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.

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Major Findings

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

o **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

o **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

o **Online chat is less preferred by businesses, however customers who use this channel are very satisfied with it and prefer it over other methods**

o **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**

o **IVR is a pain point** for both customers and businesses

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

o **Providing complete information is important to business success and customer satisfaction**, regardless of channel

o **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

o **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

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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.

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Methodology

Business Wave, Conducted July 2017	Consumer Wave, Conducted March 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
	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

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DETAILED FINDINGS

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What channels do businesses use to communicate with their customers?

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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

% Proportion of Customer Service Experiences

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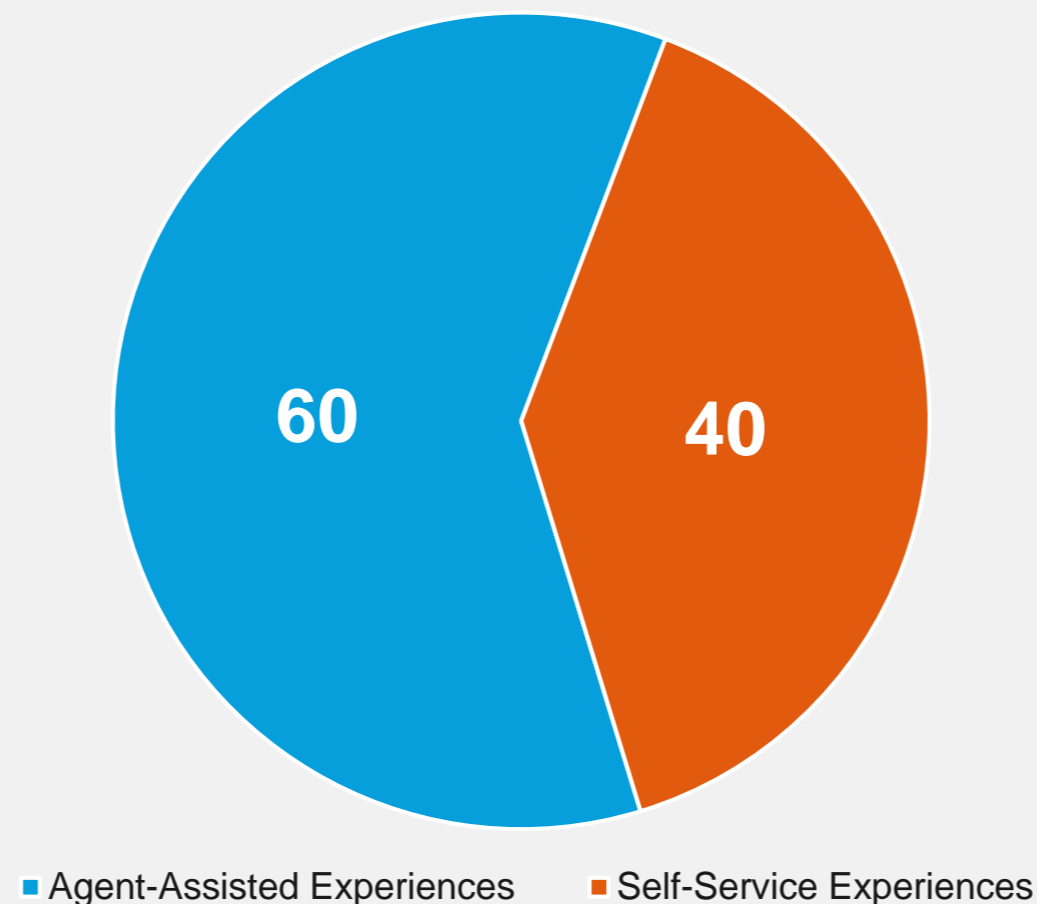
CC2. Thinking about all the service experiences customers have with your company, what proportion of those experiences fall into each of two main categories: 'Agent-Assisted' and 'Self-Service?'

