



# Executive summary

Customers want businesses to hear them, understand them, and appreciate them. Perhaps nowhere is that harder to accomplish than in corporate contact centers, the very outlet established to encourage customer engagement. Convinced that customer experience drives customer choice, global businesses are investing in contact centers that focus on customer needs and preferences. As contact volume continues to grow, companies must transition to a broad mix of channels, match self-service technologies to simple interactions, and hire and equip contact teams to handle increasingly complex interactions. In Deloitte's third survey of global contact centers since 2013, leaders representing more than 450 contact centers weigh in on how their businesses will change in the coming years.



Some key insights

Customer experience rises to the top

Complexity leads to channel diversity

Looking to technology to save the day

Raising the bar on talent

Methodology

## Some key insights

Customer experience rises to the top

Complexity leads to channel diversity

Looking to technology to save the day

Raising the bar on talent

Methodology

## Here are some key insights from the survey findings:



**Less voice, more options.** Voice is expected to remain the most prominent channel for customer interaction, but will likely fall from today's 64 percent of contacts to 47 percent in 2019. Meanwhile, chat and messaging is expected to grow from 6 percent to 16 percent. Thirty one percent of organizations surveyed think video chat will account for 8 percent of their interactions in 2019.



**Think social.** Social media will likely emerge as a mainstream medium for customer service. It is expected to expand from just 4 percent of contact center interactions today to 9 percent in 2019.



**Ready to automate.** Of executives surveyed, 33 percent indicated that artificial intelligence (AI) and robotic process automation (RPA) have matured enough to justify strategic investment by 2019.



**Define "experience."** Respondents say customer experience is predominantly influenced by providing accurate service and information (66 percent) and by making interactions effortless (62 percent).



**Shift from revenue.** Only 3 percent of companies responding consider revenue growth to be the primary driver for their contact centers. **Instead, close to 90 percent name improving customer experience as a strategic focus.**

Clearly, the survey respondents believe the traditional business model is evolving—and fast. As soon as 2019, more than half of customer interactions are forecasted to be through channels other than voice. With simpler interactions moving to self-service or being supported by AI, contact centers will require improved talent models and enabling technologies to manage the more complex interactions across diverse channels. The continued migration toward an omnichannel environment will be difficult for business leaders to navigate.

**For a deeper dive, turn the page to explore the survey findings and latest trends.**

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Some key insights

## Customer experience rises to the top

Complexity leads to channel diversity

Looking to technology to save the day

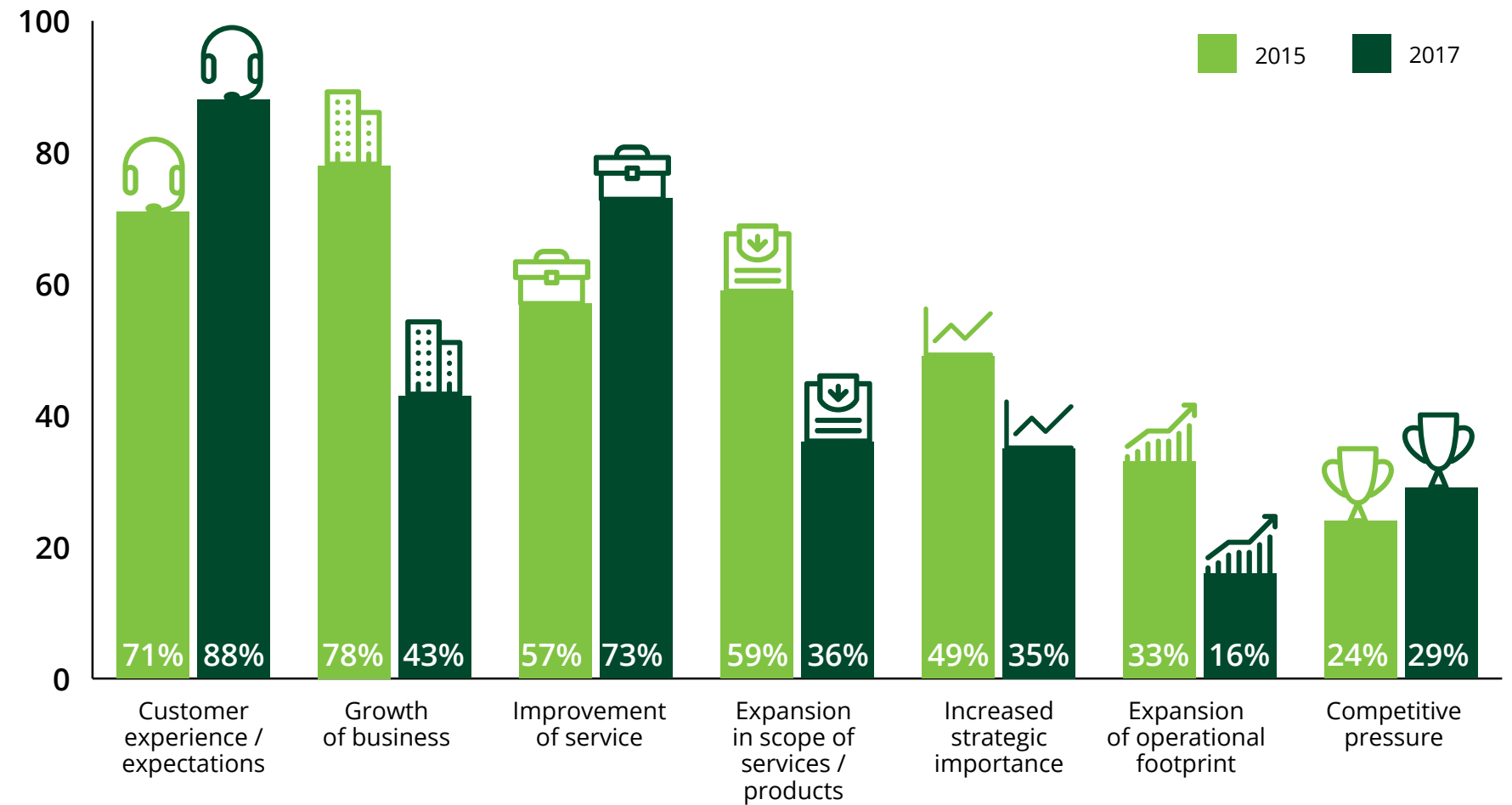
Raising the bar on talent

Methodology

## Customer experience rises to the top

No longer relegated to “nice-to-have” status, customer experience (88 percent) and service improvement (73 percent) are clear priorities for contact centers. In general, organizations surveyed are now growing their contact centers to improve customer relationships more than to support business growth, a dramatic shift from 2015. After a long period of relative economic stability, many contact centers now view growth in terms of improving service rather than expanding size.

