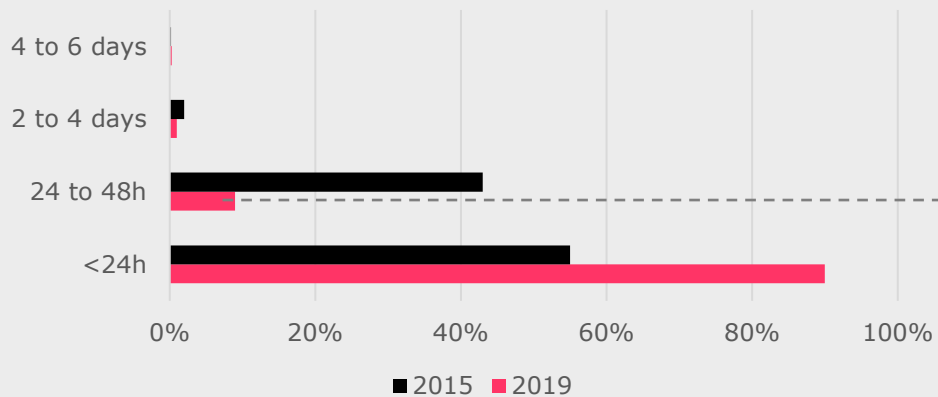
Are we more impatient?

Acceptable response time by phone 'AAT'

Category	2015	2019
6 to 10 minutes		
4 to 6 minutes		
2 to 4 minutes		
<1 min.		

0% 10% 20% 30% 40% 50% 60% 70%

■ 2015 ■ 2019

⏱ 3 minutes 17 sec.

🇫🇷	🇩🇪	🇮🇹	🇪🇸	🇬🇧
50%	42%	63%	69%	44%

Acceptable response time by email

Category	2015	2019
4 to 6 days		
2 to 4 days		
24 to 48h		
<24h		

0% 20% 40% 60% 80% 100%

■ 2015 ■ 2019

⏱ 6 hours

🇫🇷	🇩🇪	🇮🇹	🇪🇸	🇬🇧
91%	87%	94%	96%	86%
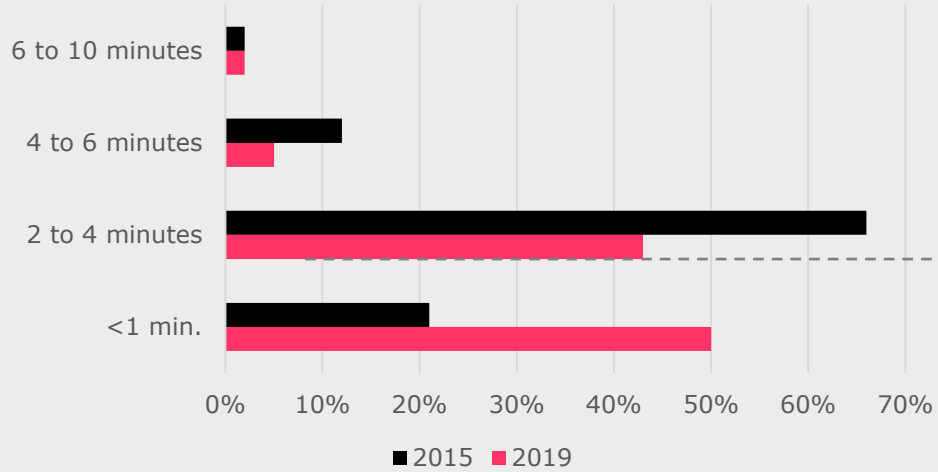
Ever changing expectations in emerging channels…

Acceptable response time by social networks, Twitter

Category	2015	2019
>12 hours		
4 to 12 hours		
1 to 4 hours		
30 minutes to 1h		
<30m.		

0% 10% 20% 30% 40% 50% 60% 70%

■ 2015 ■ 2019

2 hours 51 min.

