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Customer Service Excellence 2025

Our insights in key trends and challenges shaping
the future of Customer Service

Deloitte.
Digital



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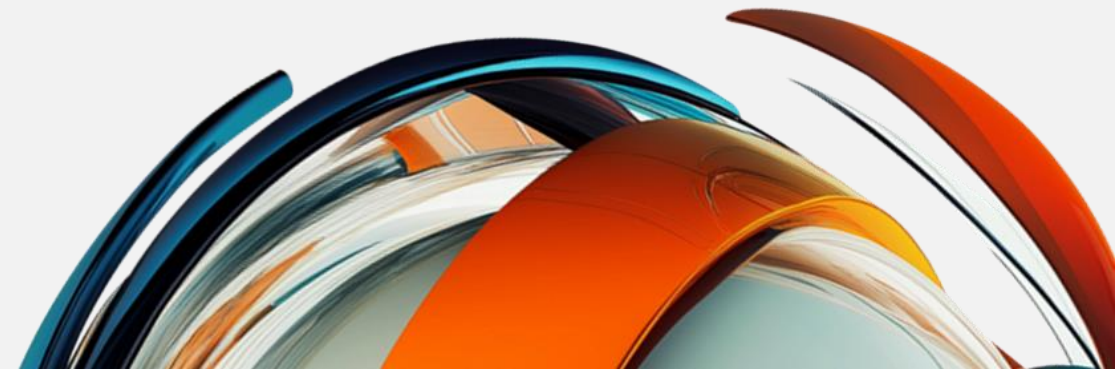
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01

INTRODUCTION

Executive summary



The latest Customer Service trends are here to lead your upcoming service transformation!

Welcome to the 3rd edition of Deloitte's Customer Service Excellence report! Our survey track **insights** into factors that impact **Service Excellence**. We define Service Excellence as *managing the right mix of organizational measures, processes & tools that results in exceptional performance in Customer Service organizations*, which means exceeding customer expectations and keeping the operations effective while enabling the employees to stay engaged.

It has been two years since our last edition of the report, so we were excited to see how the world has changed around Customer Service! To evaluate the impact on performance, we use the performance metrics, Customer Experience (CX), Employee Experience (EX) and Operational Excellence (OX), to allow full assessment of Customer Service organizations.

The hot topic in Customer Service is naturally the use of **AI**, which plays an important role in this report as well.

It is evident that AI is well suited in the Customer Service setup but there is yet a surprisingly large number of companies that still has not succeeded with implementing AI or GenAI as a core enabler into their Customer Service organizations.

Also, the usage, mix and maturity of **channels** and their fit to market demands are key drivers of performance, where proactive channels show high impact on performance, but which yet is underinvested in many companies.

Sales capabilities within Customer Service organizations also appears to vary heavily, which also showed a direct impact upon performance. Given the emphasis of moving from transactional support activities into sales-in-service, enhancing sales capabilities will require more attention to reach those benefits.

**WE HOPE YOU ENJOY READING
DELOITTE'S CUSTOMER SERVICE
EXCELLENCE REPORT 2025!**



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Succeeding with orchestrating the end-to-end journey for customers and employees will be key for companies' ability to meet their goals, with supporting technologies (such as AI), channel maturity and sales in focus!

Nathalie Ramsbjer



Executive Summary



Enhancing AI adoption

AI adoption in Customer Service has increased from 46% (2023) to 61% (2025), where **chatbots is the entry point for AI usage**. Even though AI showed a positive impact on Customer Experience (CX), Employee Experience (EX), *and* Operational Excellence (OX), most companies still use AI only for internal use.

The largest impact from AI turned out to be on resolution time, customer satisfaction and cost. To successfully implement AI solutions, organizations should focus on developing a clear strategy, ensuring compliance with regulations, and investing in skill development. It's time to scale!



Optimizing channel usage

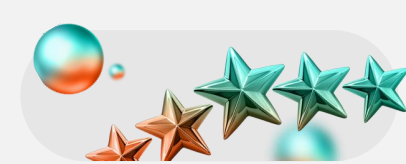
Despite low CX, EX and OX, the reliance on formerly called “traditional channels” remains high in Customer Service. Also, **proactive messaging** indicates higher **CX and EX** compared to other channels. In addition, there is finally a larger shift towards greater usage of **digital channels** and **self-service options**, even though existing self-service functionalities are still **far from optimal in meeting customer demands**. This calls for a need to optimize the channel strategy in Customer Service to fit market needs, but also an urgent need to elevate these capabilities.



AI impacting sales and efficiency

Empower Customer Service employees with the **right capabilities for cross-selling** and **up-selling** through digital channels **remains challenging** for many companies. Using AI as an enabler to increase sales in digital channels will be a game changer in Customer Service, which will also impact cost efficiency.

Worth noting is that the majority of Customer Service leaders participating in this study perceive that they yet have not obtained AI's positive impact on sales to its full capacity.



Balancing performance measures

Similar as for the study in 2023, there is a clear correlation between high employee satisfaction (EX) and high customer satisfaction (CX). So, **boosting employee potential will also have a positive effect on your customers**.

Ensuring employees having **easy access to information** and **quality tools** is essential for maintaining high levels of performance.

Also, and not surprisingly, companies that **measure customer satisfaction** and measure it more frequently also reach higher CX scores. Basically, you get what you measure.



02

METHODOLOGY & DEMOGRAPHICS

Research and analysis methodology



Research methodology

The following report is based on findings from the **CUSTOMER SERVICE EXCELLENCE 2025** survey, conducted in Q1 2025.

With customer expectations evolving and technology reshaping service interactions, this study aims to uncover key trends and challenges shaping the future of Customer Service. To better understand how Customer Service operations impact both experience and efficiency, the survey results were analysed through the lens of **Customer Experience (CX)**, **Employee Experience (EX)**, and **Operational Excellence (OX)**.

These three dimensions provide a comprehensive view of service performance. The ratings reflect respondents' assessments of their Customer Service functions, allowing for deeper insights from the perspectives of **customers, employees, and business leaders**. By benchmarking industry trends and identifying key challenges, this report offers valuable guidance for organizations striving to enhance their service strategies.



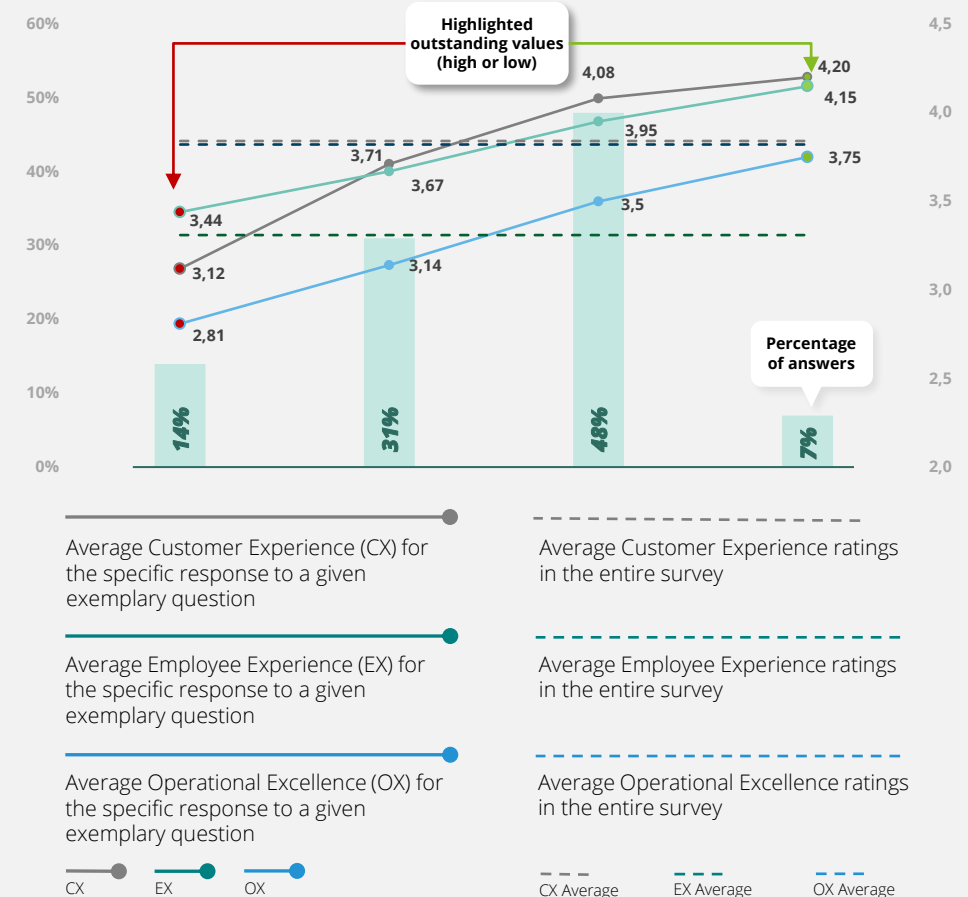
DEFINITIONS

- **Customer Experience (CX)** refers to how customers perceive their overall interaction with a business, including its employees, systems, service channels, and products. In this report, CX is measured based on respondents' assessment of Customer Satisfaction.
- **Employee Experience (EX)** reflects how employees internalize and interpret their interactions with their employer, workplace environment, and job responsibilities. In this report, EX is measured based on respondents' assessment of Employee Satisfaction.
- **Operational Excellence (OX)** is the continuous improvement of business processes, efficiency, and adaptability to change. It focuses on optimizing workflows, reducing inefficiencies, and ensuring smooth service delivery. In this report, OX is measured based on respondents' assessment of Operational Efficiency.

Each of these ratings is measured on a **scale from 1-5**, where higher scores indicate stronger performance in that area.

HOW TO READ THE CHARTS?

Example question: *Do we have the right tools?*



Research scope and Demographics

OUR RESEARCH AIMS TO:

01 → 02 → 03 → 04

Provide insights
into the global
state of Customer
Service.

Assess the impact
of Customer
Service operations.

**Identify emerging
trends** and future
directions shaping
the industry.

**Analyse key
industry
differences**
to understand
sector-specific
challenges and
opportunities.

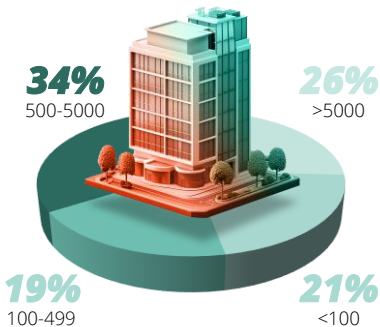
KEY AREAS OF FOCUS IN THE RESEARCH:

- **Customer Service Landscape**
Insights into team structures, operations, and industry benchmarks.
- **Performance & Satisfaction**
Measuring customer and employee satisfaction along with operational efficiency.
- **Customer Enquiries & Tools**
Understanding common inquiries, available tools, and technological support.
- **Industry & Company Insights**
Comparing trends and best practices across various industries.
- **Service Channels & Service Technologies**
Evaluating traditional and digital service channels alongside additional service technologies.
- **Emerging AI**
Identifying and evaluating the usage of AI and GenAI in the Customer Service organization.
- **Current State & Future Trends**
Identifying key challenges, innovations, and investment priorities shaping the industry.