### What are the main drivers of growth within your contact center(s)?



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Some key insights

## Customer experience rises to the top

Complexity leads to channel diversity

Looking to technology to save the day

Raising the bar on talent

Methodology

### About Deloitte

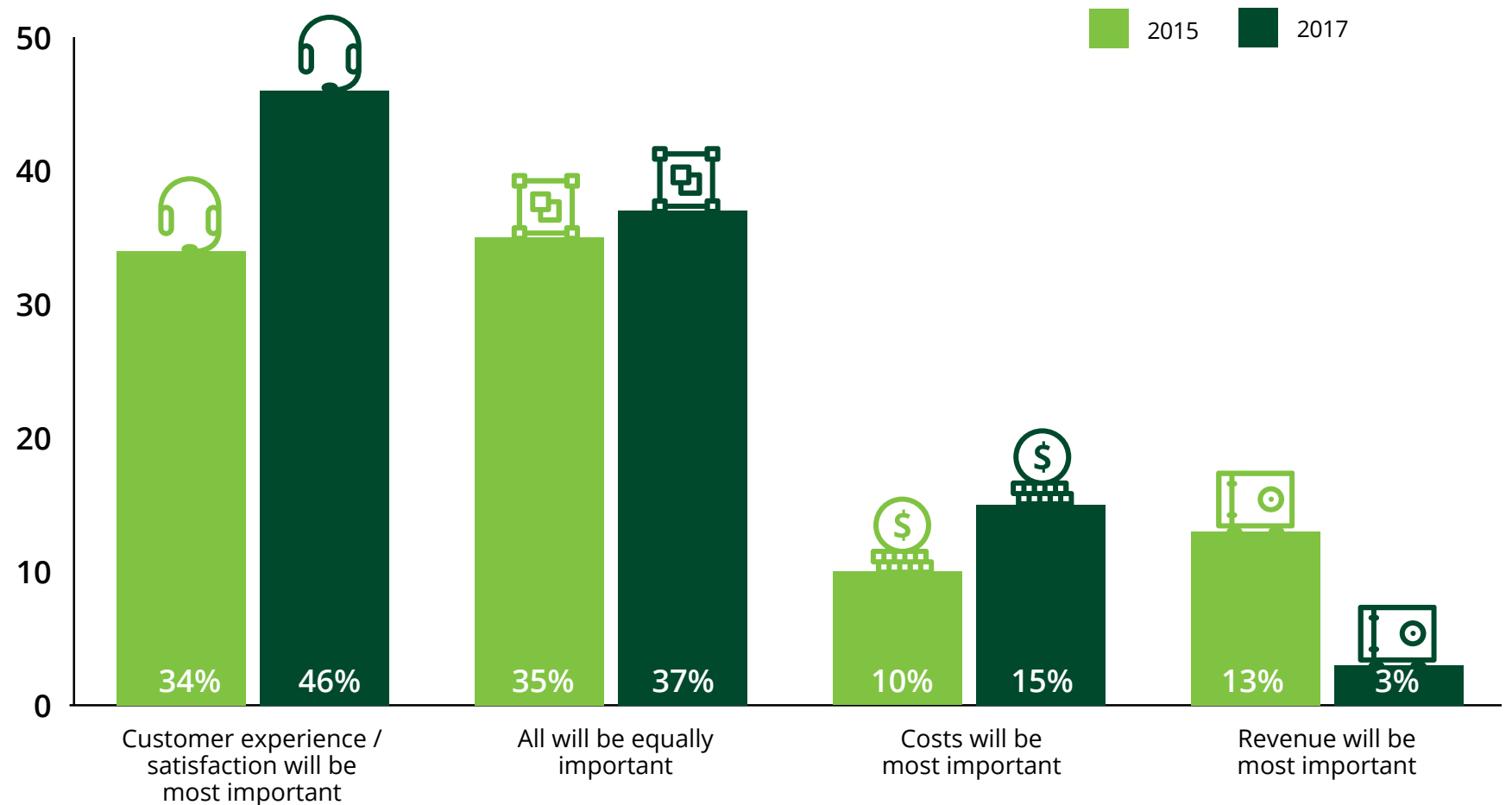
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## Customer experience rises to the top

Similarly, contact center executives are committed to optimizing costs and improving the customer experience rather than explicitly focusing on revenue growth. While 46 percent of respondents believe customer satisfaction will be the most important factor in two years, only three percent believe revenue will be the most important.

### How will your contact center organization weigh the importance of cost, revenue, and customer experience / satisfaction in two years?



1. Data has been rounded to the nearest point.
2. Respondents had a fifth option, "Business Insights Gathered will be most important" in 2015 that was not included in the 2017 survey.



Some key insights

## Customer experience rises to the top

Complexity leads to channel diversity

Looking to technology to save the day

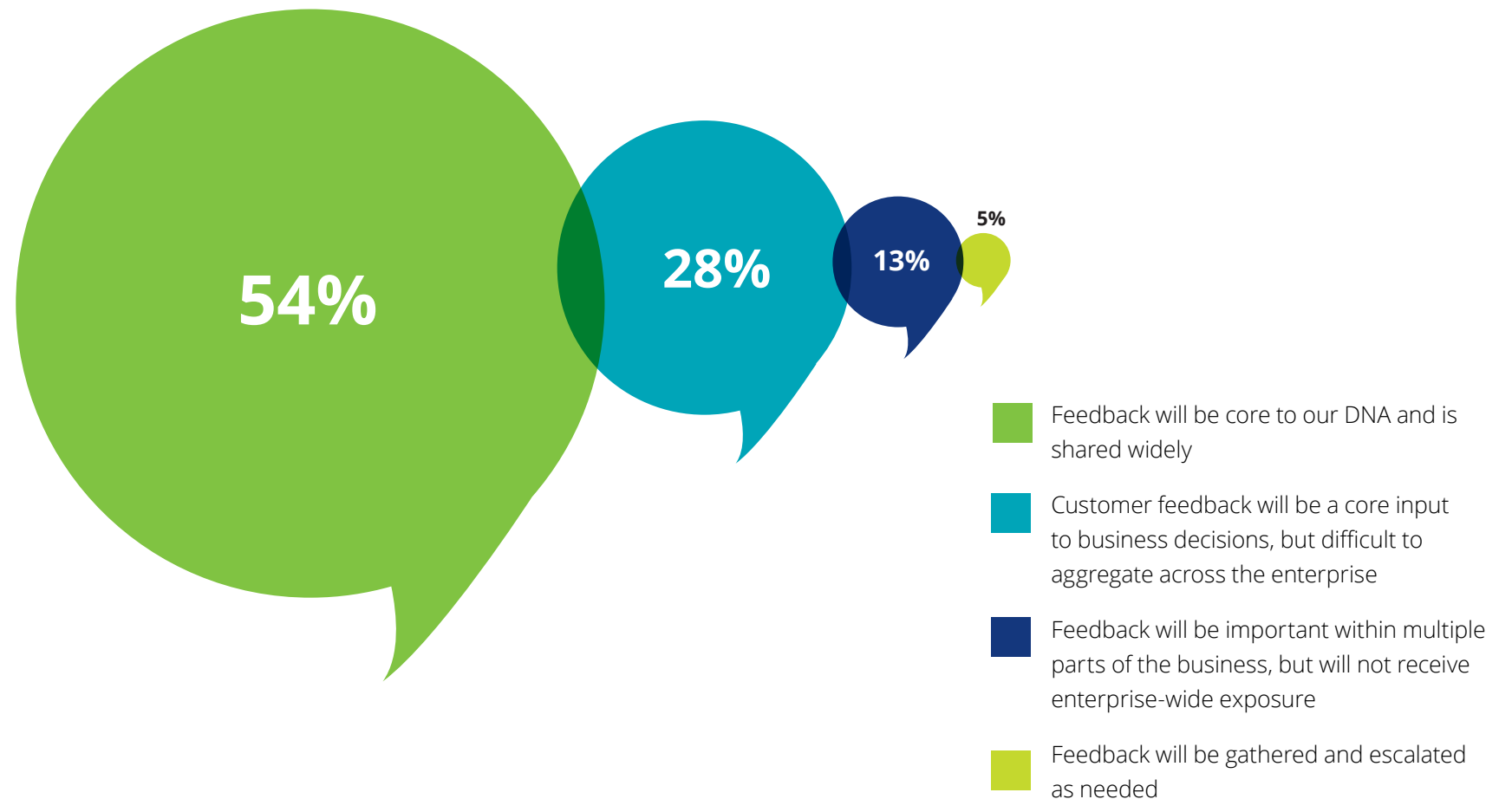
Raising the bar on talent

Methodology

## Customer experience rises to the top

With this intense focus on improving customer experience, companies are increasingly factoring customer feedback into their business decision making. In fact, more than 80 percent of those surveyed report that feedback is “core to their DNA” or “a core input to business decisions.” Only 45 percent held this view in the 2013 survey.

