

**Deloitte.**  
Digital



MAY 2019

**Global Contact  
Center Survey**

# Executive Summary

Today's consumers continue to raise the bar on what they expect at every step along the customer journey—and in response, companies are adopting strategies to deliver an improved experience. Corporate contact centers are a key touchpoint where businesses can build strong connections, earn trust, and create loyalty. Now that customer experience is a priority, contact center executives are investing in new technologies to improve access, increase personalization, and simplify interactions. Anywhere, anytime access via a variety of channels is a reality—and contact centers must deliver a consistent omni-channel experience to excel. In Deloitte's fourth edition of the Global Contact Center Survey, contact center leaders share their perspectives on meeting today's challenges and how their businesses will evolve in the years ahead.

An ever-increasing focus on elevating the human experience and continuing adoption of new technologies will drive the evolution of contact centers over the next two years. Contact center executives are investing in new services as they focus on ways to improve customer relationships through trust, ease of interaction, and personalization. Emerging capabilities, such as AI, machine learning, and cloud, shape new business models designed for efficiency, improved accessibility, and deeper understanding of customers. These same technologies can enable a skilled workforce to deliver personalized, human experiences to customers.



# Key insights

SEVEN KEY TRENDS EMERGED FROM THE SURVEY FINDINGS:

- **Customer experience (CX) is a differentiator.** Crafting a human experience allows companies to differentiate themselves from competitors. Personalized, real-time attention and the ability to resolve issues quickly are in high demand, and companies who invest in the technologies and talent to deliver on this promise can vastly increase customer satisfaction and earn loyalty.
- **Start with the basics.** Delivering a successful customer service experience boils down to a few essentials: providing on demand access, resolving issues quickly and efficiently, and earning customer trust through accuracy and follow up. While there's no shortage of new capabilities to build and test, many companies know they must get the basics right before expanding to advanced services and technologies.
- **Navigate complexity through right channeling.** Customers expect to interact with companies across a suite of channels—voice (primarily phone, but evolving), email, messaging, social media, and paper (fax/mail)—based on their preferences. Companies are challenged to direct customers to the channel best suited to the nature of the interaction to maintain cost effectiveness.
- **Looking to the cloud.** Cloud presence continues to expand with most companies planning to migrate capabilities in the coming two years. Leaders are expanding beyond customer relationship management (CRM) and knowledge management and are starting to consider additional functionalities such as workforce management. Many organizations are retiring on-premise legacy systems and replacing them with cloud-based solutions that are scalable and flexible.
- **AI omnipresence.** Artificial intelligence (AI) continues to elevate as a strategic priority for contact center leaders. Three primary use cases are evolving: 1) customer engagement automation (i.e., self-service), 2) customer service representative assistance (i.e., next best action), and 3) advanced operational and strategic analytics and insights. Contact center leaders are expecting to make great progress in AI in the coming years.
- **CRM does not stand alone.** Companies are not seeing the expected return on their investment when it comes to CRM technologies. Getting the most value out of CRM solutions requires organizations to make changes to their broader operating and service models before they are able to realize operational efficiency and customer engagement.
- **Workforce without borders.** Delivering an exceptional customer experience requires service professionals who bring specific skills. Contact center leaders gain greater access to talent by expanding the boundaries of a remote workforce.

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## Ready to learn more?

Turn the page to further explore the survey findings and latest trends.

THEME 1

# Customer experience is a differentiator

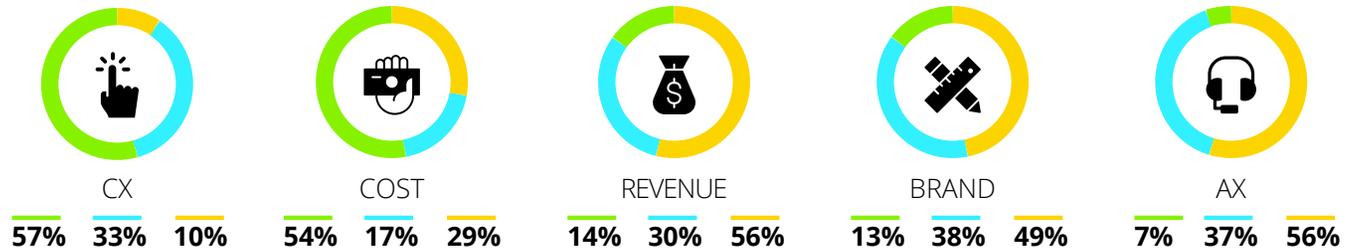


In this year's survey, contact center executives were asked two questions to better understand priorities and investments. Overwhelmingly, we see customer experience (CX) is medium to high priority. At its core, delivering a great CX is about building strong connections, loyalty, and value. CX is a high priority among organizations surveyed (57%), and it will continue to be high priority over the next two years (67%). Companies are also recognizing that engaging the workforce is important for retaining talent and developing long-term relationships with customers. Investment in the agent experience (AX) is expected to double in importance over the next two years (7% now vs. 11% in two years).

