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Digital

Contact centers find balance
in a transformed world

New research reveals how organizations are aligning technologies, channels and talent to improve customer service outcomes

July 2024

It's one thing to seek balance while moving ahead. As an executive, that's just what you do.

But for many contact center leaders, the last half decade has increasingly felt like walking a tightrope in high wind.

Back in 2019, consumer confidence was at an all-time high, and most contact center leaders were investing in new tools, talent and models to improve customer experiences and drive business growth.

Then came the COVID-19 pandemic—and the winds of change buffeted from every direction. Consumer confidence and spending fell to earth. The Great Resignation upset the equilibrium of talent markets, forcing leaders to implement work-from-home strategies while learning how to manage a remote workforce on the fly. Broken supply chains stirred a whirlwind of complications. Geopolitical conflicts tilted the landscape. Consumer confidence bounced to new highs and more recently to near-record lows.[1] Generative AI (GenAI) appeared on the horizon … and suddenly was everywhere.

All this has forced contact center leaders to seek new balance. After more than a decade when customer experience was their sole top priority, leaders now say operational efficiency and cost control are on equal footing.

SOME VISIONARY LEADERS HAVEN'T JUST FOUND BALANCE IN THIS TRANSFORMED ENVIRONMENT. THEY'RE TAKING BOLD STEPS FORWARD.

- They noticed—and adopted—new ways of *connecting channels* to improve customer experiences and provide more efficient service.

- They pioneered new ways of *connecting with other teams*—including web and mobile developers, quality assurance and other groups within the enterprise—to prevent issues that cause customers to reach out in the first place.

- They're *embracing Generative AI*—recognizing its transformative potential across multiple areas of the business.

- They're *implementing new talent strategies* to help ensure they have the right people available in the right moments, empowered with the right technology, to effectively support and develop remote, hybrid and on-site workers.

- Most important, they're *serving up enterprise value*.

These are just a few highlights from our latest international survey of contact center leaders.* In the following pages we dig deeper into the results to look at what today's most advanced organizations—we call them *service innovators*—are doing right, what they're achieving as a result, and how you can adapt these approaches to help your own service organization find its balance.
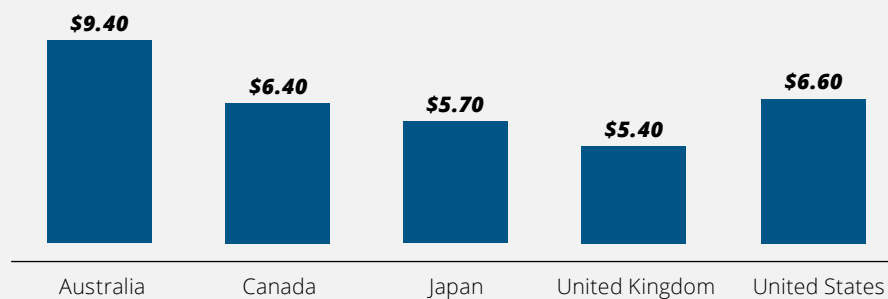
No. 1 priority
of contact centers globally:
Improving CX
Improving efficiency
(tied)

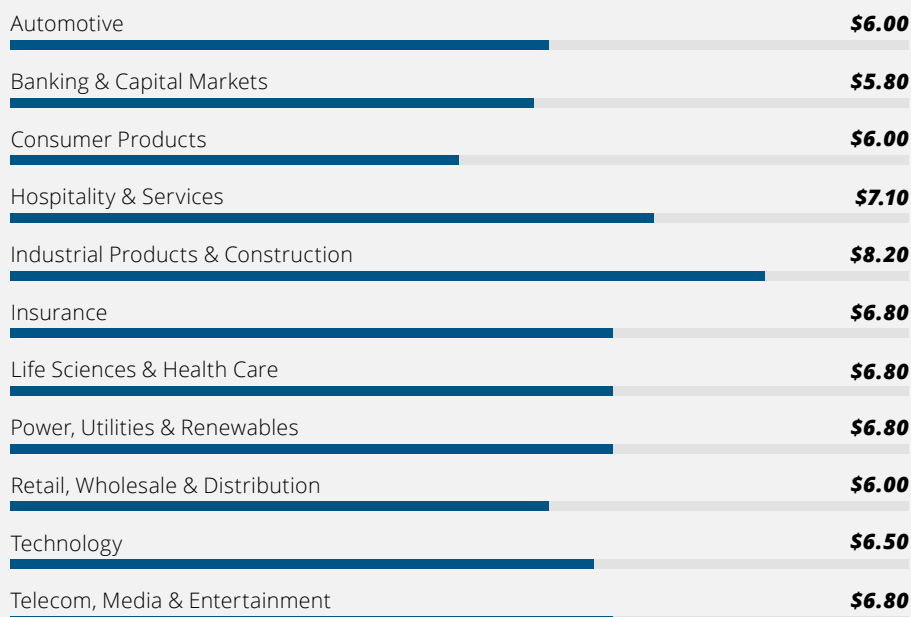# Service innovators meet the moment—and beat expectations