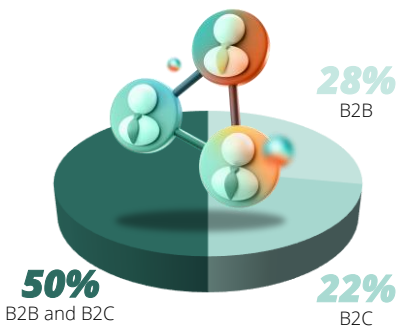
NUMBER OF RESPONDENTS:

 **235** Customer Service leaders responded to the survey

COMPANY SIZE OF RESPONDENTS:



CUSTOMER SEGMENTS BREAKDOWN:



AVERAGE CX, EX AND OX RATINGS:

The average scores for CX, EX and OX seem to be stable despite AI transformation

	Average Customer Experience (CX) rating	Average Employee Experience (EX) rating	Average Operational Excellence (OX) rating
2025	3,80	3,77	3,32
2023	3,84	3,82	3,31

A growing Customer Service function requires more attention to CX, EX and OX

The survey suggests a correlation between company size and performance in Customer Experience (CX), Employee Experience (EX), and Operational Excellence (OX).

Organizations with fewer than 100 employees score well above average across all metrics, particularly in EX, likely benefiting from agility, strong communication, and a cohesive service culture. Similarly, companies with 500 to 5,000 employees perform above average in CX and OX, suggesting they have the resources to maintain efficiency while remaining flexible.

In contrast, organizations with 100 to 499 employees score below average in all areas, indicating challenges in scaling operations effectively. Meanwhile, companies with more than 5,000 employees struggle the most, likely due to bureaucratic complexity and inefficiencies that impact both employees and customers. These findings suggest that company size alone does not determine service performance—**success depends on how well organizations manage growth, structure teams, and implement scalable solutions.**

Just as company size influences Customer Service performance, **the structure of the Customer Service function also plays a critical role in CX, EX, and OX outcomes.**

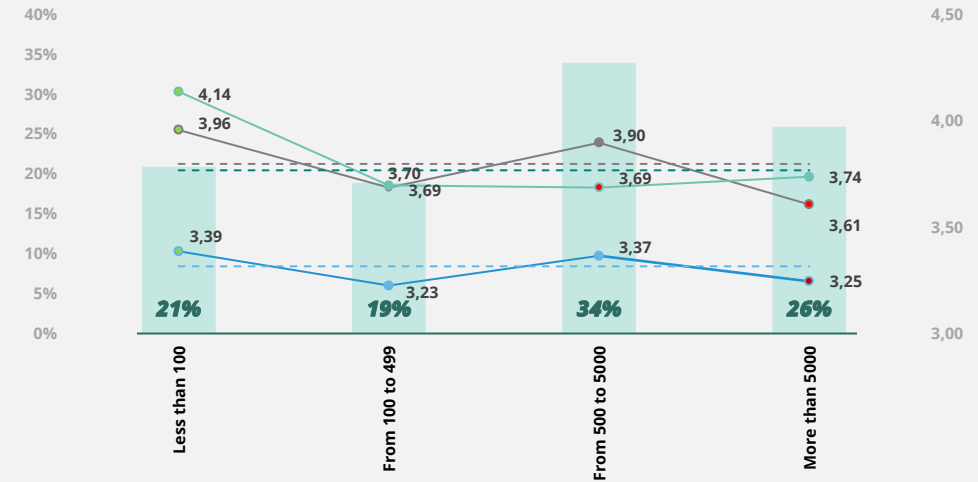
Medium-sized Customer Service teams—particularly **those with 50 to 100 employees—stand out as the top performers across all three metrics.**

This suggests that teams of this size may be large enough to manage inquiries effectively while still maintaining strong collaboration and employee engagement. At this scale, organizations may also find it easier to implement and adapt Customer Service technologies, ensuring both efficiency and responsiveness.

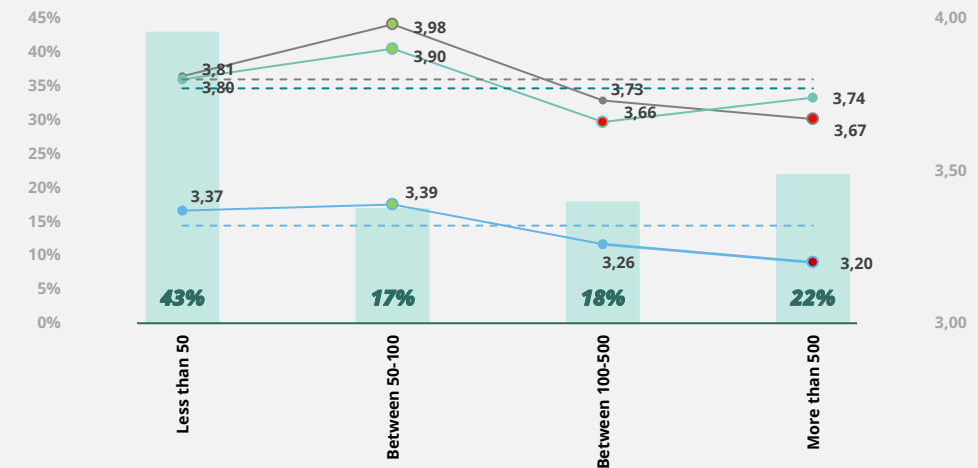
However, as businesses grow, integrating Customer Service platforms across multiple teams, locations, and touchpoints becomes increasingly complex, often impacting performance. **Without scalable, well-integrated technical solutions, large enterprises risk losing the agility needed to maintain high CX, EX, and OX performance.** This can lead to slower response times, inconsistent customer experiences, and lower employee satisfaction.

These findings highlight the **importance of investing in adaptable, customer-centric technology strategies** to ensure operational efficiency and service quality at scale.

PERFORMANCE BY COMPANY SIZE



PERFORMANCE BY CUSTOMER SERVICE FUNCTION SIZE



Transforming Customer Service requires deep industry focus

The analysis of Customer Service performance across industries reveals **significant variations** in Customer Experience (CX), Employee Experience (EX), and Operational Excellence (OX) **between industries**.

One notable finding is **the low Employee Experience (EX) score in the Consumer Goods & Retail sector**, which falls significantly below average, alongside its Customer Experience (CX) performance. A key factor may be lower brand loyalty in this sector, leading to more transactional customer interactions and higher service pressure on employees. With less emphasis on long-term customer relationships, employees may experience greater workload strain, job dissatisfaction, and limited opportunities for meaningful engagement, all of which can negatively impact both CX and EX.

Strengthening customer retention strategies and fostering personalized service experiences could help stabilize employee engagement and improve overall service performance.

While many sectors show room for improvement in OX, **the public sector stands out as particularly inefficient**, reflecting its long-standing challenges with bureaucratic complexity and slower service processes. Unlike private-sector companies—where profitability and competition drive efficiency—public sector organizations may lack the same urgency to optimize operations.

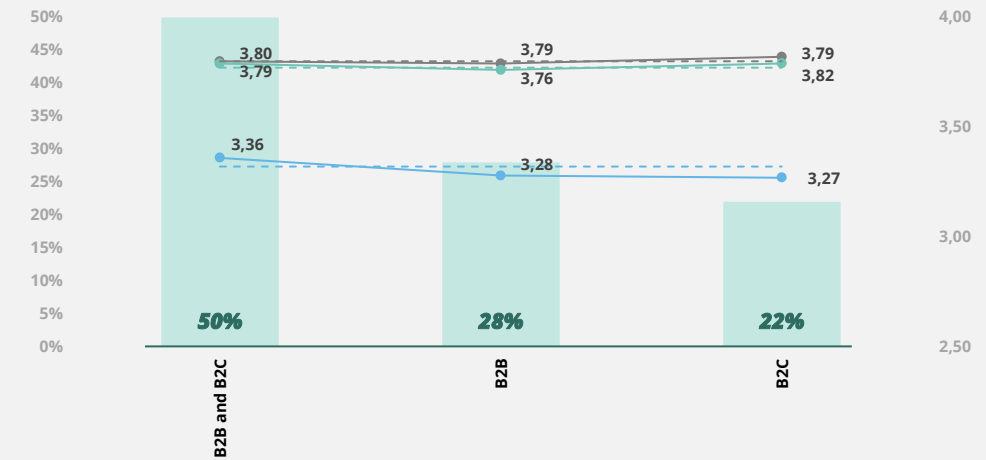
To improve service performance, public sector organizations **should adopt modern, scalable solutions that enhance efficiency, responsiveness, and accessibility**. Investing in automation, AI-driven tools, and digital workflows can help reduce inefficiencies while improving both Employee Experience (EX) and Customer Experience (CX). Without this shift, public sector organizations risk falling further behind as customer expectations continue to evolve.

In contrast, **the telecommunications sector emerges as the top performer in OX**, surpassing all other industries. With a long tradition of managing high volumes of customer interactions, telecom companies have been early adopters of scalable technology solutions, automation, and process optimization. This strong focus on efficiency and digital transformation not only improves internal workflows but also enhances customer experiences.

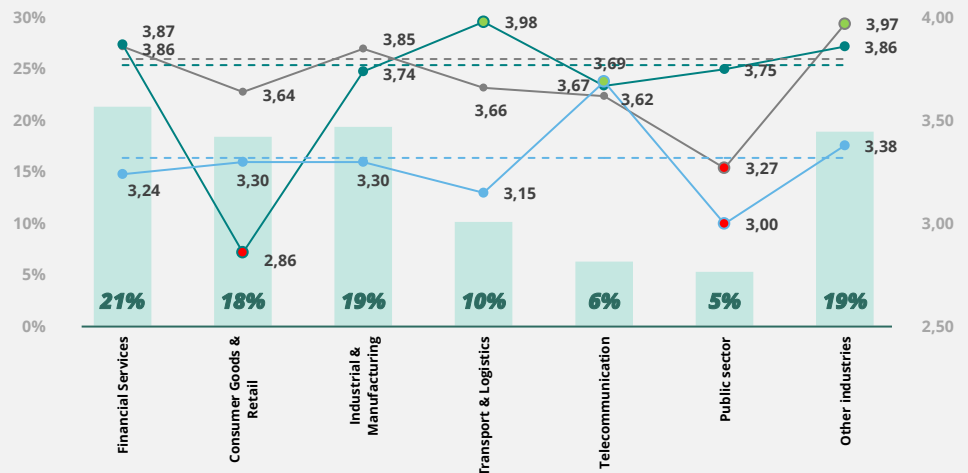
These findings further emphasize the **strong link between employee satisfaction, operational efficiency, and customer experience** across industries. Sectors that prioritize scalable service solutions and employee engagement strategies tend to perform better in CX, EX, and OX, while those that overlook these areas risk falling behind in overall service performance.