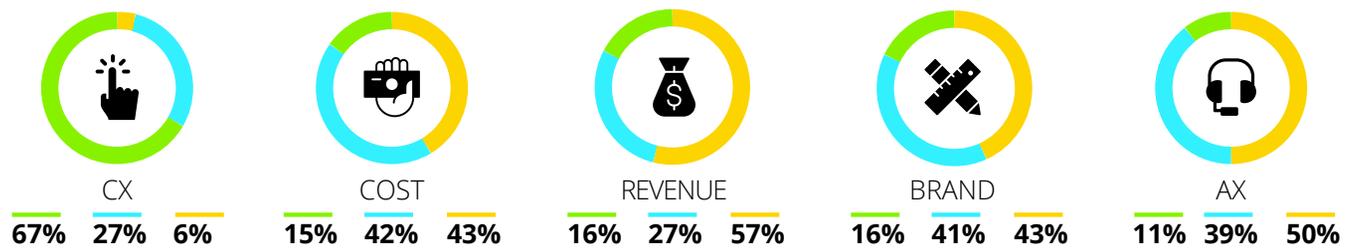
Surprisingly, while contact center executives are committed to optimizing costs, they also see cost control diminishing as a priority in the future (54% now vs. 15% in two years). However, our experience suggests while experience and value appear to be the focus of the next couple years, financial discipline and ROI-driven actions will remain part of the practical go-forward strategy.

## How does your organization weigh the importance of cost, revenue, brand, customer experience (CX) and agent experience (AX) within its contact centers?

NOW



2 YEARS FROM NOW



LEGEND

- HIGH PRIORITY
- MEDIUM PRIORITY
- LOW PRIORITY

THEME 1

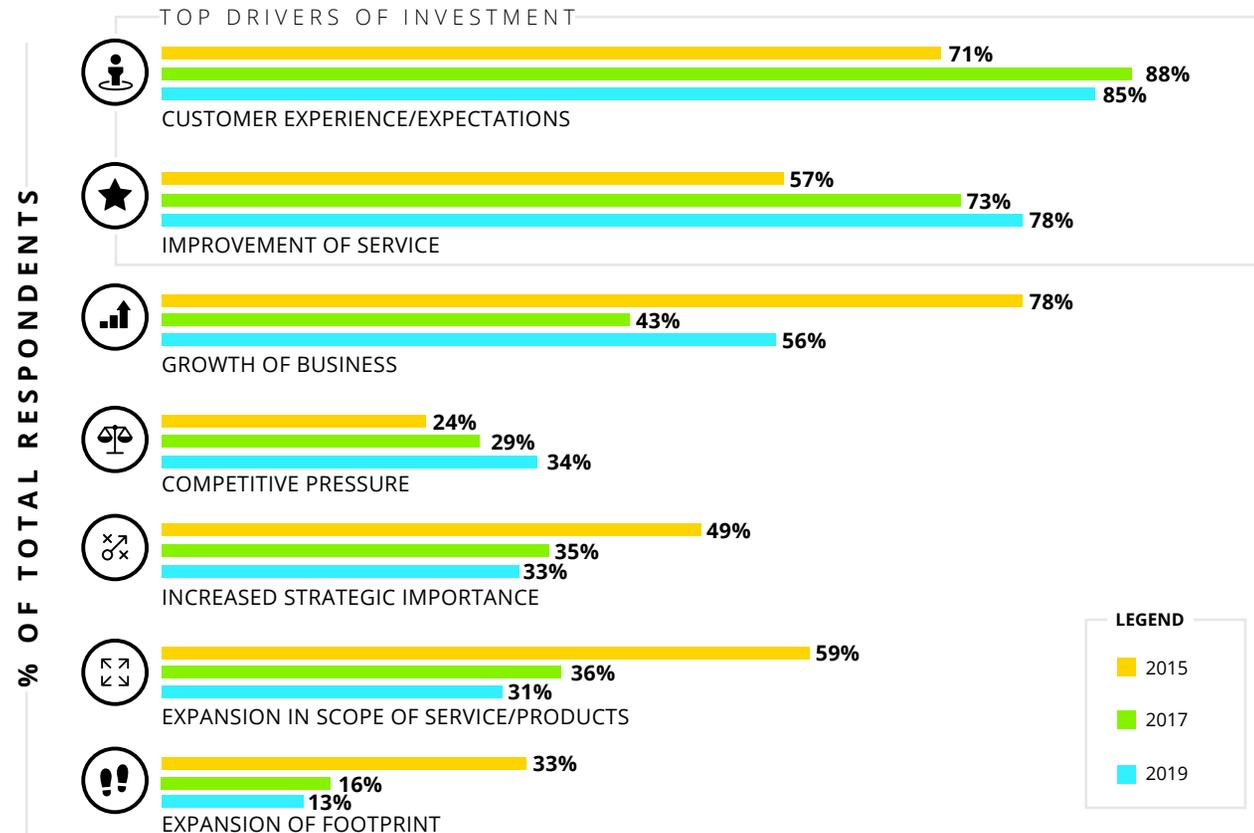
# Customer experience is a differentiator



When asked what factors are driving investment, contact center leaders again say customer service is top priority. Customer experience (85%) and service improvement (78%) top the list. As companies focus on elevating the human experience, customer service is increasingly viewed as an opportunity to differentiate from competitors.

Contact centers will continue to focus on improving the customer experience by investing in expanded channels, improving service, and meeting expectations. The goals are to set their brands apart from competitors and to improve customer acquisition and retention.