For decades, customer service was treated as a cost of doing business. Even in today's era of automated chatbots, online self-service and other efficiency-driving technologies, service can still appear *costly*, at least through the lens of common metrics such as cost per assisted contact (CPAC). Currently, the global CPAC average across industries hovers at $6.60.[2] We believe that cost is unlikely to drop significantly in the future—and will more likely rise, as agents increasingly focus on the most high-complexity, high-value tasks. Leaders are therefore looking to other strategies—and other metrics—to drive organizational efficiency. *(See "Mind the metrics that matter" sidebar.)*

AVERAGE COST PER ASSISTED CONTACT, BY COUNTRY

$9.40	$6.40	$5.70	$5.40	$6.60
Australia	Canada	Japan	United Kingdom	United States

AVERAGE COST PER ASSISTED CONTACT, BY SECTOR

Sector	Cost
Automotive	$6.00
Banking & Capital Markets	$5.80
Consumer Products	$6.00
Hospitality & Services	$7.10
Industrial Products & Construction	$8.20
Insurance	$6.80
Life Sciences & Health Care	$6.80
Power, Utilities & Renewables	$6.80
Retail, Wholesale & Distribution	$6.00
Technology	$6.50
Telecom, Media & Entertainment	$6.80

MIND THE METRICS THAT MATTER

As organizations seek balance in today's changing world, it's important to evolve measurement strategies as well. Going forward, we recommend contact center leaders focus on cost per interaction (CPI) as the key measure for efficiency, while adopting a new approach to measuring customer satisfaction (CSAT).

CPI:

By capturing costs across every channel and service tool, CPI can illuminate how effectively the organization is able to deflect customers to self-service bots and other automated service tools—and the costs associated with enabling those capabilities. CPI is thus a particularly important approach to help gauge right-channeling and self-service performance, and to help show the real-cost tradeoffs between agent-assisted and technology-powered service. It can also help capture and quantify reductions in handle times, repeat contacts and escalations.

CSAT:

While measures of satisfaction such as Net Promoter Score have long been employed by service leaders to identify at-risk customers and quantify service effectiveness, those approaches often fall short when it comes to guiding organizational strategy. For example, one customer might rate your company low due to product quality issues, while another provides the same rating due to inaccurate advertising. When you don't know the difference, it's hard to act in ways that improve satisfaction for both customers. That's why we recommend implementing TrustID, an open-source tool from Deloitte that can not only measure the factors that together drive trust—humanity, capability, reliability and transparency—but accurately predict the actions that can improve trust. Learn more about TrustID at https://www.FourFactorsOfTrust.com/.

Our research showed contact center organizations are increasingly focused on reducing the *volume* of assisted contacts—and indeed, overall demand for service—through new and improved digital capabilities. To make this happen, 30% of organizations are in the process of changing or upgrading their contact center solutions in 2024, with an additional 42% planning to do so in 2025. Their most commonly cited goals are greater scalability, improved insights and improved agent experience. These priorities indicate that as companies embark on solution upgrades, they're focused on adding capabilities, with cost control being an outgrowth rather than the primary goal. This reflects smart thinking: As more interactions become digital and automated solutions increase, overall cost *per interaction* (CPI) can be reduced—even if the cost *per assisted contact* remains the same or increases.

Success isn't guaranteed, however—and many organizations are currently feeling the pain.

On average, respondents said they achieved just 55% of their strategic goals in 2023.

The reasons reflect the complexity of customer service today. For example, 1 in 4 respondents said channel expansion has simply increased service inquires, as customers chat *and* call—or simply ignore new channels in favor of familiar ones. Three in 4 said agents are overwhelmed by systems and information, leading to poor outcomes and unnecessarily long call times. Meantime, in a global labor market that remains unusually dynamic, and particularly with the rise of remote work, agents come and go—thwarting efforts to reduce hiring and training costs. Overall average annual agent attrition was 52% in 2023, though results varied by location and sector. Australian companies reported the highest attrition in 2023, at 63%, followed by Canadian companies at 56%; averages in other countries were between 49%–51%. By sector, Telecom, Media & Entertainment companies reported the highest attrition, at 59%; the sector with the lowest attrition was Banking & Capital Markets, at 42%.

To some extent, these challenges reflect today's new realities. But too often they result from organizational and strategic issues such as siloed insights and knowledge sharing, inadequate (or nonexistent) strategies to encourage adoption of new channels, disconnected data, indistinct market positioning *(see "Avoid the mediocre middle" sidebar)*, and insufficient understanding of the factors that foster employee and customer trust.

Some companies are proving it doesn't have to be that way.

By analyzing our research, we identified the most effective 25% of contact center organizations based on service delivery, quality assurance automation, personalization and employee attrition rate. When we compared the performance of these service innovators to companies with less-advanced capabilities, we found striking differences in what they're doing—and what they're accomplishing.

COMPARED TO SERVICE ORGANIZATIONS WITH LESS-ADVANCED CAPABILITIES ...

