



From cost center to experience hub.

Tapping the potential of customer service to help drive business growth.

June 2021

Through our 2021 Global Contact Center Survey and our ongoing interactions with clients, we've identified five trends that contact center leaders are adopting to enable better operations and drive results for both their customers and their businesses:

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TREND 1

AGILE SERVICE

As the pace of change quickens, service leaders must find new ways to infuse scalability and adaptability into everything they do. That's why they're leaning into cloud technologies and flexible workforce models more than ever before.

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TREND 2

AI EVERYWHERE

Smart brands are focusing on new tech-with-talent models that leverage data, artificial intelligence and other technologies to provide experiences that are smarter, automated and more human.

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TREND 3

DISTRIBUTED WORKPLACES

The COVID-19 pandemic dramatically accelerated the trend toward remote work—with many companies forced to move faster than they were prepared to move. Despite the challenges, contact center leaders are realizing that the benefits of remote work are worth the effort.

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TREND 4

FROM EVERY CHANNEL TO *RIGHT* CHANNEL

Service channel diversification has often come at the cost of efficiency and effectiveness. That's why some brands are focusing on what we call "right-channeling"—guiding customers to the most efficient channel for each need while connecting the overall service journey across touch points.

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TREND 5

FOCUS ON VALUE

Contact centers have traditionally been viewed as a cost of doing business. But increasingly, companies are shifting to a paradigm in which valuable customer service experiences are paramount—and business value is the result.

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CONCLUSION

MOVING EVERY CUSTOMER TO THE FRONT OF THE LINE

There is no "back to normalcy." Service center leaders should evaluate where they are on the digital transformation trajectory and embrace new opportunities to turn service into experiences—and translate experiences into deeper customer loyalty and accelerated business growth.





INTRODUCTION

“For disruption, press 2020.”

Your call is extremely important to us ...

Throughout history and across cultures, service has traditionally been considered a *value*—one that is proven through altruistic acts. Religious leaders, politicians and poets have extolled the virtues of *service*—and reminded us of the good it can do not only for others but for ourselves. Among Fortune 500 companies, customer service is now the fourth-most popular core value.¹

Yet, for decades, the ledger definition of service—as a *cost* of doing business—dominated the way that companies set their customer contact or service center strategies and budgets. Low-paying service jobs were sent offshore to countries where pay was even lower. Interactive voice response (IVR) systems were deployed in ways that sometimes made it impossible (and almost always made it difficult) to reach a human agent. The length of service calls was measured; the quality of outcomes for customers, too often, wasn't.

That way of thinking began to change as companies focused more on experience. Today, practically every brand agrees that customer experiences are the lifeblood of brand differentiation and growth. Our research shows that the experiences that are most likely to build or break customer trust and loyalty are customer service interactions—especially those with human representatives of the brand.² And we've found that the quality of service interactions are the most effective predictors of customer lifetime value.³

In late 2018 and early 2019, we surveyed customer service leaders to understand their priorities and challenges. Most respondents were already turning their strategic focus to customer experience over cost reduction.

Then, of course, the COVID-19 pandemic struck, bringing with it unprecedented pressures on businesses—including supply chain breakdowns and community lockdowns, new ways of buying and new ways of working.

These changes had a sudden and profoundly disruptive impact on customer service centers.

- Operationally, contact centers had to adapt to fast-evolving stay-at-home orders and other restrictions—not to mention infection outbreaks—that impacted workplaces and workforces around the world.
- Customers suddenly needed new solutions to new problems. The unprecedented growth of e-commerce and direct-to-consumer sales, the sudden shift to new delivery channels such as curbside pickup and third-party local delivery services, the pivot to new product design and safety protocols—all of these changes meant that customers were calling, emailing, messaging and writing with new requests and issues that businesses often hadn't even contemplated a year prior.
- At the same time, contact centers became vital to customer experience in ways that we hadn't seen before. And in many cases they became *the most important way* to grow.

Please listen carefully as our menu has changed ...

In late 2020, Deloitte Digital once again surveyed customer service leaders across a wide range of industries and geographies (for survey methodology, see page 20). Not surprisingly, many of those leaders were—and are—still grappling with the fallout from disrupted markets and supply chains,

locked-down communities and shuttered workplaces, rattled employees and evolved customer priorities.

