

NICE INCONTACT CUSTOMER EXPERIENCE TRANSFORMATION BENCHMARK STUDY

Business Wave
July 2017

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Executive Summary

Today's contact centers support an average of 9 channels* and consumers have come to expect the ability to communicate with companies any time, any where and with any device. This is the first and only research study that compares how businesses say they are doing versus how consumers rate their actual experiences—in specific communication channels.

The Business Wave of the 2017 inContact Customer Experience Transformation Benchmark Study, reveals that businesses think they are doing a much better job at providing quality customer service than what consumers say they are getting. This is consistent across all channels measured across both Agent-Assisted and Self-Service channels. The success rating for Agent-Assisted channels is much higher according to both business and consumers than Self-Service.

This report presents the results of the Business Wave and includes side by side comparisons of Business findings with corresponding results from the Consumer Wave conducted earlier in 2017. inContact surveyed 300 contact center decision makers and more than 700 consumers who had experienced a customer service interaction in the past three months.

Businesses report an overall success rate of 63% for customer satisfaction in Agent-Assisted channels including inbound/outbound calls with customer service representatives, online chat/video, SMS Text, and social media. Whereas consumers give those same channels only 45% success rating—a gap of 18 points.

For Self-Service channels, businesses report an overall success rate of 52% for customer satisfaction, yet consumers give only 39% success rating—a gap of 13 points. Self-Service channels included website, mobile app, automated phone menu, and virtual assistants (i.e. chatbots).

Across channels, consumers rated customer service 17% lower, on average, than businesses rated their own success with customer experience. **Less than half of consumers** are satisfied with their experience, regardless of channel **whereas more than half of businesses** say they are doing well.

Major Findings

Businesses offer customers multiple communication channels, despite low customer adoption of many channels

- **The majority of businesses communicate to their customers with phone, email, and IVR**
 - Businesses have the highest resolution success rates with phone, echoed in high customer satisfaction
- **A significant number of businesses offer the less common methods** (online chat/video, SMS Text, social media), even though most customers still heavily rely on inbound/outbound voice calls
 - However, some customers are willing and even prefer to be contacted via email and SMS Text
- **Online chat is less preferred by businesses, however customers who use this channel are very satisfied with it and prefer it over other methods**
- **Businesses also have high success rates with email.** While customers also have moderate satisfaction with both, there are cases where email brings down the satisfaction significantly – **businesses may be unaware of some problems with email**
- **IVR is a pain point** for both customers and businesses

Responding quickly and providing complete information is important to both customers and businesses

- **Providing complete information is important to business success and customer satisfaction**, regardless of channel
- **Being quick is also important to both businesses and customers**, especially for Self-Service channels
 - Both also expect companies to direct their customers to the quickest path of resolution
- **Convenience is reported by businesses for customer service success** (especially for Agent-Assisted channels), but **personalization is more important to customers**
 - All channels more-or-less are considered convenient by customers, so adding personalization (especially when contacting a rep or through another Agent-Assisted channel) is more important to customers
 - Personalization is less of a priority to businesses, but businesses should focus more strongly on personalization in order to better meet customer expectations

Research Objectives and Comparison of Results

Objectives

- Measure & track current usage and plans to use service channels (current and emerging, assisted, self-service)
- Compare & contrast business perceptions of “best-in-class” service experiences by current/emerging channels
- Compare & contrast business perceptions versus consumer experiences/attitudes towards personalized (contextual), proactive, omnichannel service experiences via different channels (assisted and self-service)
- Compare/contrast perception of consumer expectations related to new technologies such as big data, artificial intelligence, chatbots, Internet of Things, virtual reality
- Track priorities to adopt technology to improve service experiences based on personalized (contextual), proactive, omnichannel via different channels (assisted and self-service) plus speech/text analytics, next-best action recommendations to agents or analytics driven routing

Comparison of Business versus Consumer Results

- This is the second of a two-part study that demonstrates
 - How businesses utilize channels and how they report the quality of the service they provide across both agent-assisted and self-service channels
 - How business perceptions compare and contrast to what consumers report their actual experiences across channels
- This report presents the findings from the Business phase and provides side-by-side charts from the results of the Consumer report published in April 2017.
- inContact intends to conduct this study annually, and track changes over time.

Methodology

Business Wave, Conducted July 2017

Methodology: 300 online surveys using a business panel.
Data was collected July 18-July 31, 2017.

Survey Length: Approximately 14 min

Qualification Criteria: Contact center decision makers (contact center director/manager/VP, customer experience executive involved in purchase, recommendation of technologies to improve customer experience) across any industry. (Consumers are anyone who had a customer service experience within the past three months either by initiating contact with a company, or being contacted by a company)

Business Targeted Quotas:
Enterprise – 100+ agent seats in entire organization: 150
Small Business: 25-99 agent seats: 150

Weighting: Business data is not weighted

Research conducted by: MaritzCX

Consumer Wave, Conducted March 2017

Methodology: 718 online surveys using a consumer panel. Data was collected from March 1-13, 2017

Survey Length: Approximately 9 min

Qualification Criteria: Consumers who had a customer service experience within the past three months either by initiating contact with a company, or being contacted by a company

Targeted Quotas: Surveys were completed across the following Agent-Assisted (AA) and Self-Service (SS) channels, with targets of 100 per group*:

Inbound/Outbound voice (AA):	102	
Email (AA):		99
Online Chat/Video (AA):	107	
Text/Social Media (AA):	102	
IVR (SS):		96
Website (SS):		99
Mobile App/Bot/Virtual Assistant (SS):	113	

Weighting: Data were weighted so that those entering the survey – prior to screening - aligned with US Census proportions for age, gender, race, and ethnicity

Research conducted by: MaritzCX

DETAILED FINDINGS

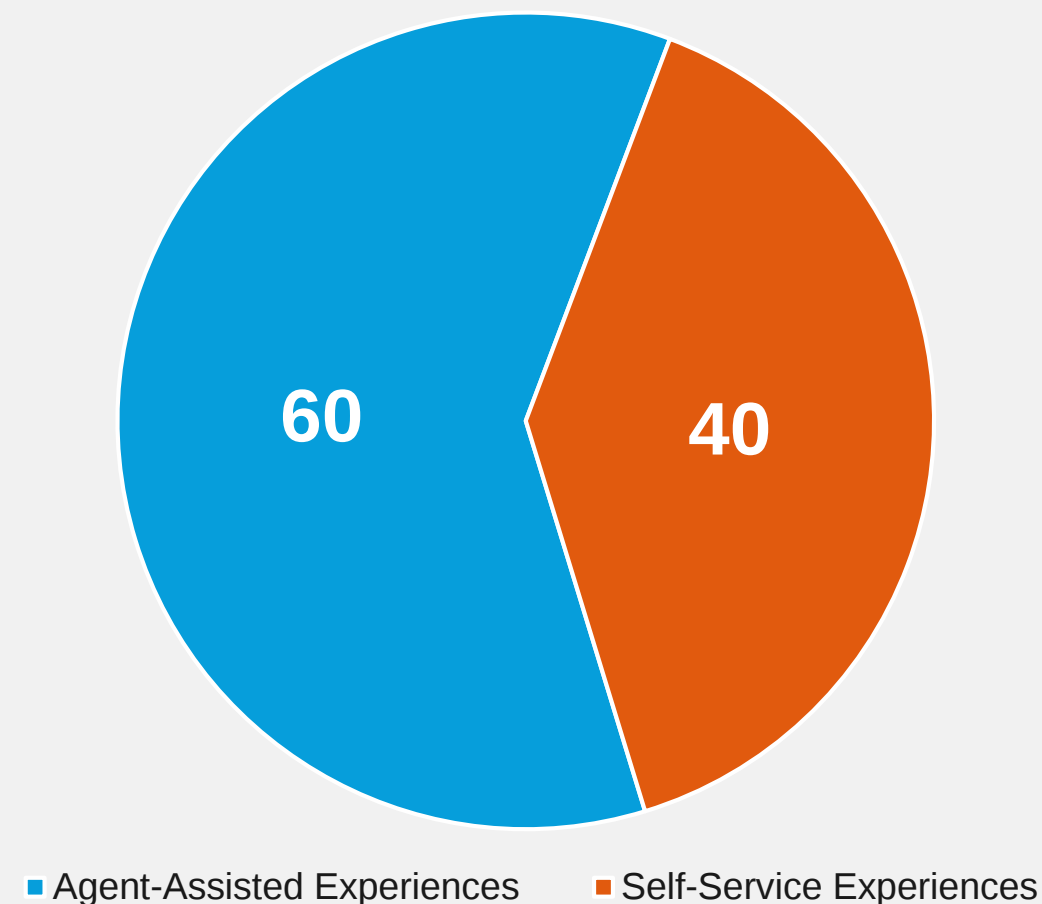
What channels do businesses use to communicate with their customers?

