



Contact Center

COVID-19: Respond, Recover, and Thrive

Insights and Trends from our Webinar Series

Summary

COVID-19 brought challenges to citizens, health care systems, governments, businesses, etc. which few have experienced in their lifetime. Contact centers were presented with an unprecedented situation with the need to quickly virtualize the entire workforce while dealing with significant fluctuations in work volumes.

Deloitte's Contact Center practice leaders defined a three phase path forward to help executives address changes in contact center operations and customer expectations.

- **Phase 1 Response:** focuses on stabilizing the contact center environment and dealing with day-to-day challenges, many of which may be unforeseen.
- **Phase 2 Recover:** a transition from the relative uncertainty of Phase 1: Respond to the "new normal" in Phase 3: Thrive, where companies adopt to the new normal while planning for the long term success.
- **Phase 3 Thrive:** focuses on preparation and execution of the longer term plans and strategy.

We engaged Contact Center Leaders around the country with our Service Excellence, Contact Center and Industry Leaders in a 3-part webinar series to share this path forward and to understand how they were responding to the COVID-19 situation, and planning for the future. The insights and perspectives from that series are summarized in this paper.

Key Takeaways

The following themes will be front and center to service and contact center organizations in their path forward.

- **Virtualization:** Redefinition of operating model with an enhanced focus on virtual and work from home capabilities, and a renewed focus on sourcing and shoring strategies (on/near versus off shore). Work from Home strategy and definition is a top current priority – employee safety may influence short term outcomes, but the long term planning will include considerations around scalability, security, employee engagement, cost and business continuity.
- **Digitization and Automation:** The customer facing capabilities will focus on fully-automating some transaction while partially automating the rest to make the interactions more efficient; agent-facing capabilities will focus on automating repetitive, manual data entry tasks and guiding agents through the interaction with relevant information and next best actions. Intelligent Automation and Conversational AI solutions will be key here.
- **Flexibility via Cloud Infrastructure:** COVID-19 has also forced companies to look at the core contact center cloud infrastructure in a new light. The move to cloud will see a significant uptick as organizations look for increased flexibility, faster speed-to-market, lower total cost of ownership and less management overhead.

The remainder of this document describes these key takeaways in more detail.

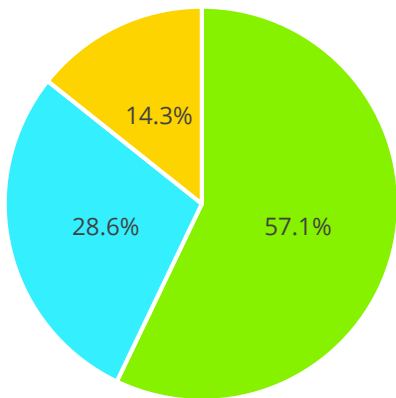
Respond

In this phase, contact center leaders were focused on day-to-day problem solving, often times dealing with near-immediate loss of access to some offshore contact center resources and capabilities, the closing of physical contact centers in the US and beyond, dramatic increases and/or decreases in contact volumes, etc.

Our survey respondents identified work from home readiness as their biggest focus area, followed by self-help deployment to address the increase in volume and loss of capacity.

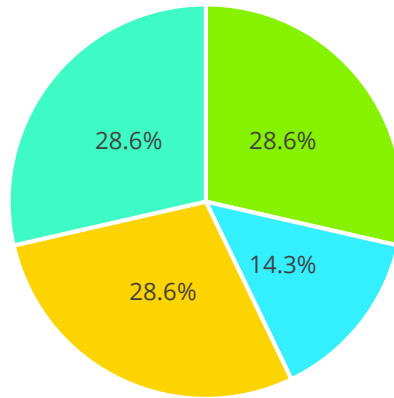
The urgency of the situation did not allow for adequate for working from home resulting in many challenges. Organizations will need to incorporate these lessons learned into their plans for a more formal and scalable WFH model in future.