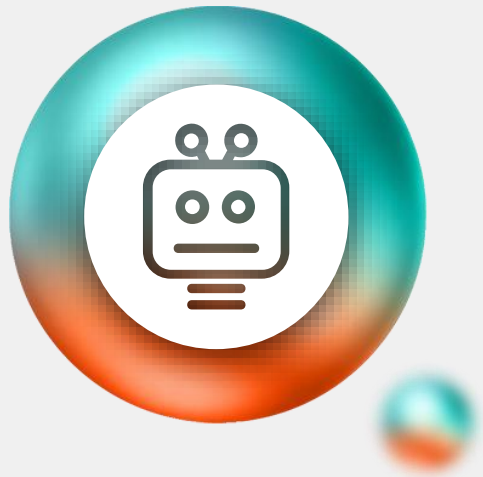
CX EX OX CX Average EX Average OX Average

CUSTOMER SEGMENT TARGET



INDUSTRY BREAKDOWN





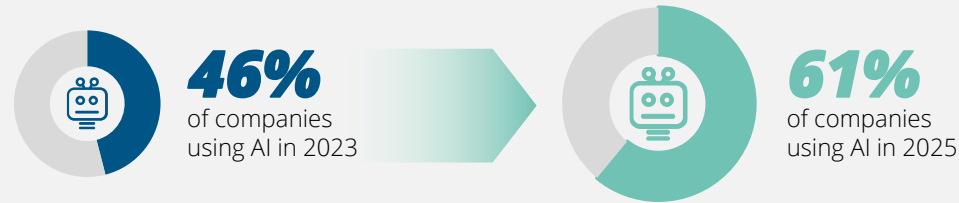
03

TREND 1: ENHANCING AI ADOPTION

The AI revolution in Customer Service is here



Increased AI adoption, but companies still struggle how to use AI to trigger sales in Customer Service



As expected, AI adoption in Customer Service overall has increased from 46% in 2023 to 61% in 2025, reflecting a growing recognition of its benefits. The results show that companies not using AI report:

- Lower Customer Experience (CX)
- Lower Employee Experience (EX), and
- Lower Operational Excellence (OX) scores

This indicates that **AI in Customer Service has started to pay off**, and that **AI investments is key to success in Customer Service!**

Varying use between industries

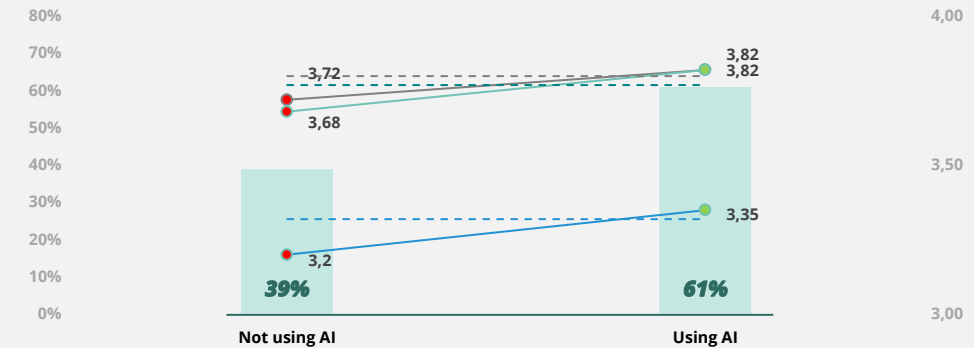
The usage of AI varies across industries, with Telecommunications leading the way, followed by Transportation and Logistics as well as Energy, Resources and Industrials. Manufacturing, Public sector and Banking are still lagging (less than 50% using AI).

AI impacts performance – but still not upon all measures

AI's most significant positive impact is on resolution time and customer satisfaction – these are areas where investment in AI will create results.

However, it is worth noting that AI's impact on sales remains limited, which indicates that companies still struggle with how to use AI to trigger sales in Customer Service. Examples of how to use AI to trigger sales are NBA (Next Best Action) and NBO (Next Best Offers), which can be used for supporting the agent with optimizing personalized offers to that specific customer or even used in self-service flows. So, even though **the use of AI has increased (compared to 2023) there is still much to be done on creating impact on the full Customer Service AI journey!**

AI USAGE



AI USAGE PER INDUSTRY



AI IMPACT ON CUSTOMER SERVICE METRICS³

✓ POSITIVE IMPACT

- #1 Resolution time (70%)
- #2 Customer satisfaction (63%)
- #3 Costs (61%)
- #3 Employee satisfaction (61%)
- #5 Case deflection (54%)
- #6 Sales (40%)

✗ NO IMPACT

- #1 Sales (52%)
- #2 Case deflection (41%)
- #3 Employee satisfaction (32%)

— NEGATIVE IMPACT

- #1 Costs (9%)
- #1 Customer Satisfaction (9%)

Chatbots as the entry point for AI in Customer Service



The degree and use of AI capabilities in Customer Service is today diverse. **Chatbot** is clearly the most used one (34%) indicating **chatbot as the entry point for AI adoption**. Most AI capabilities are being adopted, even though still in rather low scale.

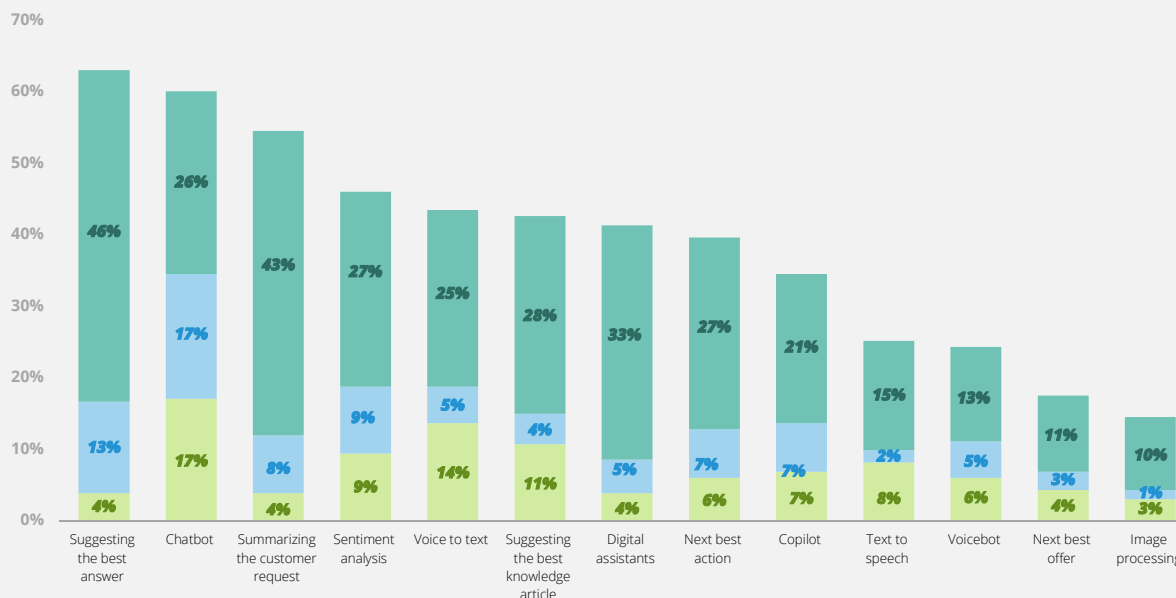
Channel choices impact on CX, EX & OX

Companies utilizing **voicebots** report higher CX scores, while some internal tools (e.g. summarize customer request) interestingly also contribute to improved CX. Knowledge-related support for agents appears to contribute to high EX, whereas text to speech has the lowest impact on EX scoring. Equally, efficiency (OX) is primarily driven by supporting the employee to suggest next steps (e.g. NBA, NBO) and support on customer sentiment.

Prioritizing AI adoption in Customer Service as prerequisites for higher performance

Companies planning to invest in AI vs ones who are not investing in AI (stating "AI adoption is not a priority") indicate **higher performance levels**, most likely due to these companies are more mature and look for how to refine operations through new processes, tools and ways of working. The largest investment plans are still (as in 2023) for suggesting the best answer and summarizing a customer request. These capabilities have a positive effect on both CX and EX and are today of limited use in Customer Service. Also, we anticipate that **chatbot, or rather it's upgraded version, Agentic-AI powered chat**, will continue to grow, as an enabler to succeed with efficient self-services!

AI USAGE AND INVESTMENT



AI TRANSFORMATION (STILL) IN PROGRESS

The data highlights a significant focus of customer service strategies, with organizations' plans to invest in generative AI (GenAI) technologies to enhance automation and improve customer experiences.

The top three areas of current or planned investment are:

- **Suggesting the best answer (59%)**
- **Summarizing the customer request (51%)**
- **Chatbots (43%)**

By leveraging GenAI, businesses aim to provide **faster, more accurate, and context-aware responses** - reducing agent workload and increasing customer satisfaction. The investment ambitions, however, do not differ much from the 2023 results, which suggests companies are still struggling with effective implementation of GenAI at scale.

GenAI mainly used internally

As much as 60% of companies in this study report they are using GenAI in their Customer Service. Notably, as much as 34% use GenAI solely for internal purposes, 6% for external purposes, and 20% for both. In addition, **companies that effectively integrate GenAI both in their internal and external operations report highest CX and EX levels**, highlighting the importance to use GenAI throughout the service operations to gain as much as possible from the investment.

Different tactics on how to implement GenAI capabilities

Most organizations (37%) have integrated GenAI capabilities into their current technology stack, while 24% rely on solutions from platform vendors. Based on this report, the type of choice have limited impact on performance outcome.

Biggest challenges are strategy, compliance, and skills

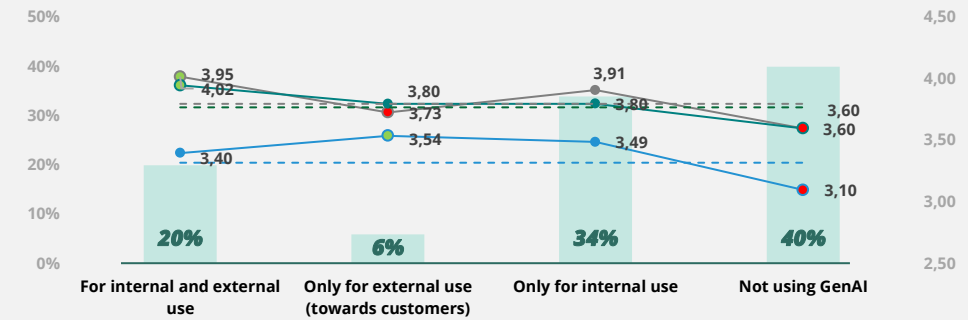
The main challenges to implement GenAI solutions are lacking strategy for GenAI tools in Customer Service, compliance issues and lack of skills. To successfully implement GenAI solutions, **organizations should focus on developing a clear strategy, ensuring compliance with regulations, and investing in skill development**. The report also indicates that organizations are willing to invest in GenAI or that cost structures have been clarified over time, compared to in 2023.

AI adoption gives competitive edge

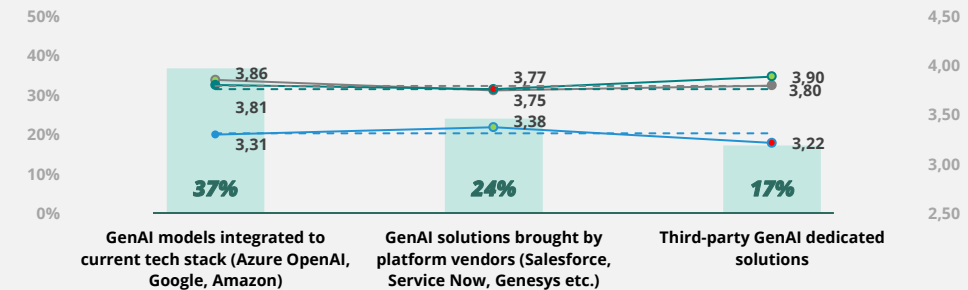
As a conclusion, it is evident that the use of various AI and GenAI capabilities has increased over the last two years. However, there are still companies that have not invested in or succeeded in adopting these technologies into their Customer Service organization. The implication is that these companies are unable to obtain equally high levels in performance compared to competitors leveraging AI capabilities. This entails **AI-empowered companies in a better position to succeed in the competitive market**, to attract new customers, employees, and potentially new partnerships.