🇫🇷	🇩🇪	🇮🇹	🇪🇸	🇬🇧
62%	48%	75%	69%	51%

Acceptable response time by chat

Category
6 to 10 minutes
4 to 6 minutes
2 to 4 minutes
<1m.
Immediately

0% 10% 20% 30% 40% 50% 60% 70%

49 sec

🇫🇷	🇩🇪	🇮🇹	🇪🇸	🇬🇧
66%	56%	64%	68%	58%
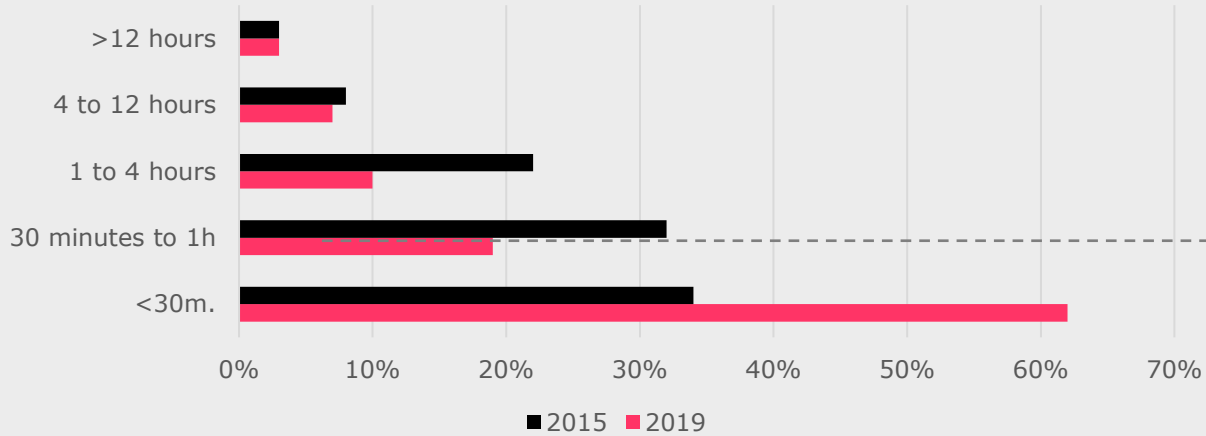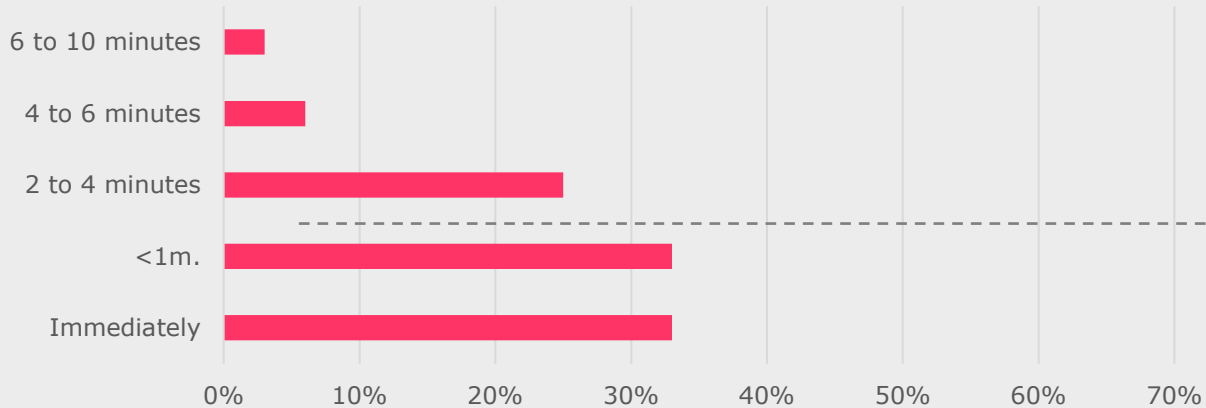
Each generation has a different emotional bias towards effort

Baby Boomers

- Will ask why is it useful?