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

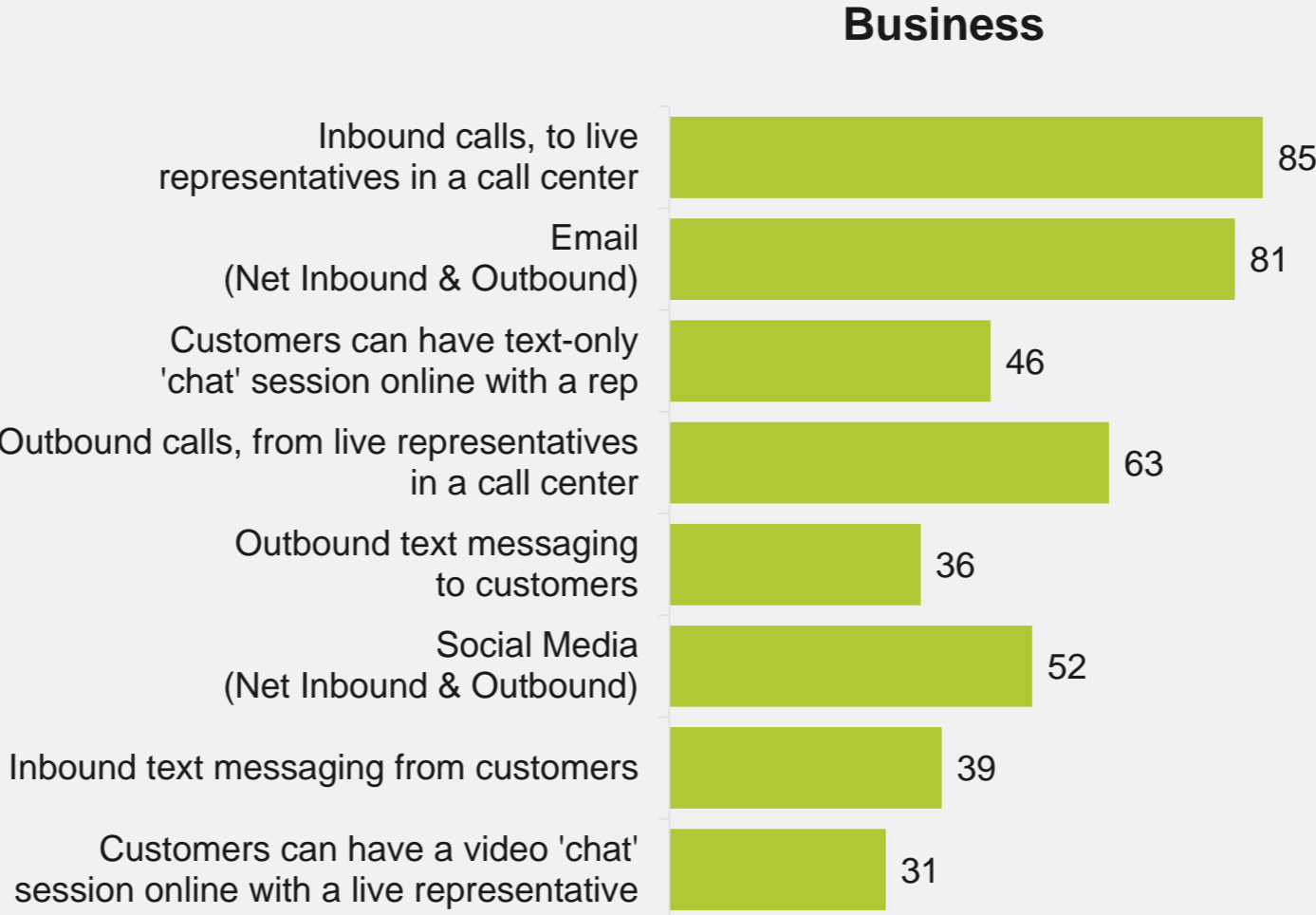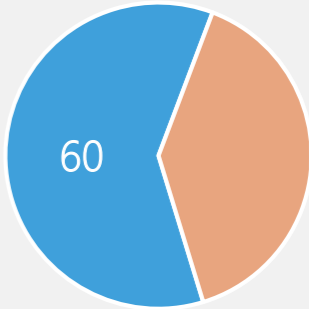**Agent-Assisted Channels**

Methods of Communication
(% each method was mentioned)

Consumer

You called the company and spoke to a live rep	66
You emailed the company	15
You started an online 'chat' session with a live representative	10
The company called you	8
The company texted you	2
You posted a question or comment on social media	2
You texted the company	1
You had a video chat with the company	1

Business

|	
Inbound calls, to live representatives in a call center	85
Email (Net Inbound & Outbound)	81
Customers can have text-only 'chat' session online with a rep	46
Outbound calls, from live representatives in a call center	63
Outbound text messaging to customers	36
Social Media (Net Inbound & Outbound)	52
Inbound text messaging from customers	39
Customers can have a video 'chat' session online with a live representative	31

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.)