## What are the main drivers of investment for your contact center?



THEME 2

# Start with the basics

What steps are companies taking to deliver an outstanding customer experience? Most companies agree that focusing on basic customer experience attributes is the right place to start. Convenient access ranks highest in priority, as companies look to offer the right channels, hours of operation, and language selections, while minimizing wait time. Contact centers also place high value on earning customer trust through accuracy, consistency, quality of information, and follow-through on commitments.

Once the basics are mastered, companies will be in a better position to shift their focus to more advanced attributes. Companies will work to reduce customer effort by improving ease of interaction and reducing resolution time. Additionally, they will leverage data to provide a more personalized service by meeting customers in their channel of choice and by making proactive service decisions based on customer preferences and behaviors.



## How does your company prioritize the following customer experience attributes?

NOW



2 YEARS FROM NOW



LEGEND

- HIGH PRIORITY
- MEDIUM PRIORITY
- LOW PRIORITY

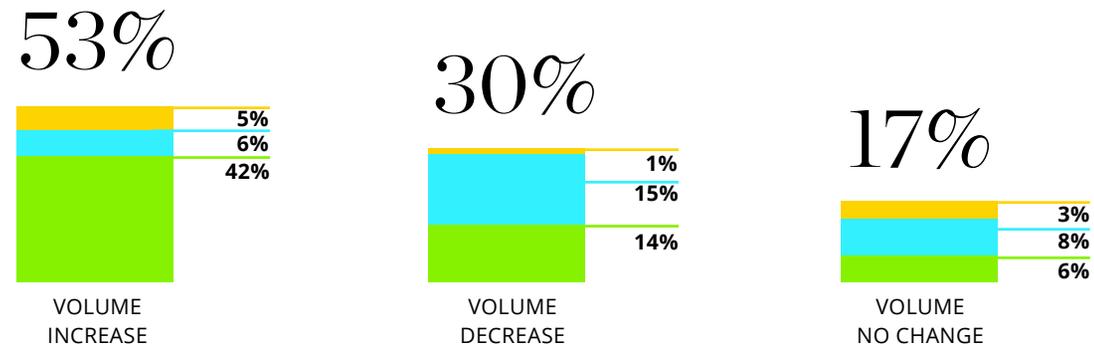
# Navigate complexity through right channeling

Customers reach out to contact centers for a variety of reasons: to request product information, make purchases, inquire about order status, initiate returns, troubleshoot issues, and much more. With a variety of channels, companies are challenged to direct customers to the channel that is most appropriate for their specific inquiry. In the survey, we asked several questions to better understand how companies are navigating complexity and a rising volume of inquiries through right channeling. Here's what we found.

Interaction volume is expected to increase due to general business growth. 53% of companies expect their total contact volume to increase over the next two years. Meanwhile, 61% of companies expect the complexity of interactions to increase as self-service adoption rates increase for low complexity inquiries.



## Volume vs Complexity



### LEGEND

■ COMPLEXITY INCREASE

■ COMPLEXITY DECREASE

■ COMPLEXITY NO CHANGE

# Navigate complexity through right channeling

To keep up with volume and customer preferences, today's contact centers make a variety of channels available for customer contact, including voice, email, messaging, social media, and paper (fax/mail). However, customers and companies alike are realizing that not all channels are suitable for all types of interactions. The personal nature or complexity of the interaction may influence the use of one channel over another to appropriately service the customer.

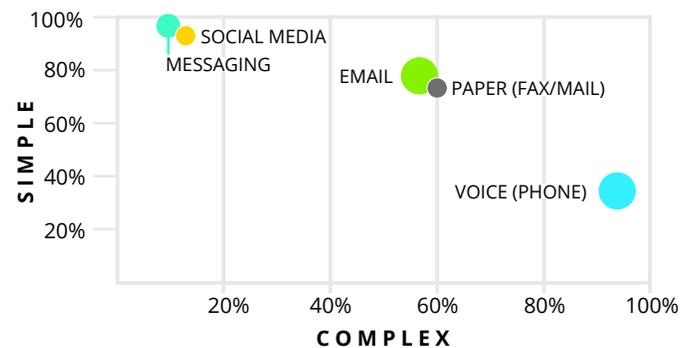
**Voice (phone):** The traditional voice (phone) channel continues to lead the pack to service the most complicated, risky, and high value interactions. Additionally, we are seeing new voice channels arise (e.g., smart home devices, in vehicle solutions). Video chat would be an even more personal extension of this channel in the right customer situations.

**Messaging:** Chat and messaging are becoming increasingly popular channels for customers who have servicing needs but either do not want to call or are multi-tasking. Companies can increase their operational efficiency as chat and messaging increase in popularity because agents are able to handle multiple interactions at once (concurrency). Some companies are using chat or chat bots for low complexity interactions and/or to triage initial customer inquiries; other companies are leveraging the channel for more complex interactions due to its real-time nature.

**Email:** Although email remains an important channel for customer contact in the B2B industry, most B2C companies are moving away from email to web-based forms to increase first-contact resolution and improve efficiency.