- Typically non-habitual users

- In general, tech does not change their life

Gen X

- First to assimilate the WWW and computers

- Generally adopt new channels but…

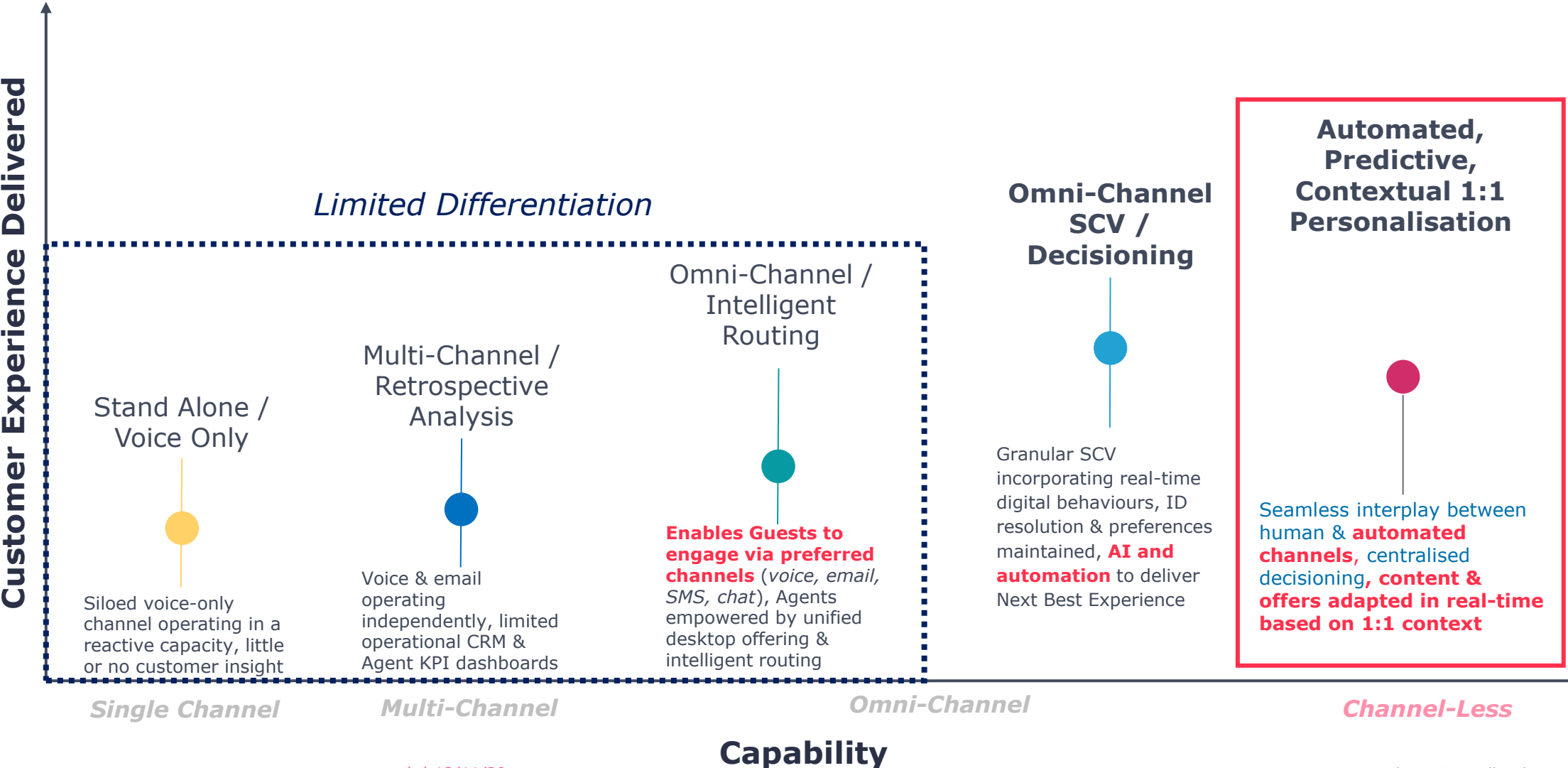- Social channels are for personal use

Millennials

- Evolved with technology

- Resourceful and often lead disruption

- Embrace all channels with business and personal overlap

Gen Z

- Only knows technology

- Tend be consumed in a digital world

- Take it all for granted

Contact Centre – Transition and Maturity Journey

Transition from Re-Active Engagement → Pro-Active Engagement

Customer Experience Delivered (y-axis)

Limited Differentiation

Omni-Channel SCV / Decisioning

Automated, Predictive, Contextual 1:1 Personalisation

Omni-Channel / Intelligent Routing

Multi-Channel / Retrospective Analysis

Stand Alone / Voice Only

Siloed voice-only channel operating in a reactive capacity, little or no customer insight

Voice & email operating independently, limited operational CRM & Agent KPI dashboards

Enables Guests to engage via preferred channels (*voice, email, SMS, chat*), Agents empowered by unified desktop offering & intelligent routing

Granular SCV incorporating real-time digital behaviours, ID resolution & preferences maintained, **AI and automation** to deliver Next Best Experience

Seamless interplay between human & **automated channels**, centralised decisioning, **content & offers adapted in real-time based on 1:1 context**

Single Channel *Multi-Channel* *Omni-Channel* *Channel-Less*

Capability (x-axis)