Despite these challenges, service leaders told us they remain focused on the same strategic priorities that they were pre-pandemic. Customer experience remains the most important strategic focus for contact center leaders, and becomes an even higher priority two years from now. Cost and efficiency pressures remain considerable.*

But tactically, leading brands are making bold moves today to help solve customer service needs of tomorrow. They're accelerating digital transformation, adopting new models for work and workplace, reimagining their mix of service channels and finding ways to turn service centers into revenue generators. They're also evolving the mix and balance of metrics to help ensure a closed feedback loop between strategies, tactics and performance.

As the acute challenges of the pandemic recede, the time is ripe and the motivation is clear for customer service leaders to heed the lessons of 2020 and drive improvements and differentiation going forward. In this paper we discuss five trends that are helping service leaders answer the call for better customer experiences—and more efficient, effective, valuable service operations.

** Unless cited otherwise, the insights, conclusions and statistics included in this paper are sourced from our owned survey research and our client experience.*

TREND 1: AGILE SERVICE

Embracing unprecedented change through cloud.

If there was a single word to sum up the business imperative of 2020, it was *agility*. The pandemic forced many companies to rapidly adjust the ways they marketed, sold, sourced, manufactured, shipped and served their products—while simultaneously reimagining protocols and priorities across human resources, finance and other back-office functions. Many employees were sent home to work remotely, where they had to learn new skills and processes while addressing new needs for customers. No business discipline, no industry, no country, no person was untouched by change.

Some customer service leaders were caught flat-footed.

Technology, infrastructure, processes and security protocols designed and selected for an on-premises environment couldn't simply be shifted to employees' homes—especially in some rural and offshore locations where workers at home often lacked high-speed internet or even functional workspaces. New products and features, delivery models and business policies meant service leaders needed to profoundly and rapidly reassess employee training, engagement, management, metrics and ways of measuring results.

This series of disruptions led many contact center leaders to **double down on digital**

transformation, with cloud technology at the center.

At the end of 2020, only 32% of surveyed organizations were running contact center technologies in cloud. But fully 75% expect to make the move within the next two years. While many organizations started their journeys by shifting customer relationship management and IVR systems to cloud, momentum is now accelerating across every key technology—including the core telephony platform (automatic call distributor), analytics, interaction recording, quality management, knowledge management and workforce management.

Of course, cloud is about more than technology transformation. By enabling more flexible and iterative adjustment of capabilities, scale and processes, cloud can serve as a catalyst for companies to rethink their ways of doing business, managing workforces and interacting with customers—from how they source and skill agents, to how they interact via IVR, to the way that different engagement channels are utilized and connected.

Toward those ends, contact center leaders have focused on workforce outsourcing as a means to introduce or enhance agility within their operations. On average, contact center leaders expect to outsource a full 37% of

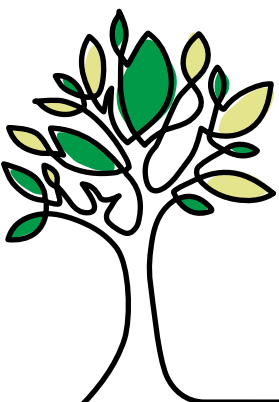
their total workforce two years from now. Reshoring is also on the rise, with 25% of leaders planning to reshore or not offshore agents at all. While offshoring remains an effective tactic for reducing overall service costs, outsourcing and reshoring can help extend agility into the contact center workforce by increasing scalability, expanding expertise, accelerating speed to market and reducing operational risk.

Prior to the COVID-19 pandemic, some companies were slow to embrace cloud due to security concerns, expected costs, and the lack of internal capabilities to deploy and manage cloud solutions. However, more and more leaders are now recognizing that cloud is not simply a “nice to have”; it is an imperative for doing business in a time when customers, competitors, markets and technologies can change in the blink of an eye.

75% of contact centers will move to cloud in the next two years.

WHY IT MATTERS

Across industries, operational disciplines and geographies, cloud is a proven way to infuse greater speed, scalability and agility into operations. Contact centers that are focused on elevating customer experiences need that kind of adaptability in order to meet the shifting expectations of customers and to respond to changes in the competitive, regulatory and cultural environments.





TREND 2: AI EVERYWHERE

Fostering human connections at machine speed.

Customers prefer genuine human experiences with brands. Recent Deloitte Digital analysis of over 300,000 social media posts has showed that person-to-person service interactions were the most common factors cited in posts about feeling “valued” by a brand.⁴

This preference for human interaction is no surprise to customer service leaders. Neither is the fact that service provided by live agents is expensive and almost impossible to scale quickly as call volume changes.

Past technological advances such as IVR and web-based self-service have attempted to address this challenge by deflecting or containing simple requests within automated systems—enabling live agents to focus on more complex needs, or at least have more information at their fingertips when they pick up the phone.