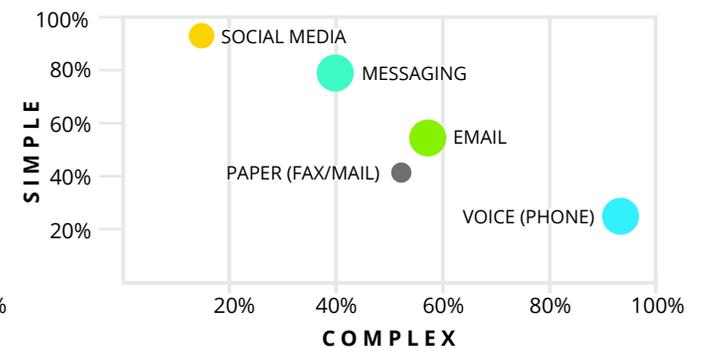
## Which of your channels are currently used for simple and/or complex transactions?

NOTE: Bubble size represents current channel volumes



## Which of your channels will be used for simple and/or complex transactions in 2 years?

NOTE: Bubble size represents anticipated channel volumes



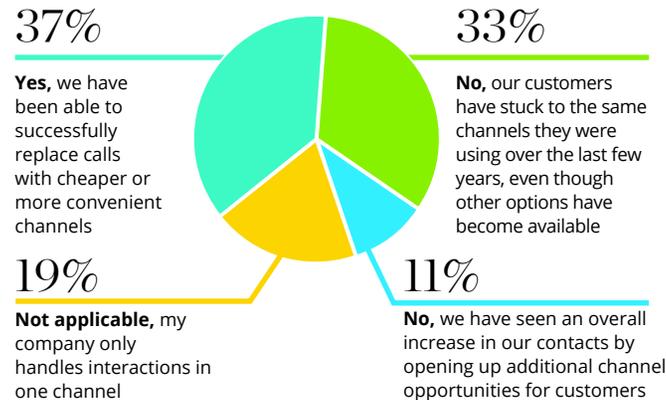
# Navigate complexity through right channeling



Although companies have been quick to add channels, customers have been generally slow to shift to newer channels. While most companies (81%) have successfully expanded the suite of channels offered to customers beyond voice, some companies are not realizing the intended benefits. About a third of companies (33%) are struggling to change customer behavior and push customers into more convenient or less costly channels. Additionally, some companies (11%) have seen an overall increase in the volume of contacts received by opening up additional channel opportunities for customers.

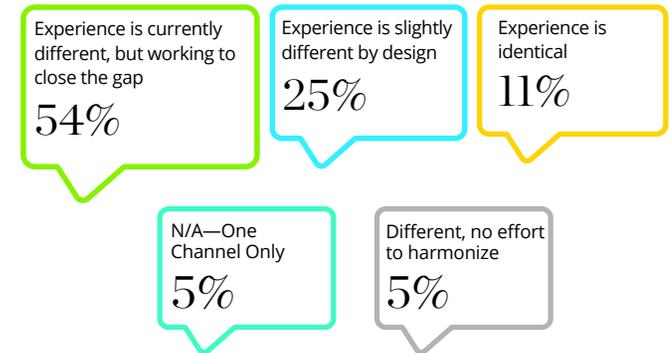
By leveraging channel steerage and customer change management strategies, some companies (37%) have been successful in directing customers to more convenient or less expensive channels. These companies have matched the complexity of interactions with the most appropriate channel, improving overall operational efficiency as well as customer experience.

## Has your organization been successful with replacing calls with contacts in cheaper or more convenient channels?



Since it is common for a customer to shift across multiple channels for a given interaction, companies are implementing omni-channel strategies to offer a consistent experience. Customers expect a seamless experience independent of the channel they chose to interact with. Most companies (90%) look to provide a consistent experience across all channels wherever possible. However, the majority of companies (54%) are still struggling to harmonize experiences across channels. Our experience shows companies are re-evaluating the omni-channel experience through advanced journey mapping, application of analytics and enabling technologies, and change management activities.

## How similar (or dissimilar) is a customer's experience across each channel that is offered within your organization?



# Looking to the cloud

Cloud technology is impacting every area of business, and contact centers are no exception. In our survey, we asked contact center leaders about their plans to move to the cloud and what technologies they are planning to migrate.

It is no surprise that more than half of executives (55%) believe moving aspects of their contact center capabilities to the cloud is a sound technology strategy. On the other hand, some leaders (45%) do not plan to move to cloud in the next two years. This delay may be due to having significant investments in on-premise assets that need to be fully depreciated before a cloud migration strategy is considered or due to lingering data privacy/management concerns.

For now, most organizations who have moved to the cloud are operating within a hybrid strategy: some systems are in the cloud while core legacy systems stay on premise. Most legacy systems that are not already in the cloud will remain in place until their end of life, financial depreciation, or some other event forces a transition to the cloud.