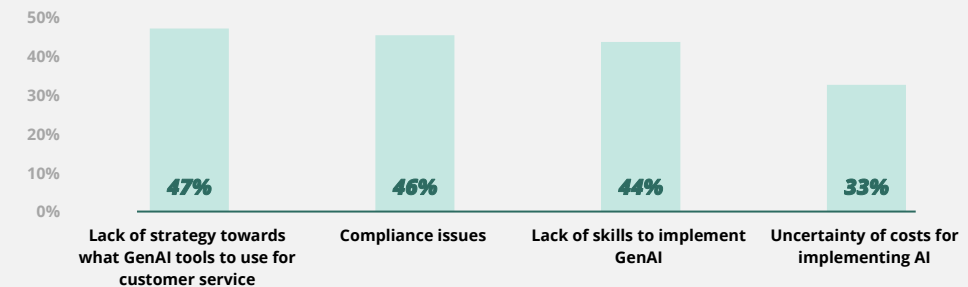
USE OF GENAI

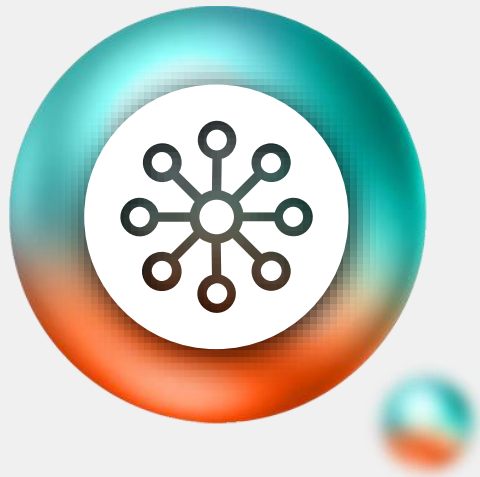


TYPE OF TOOLS



KEY CHALLENGES IN IMPLEMENTING GENAI SOLUTIONS





04

TREND 2: OPTIMIZING CHANNEL USAGE

Moving the needle for channel usage



Optimize the service journey in Customer Service through a tactical channel strategy

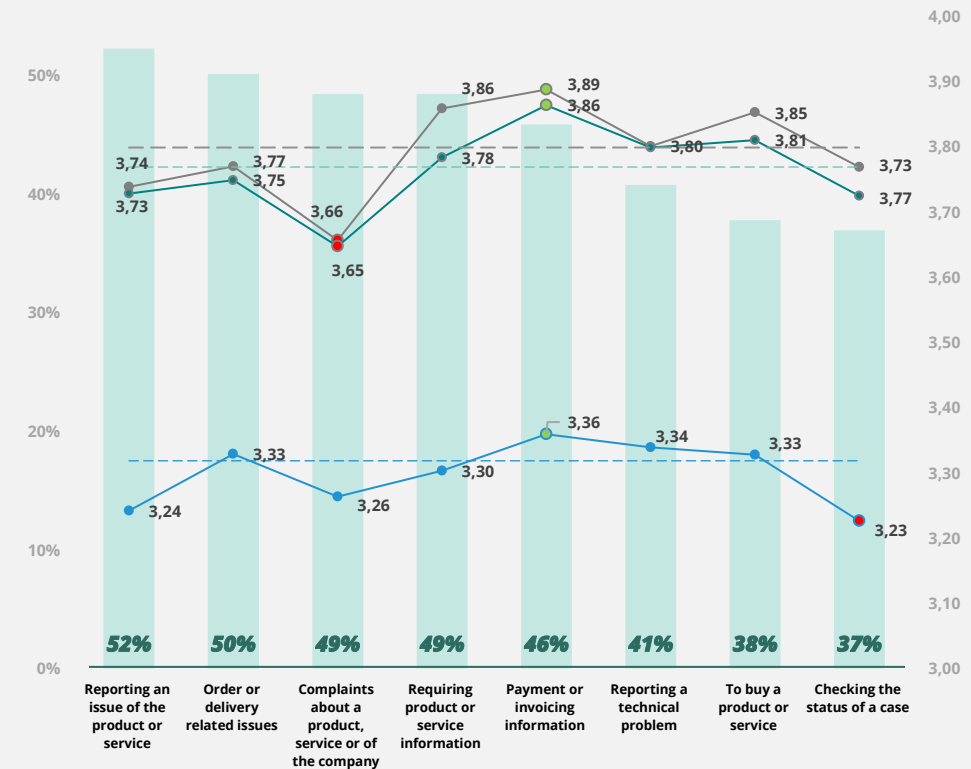


Self-service could resolve most of the Customer Service contacts

Based on insights of contact reasons, this study shows large opportunities to enhance self-service capabilities in Customer Service. For example, reporting an issue is the most frequent reason for contacting Customer Service (52%), followed by order or delivery-related issues (50%), requiring product or service information (49%), and complaints (49%). **A large bulk of these inquiries could already today be resolved through optimized self-service options.** Developing a tactical channel strategy, building upon close tracking of actual contact reasons, is hence key to optimize your Customer Service operations.

The lowest CX, EX, and OX scores in regards to contact reasons are associated with reporting an issue, complaints, and checking the status of a case, enquiries that are generally initiated due to a mismatch between expectations and actual delivery and communication thereof.

REASONS TO CONTACT CUSTOMER SERVICE, % IN TOP 4



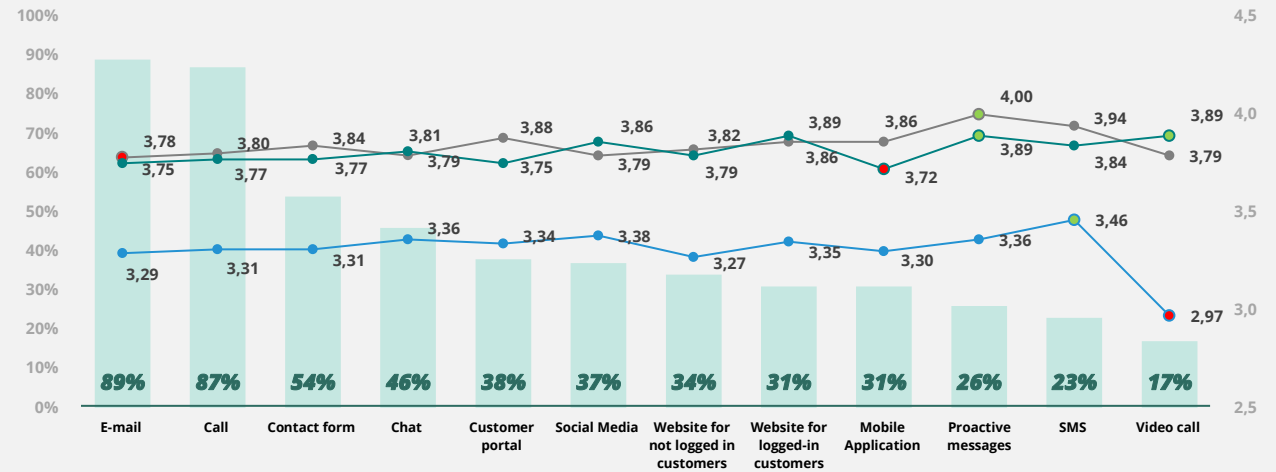
Enhance proactive messages, while refining all channels to meet customer needs for personalization

The traditional channels such as **e-mail (89%)** and **call (87%)** remain the **most utilized channels in Customer Service**, maintaining similar usage levels as in 2023. Interestingly, companies are still heavily dependent on these previously defined traditional channels, rather than on digital channels, which could reflect the recent technological developments in using AI assistance also within these traditional channels. Apart from that, the main changes from 2023 are the decreased use of social media (from 43% to 37%) and SMS (31% to 23%).

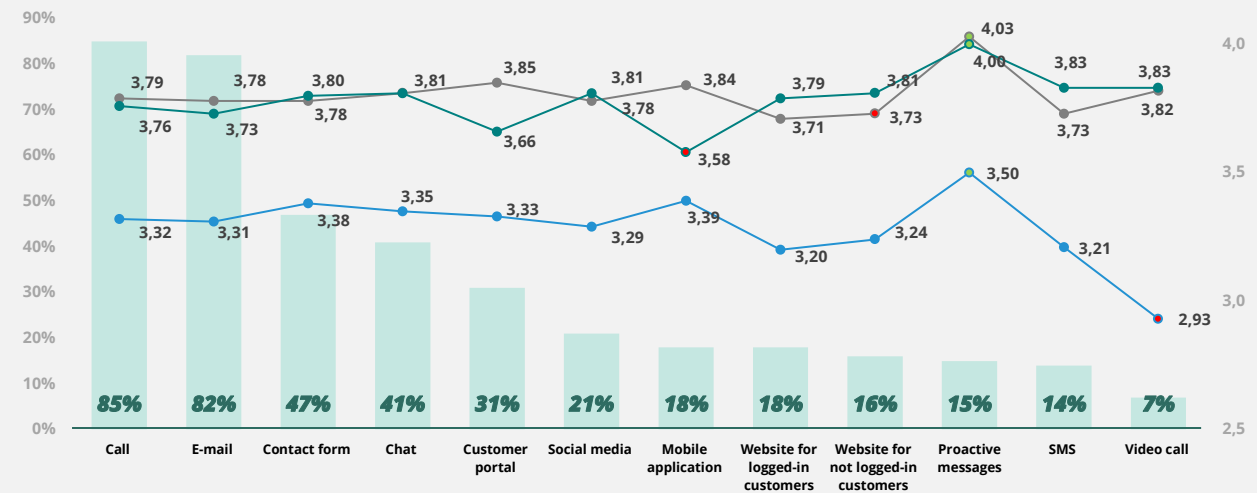
When it comes to impact on performance, there is a slightly higher impact on **CX and EX from proactive messaging**. This can be explained by personalized and timely communication towards the customer based on their unique situation, as a demonstration of commitment towards the customer through proactive communication. This shows a positive impact on both employees and customers.

As the impact on CX and EX otherwise is rather stable over the various contact channels, OX is considerably lower for video calls, indicating a need to enhance the processes and tools supporting video calls to enhance efficiency in that channel.

CONTACT CHANNELS SUPPORTED BY CUSTOMER SERVICES



TOP FOUR CHANNELS RANKED BY VOLUME OF ENQUIRIES



Prioritizing ease and accessibility for higher CX, EX and OX

Overall, the ability to solve enquiries without manual interaction from agents has increased from 24% to 30% compared to last year. This rise underscores the growing importance of self-service options and highlights that **investing in robust self-service capabilities remains crucial for companies**. Additionally, operational excellence (OX) is highest when enquiries are resolved without manual interaction, meaning that efficient self-service solutions can significantly enhance operational efficiency and customer satisfaction.