Businesses' customers interact with them via agents over half of the time, but Self-Service is still used by many (just at a lower frequency)

- 40%-90% of the time Agent-Assisted channels are used, whereas Self-Service is used for 20%-50% of the interactions

Business

% Proportion of Customer Service Experiences

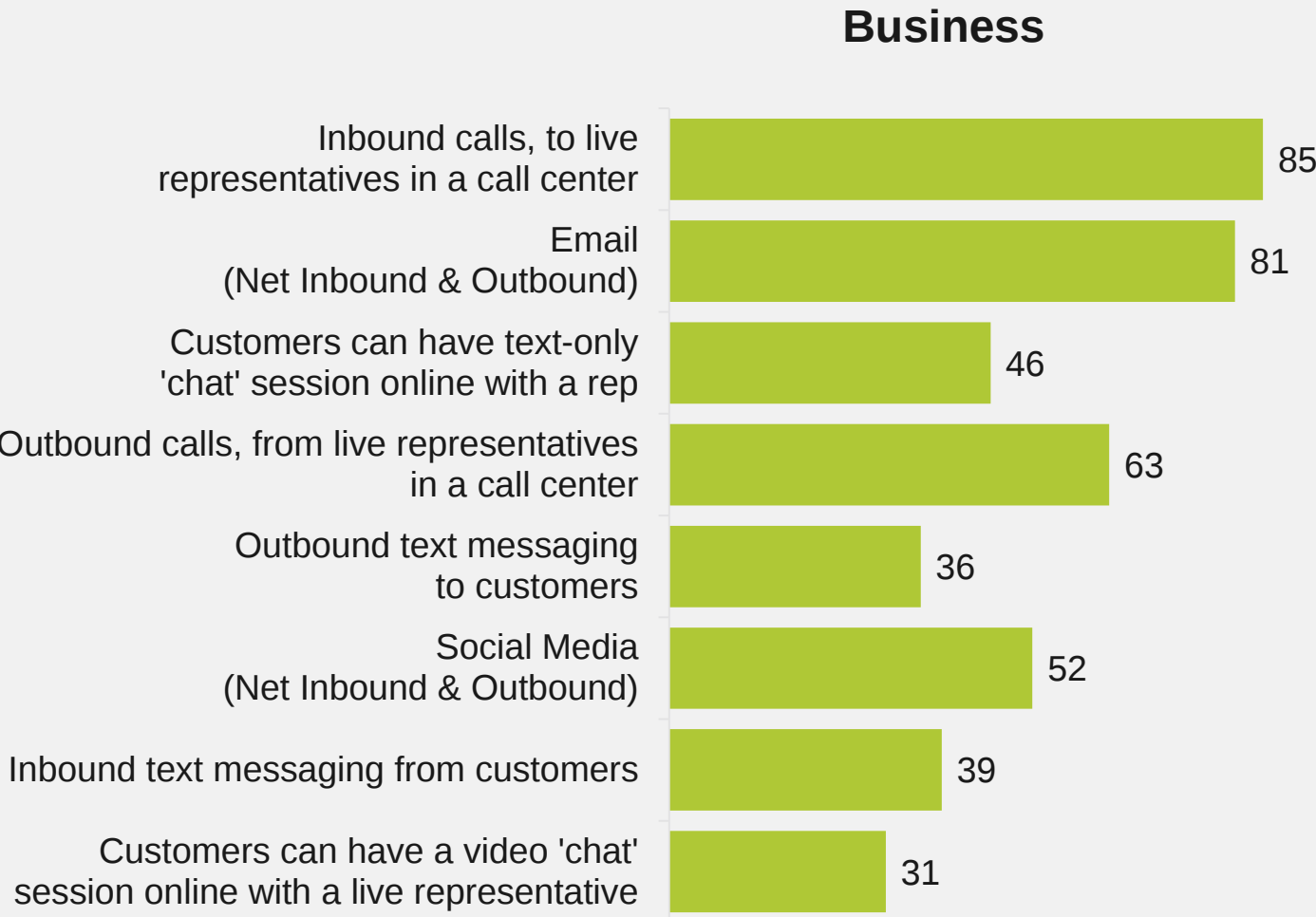
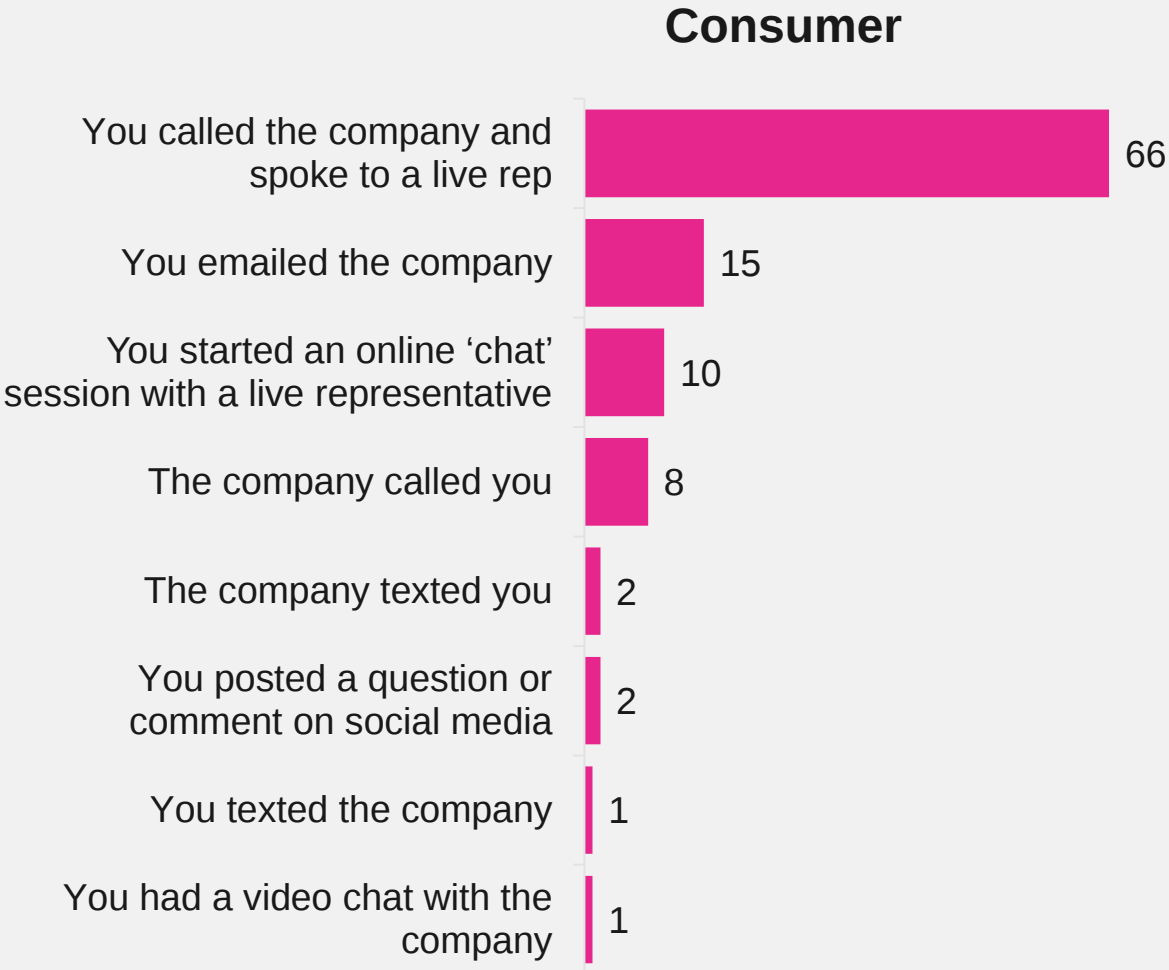
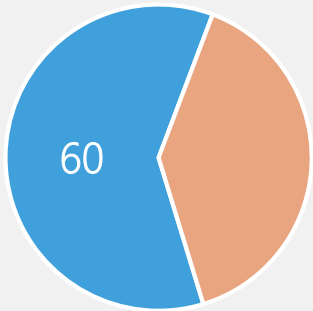


CC2. Thinking about all the service experiences customers have with your company, what proportion of those experiences fall into each of two main categories: 'Agent-Assisted' and 'Self-Service?'

Among the Agent-Assisted channels used, customers speak with a live representative most often

Agent-Assisted Channels

Methods of Communication (% each method was mentioned)

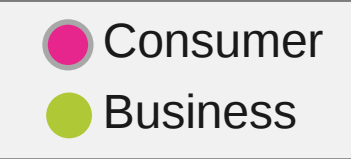


Email
Inbound 76%
Outbound 64%

Social Media
Inbound 51%
Outbound 37%

QS4. In which of the following ways did you communicate or interact during this experience? (Respondents were allowed to check multiple methods for up to two experiences.)

CC1a. In which 'Agent-Assisted' ways does your company communicate or interact with customers?



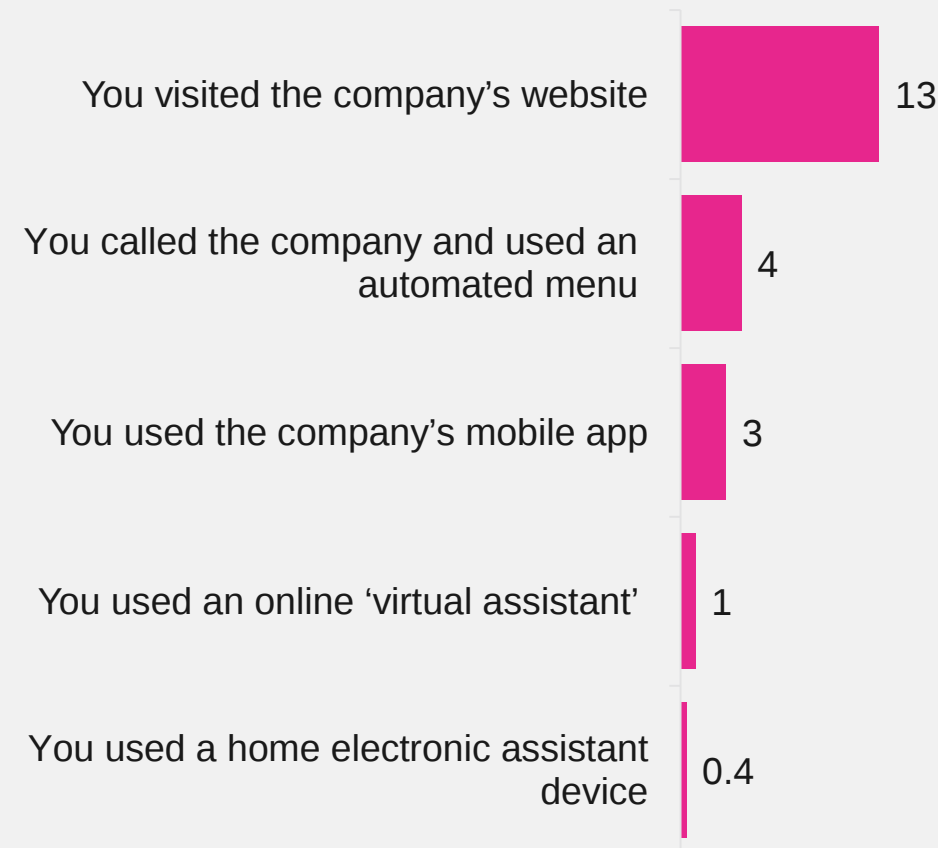
Consumer Chart Base n=2,608 (Completes + All valid screened respondents who did not complete the survey due to quota met or suspended the survey); Most recent experience
Consumer Table Base n=4,781 points of contact (across all 3,771 experiences had by 2,608 respondents). Data is unweighted, but weighted data is all within 0-2 percentage points
Total Business Base n=300