## Have you moved your contact center to the cloud?

25%

**Yes**, we have already moved our contact center to the cloud

15%

**No**, the tech is not yet mature

30%

**No**, but we are actively trying to move to the cloud in the next 2 years

30%

**No**, this does not fit our business needs or cannot deploy

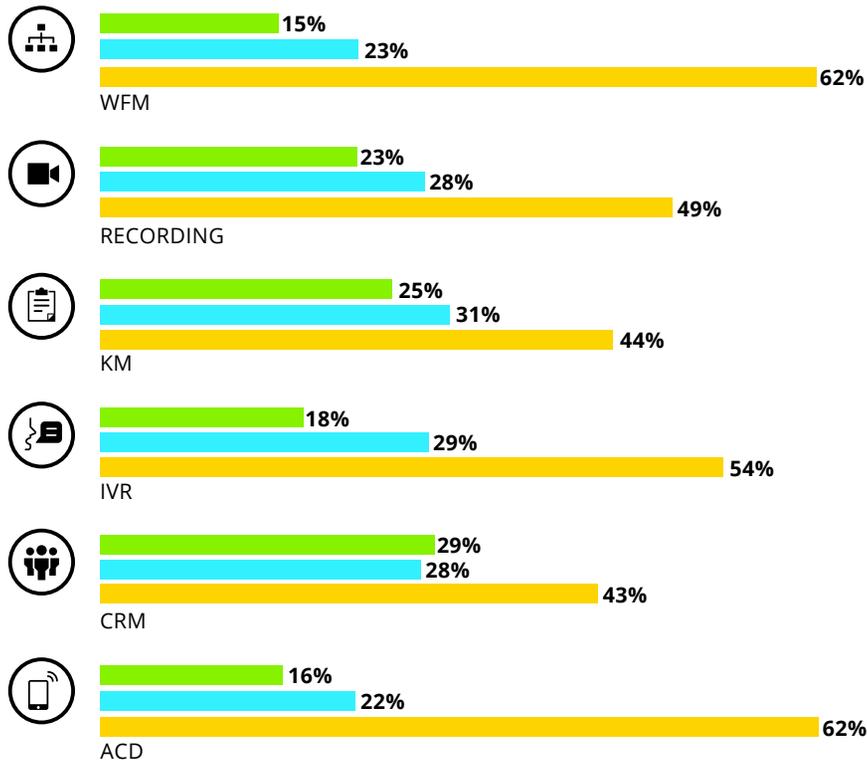


# Looking to the cloud

As cloud migration progresses, companies will shift more of their customer contact capabilities to the cloud. About 57% of companies have already moved (or are planning to migrate) their customer relationship management (CRM) and knowledge management (KM) capabilities to the cloud. Interactive voice response (IVR) in the cloud has started to become a compelling offering over the last few years as the cloud-enabled voice analytics and self-service solutions continue to advance.

On the other hand, over 60% of companies are skeptical about moving their automatic call distributor (ACD) or workforce management (WFM) capabilities to the cloud; the significant investment made in legacy on premise implementations hurts the value proposition of moving to the cloud. We anticipate that this dynamic will be uprooted as more omni-channel solutions become essential to the contact center delivery model.

## What technologies are you planning to move to the cloud?



**LEGEND**

- ALREADY IN THE CLOUD
- PLAN TO MIGRATE
- NO PLAN

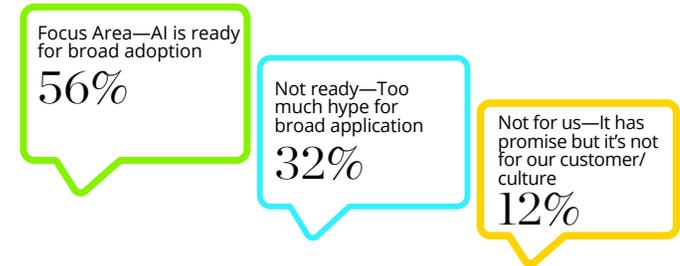
# AI omnipresence

Beyond cloud, contact center leaders are exploring other technologies to improve customer experience and operations. When executives were asked what emerging technologies they plan to invest in over the next two years, AI and process automation capped the list. While AI is in its infancy, customer service leaders recognize its potential to improve self-service and to work alongside service representatives to assist with their work, while helping to lower servicing costs. AI tools will also deliver insights that enable customer service leaders to elevate the customer experience.

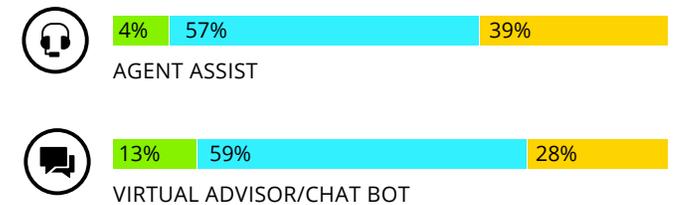
About 75% of companies plan to invest in automation technologies such as AI and process automation. AI tools can enhance the customer interaction by assessing the context of interactions and helping agents respond more effectively by suggesting the next best action or highlighting customer preferences for personalization. Process automation streamlines activities for contact centers with a high degree of manual data entry, freeing up agents to perform higher value activities related to customer experience and building relationships.

Contact center leaders see AI as a major change agent in their organizations. More than half of companies see opportunities in their contact centers for broad adoption, and more than half are piloting or testing agent assist, chat bot, or cognitive agent capabilities. Many companies are deploying customer-facing virtual advisors/chat bots. In practice, Deloitte has found that the most successful companies are moving cautiously—they are starting with internal support channels like agent assist to train the virtual agent.

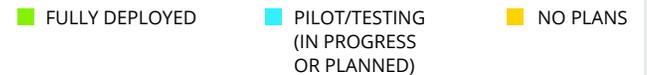
## How do you feel about AI?