### How do you anticipate describing the importance of customer feedback within your company in two years?



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Some key insights

## Customer experience rises to the top

Complexity leads to channel diversity

Looking to technology to save the day

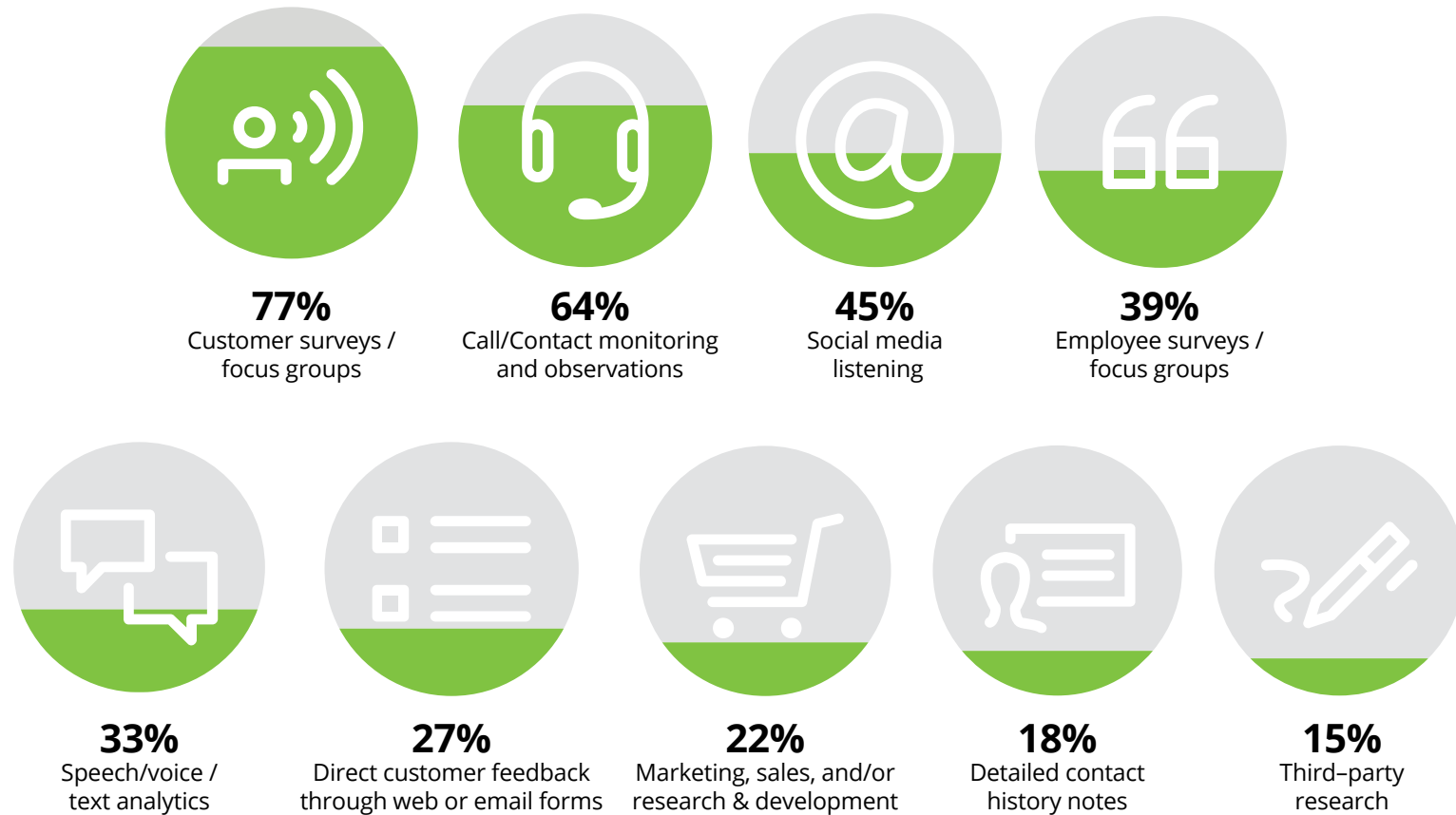
Raising the bar on talent

Methodology

## Customer experience rises to the top

How companies collect that feedback varies. Most companies responding primarily rely on customer surveys (77 percent) and interaction monitoring (64 percent). However, the use of speech and text analytics and social media listening has steadily increased over the last five years, primarily in the financial services (FSI) and the consumer and industrial products (C&IP) sectors. Overall, the growth in social media listening and text analytics could be due to lower costs and the improving quality of these technologies, along with better operational customer experience management (OCEM) solutions that streamline the process by sending feedback to the parts of the organization that can take action.