Most businesses offer Self-Service options to communicate (especially IVR and their website), despite very few customers using

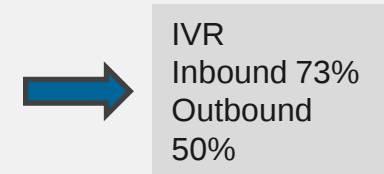
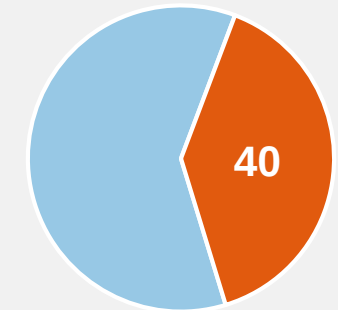
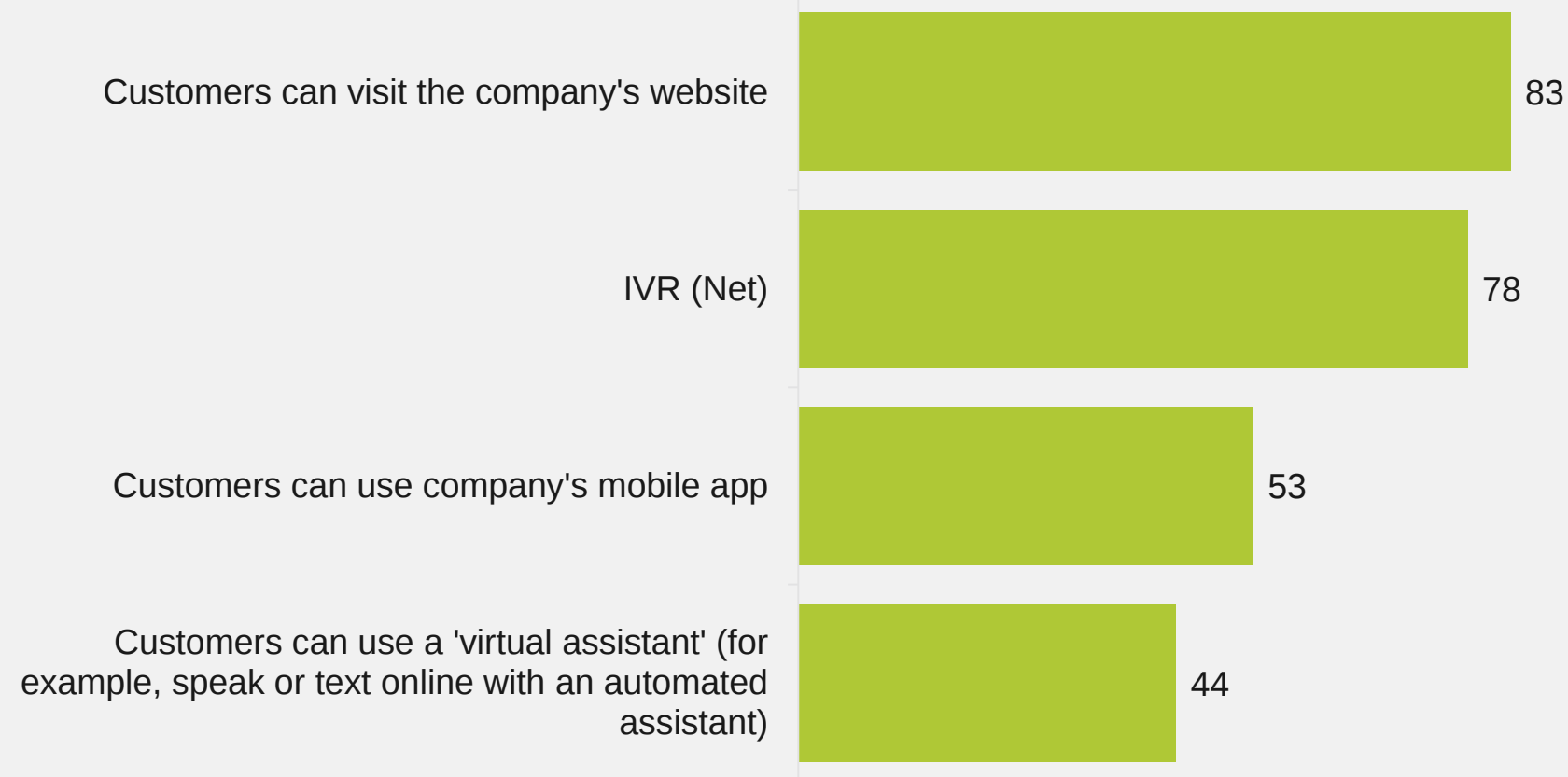
Self-Service Channels

Methods of Communication (% each method was mentioned)

Consumer



Business



● Consumer
● Business

How satisfied do businesses think their customers are with their service experiences across various channels and industries?

Businesses report higher success rates with Agent-Assisted channels overall, (especially with voice and email) along with mobile apps

- Social media, SMS Text, and IVR render the lowest success rates

Business

Success with Using each Method of Communication
(% Rating as 9/10)

	% 9/10		% 9/10
Agent-Assisted (Overall)	63	Self-Service (Overall)	52
Online Chat & Video (Net)	54	Website	56
Text Chat	49	Mobile App/Bot/Virtual Assistant (Net)	61
Video Chat	56	Mobile App	62
Email (Net)	64	Virtual Assistant	53
Inbound Email	55	IVR (Net)	55
Outbound Email	55	Inbound IVR	50
SMS Text & Social Media (Net)	57	Outbound IVR	54
Inbound SMS Text	54		
Outbound SMS Text	50		
Inbound Social Media	50		
Outbound Social Media	48		
Inbound & Outbound Voice (Net)	68		
Inbound Voice	64		
Outbound Voice	62		

QCH1. Now thinking specifically of “Agent Assisted” ways that customers interact with your company (e.g., phone, email, chat, social media), how would you rate your company overall on successfully resolving the customers’ questions or problems? QCH3. For each method below that your customers can interact with the company in an “Agent-Assisted” fashion, how would you rate your company on successfully resolving the customers’ questions or problems? *Please select one per row.*

QCH2. Now thinking specifically of “Self-Service” ways that customers interact with your company (e.g., website, mobile app, automated phone menu, virtual assistant), how would you rate your company overall on successfully resolving the customers’ questions or problems?

QCH4. For each method below that your customers can interact with the company in a ‘Self-Service’ fashion, how would you rate your company on *successfully resolving the customers’ questions or problems?* Please select one per row.

Businesses rate their success in Agent-Assisted channels higher than customer satisfaction, with the biggest gap in voice, followed by email

- Customer satisfaction from email suffers from a high proportion of customers rating low (bringing the average down); not echoed in businesses' perceptions of success
- Businesses have lower success with online chat/video, but this channel leads to the most satisfying experience according to customers

Agent-Assisted Channels

Satisfaction/Success with Using each Method of Communication
(% Rating as 9/10)