Initial Focus of Service Organizations during COVID-19



- WFH Readiness
- Getting Self-Help Stood Up Quickly
- Develop Additional/New Self-Help Content

Biggest Challenge for Staff in Transition to WFH



- Network Bandwidth
- Data and Security
- Staff and Engagement
- Management and Virtual Self

Responses Across Industries



Healthcare

Only treating emergency, urgent cases; routine medical appointments and elective procedures being deferred



Financial Services

CARES act driving a lot of pressure on banks to respond



Manufacturing and Industrial

Needing to incorporate tools and safety measures to complete the support and maintenance work

Key Actions Taken By Service Organizations

01

Virtual collaboration tools to strengthen WFH experience

04

Omni-channel bots during peak load to address FAQs/simple queries

02

Engagement with customers with a sense of empathy

05

Cloud-based capabilities to support efforts

03

Focused analytics to understand impacts to contact center

06

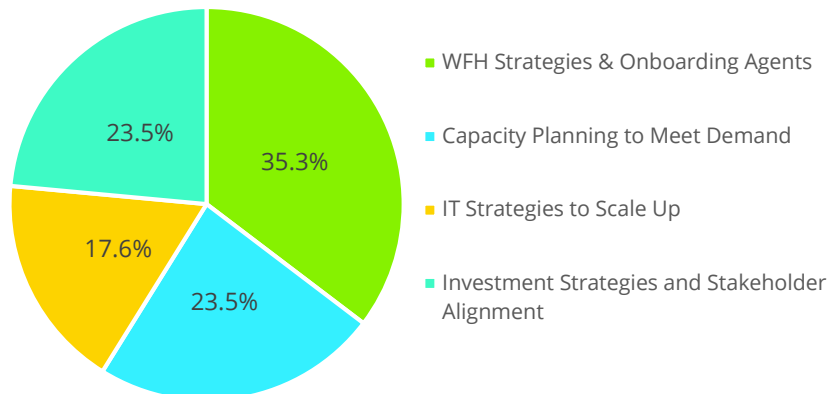
Use of non-traditional and third party staffing models

Recover & Thrive

As the economy is opening up and businesses are starting to return to normal, (aka, the Recover phase), WFH strategy continues to be the highest priority. This WFH planning will need to be done in conjunction with capacity planning – understanding how contact center volumes will evolve in line with the opening of the economy (e.g., industry and geographical impacts).

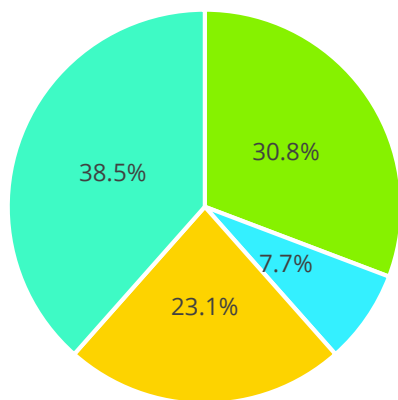
IT strategies for a robust future state will be equally important as many organizations realized that their on-premise technology solutions offered limited flexibility to virtualize workforce and quickly deploy self-help capabilities. Cloud based solution will be top of mind for organizations as they look to introduce flexibility into their technology stack.

Top Planning Focus During COVID-19 to Drive Recovery



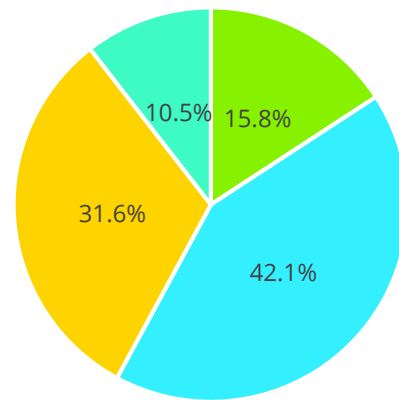
In regards to work from home, organizations will need to balance the near term need of reintegrating the workforce (how much to bring into office and how to do it safely) with the longer term strategy and a robust, formalized and scalable WFH model definition.

Most Challenging Aspect of Workforce Re-Integration



- Approach and plan to integrate workforce
- Functions/resources to bring back into office
- Percentage of resources to bring back
- Space reconfiguration

Envisioned Percentage of WFH over the Next 12 Months



- 0-25%
- 26-50%
- 51-75%
- 76-100%

In our 2019 Global Contact Center Survey, about 44% of our respondents were not expecting to have any WFH presence in 2 years. So, while not surprising, COVID-19 has clearly had a significant impact on how contact center leaders are thinking about this going forward.