● Service innovators   ● Less-advanced organizations

1.6x / **1x**
Service innovators achieved 57% more of their **strategic goals** in 2023.

4.6x / **1x**
Service innovators were much more likely to report **excellent customer satisfaction**.

2.5x / **1x**
Service innovators were much more likely to report **excellent employee satisfaction**.

11.7% Amount by which service innovators exceeded their 2023 **financial goals**—compared to 0.0% for those with less-advanced capabilities.

AVOID THE MEDIOCRE MIDDLE

For decades, brand leaders have jockeyed to find the price points, marketing messages, sales channels and product features that allowed them to carve out a distinctive market position and durable customer preference. Yet when it comes to service, companies have too often tried to be everything to everyone. The result? All that branding magic gets sucked into the mediocre middle.

Deloitte Digital sees that changing quickly as companies begin offering differentiated service

options to consumers and pricing for them transparently upfront. This revolution, sparked by the twinned worlds of tech and commerce, is called *transparent service optionality*.

Service innovators are leading the way. Compared to less-advanced service organizations, they're 7x as likely to offer better service tiers for a fee and to premium customers. And they're offering a greater range of service upgrades as part of those programs. For example, they're 89% more likely to offer 24/7 response availability,

50% more likely to offer direct routing to more knowledgeable or experienced agents, and 33% more likely to offer access to onshore agents.

Learn more about transparent service optionality by reading our recent report, "The future of service? Optionality."
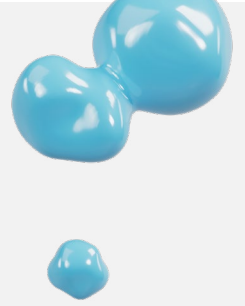
Realizing the potential of omnichannel orchestration

In past surveys of contact center leaders, respondents consistently expressed optimism that customers would soon begin shifting from phone service to lower-cost channels. But, for many leaders, that optimism hasn't yet translated into reality.

In our latest survey, 3 in 5 respondents said they've been *unsuccessful* in replacing phone calls with contacts in less expensive or more convenient channels.

Old customer habits die hard. Your company may have built the most advanced, intuitive and simple IVR system in the world; but that doesn't mean customers will flock to it. After all, most of us have endured years of frustrating experiences with IVR and other self-service channels. Those options may cost less for your organization—but customers often perceive them as quite costly in terms of their time, effort and frustration.

To solve this challenge, it's important to develop robust *strategies* and actionable *plans* to educate and proactively migrate customers to the channels most suited to their needs—no matter their initial point of contact, no matter the nature of their inquiry. And, companies need the data and technology capabilities to put those strategies into practice.

4 in 5
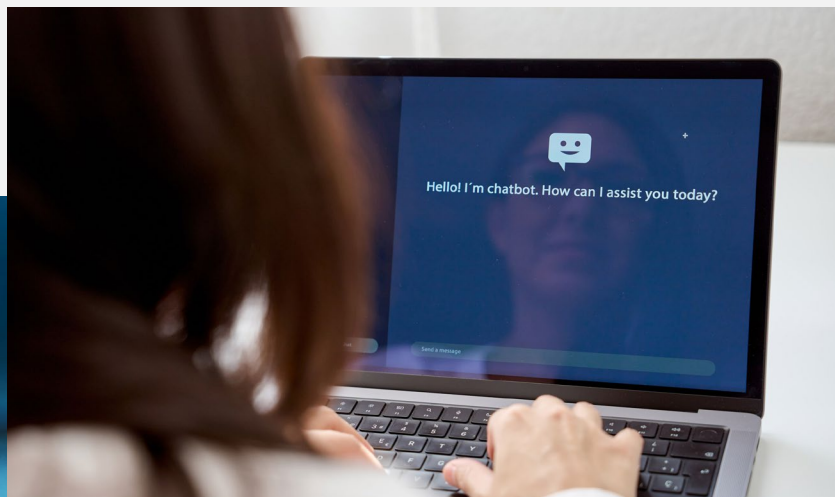have activated a **channel-steering strategy**

AMONG THOSE …
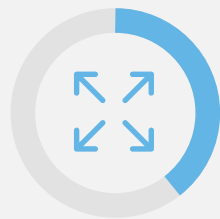
36% have successfully **deflected calls to other channels**.

1 in 3
companies have **omnichannel integration tools**

RESULTING IN …

9% lower cost per assisted contact.

Known as guided omnichannel orchestration or "right-channeling," this approach offers a powerful means to balance greater business efficiency with improved customer satisfaction and loyalty. For example, Himari might believe she needs to speak with a live agent about the blender that was broken when she opened its packaging. When she calls, the IVR system quickly provides her with an option to submit a photo of the broken blender via SMS. When Himari sends the photo, the damage is rapidly verified via GenAI analysis; within seconds she receives an apologetic text confirming her issue and offering a refund or a replacement with next day shipping.

It's important to keep in mind that right-channeling isn't *cheap-channeling*. When a customer begins searching your mobile app to solve a highly complex or emotionally loaded issue—or when the solution involves regulatory or other legal restrictions—shifting them seamlessly to a live-assisted channel (for example, by offering an immediate callback to the customer's mobile phone) is vital.