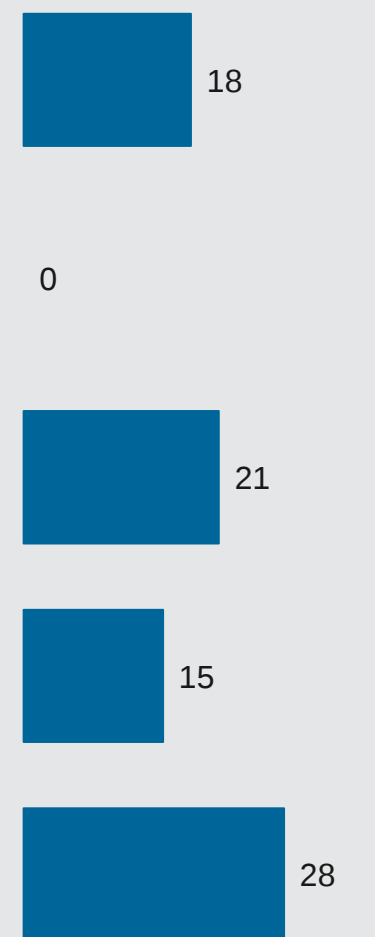
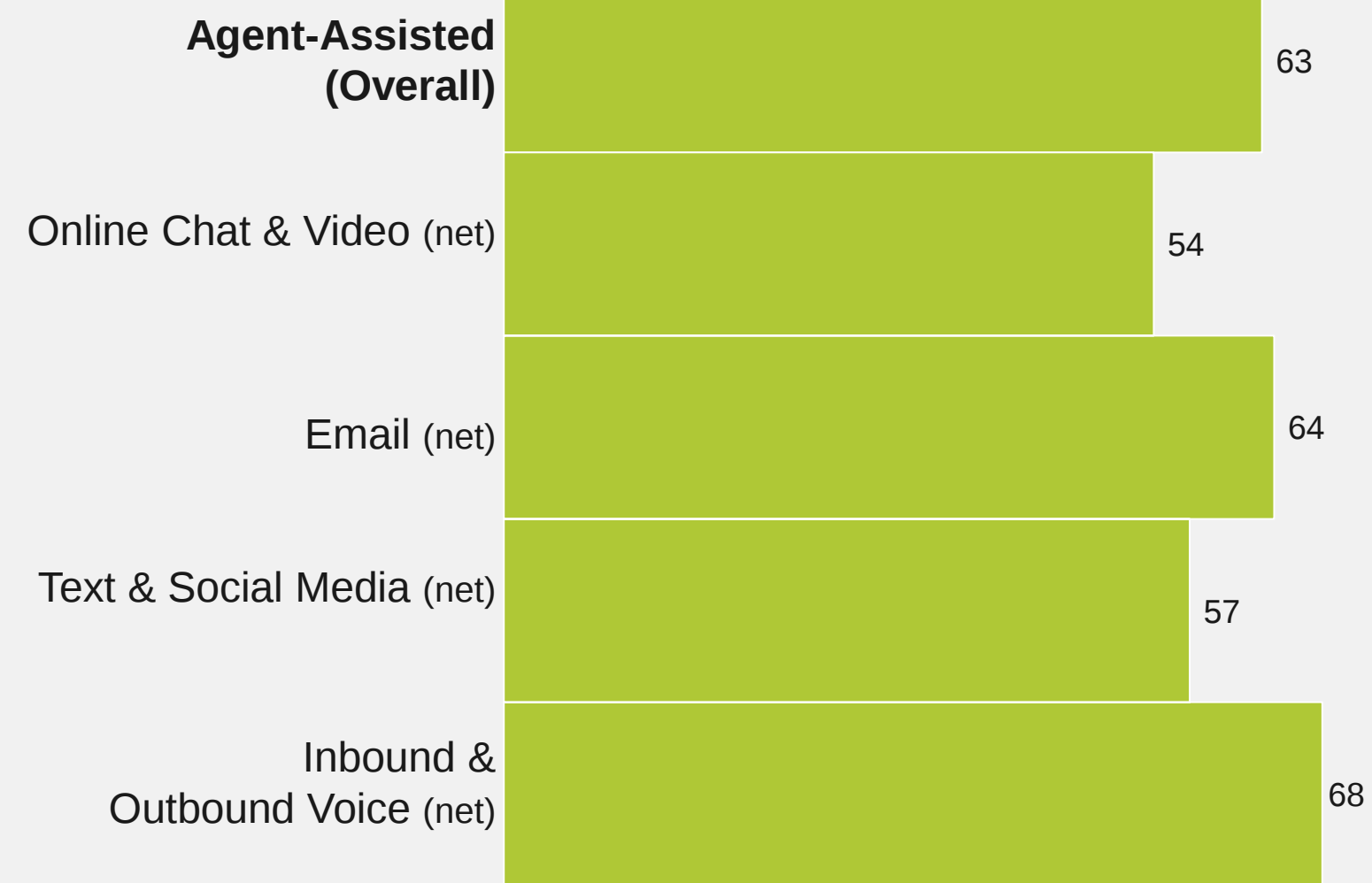
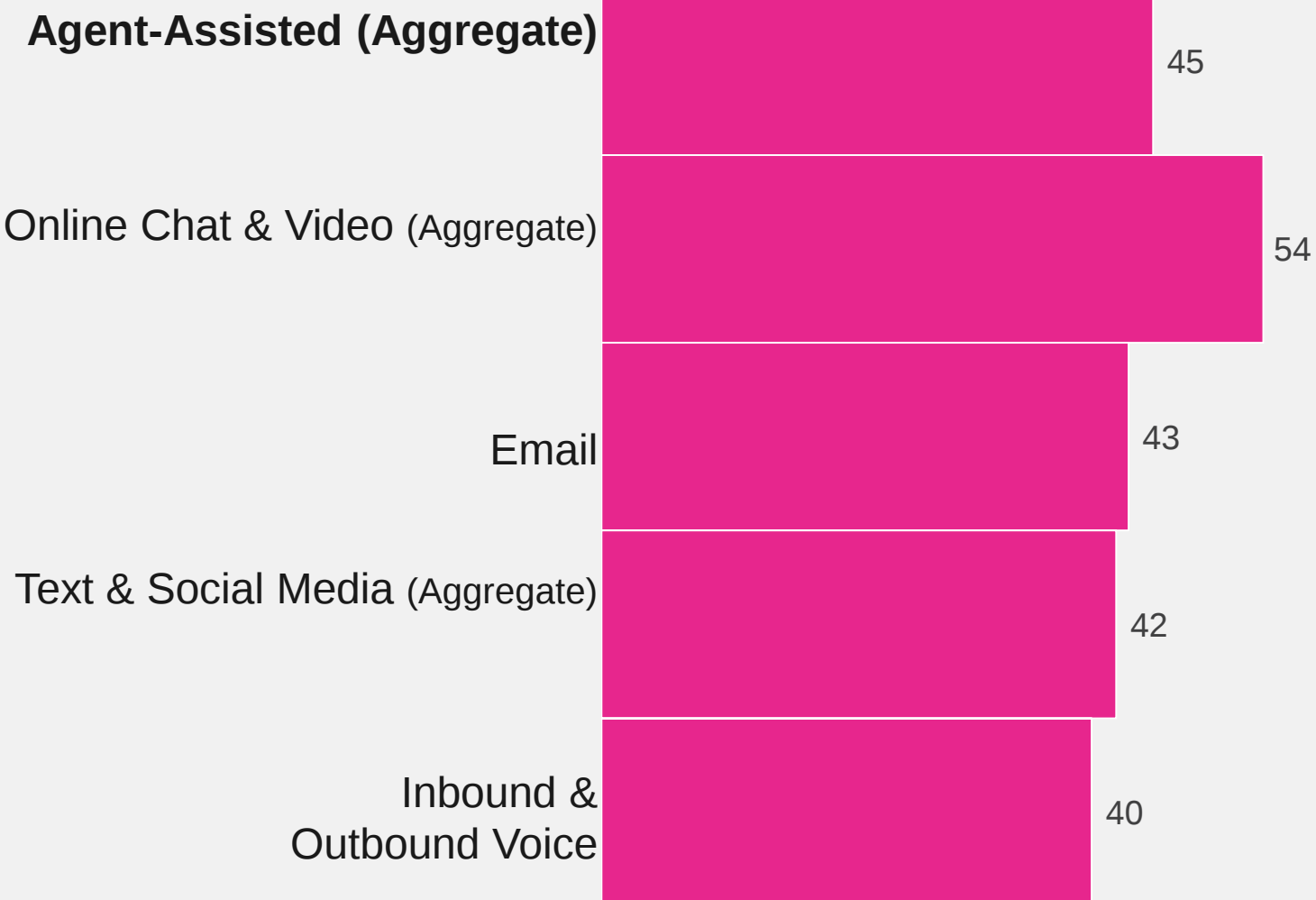
Consumer

Business

Gap
(% Rating as 9/10)

% 9/10

% 9/10



QCH1. Thinking about that recent customer service experience in the (INDUSTRY) industry where (CHANNEL), how satisfied were you overall with this method of communication during your experience?

QCH1. Now thinking specifically of "Agent Assisted" ways that customers interact with your company (e.g., phone, email, chat, social media), how would you rate your company overall on successfully resolving the customers' questions or problems?
QCH3. For each method below that your customers can interact with the company in an "Agent-Assisted" fashion, how would you rate your company on successfully resolving the customers' questions or problems? Please select one per row.

● Consumer
● Business

Businesses perceive that their mobile apps/bot/virtual assistant perform well, but customers disagree – they are more satisfied with websites. IVR also performs much worse with customers versus businesses

Self-Service Channels

Satisfaction/Success with Using each Method of Communication
(% Rating as 9/10)

Consumer

% 9/10

**Self-Service
(Aggregate)**

39

Website

49

Mobile App/Bot/Virtual
Assistant (Aggregate)

38

IVR

28

Business

% 9/10

**Self-Service
(Overall)**

52

Website

56

Mobile App/Bot/Virtual
Assistant (net)

61

IVR (net)

55

Gap
(% Rating as 9/10)

13

7

23

27

QCH1. Thinking about that recent customer service experience in the (INDUSTRY) industry where (CHANNEL), how satisfied were you overall with this method of communication during your experience?

QCH1. Now thinking specifically of “Agent Assisted” ways that customers interact with your company (e.g., phone, email, chat, social media), how would you rate your company overall on successfully resolving the customers’ questions or problems?
QCH3. For each method below that your customers can interact with the company in an “Agent-Assisted” fashion, how would you rate your company on successfully resolving the customers’ questions or problems? *Please select one per row.*

● Consumer
● Business

Businesses perceive that they are quick, solve problems, and have good customer service (customers agree). Quick/easy process is also top-of-mind for customers.

- Similarly, top suggestions for improving service experiences center on quicker response time and faster process, along with better customer service

Consumer

Top Suggestions for Improvement		Top Mentions of What is 'Good'	
• Respond quicker	9%	• Responded quickly	15%
• Respond back to emails	5%	• Answered my question	10%
		• Received info I needed	9%
• Lower prices/Offer discounts	3%	• Easy to use/Convenient	14%
• Better outcomes	2%	• Quick/Fast/Efficient	12%
• Faster process	2%		
• More friendly/less rude	4%	• Nice/Friendly/Understanding	11%
• More knowledgeable	4%	• Helpful/Listened/Patient	9%
• Better customer service	4%	• Knowledgeable	3%
• Solve my problem	5%	• Solved my problem	15%
• Faster resolution	2%	• Solved quickly	9%
		• Received a refund	3%
• Easier phone options	6%	• No wait/hold time	4%
• Less wait/hold time	6%	• Live person/Easy to reach	3%
• Prefer live representative	6%	• Like ability to email/text	2%
• Several items each at...	1%	• Simple to use	2%
<i>Better app, better site, easier to use site, more info, easier login</i>		• Website has clear info	1%

Communication
(Net)

Process (Net)

Customer Service
(Net)

Solution (Net)

Channel (Net)

Website/Mobile
(Net)