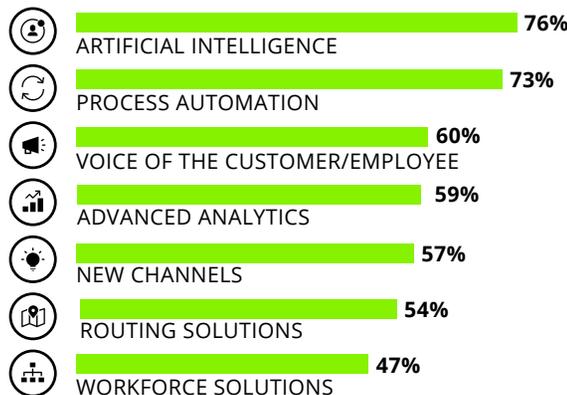
## Where are you with AI?



### LEGEND



## What emerging capabilities are you planning on investing in?



# CRM does not stand alone

Most companies have made some investment in CRM, and while it has been positioned as the “magic cure” to enabling contact centers, many executives feel that it has not lived up to its promises. Only a small number of executives (16%) are seeing the anticipated value of their CRM technologies.

To enhance the value of CRM technology, we believe broader operating and service delivery model changes are necessary. Many organizations have attempted to organize their CRM around old business processes instead of designing a new customer engagement experience and delivery model around the CRM. Perhaps the most critical shortcoming has been the inability to integrate CRM with the data found in enterprise systems. Most CRM systems are viewed as intuitive and easy to adopt, but costs are perceived to be high, solutions rarely provide a personalized experience, and omni-channel enablement is seldom realized. Interestingly, many contact center executives believe the intersection of AI maturity and adoption with refined CRM optimization approaches will realize significant value.