But we all know from personal experience that navigating an IVR menu system hardly feels human. By the time we finally reach a person and are asked for the same account information we already provided, it can feel almost inhumane.

Today, advances in technology are once again transforming customer engagement capabilities and service delivery models. And this time, it's about more than call deflection or cost reduction. Cognitive technologies such as natural language processing,

speech recognition, process automation and robotics are the key to helping customer contact center operations **drive experiences that are more personal, intuitive and empathetic—and that are also faster, more automated and more scalable.**

AI is already everywhere across customer service operations. It's now hard to find software that *doesn't* include some type of artificial intelligence capability, from smart IP-based telephony platforms to workforce and workflow management systems. And, new modular tools and integrations are constantly emerging—enabling an ever-widening range of use cases that drive faster solutions, greater personalization and smarter automation.

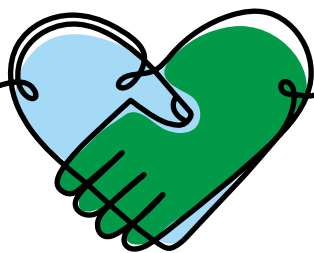
To be sure, these investments have been slow to pay off. Only one in four leaders said that AI had met or exceeded expectations, while nearly two out of five said that AI had not delivered on its promise. Most said their capabilities were still in the pilot or testing phase. To accelerate success, it's important to find specific, targeted applications of AI to drive business value while preparing for better ways of working with the technology.

Ultimately, even AI's biggest current skeptics recognize that it stands to revolutionize contact center operations and customer experiences—and no leader wants to get left behind when that potential becomes reality.

To complement and expand what's possible with AI, companies are also investing heavily in process automation such as robotic process automation, customer resource management, workflow optimization and “next best action.” Two out of three companies plan investments in those areas over the next two years.

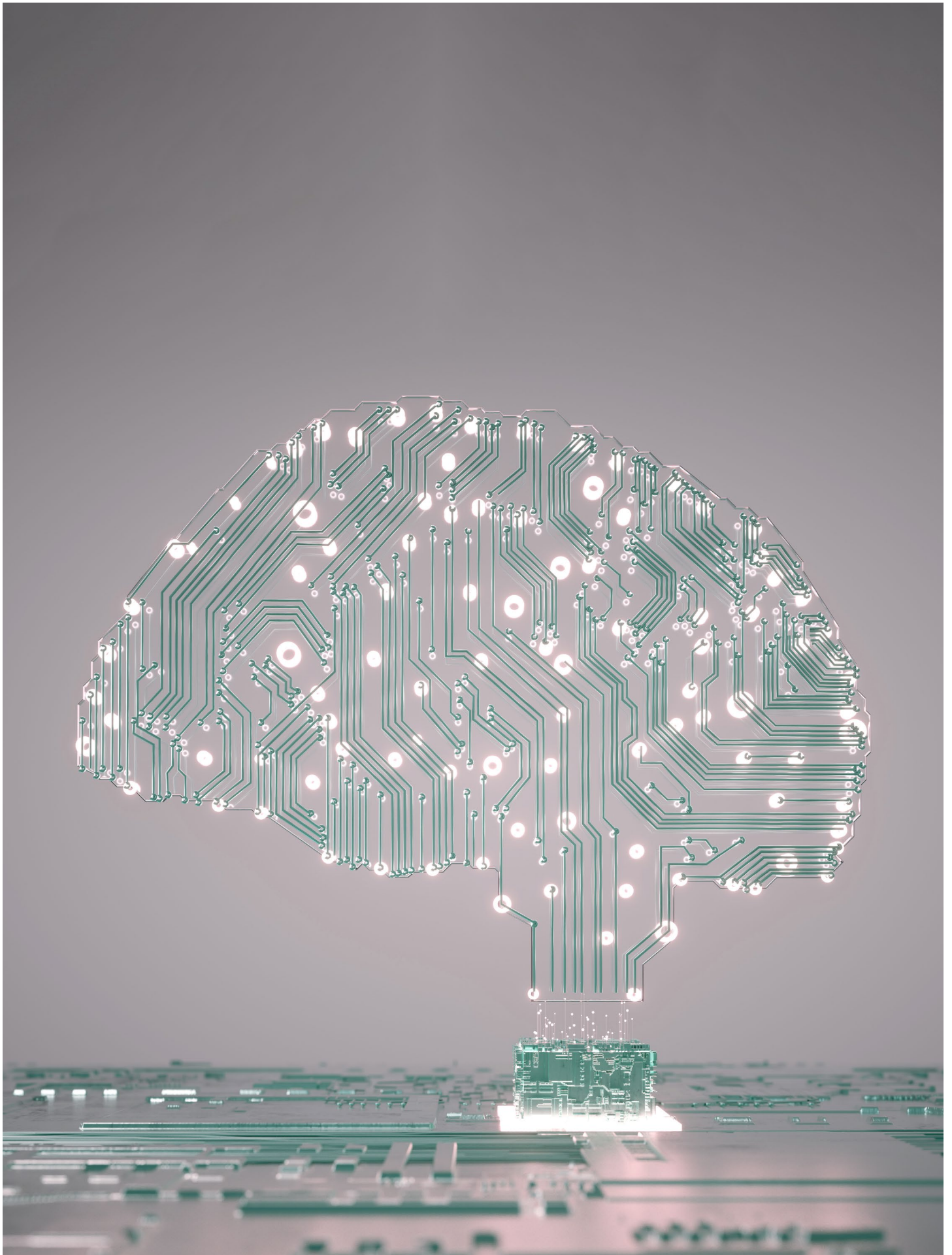
When deployed and integrated smartly, these technologies can enable companies to deliver more effective customer outcomes at machine speed by resolving simpler requests with automated services. And they can empower human customer service representatives with the individual-level customer data, business knowledge and solution tools to be more empathetic, more flexible and more able to solve every customer request.