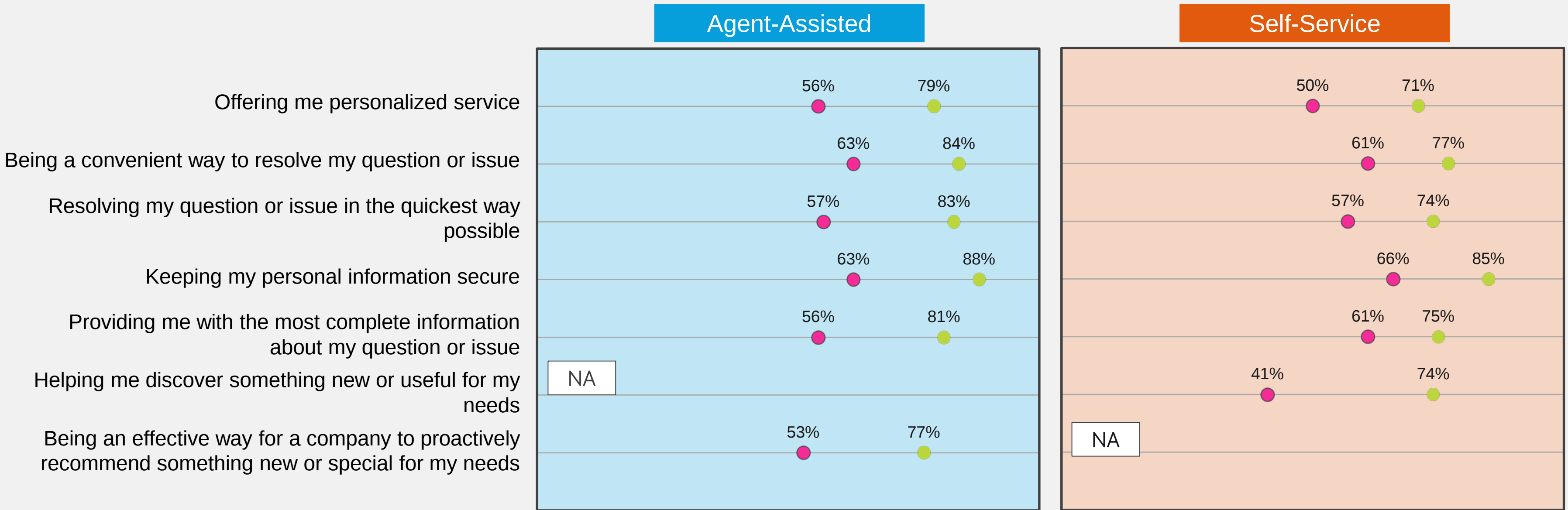
Business

Top Suggestions for Improvement		Top Mentions of What is 'Good'	
• Respond quicker	4%	• Responded quickly	15%
• Answer questions clearly	3%	• Answered my question	8%
• More communication	3%	• Good communication	4%
• Faster process	7%	• Good company/Caring	5%
• Better outcomes	3%	• Had no problems/Good	3%
• Lower prices/Offer discounts	2%	• Easy to use/Convenient	2%
		• Quick/Fast/Efficient	2%
• Better customer service	8%	• Good customer service	15%
• Increase staff	7%	• Helpful/Listened/Patient	12%
• More knowledgeable	5%	• Knowledgeable	11%
• Faster resolution	4%	• Solved my problem	15%
• Solve my problem	3%	• Solved quickly	13%
• Don't like automation	4%	• Live person/Easy to reach	8%
• Less wait/hold time	4%	• Live chat	2%
• Prefer live representative	3%	• No wait/hold time	1%
• Better System/Website	4%		
• More info on web	2%	• Website has clear info	1%
• Mobile App work better	2%		

Regardless of channel, businesses rate their performance higher than consumers for all elements

- Businesses perceive better offerings (security, convenience, resolution, etc.) with their Agent-Assisted channels
- Security is highest performing for businesses for both channels, but customers do not see a large differentiation with security compared to other performance elements

Channel Performance (% Rating as Excellent or Very Good)



● Consumer
● Business

QCH3_1. For these next few questions, think about that recent customer service experience in the (INDUSTRY) industry where (CHANNEL). Please rate this method of communication on each of the characteristics below.
Total Consumers n=718

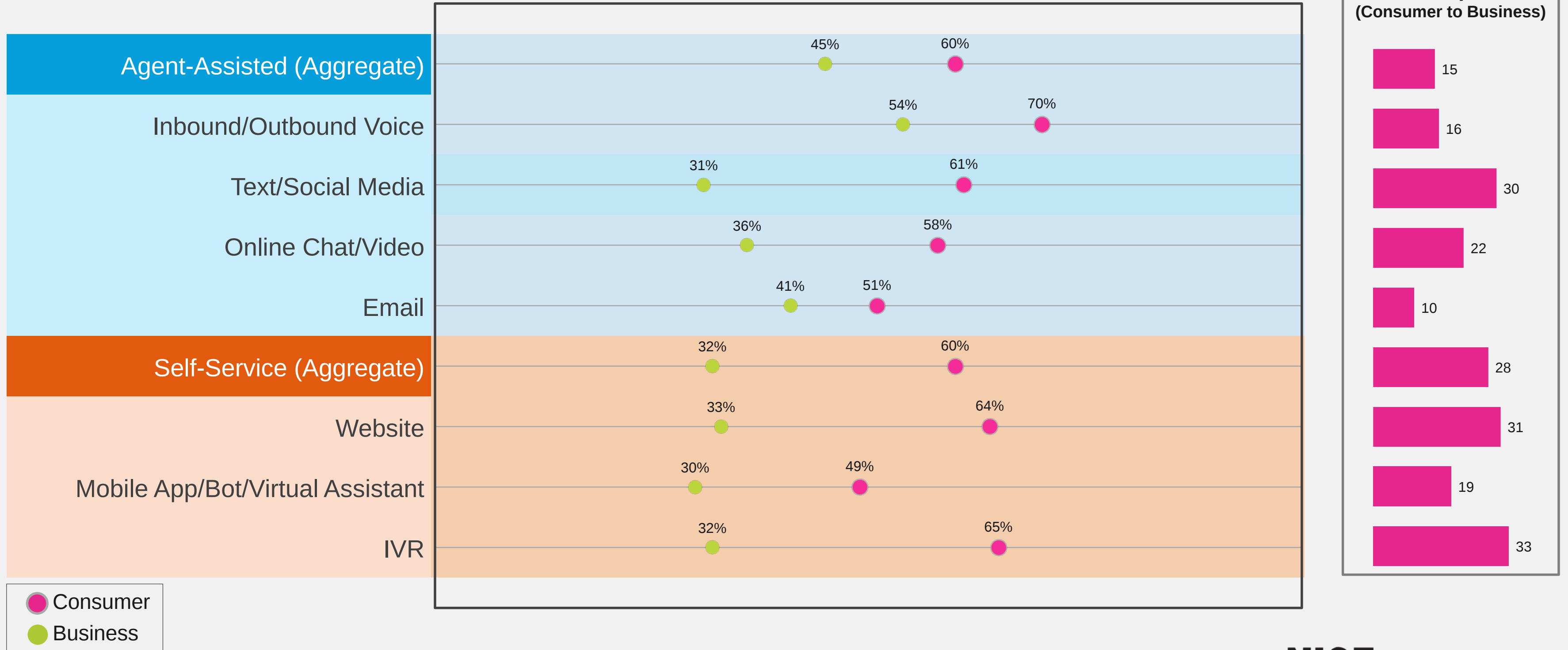
CH6.1-13 Thinking only about the 'Agent-Assisted'/'Self-Service' service experiences customers have with your company, rate your company on each of the characteristics below.
Total Business Agent-Assisted n=300; Self Service n=297

How does the service
experience impact Key
Metrics?

Customers report higher first-time resolution compared to what businesses report for any channel

- Customers report their lowest first-time resolution with mobile apps/bots/virtual assistants and email; their highest first-time resolution with voice
- Businesses report their highest first-time resolution with voice, followed by email and social media. All other channels have lower first-time resolution

% Handled First Time



Among businesses, being convenient is a top success driver for Agent-Assisted channels (along with providing complete information), which is different from customers who consider quick resolution the top driver

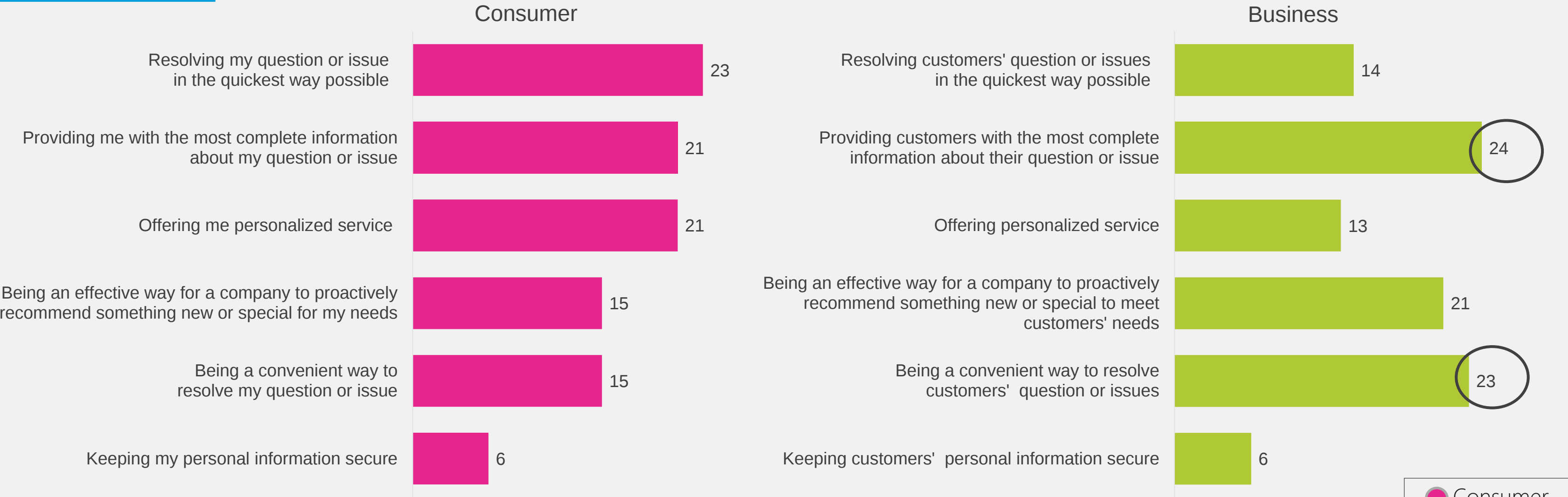
See Appendix for detailed explanation of True Driver Analysis

- Personalization is also more important to customers; lower importance to businesses

Agent-Assisted Channels

Drivers of Channel Performance (Consumer) versus Success (B2B)

“Channel Performance” (for consumers) is a composite measure (straight average of scores) based on Overall Satisfaction with the channel used, Likelihood to recommend and likelihood to continue doing business with the company based on the channel used during the most recent experience.