### What will be the most effective ways in which your contact center(s) will capture customer feedback years from now?



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Some key insights

## Customer experience rises to the top

Complexity leads to channel diversity

Looking to technology to save the day

Raising the bar on talent

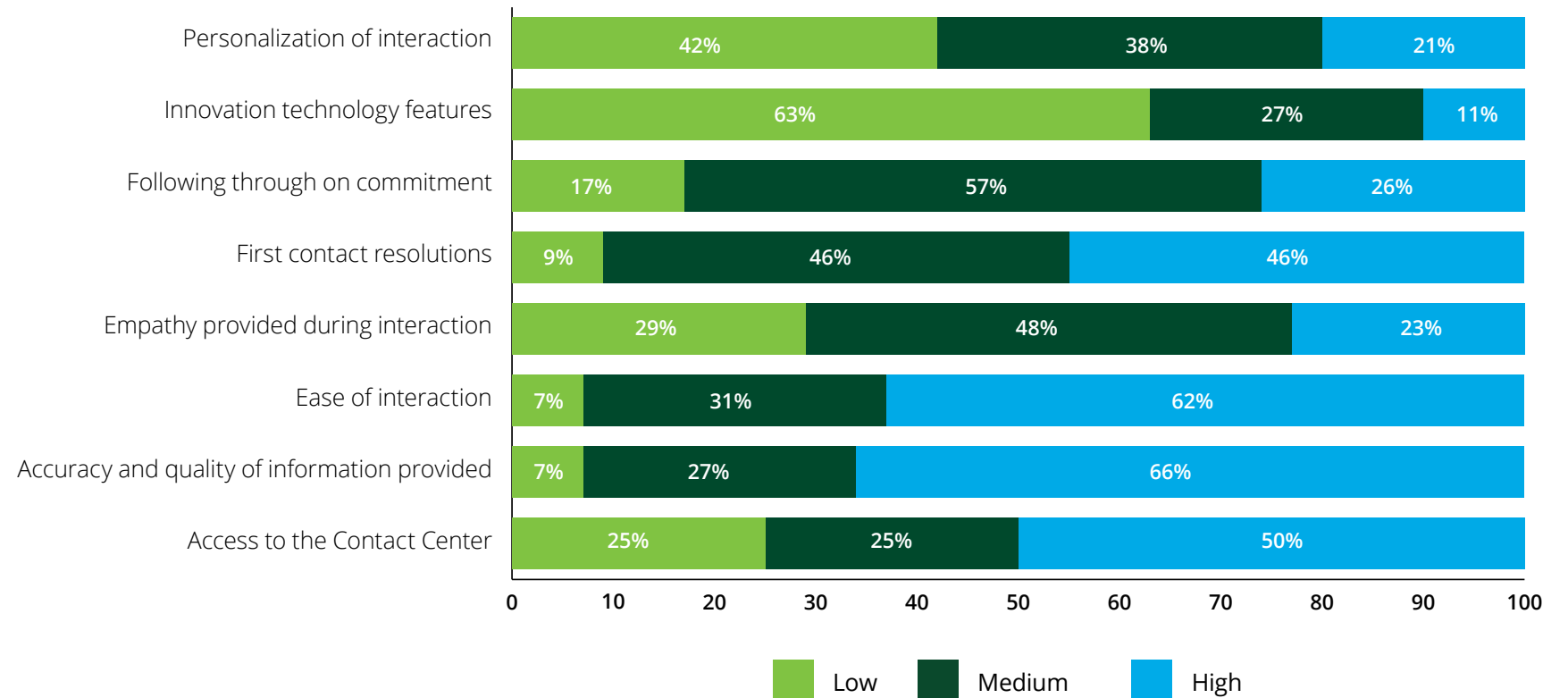
Methodology

## Customer experience rises to the top

What makes for a better customer experience? In general, surveyed contact center executives continue to perceive accuracy and quality of information (66 percent) as the most important attribute of a successful customer interaction. A close second is ease of interaction (62 percent). This trend is not surprising considering that online retailers and service companies have set new standards for customer experience. Many consumers expect virtually effortless transactions no matter who they are interacting with. Perhaps this is why more organizations are embracing “effort” as a customer satisfaction score.

While “ease” is almost on par with “accuracy” among survey respondents to define a successful interaction, there were some variations on this theme. Insurance companies are ahead of the curve, with 72 percent of respondents already emphasizing “ease” above all else. Meanwhile, technology companies (86 percent) cited “access to contact center” as the most important attribute. Smaller companies, in terms of size and revenue, also cited “access” as the most important attribute.

### How will customers prioritize the following attributes in future interactions with your contact center(s)?



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Some key insights

Customer experience rises to the top

### Complexity leads to channel diversity

Looking to technology to save the day

Raising the bar on talent

Methodology

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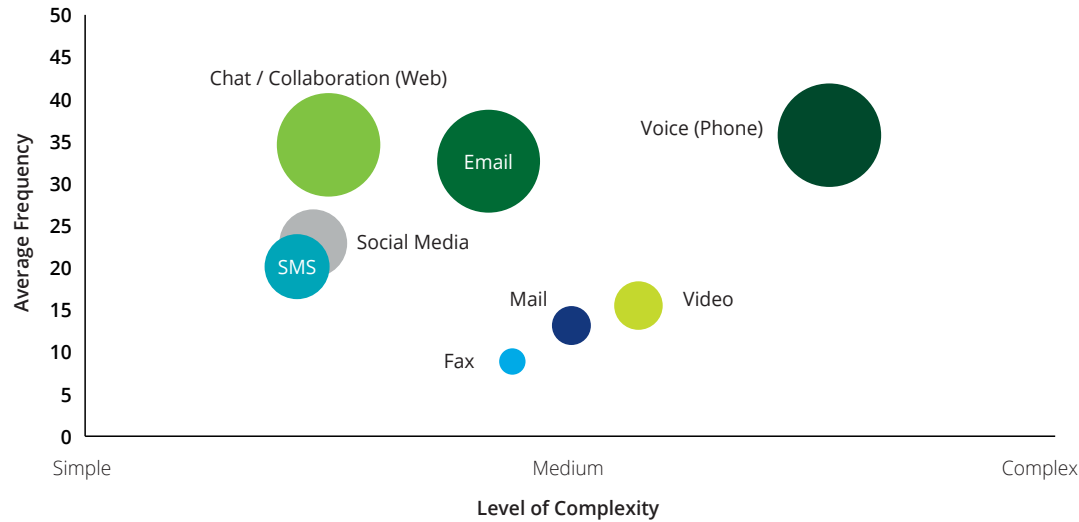
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## Complexity leads to channel diversity

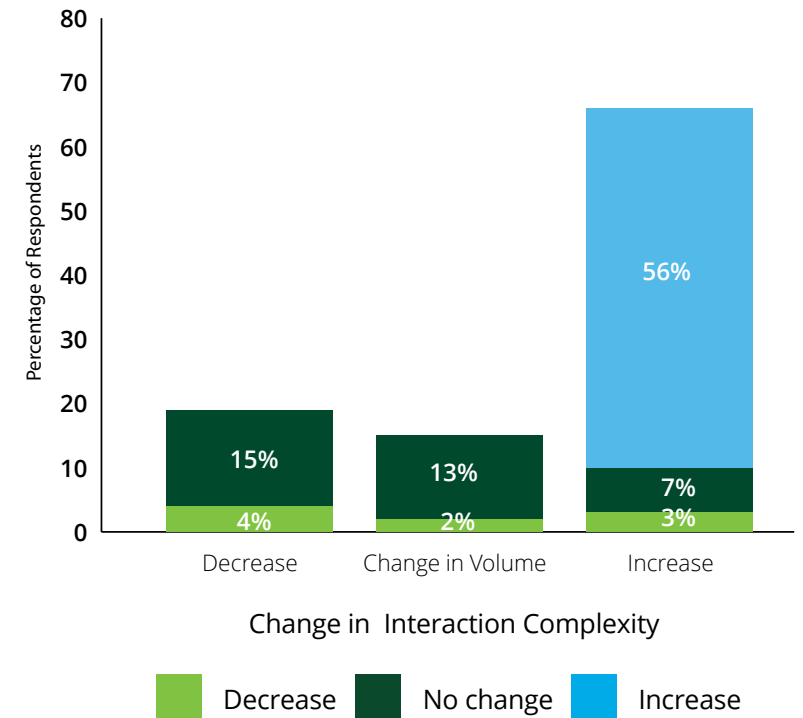
Contact center interactions are projected to increase not just in volume, but also in complexity over the next two years. For example, 93 percent of respondents in the C&IP category expect contact volume to remain constant or to increase. It is not surprising that 95 percent of life science and health care respondents find that interactions are becoming more complex, but across all businesses surveyed, 85 percent recognize the move toward complexity.

It is not only the content of contacts that is becoming more complicated and multifaceted. The mediums for customer engagement are changing and expanding as well. Contacts by phone are expected to fall from 64 percent of interactions today to 47 percent in 2019. While the phone's demise has long been forecasted, most of the migration away from phone is expected to move toward chat and social media, but those are not the only options, and a clear winner is yet to emerge.

### In two years, which channels will be primarily used for complex and simple customer interactions?



### How will the contact volume and complexity change in the next two years?



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Some key insights

Customer experience rises to the top

### Complexity leads to channel diversity

Looking to technology to save the day

Raising the bar on talent

Methodology

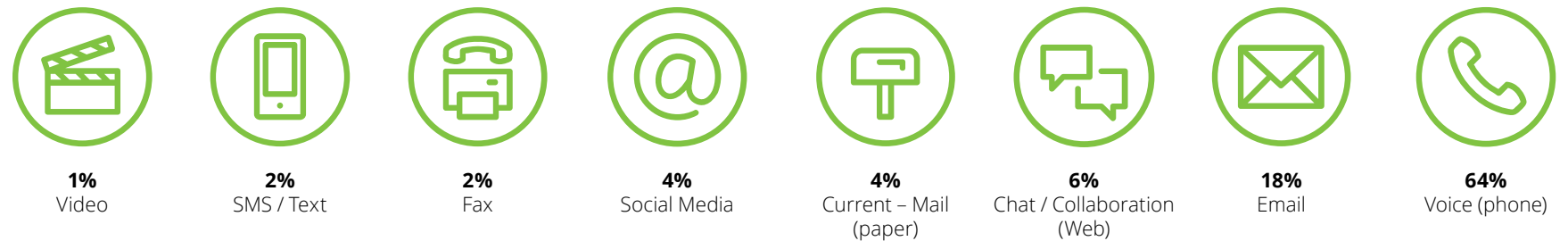
## Complexity leads to channel diversity

While chat seems the next likely alternative, 8% (92% will be using it) of the respondents are not supporting chat in any capacity today. Even though their customers are increasingly demanding it, chat poses complexity challenges that make it difficult to operate efficiently. These range from challenges with integrations, such as workforce management, to agent desktop applications that only support one customer interaction at a time. Recent advances—mainly in the form of AI automation or “chat bots”—could remove some of these hurdles, paving the way for rapid adoption in the coming years. Perhaps this is why contact center executives surveyed expect the use of chat to grow from 6 percent to 16 percent by 2019. Social media use is also anticipated to increase significantly, potentially growing 125 percent over the next two years. As with chat, this could indicate a maturation of social media as a channel, a more holistic acceptance of it within organizations, and improved technologies for integrating it.