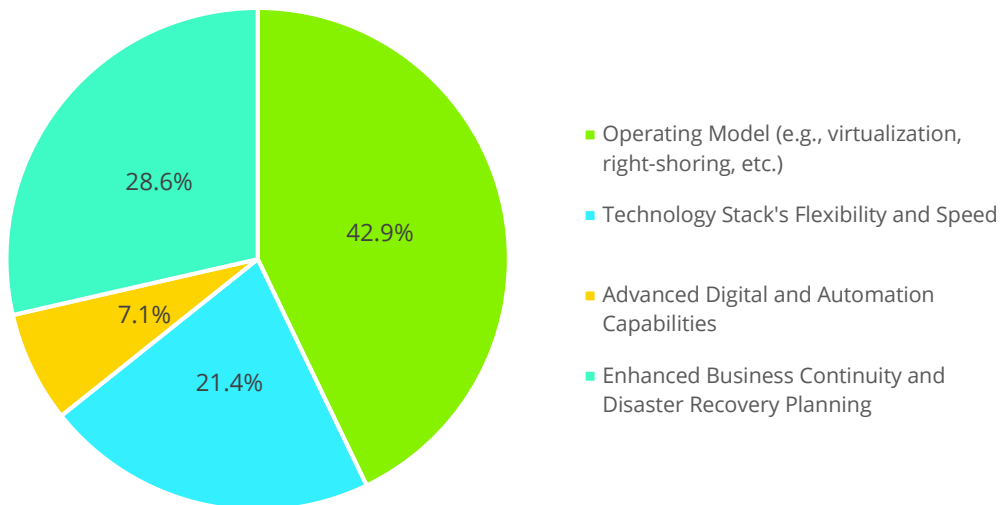
WFH capability will become an integral part of contact center operations going forward. The initial WFH answer in response to COVID may be dictated by the need to keep social distancing guidelines in place, the long-term answer would require more thoughtful planning – including the lessons learned from COVID, performance, real estate impact, etc.

Recover & Thrive (continued)

The planning for the Thrive phase – the phase that will represent the true “new normal” and will anchor contact center strategies for the foreseeable future - will be influenced by key lessons learned from Respond phase.

One such lesson important lesson learned was the loss of offshore capacity during the early stages - as a result, redefinition of the operating model will be key to the long-term success, and will require thoughtful consideration of internal versus external, on/near shore versus offshore and onsite versus virtual capacities.

Biggest Anticipated Impact of COVID-19 on Long-Term Strategy



Another important lesson learned was the lack of flexibility of their on-premise technology solutions to virtualize workforce and quickly deploy self-help capabilities – as a result, organizations will look to introduce flexibility into their technology stack with cloud based solutions.

Deloitte’s Service Connection is one such cloud based solution, enabled by 7 key Digital Products with built in AI capabilities.

Capabilities



Value Delivered

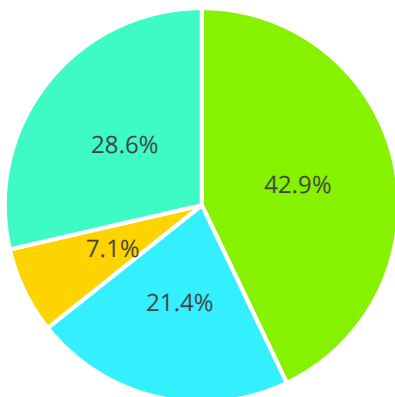
- Flexible for different business models
- End to End Service Delivery & Management Processes
- Lower Total cost of ownership
- Cloud operating model and ongoing innovation
- Automation and Predictive Intelligence
- End-to-End capabilities without having to manage disparate systems

Recover & Thrive *(continued)*

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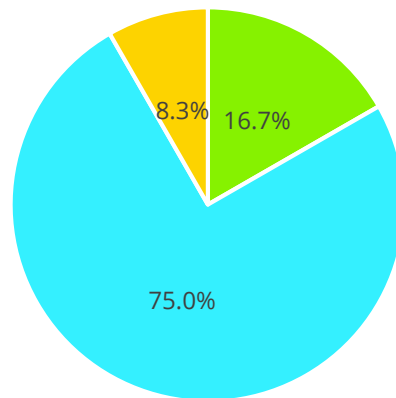
- Loss of offshore capacity during the early stages - as a result, redefinition of the operating model will be key to the long-term success, and will require thoughtful consideration of internal versus external, on/near shore versus offshore and onsite versus virtual capacities.
- Limited flexibility of their on-premise technology solutions to virtualize workforce and quickly deploy self-help capabilities – as a result, organizations will look to introduce flexibility into their technology stack with cloud based solutions.