CH3.1-.7 For these next few questions, think about that recent customer service experience in the (INDUSTRY) industry where (CHANNEL). Please rate this method of communication on each of the characteristics below.

CH6.1-6. Thinking only about the 'Agent-Assisted' service experiences customers have with your company (e.g., phone, email, text, chat, social media), rate your company on each of the characteristics below.

● Consumer
● Business

Top Self-Service channel drivers of success for businesses are similar to top drivers for customers – being quick and providing the most complete information

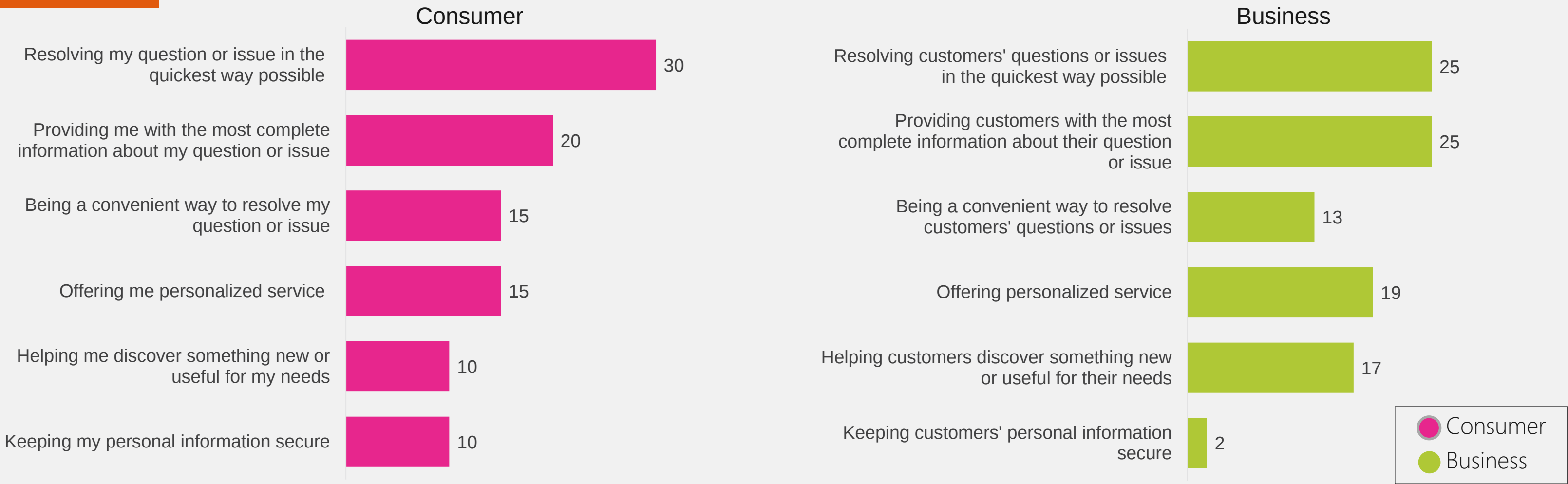
See Appendix for detailed explanation of True Driver Analysis

- Quick resolution is especially important to customers, placing 1.5 times more importance on quickness compared to complete information (businesses put equal weight on both items) – indicating that businesses may be somewhat underestimating the important of quickness in Self-Service channels
- Businesses don't place as much importance on security compared to customers

Self-Service Channels

Drivers of Channel Performance (Consumer) versus Success (B2B)

“Channel Performance” (for consumers) is a composite measure (straight average of scores) based on Overall Satisfaction with the channel used, Likelihood to recommend and likelihood to continue doing business with the company based on the channel used during the most recent experience.



CH3.1-.7 For these next few questions, think about that recent customer service experience in the (INDUSTRY) industry where (CHANNEL). Please rate this method of communication on each of the characteristics below.

Consumer n = 308
Consumer R2 = 0.621

CH6.8-13. Thinking only about the 'Self-Service' service experiences customers have with your company (e.g., website, mobile app, automated phone menu, virtual assistant), rate your company on each of the characteristics below

Total Business n = 295
Total Business R2 = 0.48

What emotions do businesses think their customers have, and what attitudes do they think customers hold about service experiences?

Businesses and consumers believe that phone calls with a customer service agent and the website create positive emotions. But businesses may underestimate customers' positive emotions from mobile apps or virtual assistants.

Rank of Emotions Positive to Less Positive
(#1 = More Positive on Average)

Agent-Assisted

Self-Service

Rank	Consumer		Business	
Mobile Apps or Virtual Assistants		#1		#6
Phone calls with live reps		#2		#1
Online chat (either text or video)		#2		#3
Website		#2		#2
Texting/Social media (net)		#5		#4
Email		#6		#5
Automated Phone Calls (IVR)		#7		#7

 Consumer

 Business

E1. Thinking about when [INSERT CHANNEL; USE SHORTENED TEXT] in the [INSERT INDUSTRY] industry about your customer service experience... how strongly did you feel each of the emotions below?

E1. When customers communicate with your company they can feel different emotions depending on the method or channel of communication. To what extent do you think each method below creates positive feelings such as trust or joy, or creates negative feelings such as frustration or anger?

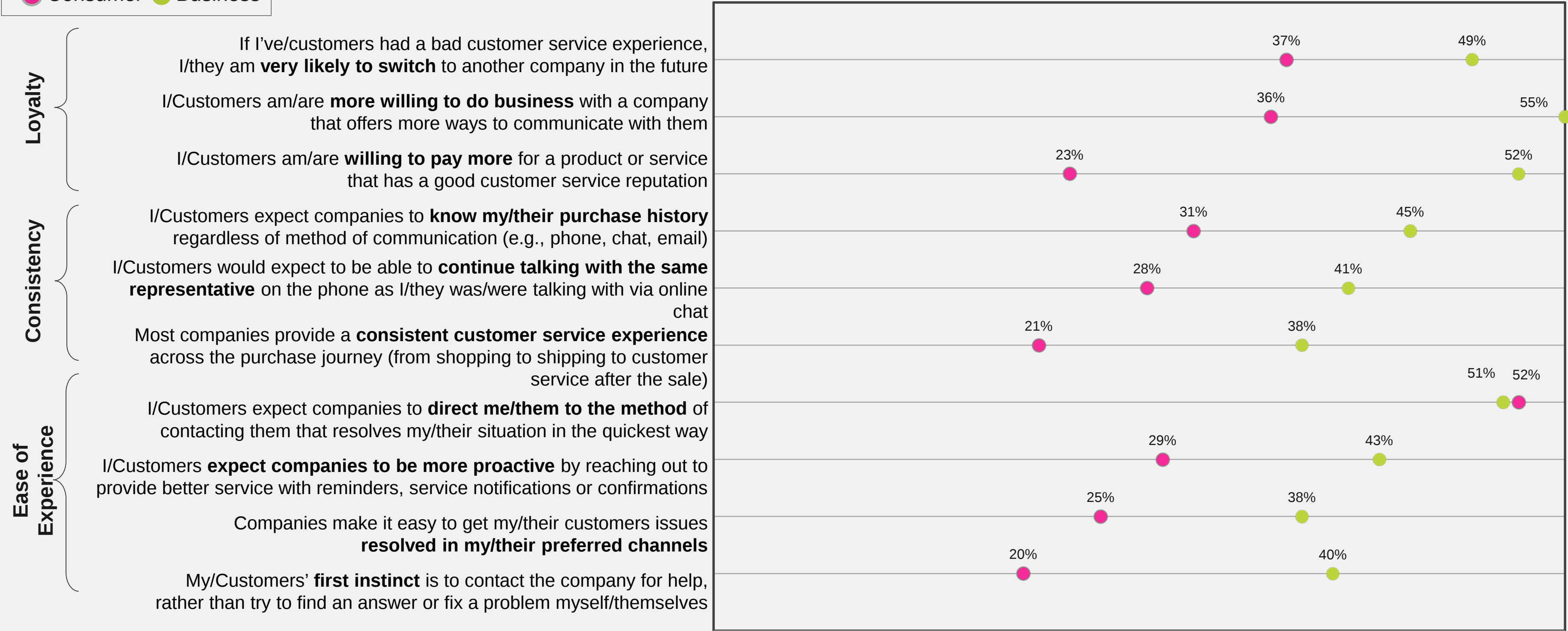
Consumer – Mobile App/Virtual Assistant (n=111) Phone Calls (n=104) Online Chat (n=109) Website (n=99) Texting/Social media (n=100) Email (n=102) IVR (n=94)
Total Business - Mobile App/Virtual Assistant (n=195) Phone Calls (n=274) Online Chat (n=163) Website (n=248) Texting (n=133) Social media (n=157) Email (n=242) IVR (n=233)

Businesses and customers agree that the companies should direct customers to the channel that resolves their situation in the quickest way

- Businesses believe that customers have higher expectations of businesses than reality. The biggest gap is with customers’ willingness to pay more when a company has a good customer service reputation