Match your people with the customers who will appreciate them

Match queries with the most suitable resource
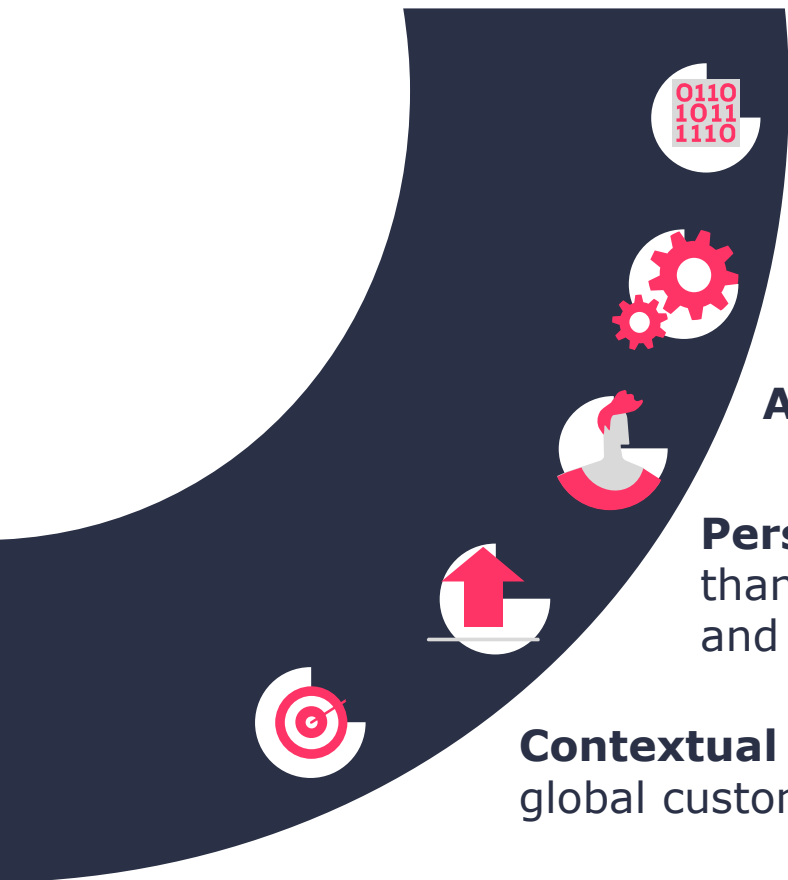
Automatisation when relevant

Integration with CRM or other business tools
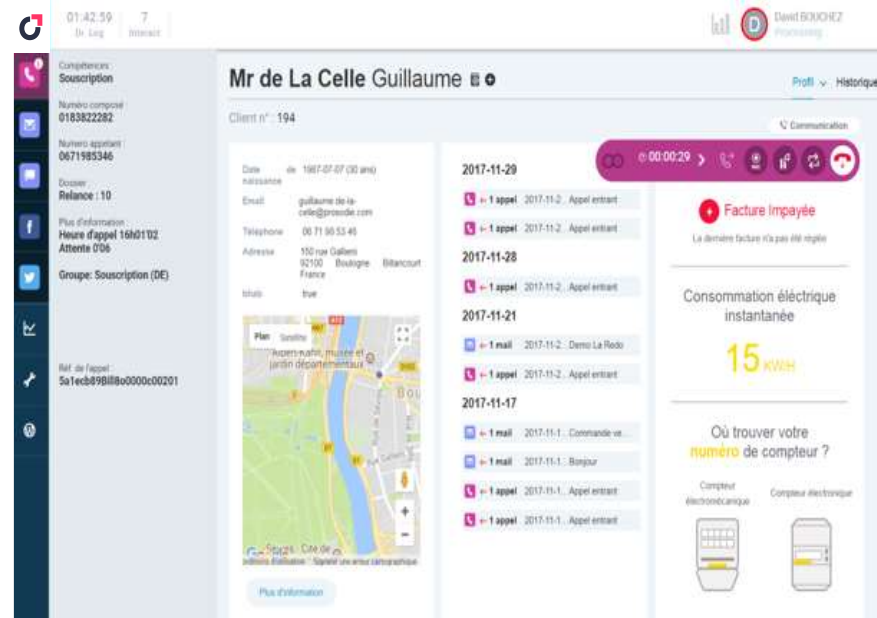
AI for smart qualification

Personalisation thanks to customer card and interactions history

Contextual routing based on global customer knowledge

Which of the following are IMPORTANT when receiving customer service?

65% agent Knowledge

47% non repetition

In Summary

- The phone will not go away, despite it often being a more time-consuming channel people of all ages will use it when they deem it necessary

- Digital adoption is on the rise, especially across 2020, however satisfaction is still low

- One size doesn't fit all, time, demographic, situation and channel choice will differ

- Personalise, Personalise, personalise, be reactive to customer situations, apply tools to offer what customers want

- Customer effort is key to ensure continual CSAT and loyalty across all brands