Key to successful right-channeling are next-generation tools designed specifically to reduce friction across channels and experiences, such as digital omnichannel integration platforms. Among companies that have deployed such platforms, 71% said they've achieved significant business value as a result—including an average 9% reduction in cost per assisted contact. To amplify the value of these platforms, organizations should work to ensure they have the freshest, most accurate customer data available at any time, for any need. *(See sidebar.)*

Equally important are tools to connect customers to the most appropriate and available agent—no matter the need or initial channel of outreach. Today, most contact centers use routing tools for agent-assisted chat (74%) and phone calls (51%). Such single-channel tools have helped drive an average agent occupancy rate of 76%—which is pretty good. But of course, you want *great*.

Channel-specific tools can't effectively help connect customers with the right agent quickly *across* channels; nor can they help balance the ever-shifting volume of incoming contacts on various agent-assisted channels. To solve that need, 25% of contact centers have now adopted dedicated, omnichannel routing tools.

This is the next frontier of omnichannel orchestration—and a powerful tool for improving efficiency through increased agent occupancy rates.

25% have implemented an
omnichannel routing engine

RIGHT DATA, RIGHT MOMENT, RIGHT SOLUTIONS

Having all data connected and available is key to successful omnichannel orchestration and experience personalization. Yet despite years of investment and effort, just 13% of companies said customer data, history and context carry over *fully* across interactions and channels.

Disorganized and inaccessible data impacts service efficiency and customer experiences in a range of ways. Requests to repeat basic information at every step of a service experience is a common complaint among consumers. Poor data management and/or activation stymies efforts to personalize service interactions—further stunting or even damaging customer trust.

Solving such challenges is the key purpose and value of digital omnichannel integration platforms. These platforms are designed to connect experiences

across chat, web, voice and SMS in ways that were previously cumbersome if not impossible to achieve at scale through customer relationship management (CRM) systems or other platforms.

Ironically, agents often find themselves overwhelmed by *too much* information to process, as highlighted earlier in this report. This typically results in unnecessarily long calls as agents re-verify customer information and sift through various platforms to find the records and answers they need.

Companies often work to solve all this by unifying customer data into 360-degree profiles within the CRM or a customer data platform (CDP). Those platforms can provide real value to service organizations, as well as to other parts of the business. Companies are now discovering an approach to leverage *only the best* from their 360-degree

customer profiles. We call it *Customer 3.6*. The process uses GenAI to support human agents by analyzing the full customer view, culling just the necessary information from it (hence 3.6), and using that to guide the human conversation with suggested scripts generated in real time. The technology can even provide a summary of the interaction.

With Customer 3.6, both brand and customer can win. Agents are better able to focus their attention on emotional connection and creative problem-solving, while customers get greater clarity and speed of resolution. Forward-thinking organizations are already embracing Customer 3.6 through custom integration of existing contact center systems. While current agent desktop tools such as CRM systems aren't yet optimized to serve this purpose, we see that as the future of their evolution.

Cultivating talent for the next era of customer service

Soon after graduating, Dave landed a job in customer service for a large financial services company. He felt the work gave him a unique understanding of the fears, dreams and frustrations of the company's customers. Surely this would help launch him to better opportunities with the company. But even as his technology skills and knowledge grew, nobody spoke with him about his ambitions. In fact, none of his workmates ever moved up beyond local management. They just moved on …

For many agents today, customer service can feel like a dead-end job. Cost-cutting initiatives of years past separated service centers from corporate offices physically, making it hard for agents to feel like valued, engaged participants in company culture and growth. Corporate-level talent retention and cultivation strategies frequently overlook the very agents who—aside from front-line salespeople—understand customers most intimately. Even the most standout performers face long odds when it comes to advancement opportunities. As a result, working as a service agent becomes a stepping stone to other careers with other employers—leaving contact center leaders perpetually saddled with the challenge and costs of finding, hiring and training new agents.

This approach made sense when most or all customer service inquiries needed a human agent's intervention—and when agents were therefore needed to handle simple inquiries. But as AI-powered self-service capabilities reduce and even eliminate the need for agents to provide tier-one (low-complexity) service, enterprises need to rewrite the narrative.

Customer service roles will increasingly require advanced skills in listening and empathy, communication and collaboration, technological resourcefulness, and problem-solving. That's why smart leaders are working to reimagine talent models in ways that help attract, train *and retain* the best available talent through improved career advancement opportunities and pathways, proactive engagement initiatives, and better compensation and incentive models.

We found that companies currently investing in agent career progression reported 15% lower annual attrition than other companies and were 76% more likely to say agents would rate their experience as excellent. Similarly, companies currently investing in increased agent compensation were twice as likely as others to say employees would rate their experience as excellent.

COMPANIES INVESTING IN AGENT CAREER PROGRESSION ACHIEVED

23%

more of their strategic goals than companies that plan such investments in the future.

From self-service to self-improvement

2.7x
as likely to be investing in analytics.