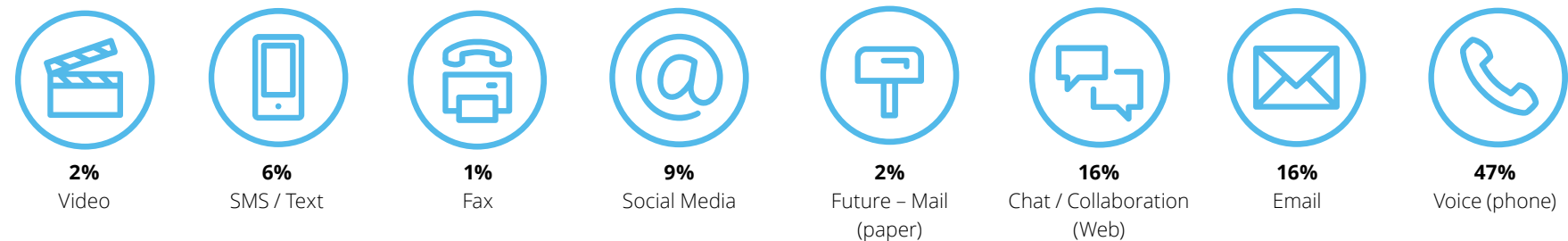
For the most complex inquiries, phone will likely remain an important channel, followed by the newcomer, video chat, which is anticipated to be leveraged by 31 percent of companies for an estimated 8 percent of total interactions by 2019. Such mediums as social media and text will likely be reserved for simpler inquiries and routine transactions.

### How does your company anticipate interacting with customers in two years compared to your current distribution?

#### Current—2017



#### Future—2019



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Some key insights

Customer experience rises to the top

Complexity leads to channel diversity

Looking to technology to save the day

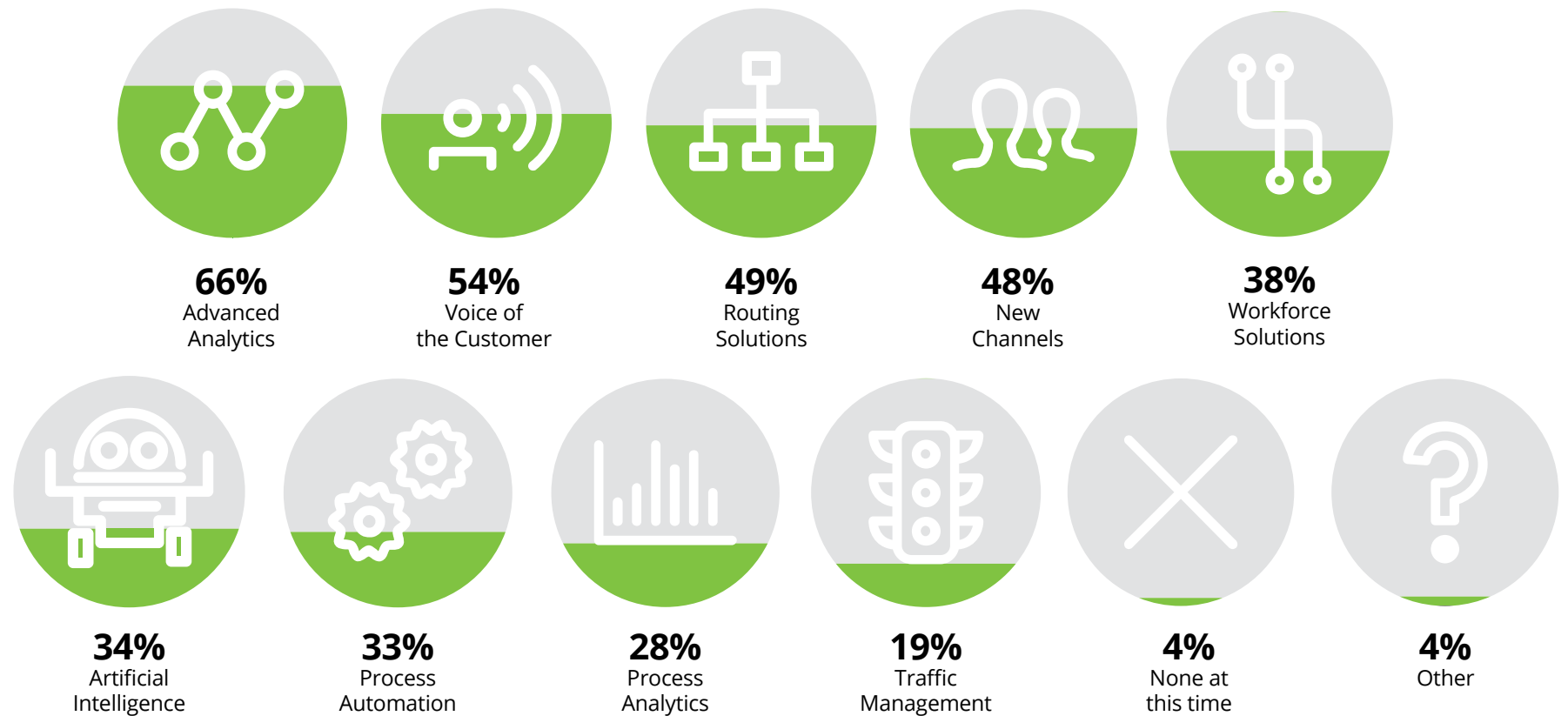
Raising the bar on talent

Methodology

## Looking to technology to save the day

With the growing complexity of content and channels, contact centers are seeking out new technologies to support interactions. All respondents say they are planning to invest in emerging technologies. Specifically, more than 50 percent of respondents name advanced analytics, voice of the customer (VoC), new channels, routing solutions, and RPA. Sentiment analytics (28 percent) and traffic management (19 percent) are mentioned least. Of note, certain industries—such as FSI and technology, media, and telecommunications (TMT)—are more likely to embrace RPA and AI than others.

### What emerging capabilities are you planning to make strategic investment in the next two years related to customer experience or contact center(s)?



Overall, integrated analytics continues to be the holy grail for most organizations surveyed as they struggle to merge data from channels and enterprise systems (operational, customer, and financial) into a single analytics solution. Surveying continues to be the primary draw for VoC investment. New options, such as OCEM solutions, aim to share insights across the organization and make responding to customer feedback timely and actionable. Furthermore, investments in routing solutions and new channels correlate with the need to engage customers in different ways and to route interactions across various channels to deliver efficient service.