79% of contact center leaders plan to invest in greater AI capabilities in the next two years.



HOW IT CONNECTS

Today, AI's primary application is to help deflect and contain customer interactions within IVR systems and chatbot sessions. Organizations that are further along the AI journey are now working to improve person-to-person interactions as well by connecting voice and text analytics, knowledge management tools and CRM capabilities with customer data to drive personalized, in-the-moment experiences.



TREND 3: DISTRIBUTED WORKPLACES

Making work from home, work.

In early 2020, as pandemic-related lockdowns became common around the world, the vast majority of customer contact organizations were forced to move all or most of their agents to a work-from-home model in a very short time. By the end of 2020 the percentage of directly employed agents who worked from home had dropped to 56% as organizations around the world started to transition staff back to onsite work, as local laws and regulations allowed. The shift also impacted outsourced agents, 35% of whom were working remotely at the time of our survey.

Compare this to the fact that before the pandemic only 6% of customer service agents, on average, worked from home, and you can see how quickly and significantly the work-from-home operating model has come along.

Many service organizations were ill-prepared for this revolution in the nature of work and workplace. As they cobbled together plans and programs—often from scratch—many leaders wondered: Was this just a stopgap to address a temporary need created by the pandemic? Or an opportunity to leap to a new model that provides competitive advantages and elevated experiences?

Certainly flexible and remote work arrangements had become more common in recent years, even prior to the emergence of COVID-19. But contact centers often faced challenges in applying those models. Customer service agents are often among the lowest paid workers within the modern enterprise, and their professional experience typically is not extensive. As a result, they require more ongoing training than other employees. Add in the fact that their positions are often stressful—with

high workloads punctuated by difficult interactions with angry customers—and it's no surprise that attrition tends to be high in contact centers.

These workforce challenges were exacerbated by the pandemic-forced shift to working from home. One out of four companies said they experienced lower agent performance and longer hiring and onboarding cycles as a result.

Compounding the challenge, many companies were not prepared to send employees home at the beginning of the pandemic due to technological or process barriers. On-premises computers, servers and hardwired phone systems couldn't simply be sent home with employees (some of whom lacked reliable home internet, especially in some rural and offshore locations). Remote employee training and management programs hadn't been developed or tested.

Despite the many bumps in the road, leaders now recognize that working from home will become integral to the future-state operating model for contact centers. Even as some organizations pull agents back into contact centers in the near-term, forward-thinking leaders are working to lay a sustainable foundation for their work-from-home programs in the longer term. The reason? **Better workers at lower cost.**

By allowing employees to work from any location with access to high-speed internet and a computer, companies can tap workforces that are far removed from their official corporate offices. The length of commute is no longer an issue—and neither is the cost of living near contact centers. Companies can also expand the types of

employees who work for them, such as stay-at-home parents who prefer gig or part-time work.

While the agent performance in a remote environment is something that the center leaders are concerned with, the work-from-home model ultimately can lower the cost of running a contact center by reducing or even eliminating expenses that were previously considered fixed and not directly productive: real estate, utilities and other facility-related costs. Eight percent of companies now plan to close their physical customer service centers entirely.