● Consumer
 ● Business

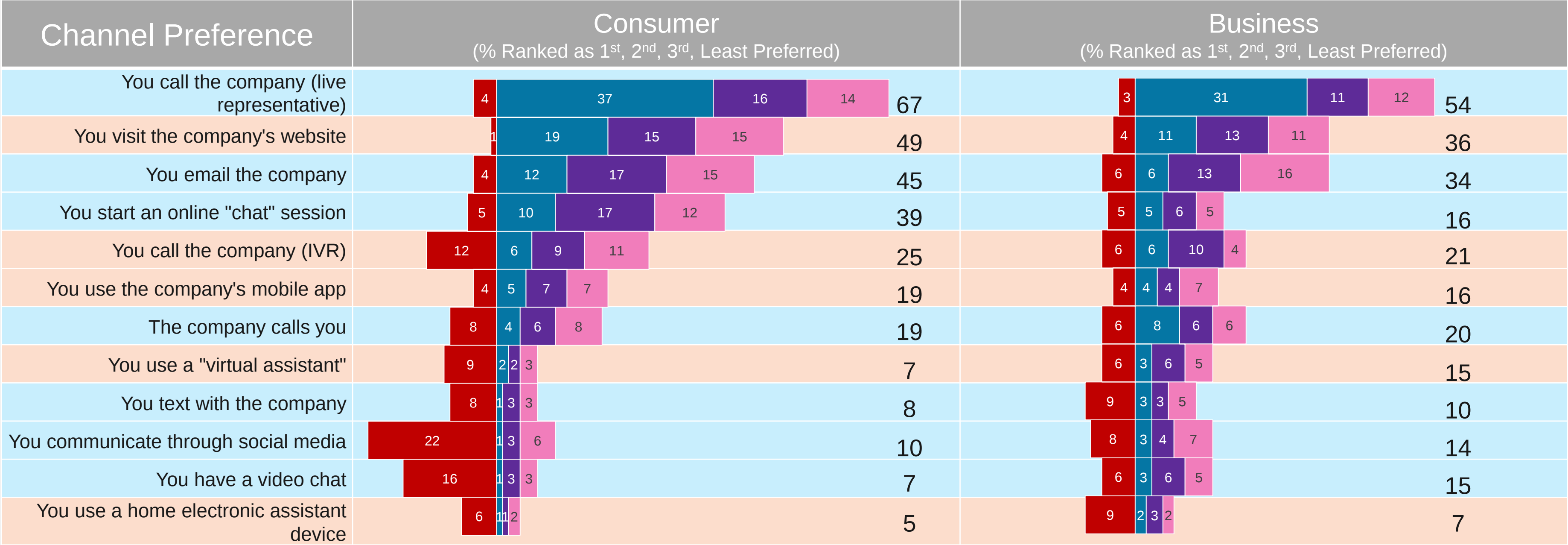
Channel Attitudes (% Strongly Agree)



What channels do businesses prefer to communicate through, and how well do channels handle problem resolution?

Customers and businesses both prefer interactions with a customer service agent, along with website and email. Customers also prefer online chat much more than businesses prefer to offer it.

- Social media and video chat are least preferred by consumers – even less preferred compared to businesses



Agent-Assisted

Self-Service

QCP1. Of the ways in which you can interact with a company during a customer service experience, please rank your top three from the list below. QCP2. Of the ways in which you can interact with a company during a customer service experience, which is your LEAST-preferred method?
Base: Consumers, n=718

Least Preferred

Ranked #1

Ranked #2

Ranked #3

QCP1. From the list below, please rank the top three ways that your company would prefer to interact with a customer during a service experience. Enter a '1' for your most-preferred method, followed by a '2' and '3' for your next most-preferred methods.
QCP2. And from the list below, which is the LEAST-preferred method that your company would prefer to interact with a customer during a service experience?
Base: Total Business n=300

*Totals may not match 1st, 2nd, 3rd percentages due to rounding

Selected reasons for each method being companies’ “least preferred” channel of communication with customers

Agent-Assisted	Inbound Calls, to Live Representative	Outbound Calls, From Live Representative	Inbound Email To Customers	Outbound Email to Customers	Online Chat Session	Inbound Text Messaging From Customers	Outbound Text Messaging From Customers	Inbound questions or comments via Social Media	Outbound questions or comments via Social Media	Have a Video Chat
	Cost to staff is not balanced by effectiveness	They are inefficient with regard to time spent	It's best to cover one on one customer service with a live person	Less personal less emotional. More professional to hear a voice and have a physical person solve problems	Chat can be very inconsistent. It can be very time consuming and has a high drop off rate	Feel direct contact is better for customer rather than text messages	Sometimes we can't notice the text messages when we're busy	There are still many customers that do not use social media	There is a certain amount of privacy that the customer sacrifices using social media	There can be quite a bit of background noise, people walking, etc. having a bit of anonymity in this type of interaction is a good thing
	It requires paying someone to do the job	Takes the most time	Questions are harder to understand in an email		Resolutions tend to come about when people are speaking with an actual person	Things get lost, sometimes you just do not see all texts, things are read wrong. Too much back and forth	The response time between people is not guaranteed	The social media can provide a needed service, however the company can not rely of the truthfulness of the media.	I don't feel it is as secure	
	Highly effective, however it is also the most expensive	It is not efficient and it cost a great deal especially if you have a very large customer base	Rarely do customers provide enough info to solve the issue on first contact	Hard to explain things in an email, no emotion	Now days very few people check their email frequently	Cause it confuses them sometimes	Usually not taken seriously	Quite impersonal way, frequently not much feedback	Not personal	It can some times be awkward or uncomfortable
							It is very impersonal	Too public	People can express their emotions in a way to hurt us	Most people find it difficult to use

Self-Service	Inbound calls, to an automated phone service (IVR)	Outbound calls, from an automated phone service (IVR)	Visit the Website	Use the Mobile App	Use a Virtual Assistant	Use a Home Electronic Assistant
	Sometimes the issues are too complicated to resolve this way and realize the frustration it causes to customers	Least personal feel when interacting with a client, catches them at bad times and annoys	It takes longer to resolve this way. You usually don't find the answer you're looking for and then the customer has to create a ticket for the support issue	Not up to date w/ current windows Java update, often crashes	It's just not accurate enough	We prefer a more warm and personal touch
	Not personalized	This method is too similar to telemarketing	Not as interactive has other options	Certain demographics do not use it	Customers like dealing with real people	The information obtained by the home electronic assistant may not be accurate
		It's not efficient. Customers are annoyed by it often times		Not reliable	Not as reliable as the other services	Takes extra time

Where do businesses
plan to invest in order to
improve service
experiences?

Businesses plan to make a variety of customer service improvements next year – including improving website, customer satisfaction measurement, and upgrading technology

Business

% Aware of Changes to Improve the Customer Service Experience

Improvement(s)	Total Business (% Aware)
Improve the website experience	50
Continuing 'customer satisfaction' or 'customer experience' measurement programs	38
Upgrading other technology to communicate with customers (e.g., chat, text, email)	37
Improving the mobile app experience	37
Upgrading contact center technology	36
Adding staff to customer support positions	35
Implementing new customer service training	35
Implementing new 'customer satisfaction' or 'customer experience' measurement programs	32
Adding new services to let customers resolve issues on their own	27
Adding new services that allow channels of communication to work together seamlessly	27

T2.. In the coming year, what changes are you aware of that your company will be making to improve the customer service experience? *Please select all that apply.*

Total Business Base n=300

Businesses plan to invest in channels that consumers say they are less satisfied with.

- Consumer satisfaction is highest for SMS Text and Chat where fewer businesses plan to invest

Consider Technology Improvement	Likely to Invest to Improve Experience (% Top 2 Box)	Consumer Satisfaction (% Top 2 Box)	Gap
Email support	59	43	-16
Company's website	59	49	-10
Voice call support	51	40	-11
Company's mobile app	46	44	-2
Communicating with customers on social media	45	32	-13
Automated phone services (IVR)	44	28	-16
Virtual assistant through the website	43	32	-11
Video 'chat' sessions online with a live representative	40	NA*	
Text messaging with customers	40	47	7
Text-only 'chat' sessions online with a live representative	36	54	18

T1. In the coming year, how likely will your company invest efforts and/or money in improving the customer service experience in each of the following channels? *Please select one per row.*
QCH3. For each method below that your customers can interact with the company in an "Agent-Assisted" fashion, how would you rate your company on successfully resolving the customers' questions or problems? *Please select one per row.*
QCH1. Thinking about that recent customer service experience in the (INDUSTRY) industry where (CHANNEL), how satisfied were you overall with this method of communication during your experience?
Consumer Bases: Email (99) Web (99) Voice (102) Mobile App (75) Social media (34) IVR (96) Virtual Assistant (38) Video chat (5) SMS (68) Online text chat (102)

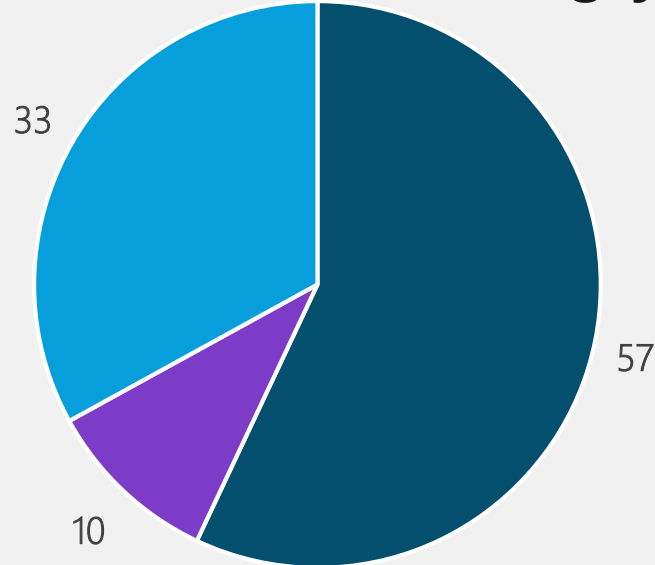
Base: Voice call support (n=295) Email support (n=296) Text-only chat (n=292) Video chat (n=290) Text messaging (n=291) Social media (n=291) Automated phone services (n=293) Company's website (n=295) Company's mobile app (n=295) Virtual assistant (n=289)

Consumer

Business

Over half of businesses will need more resources for Agent-Assisted channels in the next year, mostly due to customers increasingly interacting through calls, chat or social media

% More likely to happen in the coming year



- Your company will need more resources (people and/or technology) for 'agent-assisted' communication with customers to handle calls, chat, social media
- Your company will need less resources (people and/or technology) for 'agent-assisted' communication with customers to handle calls, chat, social media
- Your company will need about the same level of resources for 'agent-assisted' communication with customers

T3.1. In the coming year, which one of the following do you think is more likely to happen?
T3.2. You mentioned your company will need more resources (people and/or technology) for agent-assisted communication. Which one of the reasons below is driving that need more so than the other?
T3.3. You mentioned your company will need less resources (people and/or technology) for agent-assisted communication. Which one of the reasons below is driving that need more so than the other?