1. Multiple responses permitted.

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Some key insights

Customer experience rises to the top

Complexity leads to channel diversity

### Looking to technology to save the day

Raising the bar on talent

Methodology

#### About Deloitte

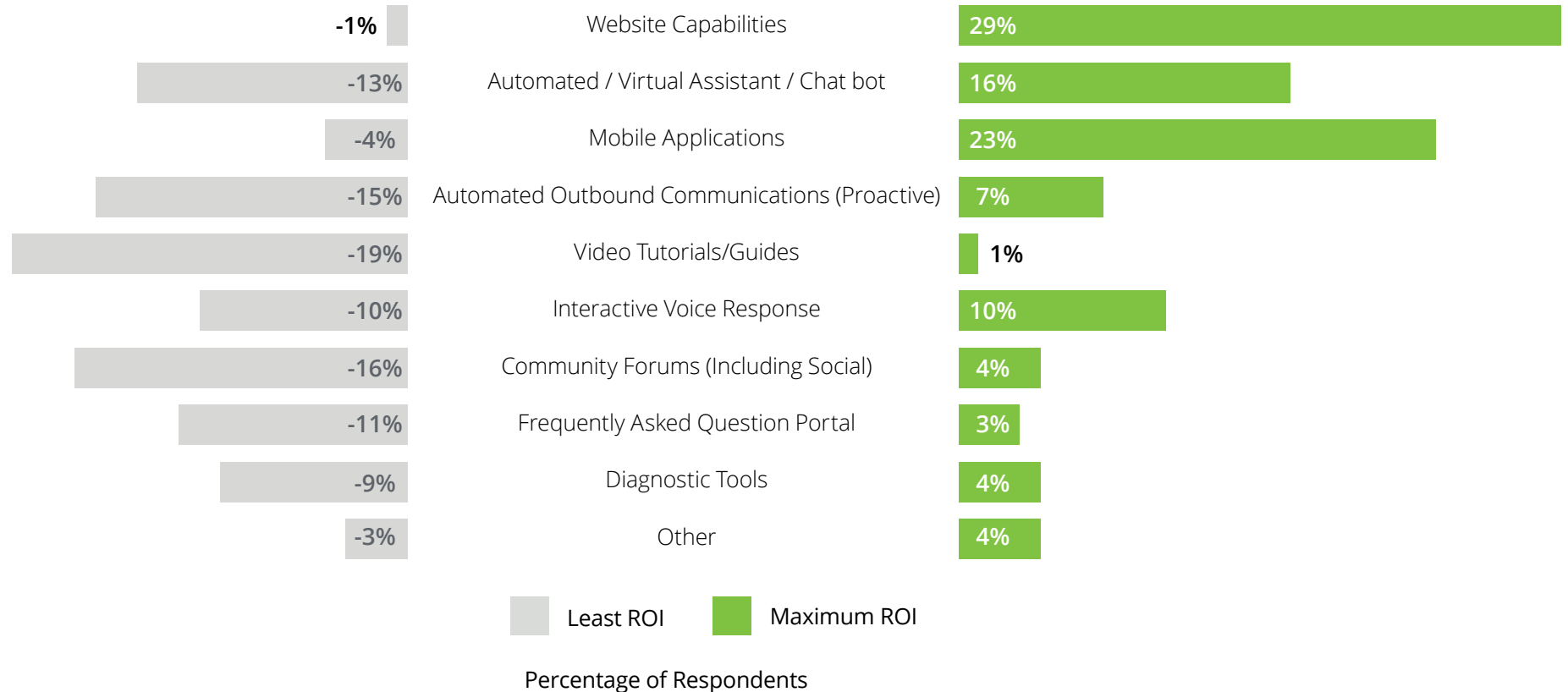
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## Looking to technology to save the day

Which investments could deliver the highest returns? Contact center executives who recognize that self-service is a good way to reduce expenses are championing investments in web and mobile capabilities. However, their plans may be hindered by competing priorities within their companies that require shared digital implementation teams. Still, contact center executives are optimistic about the returns from investing in virtual assistants and chat bots, which are rapidly maturing to handle an ever-expanding breadth of customer interactions.

### What capabilities would generate the best / least return on investment (ROI) for deflecting inquiries to the contact center(s)?



1. Multiple responses permitted.



Some key insights

Customer experience rises to the top

Complexity leads to channel diversity

### Looking to technology to save the day

Raising the bar on talent

Methodology

#### About Deloitte

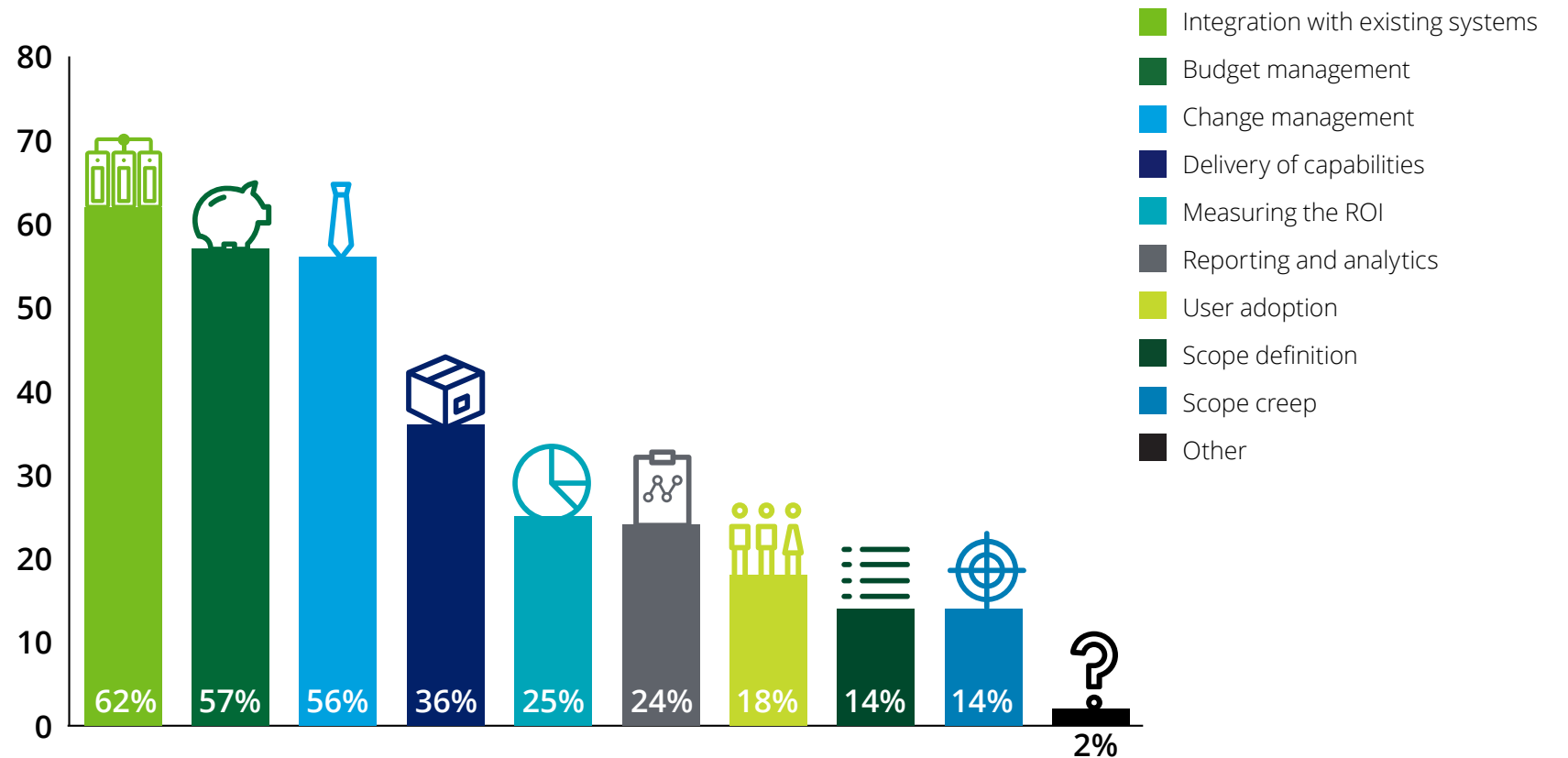
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## Looking to technology to save the day

The biggest obstacle to realizing intended ROI is integration with existing systems, cited by 63 percent of respondents. This reflects the need for access to high-quality enterprise data to realize the full potential of new capabilities, and ultimately, to deliver an omnichannel experience. Respondents also pointed to change management (56 percent) and budget management (55 percent) as significant barriers to realizing value from their investments, indicating opportunities for improved governance in transformation initiatives.