4x
as likely to be investing in self-service.

As with any business problem, bandages usually just cover up pain points. And too often, it's the contact center that most acutely feels the pain. When an upset customer reaches out about a delayed shipment, the agent must absorb the customer's frustrations—while the contact center absorbs the cost of fixing an issue likely rooted in the company's inaccurate inventory and delivery systems. When a customer complains about an incorrect cash-back credit on a rewards credit card, the contact center must fix a mistake made by tools managed in the commerce department.

These real costs to the business are compounded by the customer's loss of trust—which itself is compounded when self-service options can't solve the issues quickly, easily or accurately.

Contact centers have long been the last line of defense for companies when it comes to solving issues in ways that salvage (and hopefully enhance) customer loyalty. But in the pre-digital era, it was essentially impossible for a service organization to provide accurate and actionable insights to other business teams in a timely fashion— especially when agents were outsourced, offshore or in onshore locations far removed from corporate headquarters. And in the early years of digital service channel proliferation, the insights gleaned from live agent interactions often required significant manual effort to blend with insights from other channels.

It's now possible to make the connections. Interaction recording systems, speech and text analytics, artificial intelligence and machine learning capabilities, and other technologies make it possible for contact centers to accurately capture and connect data from every interaction—including why the customer reached out, what solution resolved their need, and whether the customer left the interaction with positive or negative sentiments. Those insights can rapidly be used to improve self-service channels and knowledge management systems—improving service efficiency. But more important, they can provide trustworthy, prioritized and timely feedback to help other areas of the business identify product and service failures, trouble spots in commerce and delivery systems, emergent health and safety issues, inaccurate advertising messages and more.

As a result, customer service can be more than a last line of defense and a cost of doing business.

THE CONTACT CENTER CAN BECOME A FIRST LINE OF INSIGHTS TO NURTURE CUSTOMER VALUE, STRENGTHEN COMPETITIVE DIFFERENTIATION, AND HEAL COSTLY BUSINESS INEFFICIENCIES.

Our research shows that some companies are setting the stage to seize this potential. One in 4 reported they now have a well-defined, *cross-functional* strategy to improve self-service. More than 80% plan to invest in improved self-service and/or improved

analytics and insights capabilities by the end of 2025.

Today's service innovators are already past planning and are moving ahead. They're 4x as likely to be *currently* investing in self-service improvements, compared to organizations with less-advanced capabilities. They're also 2.7x as likely to be investing in improved analytics and insights.

Key to successfully improving self-service is strengthening collaboration between the contact center and web and mobile development teams. Too often, these teams are *literally* siloed from one another—for example, the contact center operates in a remote, rural location, while developers work in a coastal big-city corporate tower. Even when these teams answer to the same executive leader, they can often seem to speak different languages when it comes to understanding and serving customers. Efforts should be made to bridge differences of culture as well as perspective; and develop processes that facilitate ongoing collaboration.

Similar connections should be fostered between the contact center organization and teams in marketing, sales and commerce, research and development, and others whose work directly impacts customer engagement and satisfaction.

In doing so, the contact center not only reduces the cost of its own operations by reducing or eliminating service inquiries, but also becomes a driver of efficiency, value and trust across the enterprise.

Early adopters achieve outsize productivity gains with GenAI

According to Deloitte's Q2 2024 State of Generative AI in the Enterprise report, 56% of global business executives said they believe GenAI will improve efficiency and productivity—the top anticipated benefit of the technology.[3] Less than half as many respondents said they anticipated GenAI will help shift workers from lower-value to higher-value tasks, uncover new insights, and/or enhance customer relationships.
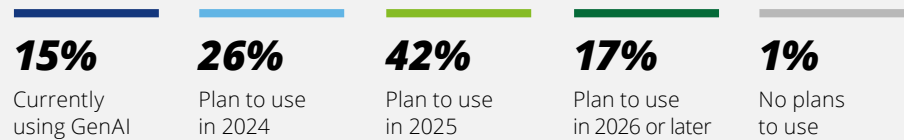
But contact centers that have already adopted GenAI are demonstrating value *in all those areas*. For example, more than half said they've improved agent productivity and customer effort scores. Nearly as many said they've increased the number of inquiries handled via self-service—thus allowing agents to focus efforts in the moments that matter. In each of these areas early adopters have achieved results that are better than future adopters anticipate. *(See chart.)* In addition to improving overall efficiency and customer value, early adopters of GenAI were 34% less likely to report their agents feel overwhelmed by the information in front of them.
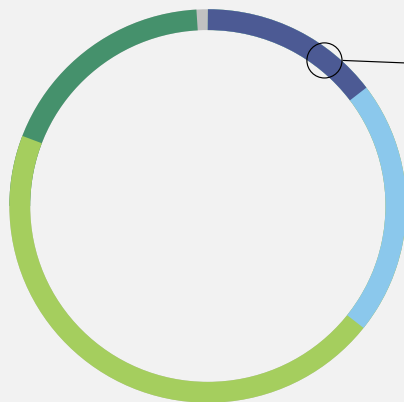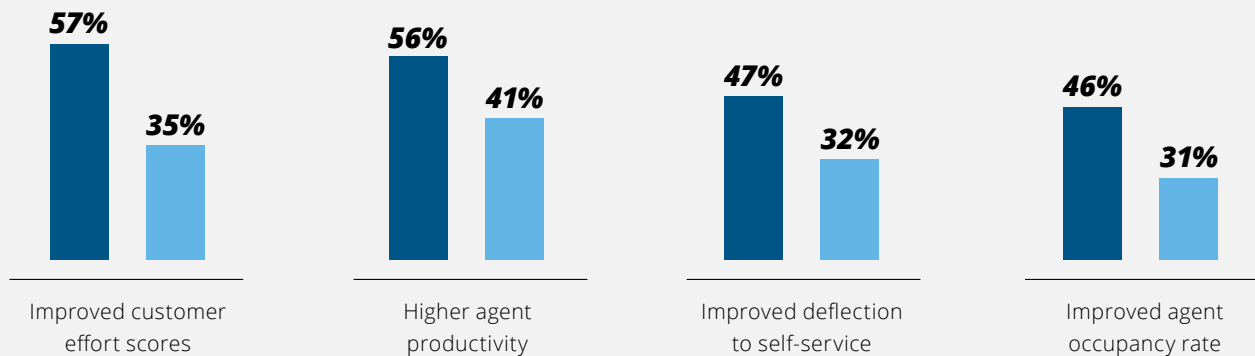
1 IN 6 CONTACT CENTERS HAVE DEPLOYED GENERATIVE AI CAPABILITIES.