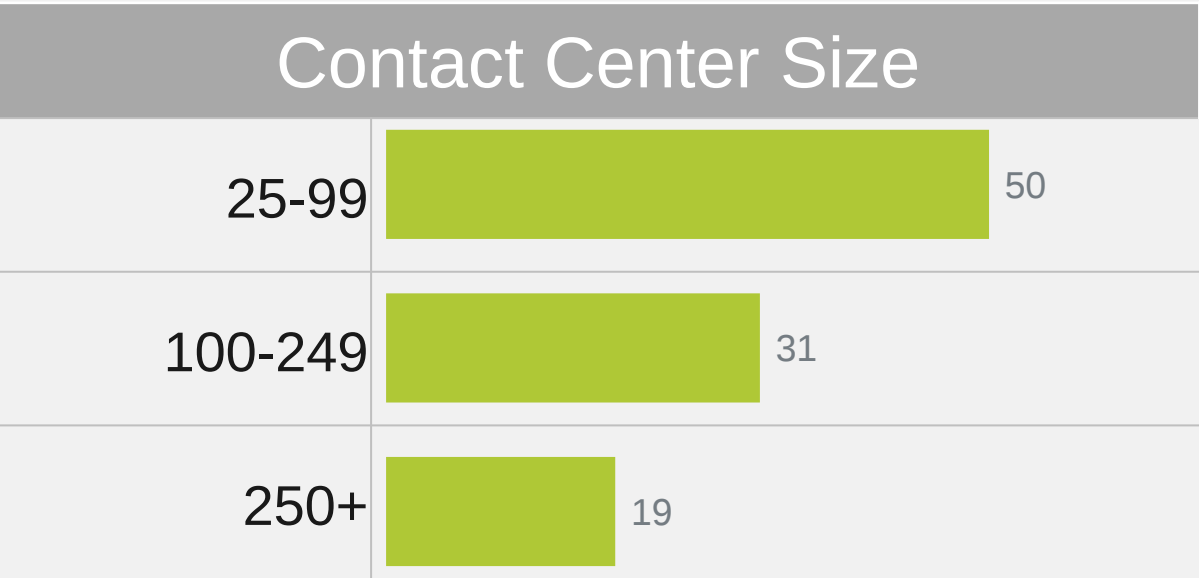
Business

	% among companies who need more resources
An overall <u>increase</u> in the number of customers interacting with your company through calls, chat, or social media, creating more agent-assisted experiences	35
Customers <u>shifting</u> from self-service experiences (web, mobile app, etc.) to methods where they need an agent	6
Both equally	15

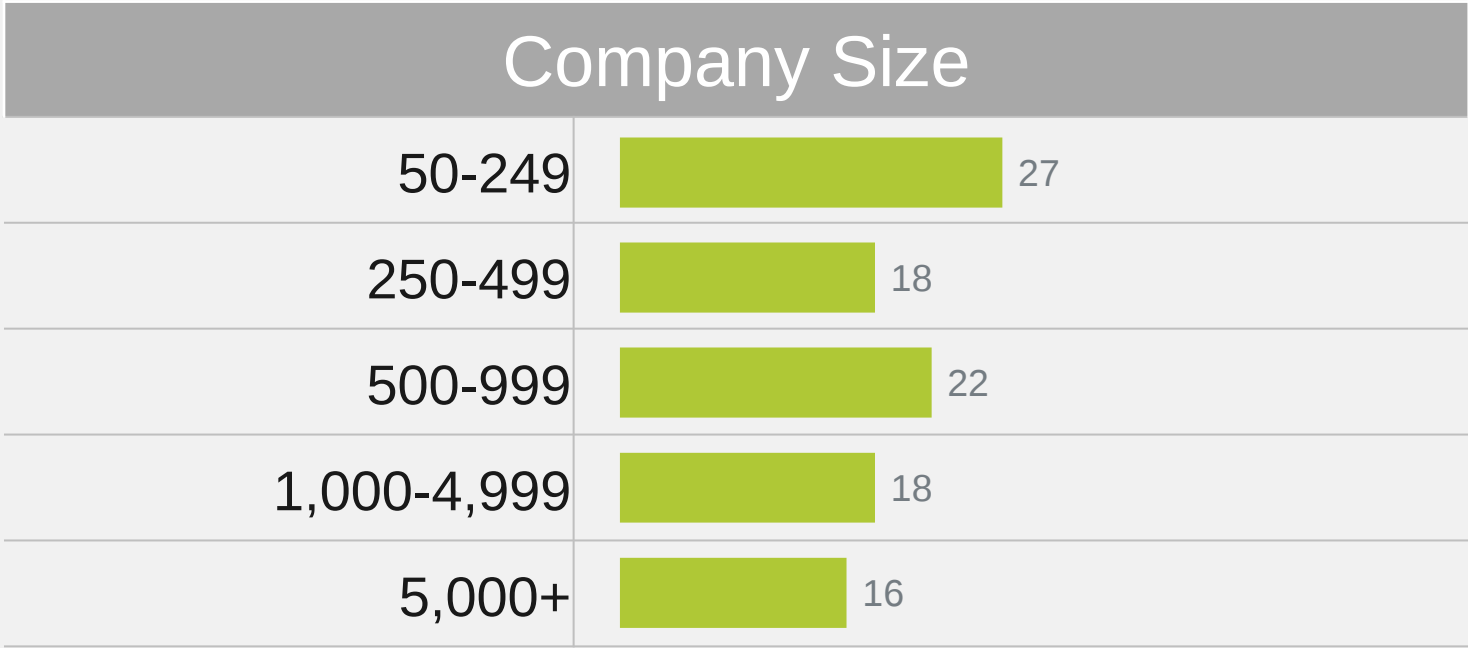
	% among companies who need less resources
An overall <u>decrease</u> in the number of customers interacting with your company through calls, chat, or social media, creating fewer agent-assisted experiences	2
Customers <u>shifting</u> from agent-assisted methods to self-service experiences (web, mobile app, etc.)	7
Both equally	2

FIRMOGRAPHICS

Firmographics



Company Sizes	Contact Center Sizes		
	25-99	100-249	250+
50-249	47	12	2
250-499	21	20	5
500-999	19	25	25
1,000-4,999	11	26	21
5,000+	3	17	47



Quotas*	
Enterprise – 100+ agent seats in entire organization	n=150
SMB – 25 to 99 agent seats	n=150

*Even quota targets were set in the attempt to acquire 150 SMB and 150 Enterprise completes. Therefore, it is not fully representative of the market

S3. How many people does your company employ at all locations? Your best estimate is fine.
S4. When your call center(s) is/are fully-staffed, how many stations do you have across the company? Again, your best estimate is fine.

Total Business Base n=300

Firmographics

Industry	Count	Industry	Count
Other	67	Supermarket/Grocery store	6
Retailer	51	Auto Dealer	5
Software Firm	39	Computer/Tablet maker	5
Health Plan	20	Credit Card Issuer	5
Business Process Outsourcer	19	Wireless Carrier	4
Investment Firm	17	Fast Food Restaurant	3
Banking	14	TV Service	3
Insurance Carrier	11	Airline	2
Utilities	11	Car Rental	2
Internet Service Provider	7	Major Appliance	2
Hotel	6	Parcel Delivery Services	1

S6. And which of the following industries best describes the company you work for? Please select one.

Total Business Base n=300

Notes

1.

QCH2_1. And what was particularly good about that method of communication that led you to give that rating? Base: Rated Communication method as 9-10, n=307

QCH2_2. And what about that method of communication could be improved so that next time you would be more satisfied? Base: Rated communication method as 1-8. n=411

QCH5_1. And what does your company do particularly well to promptly resolve customers' questions or problems? Please be as specific as possible. n=300

QCH5_2. And in what ways could your company improve the support to customers? Please be as specific as possible? n=300

As multiple codes can be assigned to a comment, a respondent can appear in multiple individual codes, and in multiple 'net' categories, but can only count once within a 'net' category

2.

QCH5_1. And what does your company do particularly well to promptly resolve customers' questions or problems? Please be as specific as possible. n=300

QCH5_2. And in what ways could your company improve the support to customers? Please be as specific as possible? n=300

3.

QP1. Thinking about your experience in the (INDUSTRY) industry when (CHANNEL), was your question answered or your problem resolved? Base: Total Consumers: n=718

QP2. And which would you say best describes your experience in the (INDUSTRY) industry when (CHANNEL), would you say... Base: Total Consumers:, n=718

QP1. Below are the various ways you said customers interact with your company. For each channel, what percentage of the time is the service experience resolved during the first point of contact? A rough estimate is fine, but you can only enter a whole number from 0 to 100, and not a range. If you are not aware of this information for a certain channel, you can check 'Don't Know.' Base: Total Business: n=300

4.

CP3. Why did you select “[**INSERT ABBREVIATED WORDING FOR SELECTION IN CP2**]” as your company's least-preferred method of interacting with a customer? *Please be as specific as possible*

Total Business Base n=300

Thank You