To be certain, this shift is not without ongoing challenges.

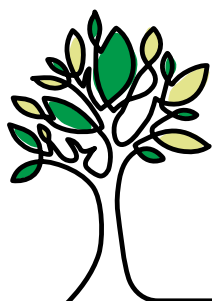
In the near term, many contact center leaders are increasing investments to support employee and management needs, such as collaboration and teaming tools, remote training resources, dual monitors for agents and cloud-based telephony.

Longer term, it is important that companies build robust training programs with tools and processes to remotely train employees from day one. They'll also need employee experience programs, resilient risk and security protections, and other workforce and workplace processes and assets to help ensure that employees still experience a sense of purpose, place and connection—no matter where they're working.

77% of service organizations are either adopting or accelerating their work-from-home programs.

WHY IT MATTERS FOR GROWTH

By embracing the work-from-home model, companies can often find both better qualified *and* less expensive employees—while enabling greater scalability of resources to address peak times of need. This creates the potential to enhance organizational agility while also supporting a wider array of employee preferences.





TREND 4: FROM EVERY CHANNEL TO *RIGHT* CHANNEL

Optimizing channels, connecting journeys.

It's now more or less expected that companies be able to provide service at any time of day for any need, via phone, email, live and asynchronous messaging, and social media—as well as in-store and via physical mail. Businesses have endeavored to deepen capabilities in each of those channels, and to connect them in ways that produce seamless experiences for customers.

There is smart thinking behind these efforts. Customers want connected experiences—and are willing to abandon brands that don't offer them.

For these reasons, omnichannel service orchestration has been a mantra of service leaders for years. Toward that end, roughly 60% of organizations reported progress on connecting their service channels, and 11% can now transition customers across channels and experiences seamlessly.

The trouble is, optimizing every possible experience on every channel isn't just difficult—in many cases, it isn't really feasible. Customers seem to know this intuitively. Today, 36% of leaders say that despite the ongoing proliferation of service “front doors,” customers have stuck with the same, familiar channels—primarily phone, the most expensive channel of all—to reach them.

To balance the needs of customers with the needs of the business, leaders are now looking to **complement omnichannel service orchestration with a new principle: “right-channeling.”** The idea is to meet customers where they are in the moment *and* usher them each to the most appropriate channel to answer their needs.

A key here is to recognize that omnichannel service doesn't mean *any* channel, but rather *all* channels. Done right, it's about making transitions and connections so seamless across every offered channel that they don't even feel like transitions at all, but rather stepwise motions as you escort

your customer along the most efficient path to a solution—while helping them feel recognized and valued at every step along the way.

Right-channeling starts with mapping contact types to the most suitable channel or channels based on the nature of contact, data exchange, ease of use and likelihood of first-contact channel resolution; and then deploying appropriate tactics across channels to guide customers to the desired channel.

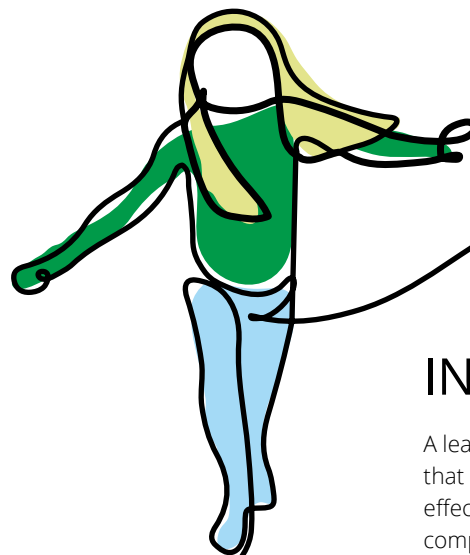
So, for example, when customers need to register address changes there should be one primary channel to do that efficiently. If they reach out through a different channel—for example, by phone—automated responses can quickly link them to the right channel—say, by sending a link to the best resource via SMS or email.