### What are the biggest challenges you are likely to face when implementing strategic investments and changes in the next two years?



1. Multiple responses permitted.



Some key insights

Customer experience rises to the top

Complexity leads to channel diversity

Looking to technology to save the day

## Raising the bar on talent

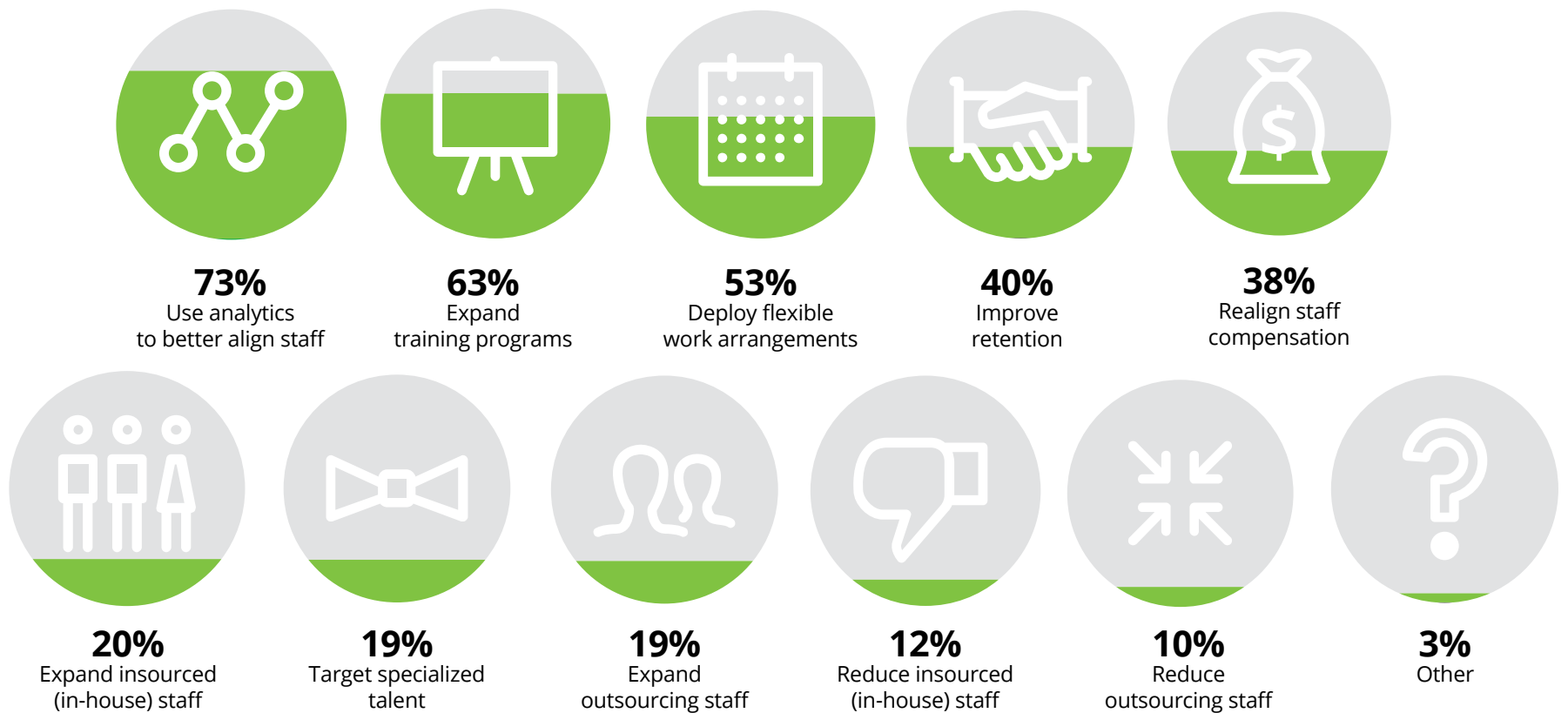
Methodology

## Raising the bar on talent

The quality of contact center talent will likely take on greater importance in the face of increasingly complicated subject matter and growing channels and technology tools. All respondents say they will be investing in talent improvement programs in the next two years. How do they plan to direct those investments? The two most common answers: using analytics to better align staff (73 percent) and expanding their training programs (63 percent). Both purposes seem to point to the need for equipping the right talent with the right skills for more complex tasks.

Outsourcing appears to have reached a state of equilibrium for our responding executives, with almost an equal number of respondents investing to expand in-house staff (20 percent) as respondents that are planning to expand outsourced staff (19%). Deploying flexible work arrangements, such as working from home or part-time arrangements (52 percent), were also a popular choice for responding executives—perhaps indicating the need for giving employees more options in an effort to improve retention.

### What talent-related initiatives will you undertake in the next 2 years?



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Some key insights

Customer experience rises to the top

Complexity leads to channel diversity

Looking to technology to save the day

Raising the bar on talent

## Methodology

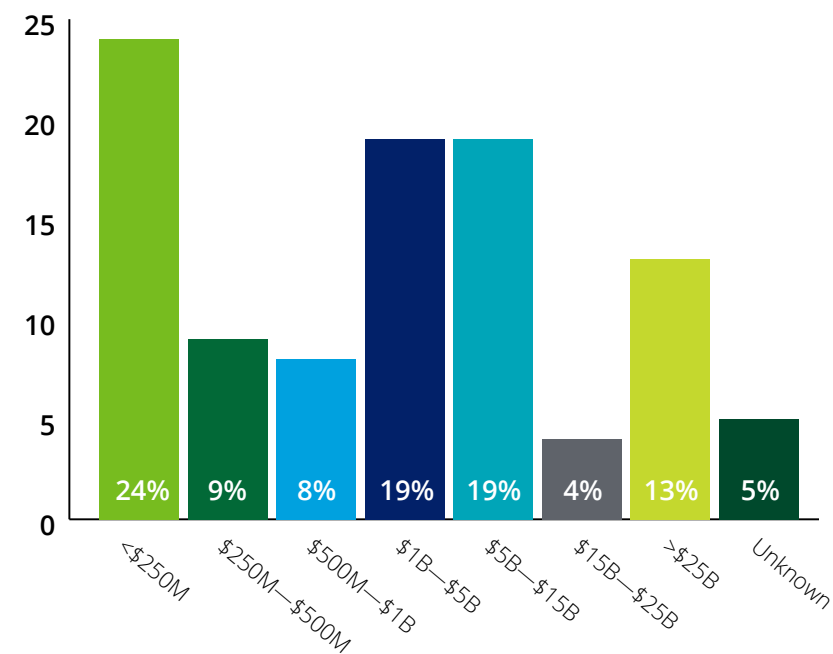
## Methodology

Deloitte surveyed global contact center executives between November and December 2016 regarding the current state of their businesses and what they perceive their business will be doing in 2019. Respondents represent more than 450 contact centers worldwide across six industries and spanning 17 industry sectors. These respondents represent organizations headquartered in 16 countries and operating in five continents. Some 66 percent of respondents were headquartered in United States and Canada, while 24 percent of respondents were headquartered in EMEA. This is the third publication of Deloitte's Global Contact Center survey, which has been published biennially since 2013.