Websites are the most frequently provided self-service solution (69%) indicating their popularity for ease and accessibility. Customer portals (47%) and chatbots (41%) are also widely used.

Also, the most common actions customers can perform within offered self-service solutions are quite similar to 2023 results, with **actions related to offers, products, or services staying as the most offered solutions** (55%) followed by downloading documents, such as invoices and duplicate copies (49%).

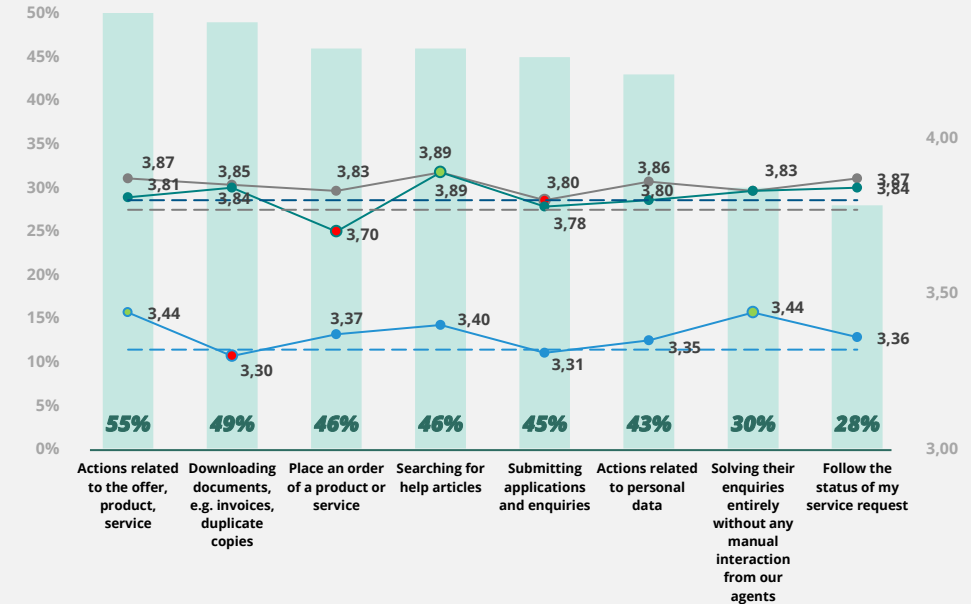
Enhancing Operational Efficiency (OX) through improved self-service solutions

Despite the positive trend described, **12% of companies still do not offer self-service solutions**, resulting in the lowest scores for customer experience (CX), employee experience (EX), and operational excellence (OX). However, given the benefits of offering self-service solutions, it is surprising that not all companies offer these services in their Customer Service.

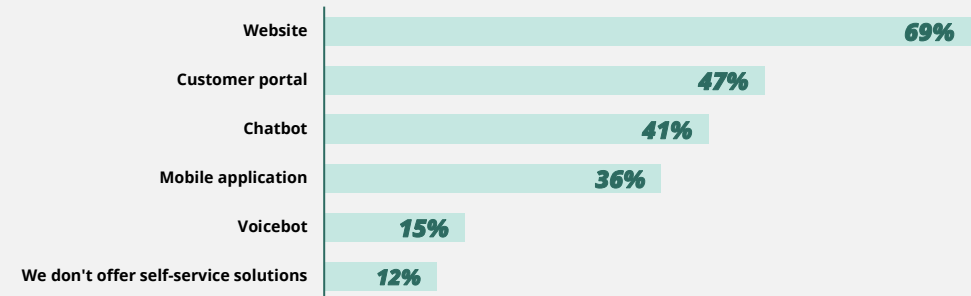


CX EX OX CX Average EX Average OX Average

WHAT CAN CUSTOMERS DO WITH OFFERED SELF-SERVICE SOLUTIONS?



WHICH SELF-SERVICE SOLUTIONS/OPTIONS DO YOU OFFER CUSTOMERS?



Current self-service functionalities are still far from optimal in meeting customer demands, which impacts performance

43% of the respondents indicated **no change in demand of using self-service solutions compared to the previous year**, while 35% reported a slight increase in demand.

The results also show **a clear trend towards increased usage of self-service solutions**.

This is shown by the combined 48% of respondents reporting either a slight or considerable increase in demand, compared to a small percentage reporting a decrease (10%). As the frequency increases, CX, OX, and EX also gets higher, although EX drops when the increase is considerable.

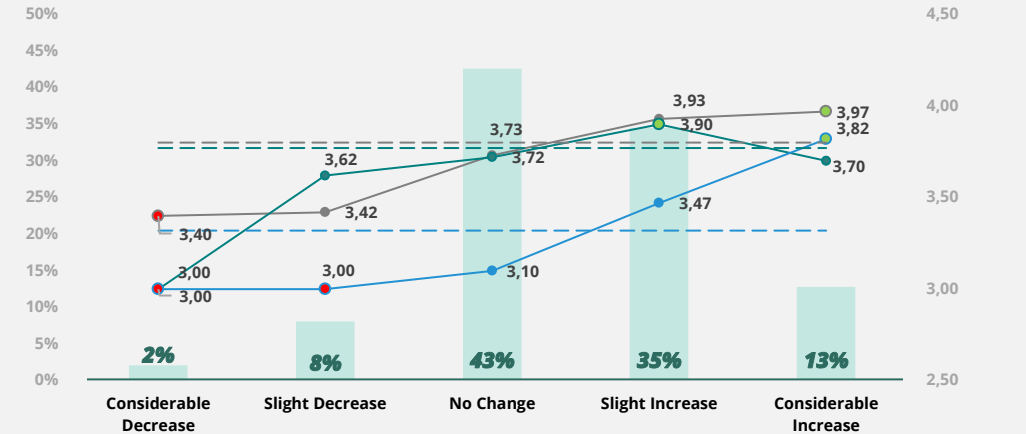
Self-service capabilities still need to improve to meet customer demands

When it comes to how well the self-service capabilities are matching the customers' demands, 41% rated the self-service capabilities as average, indicating **they are functional but have room for improvement**. Only 8% rated them as excellent, suggesting **few customers feel fully satisfied with the offered capabilities**.

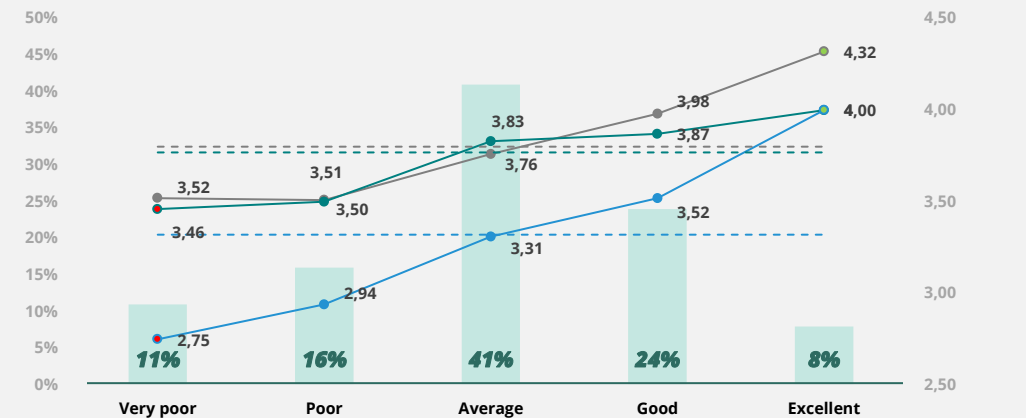
On the lower end, **27% of respondents rated the capabilities as poor or very poor**, highlighting that these solutions often fall short when it comes to customer needs. Notably, better alignment with customer needs also leads to higher CX, EX, and OX scores, underscoring the importance of enhancing self-service capabilities.



HOW HAS THE FREQUENCY OF USING SELF-SERVICE SOLUTIONS BY CUSTOMERS CHANGED COMPARED TO LAST YEAR?



HOW WELL ARE THE SELF-SERVICE CAPABILITIES MEETING YOUR CUSTOMERS' DEMANDS?



Digital assistants on the rise for succeeding with efficient resolutions



Companies are prioritizing investments **in digital assistants (42%) and mobile applications (38%)** to enhance automated support and mobile accessibility. This shift reflects the growing need for scalable, efficient solutions that handle high volumes of interactions. The emphasis on chatbots (37%) and customer portals (34%) underscores the importance of interactive and comprehensive customer interactions.

Traditional channels like e-mail (13%), SMS (3%), and contact forms (9%) are less prioritized, highlighting a trend towards more modern digital channels that aim to enhance overall satisfaction by offering customers convenient, anytime access to services.

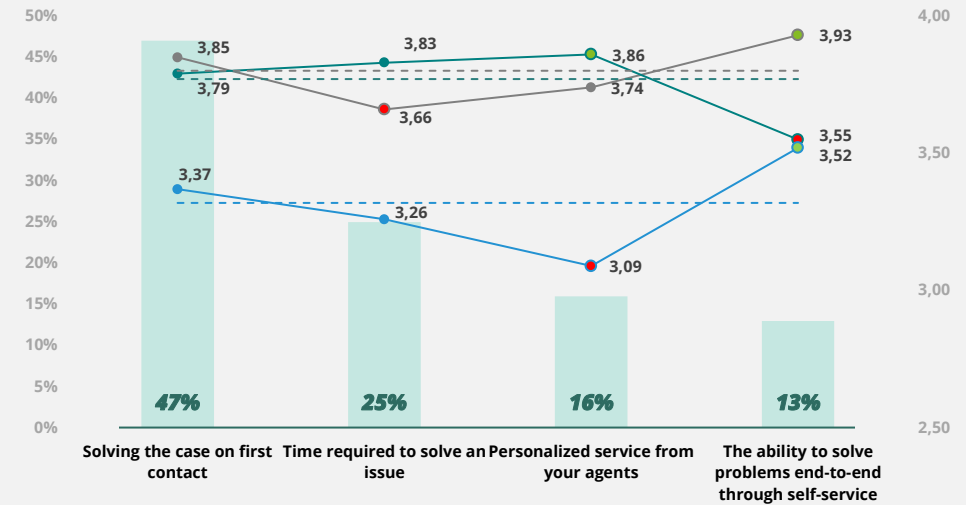
Similar as previous years, customer service leaders believe that customers care most about solving the case on the first contact. However, when linking that option to performance (CX), it appears that **customers are slightly more satisfied when being able to solve problems end-to-end through self-service** (highest CX). This option

is interestingly also linked to the **highest efficiency scoring (OX)**, but also to the lowest Employee Satisfaction, indicating that the process might not be as satisfactory for the employees.