## Overall ROI Across All Technologies

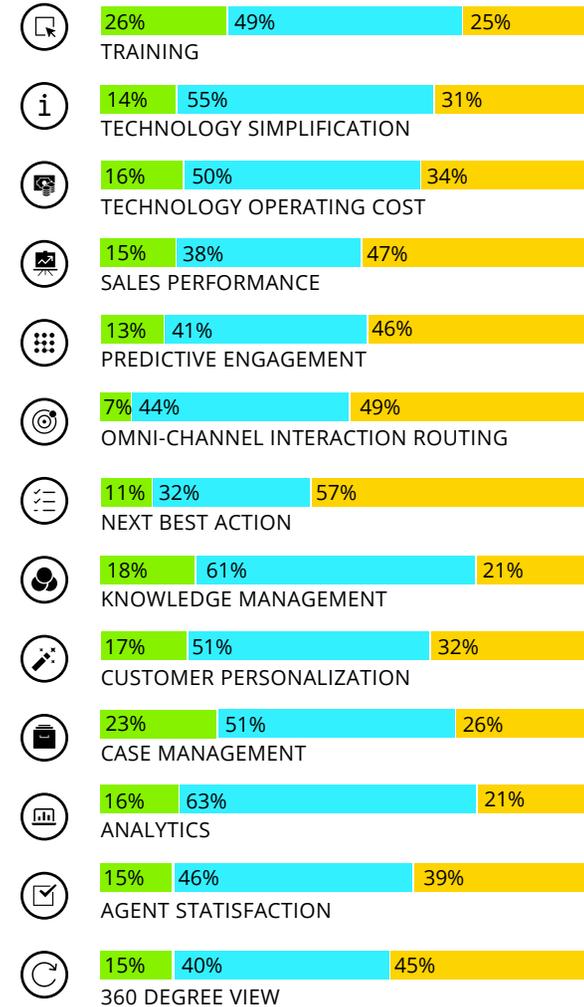


37%  
Not Currently Using

16%  
Providing Anticipated Value

47%  
Needs Further Enhancements

## Which CRM functionality is providing anticipated value and which functionality could use enhancements?



**LEGEND**

- PROVIDING ANTICIPATED VALUE
- NEEDS FURTHER ENHANCEMENTS
- NOT CURRENTLY USING

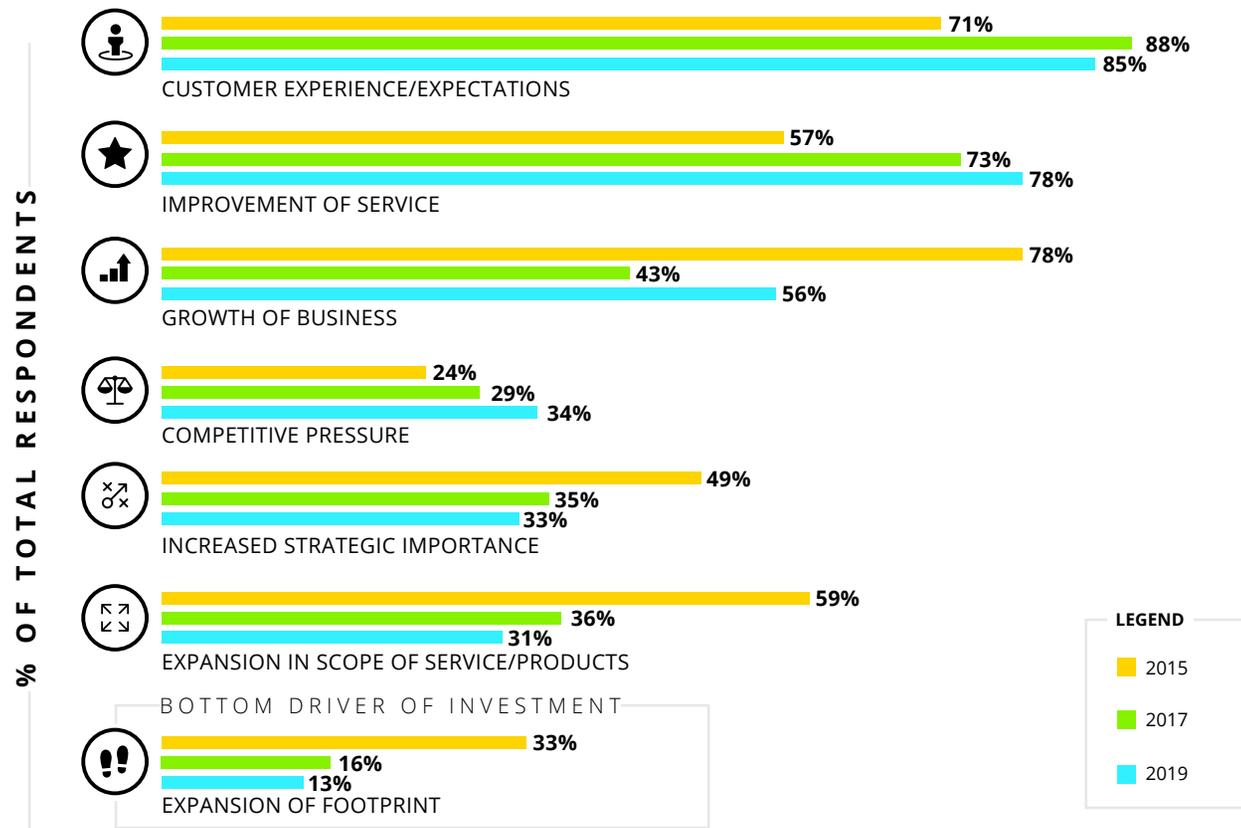


# Workforce without borders

When contact center leaders were asked about the main drivers for investment now and in the coming months, only 13% of executives said they plan to invest in an expansion of their physical footprint.

The physical footprint of a contact center is becoming less important because of two main factors. First, as we see an increase in digital channels such as chat where the realized concurrency on interactions is increasing, thus decreasing the total number of agents needed to handle the same amount of interactions. Second, many organizations continue to push the boundaries on remote workforces. Backed by globally-accessible technology and data resources, contact centers and their agents can effectively support customers from any location.

What are the main drivers of investment for your contact center?

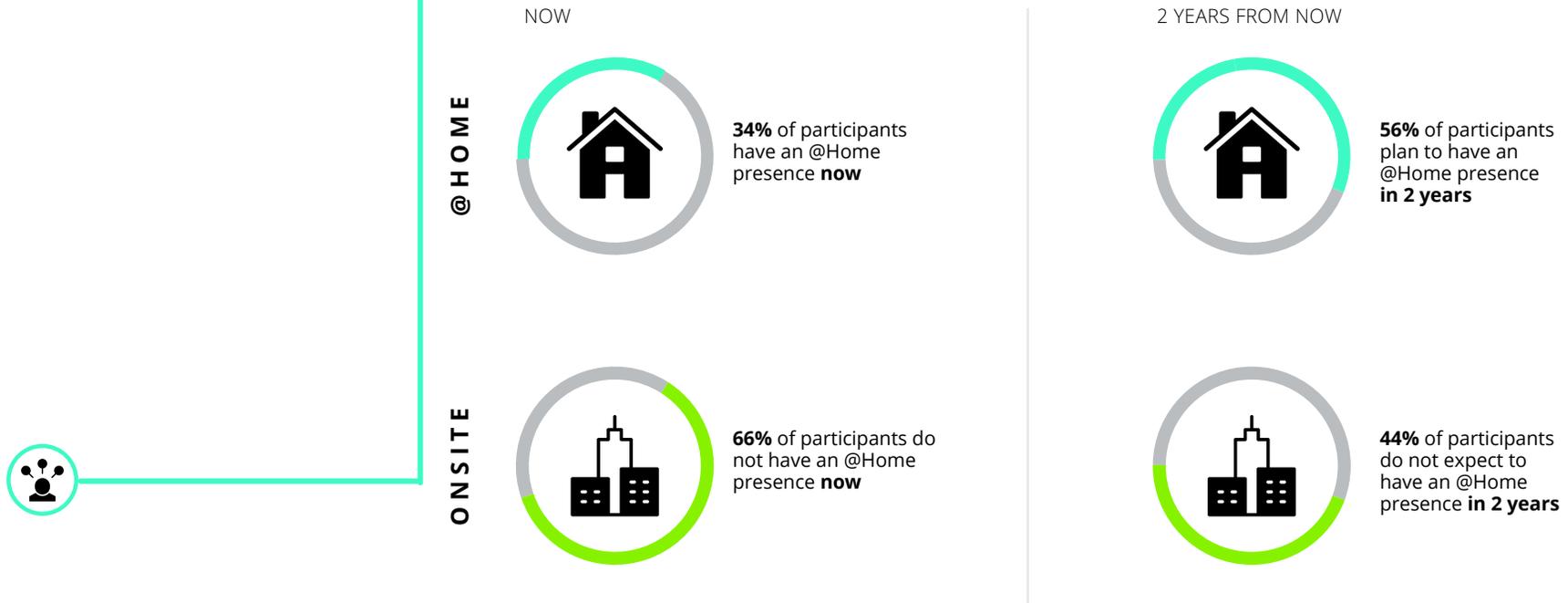


# Workforce without borders

A location does not even need to be a physical contact center. As employees demand more flexibility, companies continue to explore home-based work programs that are well-suited to the nature of the work and the need to recruit a qualified workforce. Over the next two years, the number of companies with an at-home presence will increase from 34% to 56%.