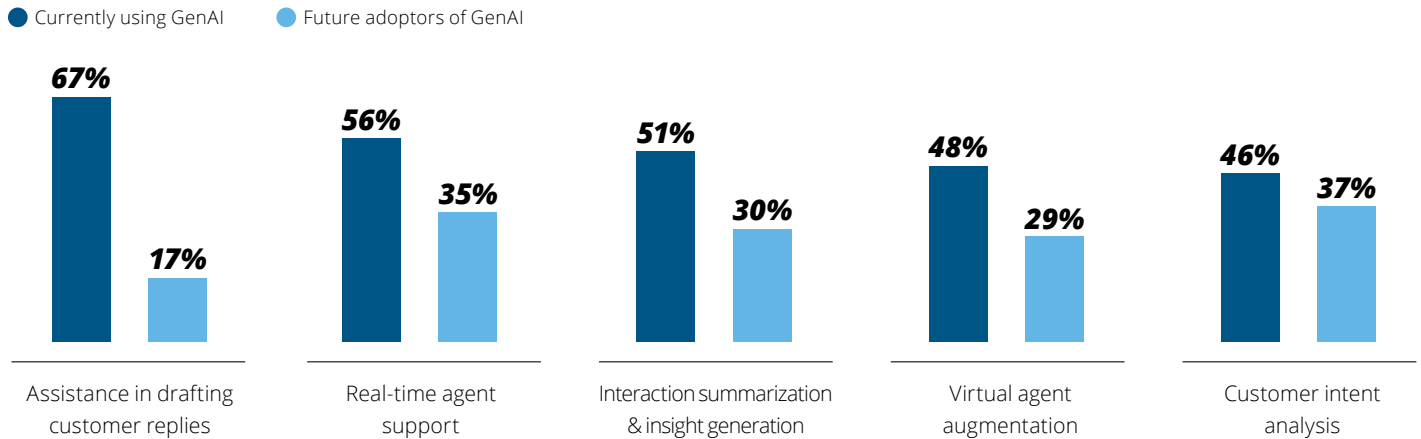Service innovators are 8x as likely as those with less-advanced service capabilities to have deployed GenAI.

15%	26%	42%	17%	1%
Currently using GenAI	Plan to use in 2024	Plan to use in 2025	Plan to use in 2026 or later	No plans to use

GENERATIVE AI'S EARLY ADOPTERS EXPERIENCE GREATER IMPACT THAN FUTURE ADOPTERS ANTICIPATE

● Currently using GenAI   ● Future adoptors of GenAI

	Currently using GenAI	Future adoptors of GenAI
Improved customer effort scores	57%	35%
Higher agent productivity	56%	41%
Improved deflection to self-service	47%	32%
Improved agent occupancy rate	46%	31%

EARLY ADOPTERS USE GENERATIVE AI MORE BROADLY THAN FUTURE ADOPTERS ANTICIPATE

● Currently using GenAI   ● Future adoptors of GenAI

	Assistance in drafting customer replies	Real-time agent support	Interaction summarization & insight generation	Virtual agent augmentation	Customer intent analysis
Currently using GenAI	67%	56%	51%	48%	46%
Future adoptors of GenAI	17%	35%	30%	29%	37%

These benefits have accrued through an array of use cases that are also more numerous than future adopters said they expect. More than half of early adopters said they're using GenAI-powered tools to draft customer replies, provide real-time support to agents, and summarize interactions and generate insights. Other top use cases include improving virtual agent interactions, analyzing customer intent, and improving service quality through automated scoring and management. *(See chart.)*

Such uses can help drive efficiency at every step of a customer service interaction. At the front end, GenAI-enabled tools can drive faster authentication for the customer while providing pre-interaction journey summarization to the agent. This capability alone can be transformational for service efficiency. Consider the example of a customer who receives a mobile app reminder of a payment coming due. The customer logs into the company's secure website to make the payment—but later receives a message that the payment method had failed. When the customer calls the contact center to sort the problem out, GenAI can quickly prepare a summary of the customer's past history of payments as well as every action at every touch point that led up to the call—and provide the agent with a suggested opening script that recognizes the customer's long loyalty and most likely reason for calling.