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

Industry Groups	Industry Sectors	%
Financial Services <b>(FSI) 31%</b>	Banking & Security	13%
	Insurance	16%
	Asset Management & Real Estate	2%
Consumer and Industrial Product <b>(C&amp;IP) 25%</b>	Travel, Hospitality, and Leisure	10%
	Retail & Distribution	9%
	Consumer Products	4%
	Process & Industrial Products	1%
	Automotive	1%
Life Sciences and Health Care <b>(LSHC) 15%</b>	Health Care Providers	7%
	Health Plans	5%
	Life Sciences	3%
Technology, Media, and Telecommunications <b>(TMT) 14%</b>	Telecommunications	7%
	Technology	6%
	Media & Entertainment	1%
Public Sector <b>(PS) 9%</b>	Public Sectors—State/Local	9%
Energy and Resources <b>(E&amp;R) 6%</b>	Power & Utilities	5%
	Oil & Gas/Mining	1%

### What are the annual net revenues of your organization?



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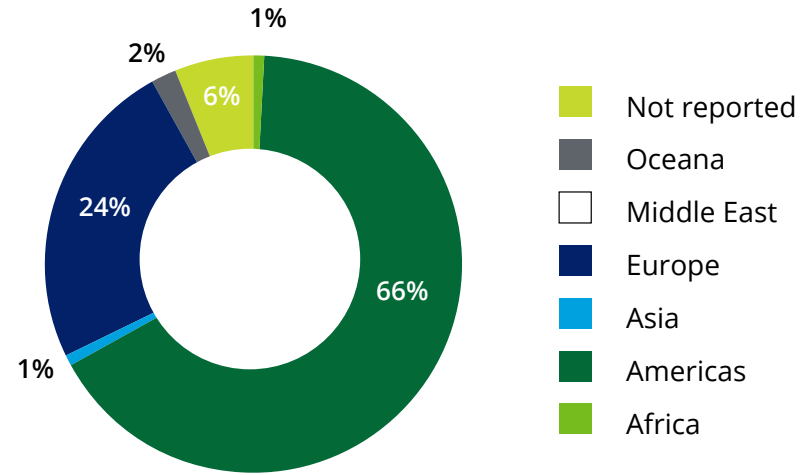
Complexity leads to channel diversity

Looking to technology to save the day

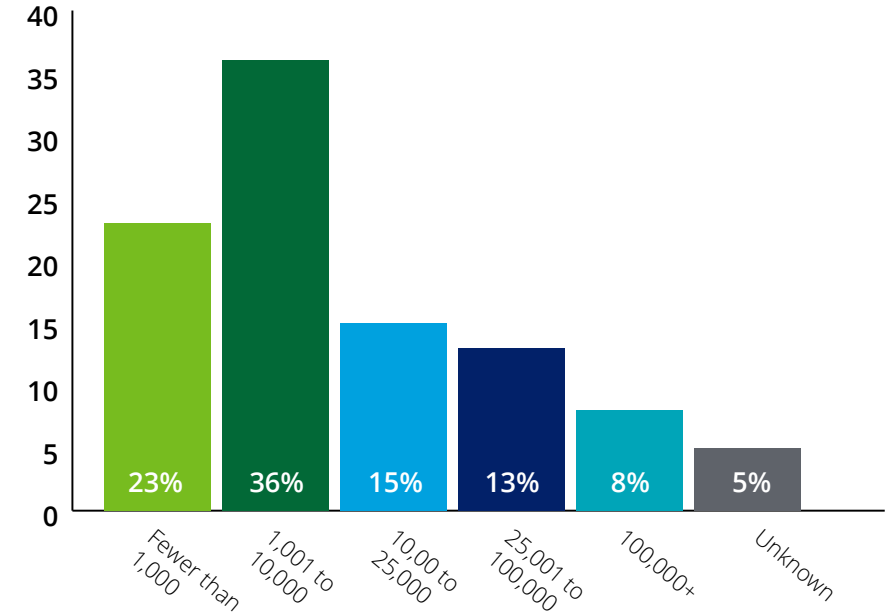
Raising the bar on talent

## Methodology

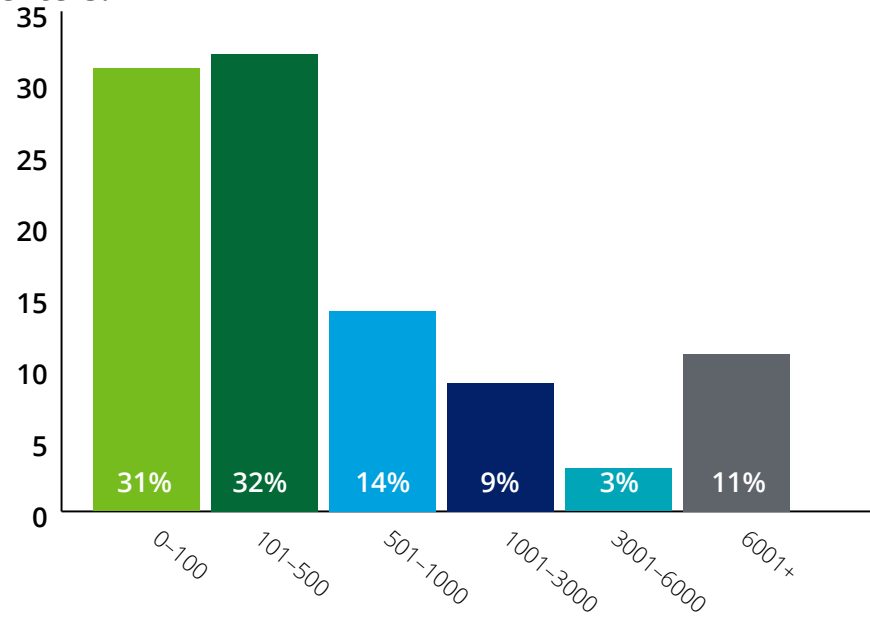
Where is your organization's headquarter located?



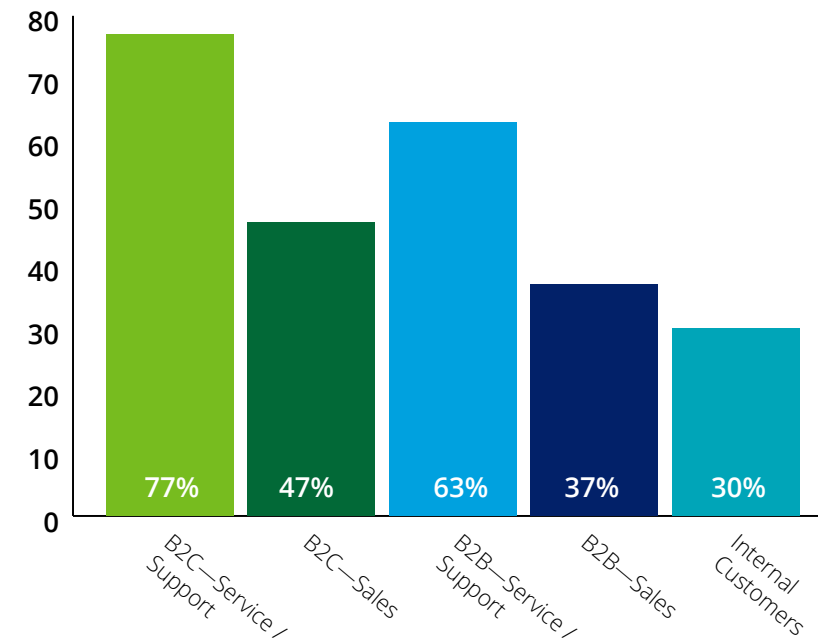
What is the size of your total organization in full-time employees?



How many people work in your company's contact centers?



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



## Methodology

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# 2017 Global Contact Center Survey

Some key insights

Customer experience rises to the top

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Raising the bar on talent

Methodology

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