Meanwhile, the work done by contact center agents is evolving. Self-service improvements are driving down the demand for simple interactions with humans, and AI capabilities will likely accelerate this trend. Agents will need specific skills to support more complex transactions concurrently—while relying on data and AI-driven tools to personalize interactions. A workforce without borders allows companies to expand their recruiting efforts to access the necessary skillsets while offering the flexibility that workers require.

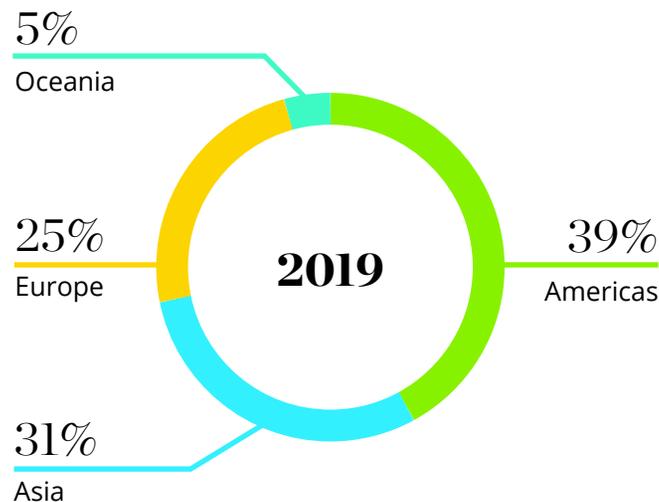
## What percentage of your contact center is/will be working from home?



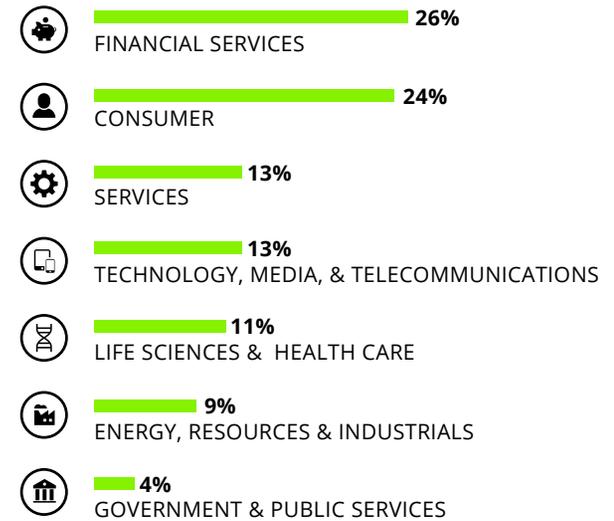
# Methodology

Deloitte surveyed global contact center executives between November 2018 and February 2019 regarding the current state of their businesses and what they perceive their business will be doing in 2021. Respondents span a variety of geographic locations, industries, and serve all types of customers. Respondents represent seven industries (Financial Services, Consumer, Services, Technology, Media and Communication, Life Sciences & Healthcare, Energy, Resources & Industrials, Government and Public Services), and service varying customer bases touching both B2C and B2B. This year, we are publishing responses from enterprise-level respondents, representing 172 organizations headquartered in 16 countries and across four regions. This is the fourth publication of Deloitte's Global Contact Center survey, which has been published biennially since 2013.

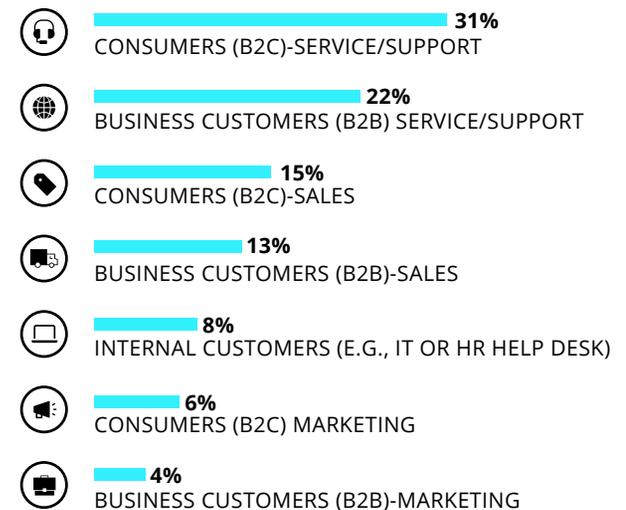
## Who are the customers supported by your company's contact center(s)?



## Which industry segment(s) does your company serve?



## Who are the customers supported by your company's contact center(s)?



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