This isn't just about efficiency. In our research on emotions, we found that beyond considerations of product quality and price, customers consider quality and

speed of service to be the most important factors in *building trust for a brand*.⁵

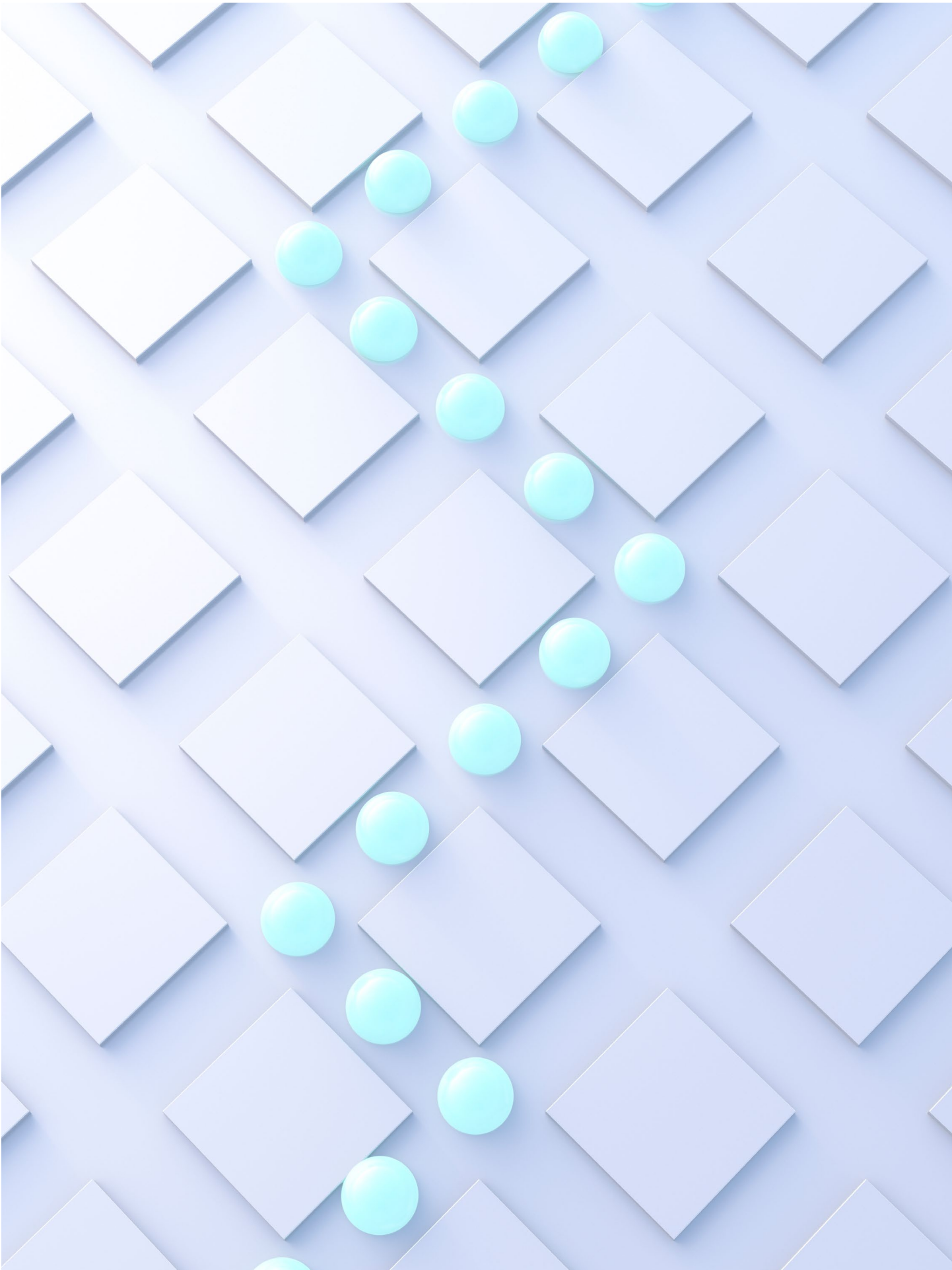
By combining omnichannel and right-channel service capabilities, you demonstrate that you *understand* your customers, *value* their time and *can deliver* valuable, consistent, effective solutions for any need. That helps build customer trust. And in the process, you can reduce the cost and complexity of service delivery for your organization.

87% of customers find it frustrating to repeat themselves in multiple channels, and **73%** question doing business with that brand as a result.⁶



IN THE REAL WORLD

A leading consumer goods company found that channel complexity was reducing service effectiveness and efficiency. We helped the company analyze ongoing contact trends and channels and, where appropriate, invent methods to nudge customers toward different channels that improve both the customer experience and business efficiency.



TREND 5: FOCUS ON VALUE

Serving business growth.

Traditionally, contact centers were viewed as little more than a necessary cost of doing business. Still today, reducing costs remains the second-highest strategic priority for the contact center leaders we surveyed.