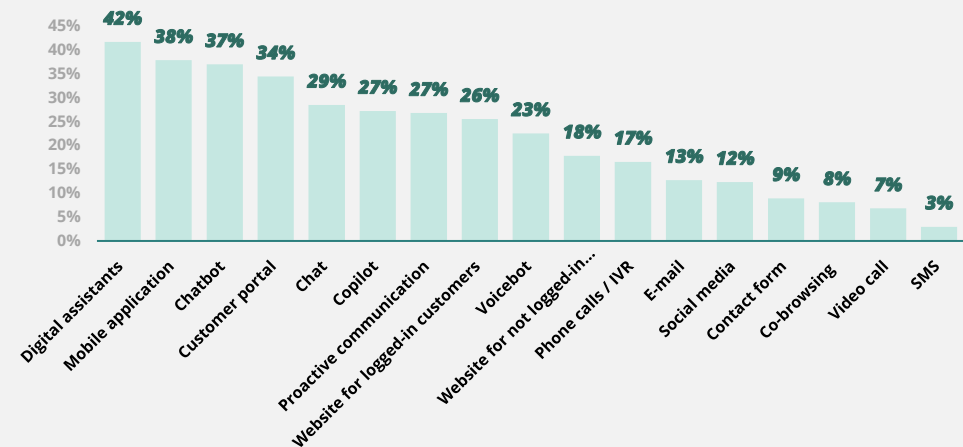
Personalized service is indicated to be the least important aspect for customers, which in addition decreased further compared to 2023 (22% in 2023, 16% in 2025). Personalized service is on the other hand linked to high CX and the highest EX, suggesting that agents are more satisfied when they in fact are bringing value in their service interactions that meets the customers' needs for being treated as individuals, with adapted support based on the situation they currently are in.

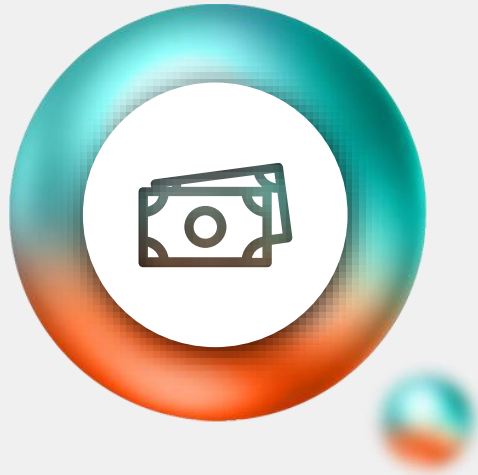
CX EX OX CX Average EX Average OX Average

WHAT DO CUSTOMERS CARE ABOUT?



% OF COMPANIES WANTING TO INVEST IN A PARTICULAR CHANNEL





05

TREND 3: AI IMPACTING SALES AND EFFICIENCY

Selling through digital channels is beneficial for performance,
but is challenging to succeed with



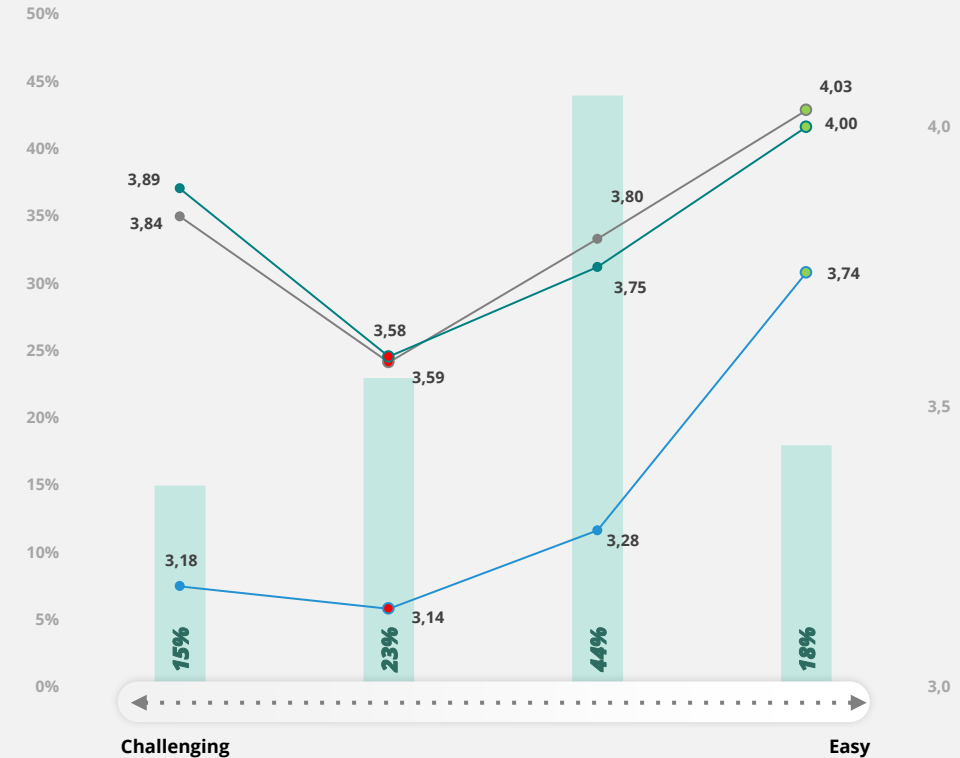
Will AI support the transition from transactional to sales-focused Customer Services?

The debate on how and whether AI can support companies transitioning from **transactional to more value-based profit centers through the shift to digital channels** have already started and will with further evidence from real life cases continue to enlighten us.

Based on insights from this study, the market is currently experiencing this transition. For example, **only 40% of respondents believe AI has a positive impact** on sales. Also, 38% of the companies consider cross- and/or up-selling through existing digital channels to be **challenging/ somewhat challenging**, and only 18% find it easy.

This implies that companies are still struggling with effectively using AI for supporting agents to succeed with sales through digital channels. This calls for actions to better equip Customer Service **agents with the right AI tools and capabilities** to take an important step from heavy reliance on traditional channels towards digital channels to reach sales targets.

HOW CHALLENGING IS IT TO CROSS-SELL AND/OR UP-SELL THROUGH YOUR DIGITAL CHANNELS?



HAS AI IMPACTED YOUR SALES IN CUSTOMER SERVICE?



Unlock cost efficiencies through digital solutions



Clear AI strategy is key to reach goals

The survey included an open-ended question asking respondents to identify the main opportunities for improving cost efficiency within customer service thus respondents were free to suggest their strategies. Almost half of the respondents clearly **identified AI or process automation as the key for improvement**. Suggestions for utilizing AI involved streamlining workflows, reduce handle time, and optimize customer pathways.

On the other hand, **11% of respondents are uncertain about the main opportunities for cost efficiency**, underlining a strong need for guidance and clearer strategies on AI in Customer Service.

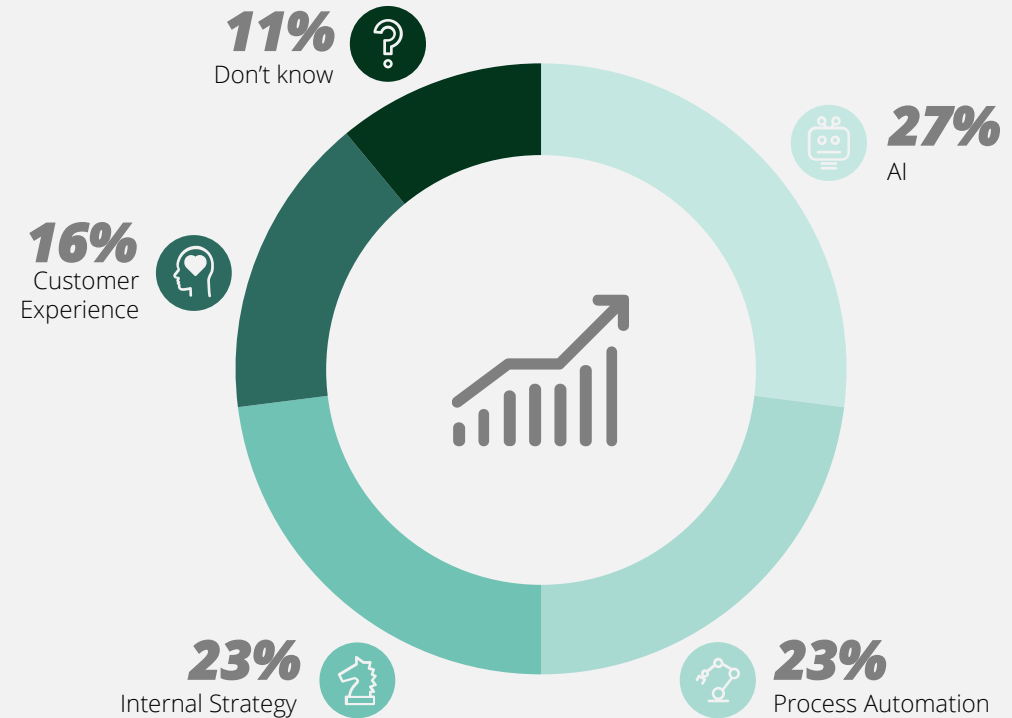
Excellence rooted in digital solutions

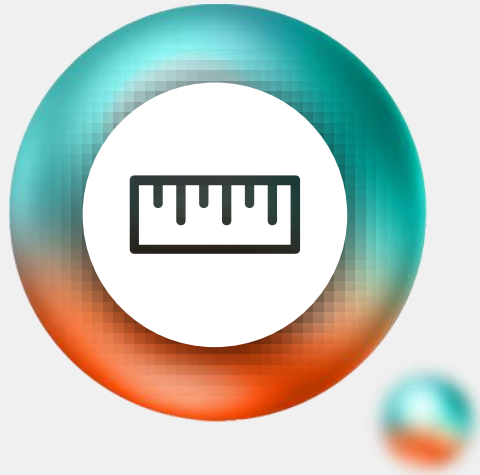
Refining Internal Strategies and focusing on Customer Experience were also strongly advocated. Approaches included digital transformations, implementing better tools for agents, and improving self-service channels.

Clear trend towards digital tools

The overall indication is that **there is a clear trend towards leveraging AI and Process Automation, while there is some uncertainty**. Whether the focus is on Operational Excellence (OX), Employee Experience (EX), or Customer Experience (CX), **there is a growing recognition of digital tools' role in streamlining operations and reducing costs** in these areas. Companies should prioritize digital solutions to achieve cost savings and enhance overall service excellence.

WHAT ARE THE MAIN OPPORTUNITIES FOR IMPROVING COST EFFICIENCY WITHIN CUSTOMER SERVICE?





06

TREND 4: BALANCING PERFORMANCE MEASURES

Getting the basics right of measuring and prioritizing efforts is important for high performance in Customer Service



The operational perspective: Balancing performance measures



Emphasis on quality, with minimal variation among KPIs

The wide use of both qualitative and quantitative metrics to measure performance has been apparent for many years in Customer Service, and the results from this year's survey is no difference. A slight change can however be spotted: A significant portion (69%) of Customer Service managers prioritize **Service Quality** when assessing performance of their teams and employees. Also, the increase from 2023 in the Time to resolve an issue KPI (11pp increase) signals a further growing focus **on operational efficiency** in Customer Service operations.

So, similar as last year, Customer Service leaders need to optimize the use and prioritization on competing KPIs, such as **balancing time efficiency** (e.g., time per customer) with **solution quality**. However, the variations in **performance impact on CX, EX and OX scores** are minor between the various KPIs.