During the call, GenAI can help suggest the most expedient and appropriate path to resolution. Post-call, GenAI can provide an automated call summary and follow-up recommendations. Similar benefits are possible across a range of channels and support technologies.

Today, many GenAI use cases are focused on post-interaction summarization. Pre-interaction summarization remains somewhat nascent—but that capability will soon become mature. On the further horizon lie opportunities to leverage GenAI for truly effective next-best-action recommendations and Customer 3.6 desktop solutions.
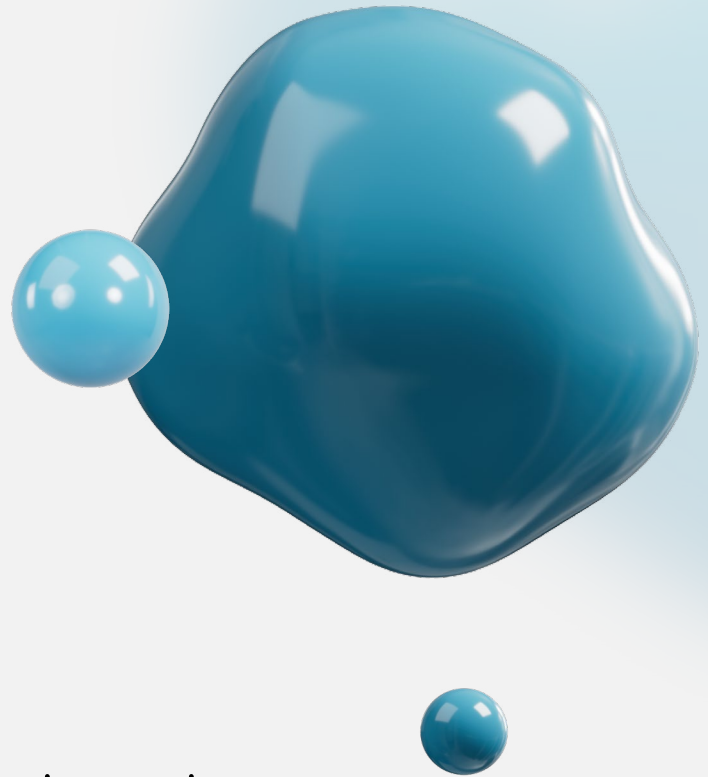
Channeling new efficiencies, generating better outcomes

Buffeted by the winds of change in a newly transformed world, today's service innovators are finding new balance and taking bold steps forward. To improve efficiency, they're combining the transformational power of GenAI with best-fit channels and tools for every customer need. To improve effectiveness, they're investing in talent models that emphasize career development and talent retention, and finding ways to simplify agent experiences and offload repetitive tasks. And they're rooting out and addressing the causes of common service issues in ways that preserve customer trust and prevent future costs.

AS YOU WORK TO STRIKE THE RIGHT BALANCE FOR YOUR OWN ORGANIZATION, HERE ARE SOME QUESTIONS TO ASK YOURSELF.

01 How are you making servicing easier and more effective for your clients and agents?

02 How are you preparing for the workforce of the future?

03 How should you work with your business partners to identify and resolve the root causes of issues that drive low-value or high-volume service inquiries?

04 What is your plan to meet customers in their channels of choice while reducing the cost to serve?

05 Where will you start with GenAI?

ENDNOTES

1. The Conference Board, "Global Economic Outlook, updated 11 April 2024,"
   https://www.conference-board.org/topics/global-economic-outlook. Accessed April 25, 2024.

2. Individually calculated combined country averages may not equal global total averages due to US overrepresentation within the sample.
   (See methodology.)

3. Nitin Mittal, Costi Perricos, Kate Schmidt, Brenna Sniderman and David Jarvis, *Now decides next: Getting real about Generative AI*, April 29, 2024,
   p. 9, https://www2.deloitte.com/us/en/pages/consulting/articles/state-of-generative-ai-in-enterprise.html. Accessed April 25, 2024.

METHODOLOGY

Statistics cited in this report are based on a blind survey conducted by Lawless Research on behalf of Deloitte Digital in March 2024. Respondents included 600 executives (vice president-level or above) responsible for contact center strategy at midsize and large business-to-consumer and business-to-business companies in five countries.