Trouble is, the most efficient operational solutions aren't always what's best for the customer—or even for the business. In our research on emotions, we found that three out of five surveyed customers would likely *abandon their favorite brand* after a bad customer service interaction. Two out of three said they are also unlikely to purchase again from a favorite brand if they received no solution after a complaint.⁷

With the capabilities available today, there's little excuse for bad service. Yet a cost-reduction-at-all-costs mentality means that bad customer service is an almost unavoidable outcome in many cases.

In recent years, the emerging competitive importance of customer experience, combined with the hastening march toward digital-first business and commerce models, has caused service leaders to rethink the goals they serve and the roles their organizations perform. Experience-focused leaders are shifting their orientations from an emphasis on reducing costs toward the goal of generating business and customer value.

They've recognized that in today's digital-first paradigm, customer service is often the first and primary point of contact between customers and brands. By providing proactive, efficient service that feels personalized and effortless to the customer, these brands are able to foster greater

satisfaction, trust and loyalty—the *critical ingredients to growing brand value and market share*.

In other words: They're finding ways to **drive business value by orchestrating valuable service experiences**. Along the way, they're opening the door to direct revenue generation within the service operation, through personalized offers that fit the context and needs of the customer.

Embracing this shift doesn't require a wholesale transformation of your operations. Indeed, existing technology investments have the potential to serve all of these aims.

- Customer relationship management systems can provide the single view of each customer that sets a foundation for *personalized and proactive* engagement.
- Analytics can help you understand and predict customer behavior, satisfaction, lifetime value and potential churn—enabling further *personalization*.
- Omnichannel orchestration platforms help meet customers where they are and connect them to what they need—making service feel more *effortless*.
- Knowledge management resources drive *efficiency* for both customers and the business.
- Artificial intelligence can impact it all—allowing your business to provide *proactive* alerts and reminders, *personalized* offers, *effortless* self-service, and *efficient* responses to customer needs.

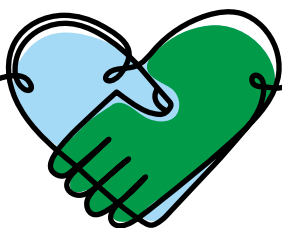
To succeed in this shift, it is vital to start with the customer's wants, needs and context.

Fifty-five percent of service leaders are already including or planning to include selling in their service transactions. But take care: Those efforts can go awry if you don't first understand why customers are contacting you in the first place. After all, a first-time customer calling about a missing delivery or damaged product likely isn't interested in buying an upgrade—whereas a longtime, loyal customer might be looking for exactly that. And, if your next best offer is one-size-fits-all, it's probably the first-worst option. Your tactics should always be powered by individual-level customer data and contextual cues, and delivered in personalized ways.

Ultimately, a value orientation helps customer contact organizations focus on the long tail created by positive customer experiences. It's about recognizing that the cost of a service call today has benefits that can last for years—in happier customers, reduced churn, and expanded lifetime value that produces revenue growth.

2X: The percentage of service leaders whose top priority is increasing revenues will double in the next two years.

-1/3: At the same time, the percentage whose top priority is cost reduction will drop by 32%.



HOW IT CONNECTS

Delivering value through service depends on not only a shift in mindset but also consistency and connection across external touch points and internal organizations. Silos that separate product development and quality assurance from sales and service need to be broken down. Your business purpose, brand personality and marketing messages likewise need to be consistent and connected with the service experience.





CONCLUSION

Moving every customer to the front of the line.

All of our agents are busy helping other customers ...

As of May 2020, there were approximately 2.8 million customer service representatives working in the United States.⁸ But for a couple months there, you wouldn't have known it if you tried to get one of them on the phone. The COVID-19 pandemic caused massive customer service disruptions across industries, especially for those organizations that were just beginning to embrace digital transformation.

Looking back, what's perhaps most surprising is how quickly most organizations adapted to fast-evolving community regulations, market conditions, customer needs and business priorities. Contact centers that hadn't yet embraced work-from-home programs got them up and running, even when that meant routing phone calls to agents' personal phones and carting desktop computers from the office to employees' homes. Companies doubled down on cloud-based tools, AI-driven chatbots and other capabilities that helped reduce agent workloads while helping serve the needs of customers. As a result, one cross-industry study conducted late in 2020 showed that across 150 million inbound and outbound service calls, average hold time actually *decreased* by 53%.⁹

Of course, *answering calls quickly and hitting key performance indicators* are hardly the same thing. Behind the scenes, the scramble to shift people, processes and technology to the new conditions was often extremely difficult and costly.

Calls will be answered in the order they were received ...