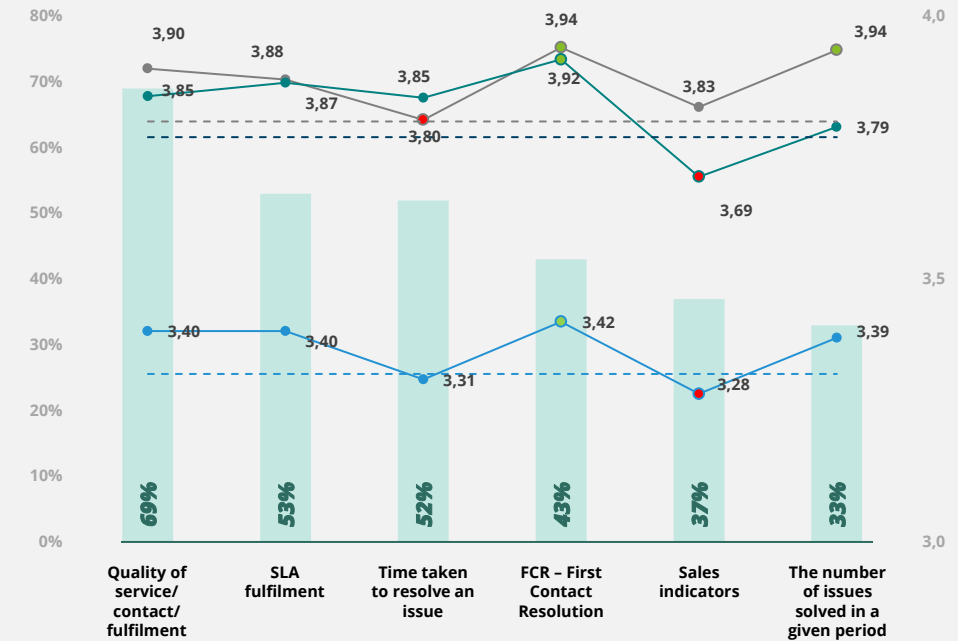
Sales and efficiency not compatible

Although there are differences in the number of responses for each KPI, However, focusing on sales indicators leads to slightly lower OX, implying that in customer service, sales and efficiency are not yet compatible. Due to the challenges in achieving efficient sales, EX is also considerably lower.

Strategic Insights

The small differences in KPI performance and the strong emphasis on Service Quality suggest that Customer Service teams should **maintain their focus on quality while balancing this with a sharper focus on operational efficiency**. Striking a balance between the two could lead to improved performance without overburdening employees with excessive targets

MOST POPULAR METRICS USED TO MEASURE THE PERFORMANCE OF TEAMS AND INDIVIDUAL EMPLOYEES



Measuring customer satisfaction: Reflecting organizational values in customer experience

1: Importance of measuring customer satisfaction

Organizations that actively measure customer satisfaction tend to achieve higher overall CX scores. The most commonly used metric is **NPS - Net Promoter Score**, utilized by 60% of companies. **C-SAT - Customer Satisfaction** follows closely at 57%. Interestingly, only 32% of respondents use **FCR - First Contact Resolution** to gauge individual agent performance, and a mere 11% do not measure customer satisfaction at all. This highlights a significant opportunity to leverage FCR more effectively to boost CX.

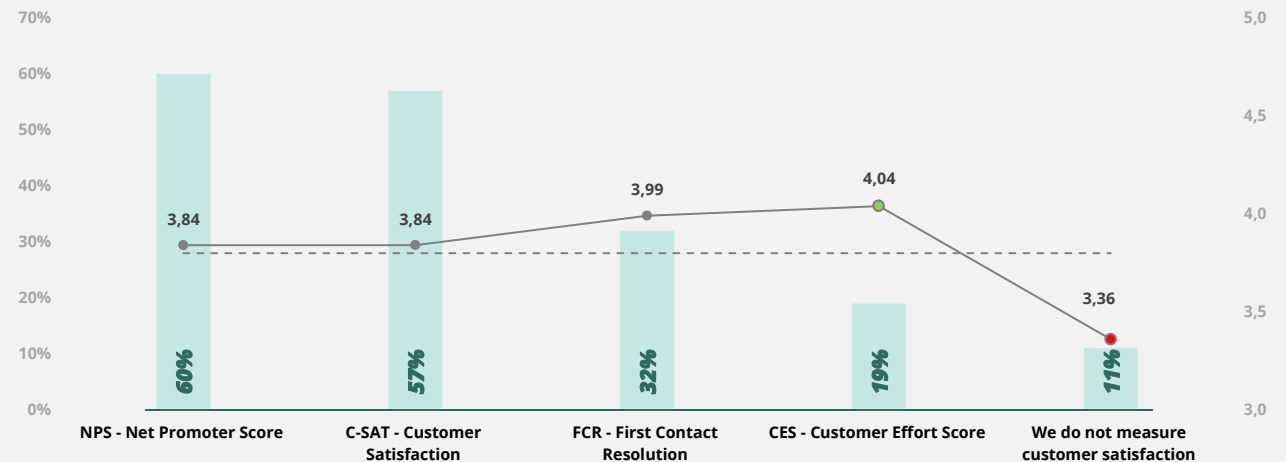
2: Regular analysis of customer feedback

Frequent analysis of customer feedback is linked to improved CX outcomes. **Real-time analysis** is particularly impactful, though only 6% of companies currently employ it. The data shows that more frequent updates, such as within hours or daily, have a substantial positive effect on CX, EX, and OX. This underscores the need for organizations to adopt more timely data analysis practices to enhance their Customer Service operations.

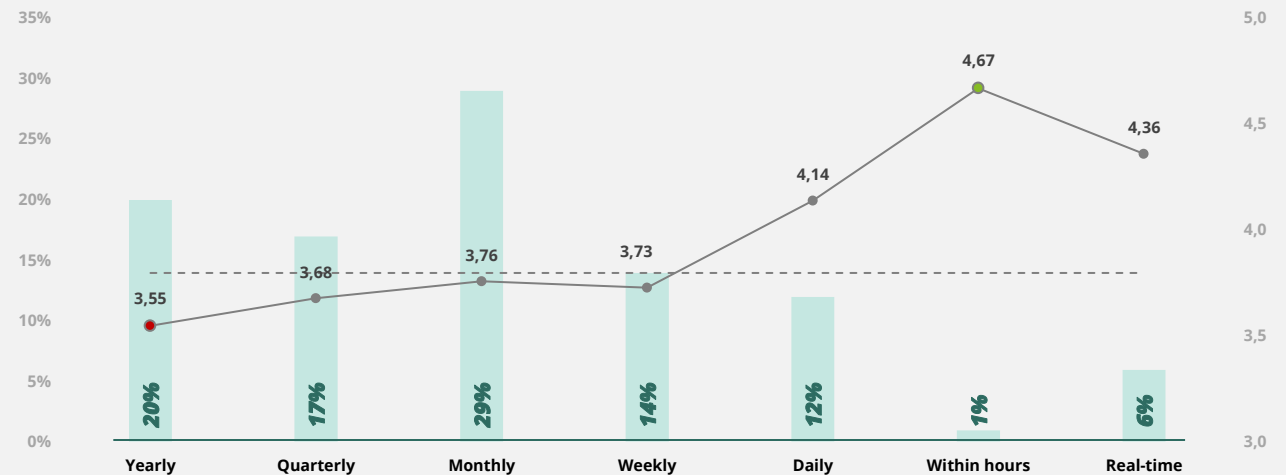
3: Leveraging insights for continuous improvement

Utilizing customer insights to drive changes and improvements is crucial for achieving better CX scores. By focusing on customer-centric strategies, businesses can better meet customer needs and create value. This process requires dedicated resources and tools to effectively analyze data, generate actionable insights, and implement changes consistently. The highest CX score (4.04) was observed for **CES - Customer Effort Score**, indicating the importance of reducing customer effort in improving satisfaction.

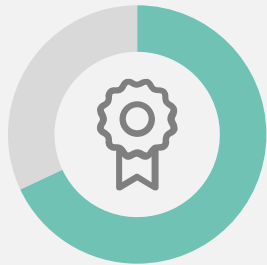
MOST POPULAR METRICS USED TO MEASURE CUSTOMER SATISFACTION



HOW OFTEN DO YOU ANALYZE CUSTOMER SATISFACTION SURVEY RESULTS?



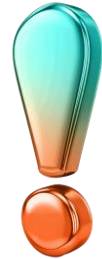
Boosting employee potential: Driving positive impacts on customer satisfaction



68%
of companies
carry out
employee
satisfaction
surveys on a
regular basis

Satisfied employees create satisfied customers!

Similar as during 2023, 68% of Customer Service organizations conduct regular employee satisfaction surveys. From those organizations measuring the employee satisfaction, 69% of leaders see their teams as satisfied or highly satisfied. The data shows a **strong link between Employee Satisfaction (EX) and Customer Experience (CX)**, emphasizing that aligned employee and customer experiences drive business growth. This linkage was also evident during the 2023 report.

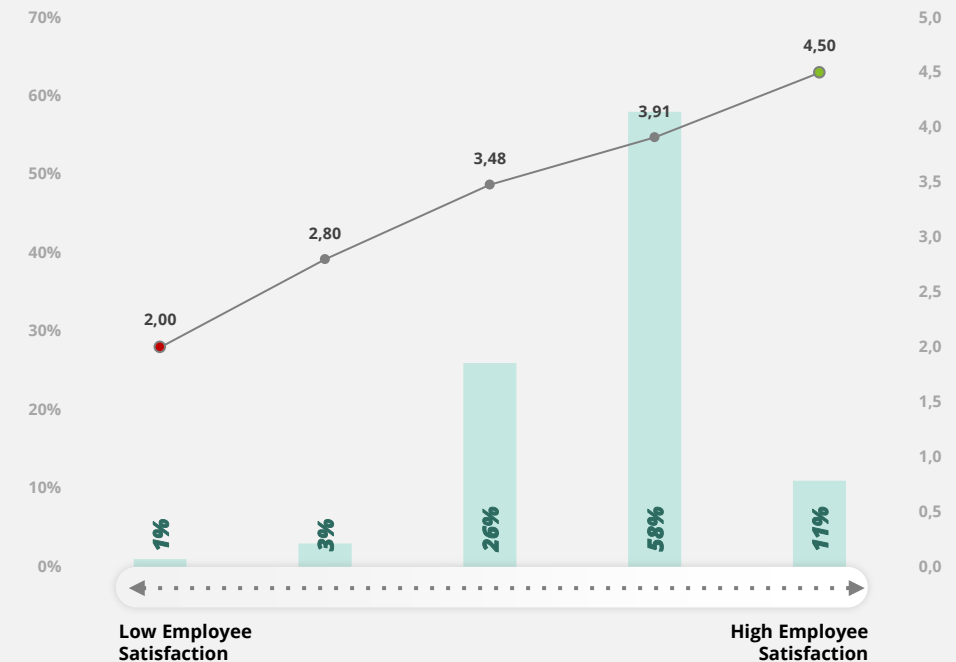


You get what you measure: Focusing on customer and employee satisfaction is generally also reflected in higher satisfaction levels. So, make sure your focus is clearly represented in the KPIs and operational processes!

However, over 30% of companies still do not conduct these surveys consistently, with the automotive sector particularly lagging. Fostering employee satisfaction remains crucial for delighting customers.

Most importantly, follow-through matters—how a company acts on the findings, implements changes, and ensures ongoing quality monitoring is essential. For those companies not conducting employee surveys, there is an opportunity for improvement in truly understanding and supporting their workforce.