Respondents by sector:

Automotive	8%
Banking & Capital Markets	8%
Consumer Products	8%
Hospitality & Services	8%
Industrial Products & Construction	8%
Insurance	8%
Life Sciences & Health Care	8%
Power, Utilities & Renewables	8%
Retail, Wholesale & Distribution	8%
Technology	8%
Telecom, Media & Entertainment*	17%

* The Telecom subsector was surveyed separately from the Media & Entertainment subsector, with equal numbers of respondents in each subsector.

Respondents by country:

Australia	10%
Canada	10%
Japan	10%
United Kingdom	10%
United States	60%

Respondents by annual revenues:

$100 million – $499.9 million	8%
$500 million – $749.9 million	12%
$750 million – $999.9 million	25%
$1 billion – $4.9 billion	33%
$5 billion – $9.9 billion	16%
$10 billion or more	6%

Respondents by number of contact center agents (in-house and outsourced):

1-249	14%
250-499	32%
500-999	38%
1,000 or more	16%

MATURITY MODEL:

An organizational maturity model was developed that identified the most effective 25% of companies based on service delivery, quality assurance automation, personalization and employee attrition rate. In this report we refer to those high-maturity companies as "service innovators."

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GET IN TOUCH

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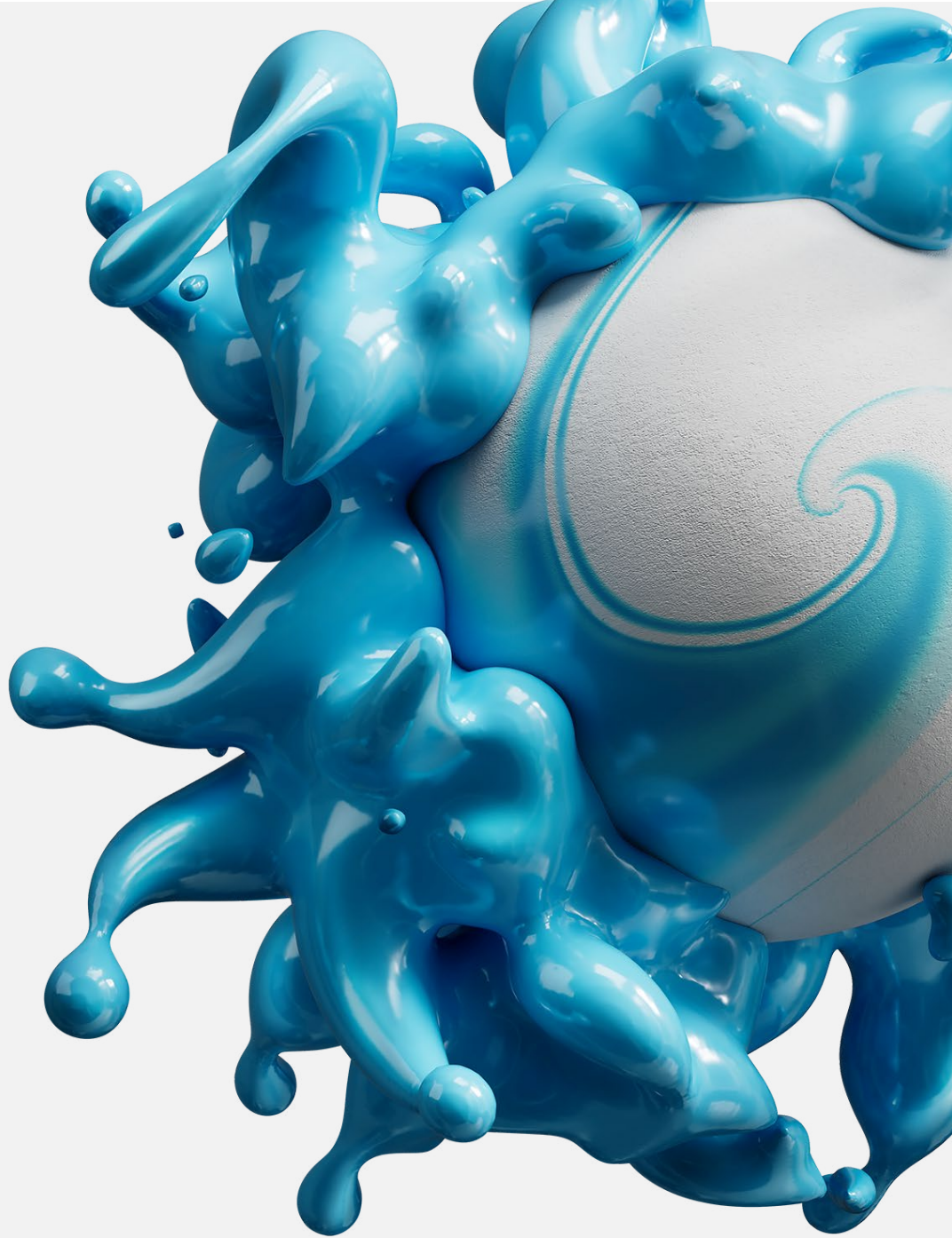jherrin@deloitte.com

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