Biggest Anticipated Impact of COVID-19 on Long-Term Strategy



- Operating Model (e.g., virtualization, right-shoring, etc.)
- Technology Stack's Flexibility and Speed
- Advanced Digital and Automation Capabilities

Prioritized Capabilities to Recover and Thrive from COVID-19



- Agent assistive technology (Virtual Assistant, Next Best Action, Voice to Text Transcription)
- Self-Service capabilities
- Customer Experience Management platform (CXM)

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Recover & Thrive *(continued)*

Unlike the contact center function where the workforce was able to transition to a virtual work environment during this pandemic, field services function wasn't quite able to do that for many organizations.

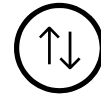
Challenge



Safety of employees and customers

COVID-19 pandemic has challenged companies to re-evaluate how they deliver service to their customers.

Opportunity



Service deflection to self-serve

Deflecting service through strategies such as Self Service, Remote Support, Proactive and Predictive Service can help keep service organizations nimble and their customers happy.

Future of Field Service (FoFS)



INCREASE SELF-SERVICE

Capitalizing on IoT and AR to increase self-service and reduce truck roles



ENABLE REMOTE INSPECTIONS

Tapping into drones Enhanced Computer Vision Technology, and AI to improve quality of remote inspections



REDUCE TIME ON-SITE

Leveraging customer service and connected asset data to "solve" before arriving on-site and reducing repeat truck rolls



THIRD PARTY SUPPORT

Sharing contact center and field service assets and resources to reduce backlog and support other companies/ industries

Projected Shifts Across Industries



Automotive

Finding new ways of manufacturing as it relates to the placement of workers on the assembly line; Enabling digital sales and delivery (e.g., auto dealers) as many recognized their digitalization gaps such as inability to enable digital signatures and schedule vehicle deliveries .



Retail & Consumer Goods

Accelerating move toward digital transformation, including digital transformation of Omni channel supply chain; Service as a part of a customer intimacy program will likely increase in relevance.



Airlines and Hospitality

Adopting new standards for cleanliness and hygiene; Fully digitalizing experiences such as touchless check-in and payment

Conclusion

The challenges COVID-19 first presented were unprecedented and dynamic, but most contact center leaders were able to get over them and were able to quickly virtualize their workforce and deploy relatively quick solutions to address volume fluctuations. The lessons learned, however, will drive the actions of the contact centers leaders to prepare for the future – the following actions will be integral to the future state planning.

- **Virtualization:** Organizations will need to redefine their operating model with an enhanced focus on virtual and work from home capabilities, and a renewed focus on sourcing and shoring strategies (on/near versus off shore). For outsourcing and offshoring arrangements, vendor's work from home capability and model will become an important evaluation criteria going forward.

Work from Home strategy and definition is currently one of the top most priorities for most organizations. The short-term planning will focus on reintegration of workforce and will include considerations around adherence to governmental policies for employee safety, prioritization of business functions, consideration of team performance and incorporation of employee preference, but the long term planning will need to be in line with the broader business objectives and include considerations around scalability, security, employee engagement, cost and business continuity.

- **Digitization and Automation:** The automation and digitization of customer journeys was already on the roadmap for most organizations; this need will only get accelerated going forward. The customer facing capabilities will focus on fully-automating some transactions for self-service while partially automating the rest to make the interactions more efficient; agent-facing capabilities will focus on automating repetitive, manual data entry tasks and guiding agents through the interaction with relevant information and next best actions. Intelligent Automation and Conversational AI solutions will be key here.
- **Flexibility via Cloud Infrastructure:** Organizations had gotten comfortable with technologies like CRM being in the cloud, but many were still cautious about moving their core contact center infrastructure to the cloud before COVID-19 happened. The move to cloud will see a significant uptick as organizations look for increased flexibility, faster speed-to-market, lower total cost of ownership and less management overhead.

Perhaps at no time previously has the importance of effectively and empathetically engaging with humans (customers, employees, partners, etc.) been so essential. As digitization and automation increases, incorporating human-centered design practices, new human experience metrics and measures, and enabling new cultural philosophies may prove to be a competitive differentiator for those companies that thrive.

These times are truly unprecedented, and we believe the contact center is entering uncharted territory. We also believe that contact centers and effective human engagement will be critical for companies to thrive in the new normal.

Deloitte is a global leader in contact center advisory, transformation, and managed services with a wide range of capabilities, assets, accelerators, and skills to help you through this journey.

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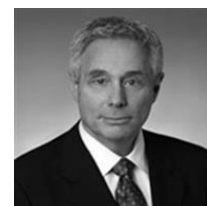
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