CORRELATION BETWEEN EMPLOYEE AND CUSTOMER SATISFACTION INDICATORS



Provide the right tools and access to information to ensure high overall performance



The correlation between CX, EX, and OX levels and the quality and customization of tools and interfaces

While most respondents find their tools acceptable or good, **only 13% rate them as excellent and well-customized**. Improving tool quality can significantly enhance CX, EX, and OX scores. Notably, 38% rated their tools 4 out of 5, suggesting adequate support for Customer Service teams. Better tools clearly drive higher CX, EX, and OX scores, making investments in them highly beneficial.

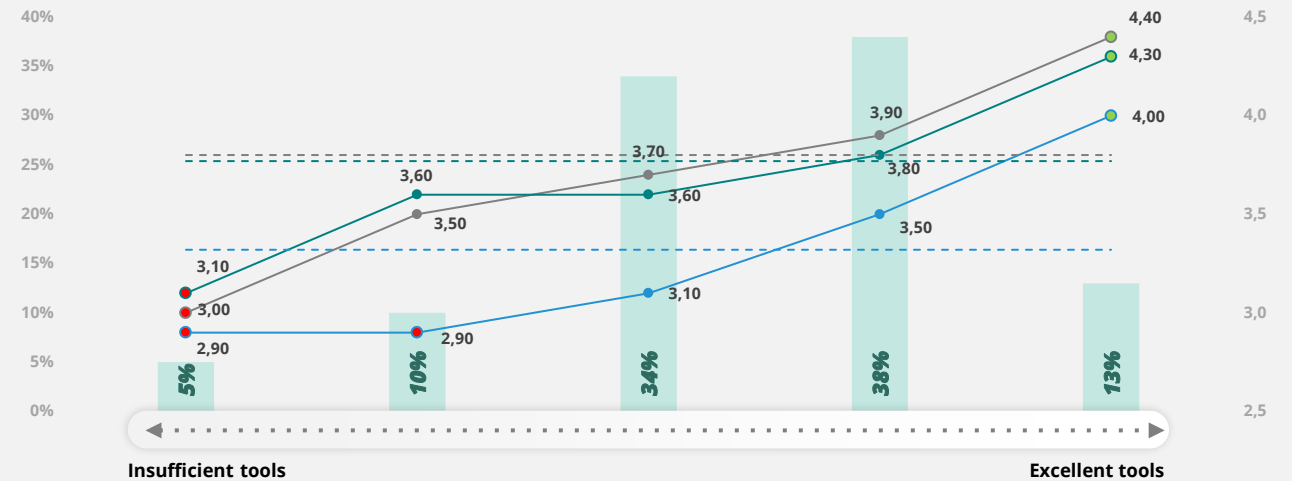


Easy access to information for agents is linked to high CX, EX, and OX scores

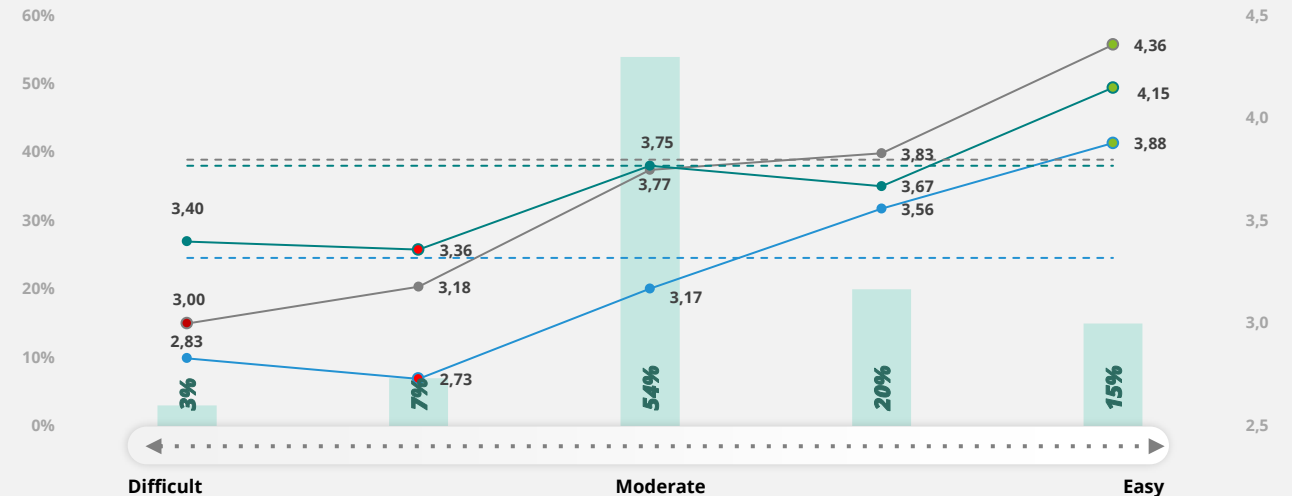
Only 15% of respondents find information easily accessible, while 54% report moderate access. Constantly navigating between pages to locate data underscores the issue. Better data access could improve CX, EX, and OX scores. With 54% rating ease of access at 3 out of 5, improvement is needed. The public sector has the poorest Customer Service tools (18% poor), while the automotive sector excels with the most excellent tools.

These findings highlight the critical role of **equipping agents with appropriate tools and easy access to information** in driving the success of any Customer Service organization.

DO WE HAVE THE RIGHT TOOLS?



IS THE INFORMATION EASILY ACCESSIBLE FOR THE EMPLOYEES?

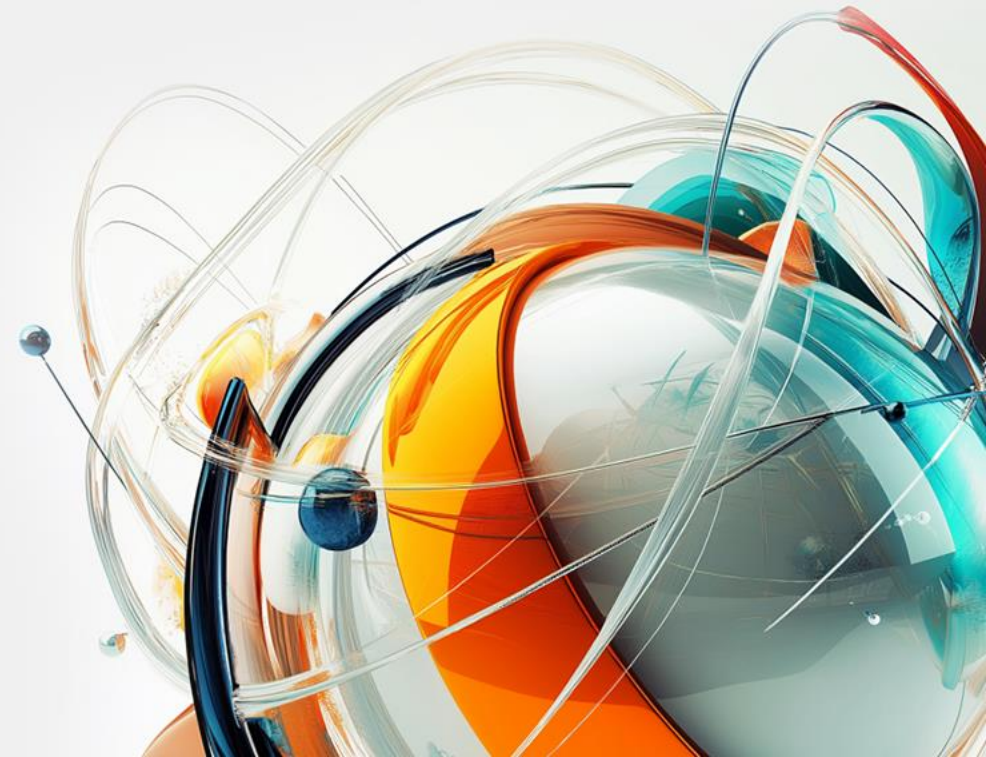




07

OUR OFFERINGS

What Deloitte can offer to support
to meet these trends



Does your company have the right strategies for your Customer Service organization to meet the demands from these trends?

We at Deloitte can support you to **REACH YOUR GOALS** with your **CUSTOMER SERVICE**

Service excellence maturity assessment

Gain an assessment of your **Service Excellence capabilities** to set the right expectations for your channel strategy based on best practices and benchmarks. Use those insights to build your Customer Service for success!

Prerequisite to plan and act to reach benefits

AI strategy for your Customer Service

Develop an **AI strategy** and plan for your AI journey within your Customer Service organization, together with key stakeholders across IT, Business and Legal to ensure coherence across the company.

Prerequisite to plan and act to reach benefits

Create guided omnichannel with AI

Create your optimal **right-channelling strategy with AI** as a key enabler based on your company's segmentation approach. Guiding the right enquiries to the right type of channels to enhance efficiency, sales and satisfaction!



Reduced cost to serve



Improved customer experience



Increased revenue

Enhance your self-service channels

Assess your **self-service channels and capabilities** based on fit for purpose, prioritize improvements and then start to develop required improvements based on your optimal to-be state!



Reduced cost to serve



Improved customer experience



Increased revenue

Implement AI cases in your service journey

Assess and start **implement AI use cases** in your Customer Service based on what key goals to meet. Gain knowledge by realizing effects and gain insights on how to scale. Scope and implement Proof of Concepts or pilot, test, learn, refine and scale through our tested methodology!



Reduced cost to serve



Improved customer experience



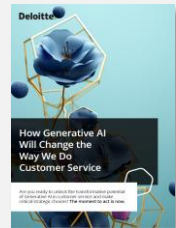
Increased revenue

We bring insights and expertise in Service Excellence

Deloitte Digital Insights secure that we stay at the forefront of new development and assess best practices relevant to the goals and aspirations of your organization to deliver outstanding results and truly make an impact that matters.



Digital Consumer Trends (2023)



How Generative AI will change the way we do Customer Service (2024)



Facing the future of field service (2023)



Global Marketing trends (2023)



Customer Service Excellence (2023)



Guide to provide excellent Customer Service in a cost-effective manner (2023)



The future of service? Optionality (2024)



Contact centers face a new reality (2024)

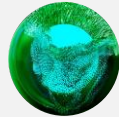


We bring end-to-end capabilities to move into activation, leveraging our partners, ecosystems, AI assets and a willingness to meet your goals



GEN AI STUDIO

The Deloitte GenAI Studio accelerator is our low-code tool that **enhances technical capabilities, reduces costs, and adapts to evolving needs.**



GENAI INCUBATOR

Our Incubator benefits from the strength of our Global Delivery Network; our multi-disciplinary model; and deep AI, cloud, and engineering experience that has already deliver 100+ AI PoC's



TRUESERVE

We combined Deloitte's deep industry expertise & innovative thinking with the power of our AI and our alliance partners to bring you a flexible & accelerated way to transform your contact center.



Market leading CRM integrated with advanced AI, agentic AI, and contact center capabilities



Enhanced CX solutions that blend digital and AI capabilities to drive efficiency and satisfaction

COGNIFY

The leading Enterprise Conversational Automation Platform



Extensive AI and Customer Service capabilities with Copilot and AI-agents



END-TO-END EXPERTISE

In-house experts on all aspects of an autonomous service solution like change management, data, strategy, legal, and more.



GLOBAL NETWORK

A strong global network of skilled specialists within the wide range of Customer Service capabilities to be easily connected and onboarded.



PROVEN INDUSTRY KNOWLEDGE

Leverage Deloitte's deep industry knowledge and benefit from customized solutions for every industry

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Thank You

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