In our work with clients, we've seen that the businesses that were best lined up to succeed in 2020 had a few things in common:

- They stuck with a customer experience-focused strategy, even as they implemented quick cost-cutting or cost-avoidance tactics to meet the pressures of the moment.
- They were already well along the path of digital transformation through cloud and scalable workforce initiatives.
- They understood the important balance between omnichannel service integration and right-channel service efficiency.
- They were committed to dissolving internal silos and connecting operations in ways that enabled more coherent, connected customer journeys.

Today, those organizations have a head start in their industries and markets. For others, now is the time to move customer experience and digital transformation to the front of the queue.

That means connecting feedback and insights across the whole enterprise to address the *root causes of customer support requests*. It means automating low-value customer interactions through AI, process automation and machine learning—thereby freeing up agents for higher-value engagement. It means leaning into agile principles and technologies to enhance scalability and accelerate solutions as needs arise.

Most important, it means reorienting the mission of customer service around enhancing value *for each individual customer*. By answering that call, your contact center can become the human heart of your digital business.



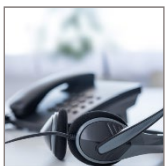
MAPPING THE PATH FORWARD

As you work to transform your contact center into the experience hub of your brand, ask yourself:

- 1** Are my customers using the most optimal channels for their inquiries? How can I help them to get there in ways that feel empathetic to their needs, respectful of their time and valuable to them?
- 2** Is my contact center prepared to respond quickly and effectively if another global event like COVID-19 were to happen?
- 3** How should I (re)structure my current work-from-home arrangements to align with my organization's return-to-office policies and to optimize access to qualified talent?
- 4** How do I transition my contact center from a focus on cost to a focus on value? What processes, training, tools and/or metrics do I need to support that transition?
- 5** What do I need to do in order to get the most out of my AI investments?



ADDITIONAL READING: CONTACT CENTER TRANSFORMATION.



Contact Centers Respond, Adapt to COVID-19 Crisis.

As contact centers navigate the COVID-19 pandemic, many leaders are taking the opportunity to rethink everything from technology to flexible work arrangements.

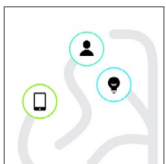
[View here](#)



Messaging in an omnichannel world.

Enabling contact centers to support asynchronous channels.

[View here](#)



Insights from Deloitte's fourth Global Contact Center Survey, 2019 report.

Seven key trends influencing strategic priorities at customer contact centers.

[View here](#)



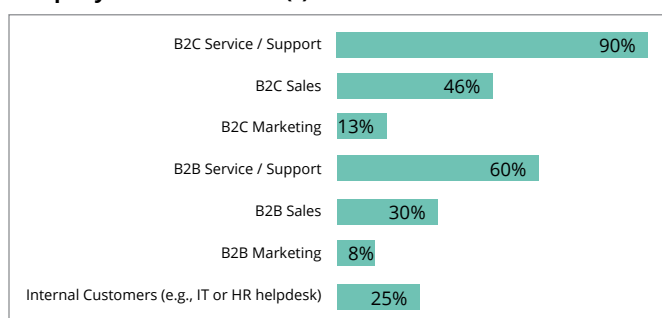
METHODOLOGY

Deloitte surveyed global customer contact center executives between November 2020 and February 2021 regarding the current state of their businesses and what they perceive their business will be doing in the next two years. Respondents represent industries including consumer & industrial products, energy & resources,

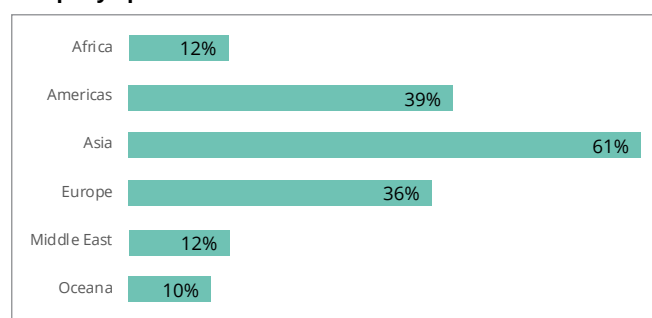
federal & public sector, financial services, life sciences & health care, services, travel & hospitality, and technology, media and telecommunications. Their contact centers serve varying customer bases touching both B2C and B2B as well as internal customers such as IT or HR help desks. This year, we are publishing responses from

enterprise-level respondents, representing 135 organizations headquartered in 14 countries and across six regions. This is the fifth 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)?



What region(s) does your company operate in?



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