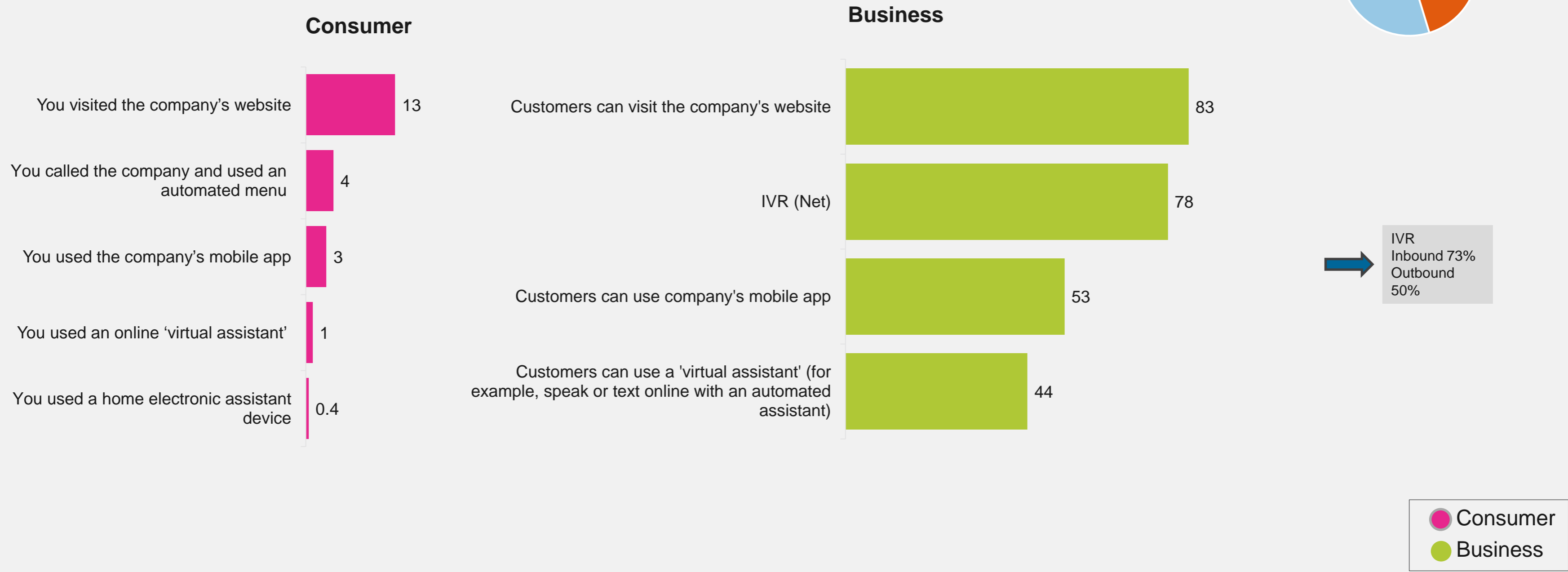CC1a. In which 'Agent-Assisted' ways does your company communicate or interact with customers?
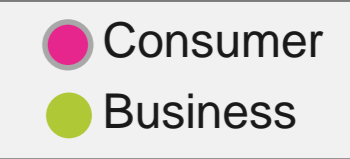
- Consumer
- Business

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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

Channel	Value
You visited the company's website	13
You called the company and used an automated menu	4
You used the company's mobile app	3
You used an online 'virtual assistant'	1
You used a home electronic assistant device	0.4

Business

Channel	Value
Customers can visit the company's website	83
IVR (Net)	78
Customers can use company's mobile app	53
Customers can use a 'virtual assistant' (for example, speak or text online with an automated assistant)	44

40

IVR
Inbound 73%
Outbound 50%

● Consumer
● Business

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

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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.

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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

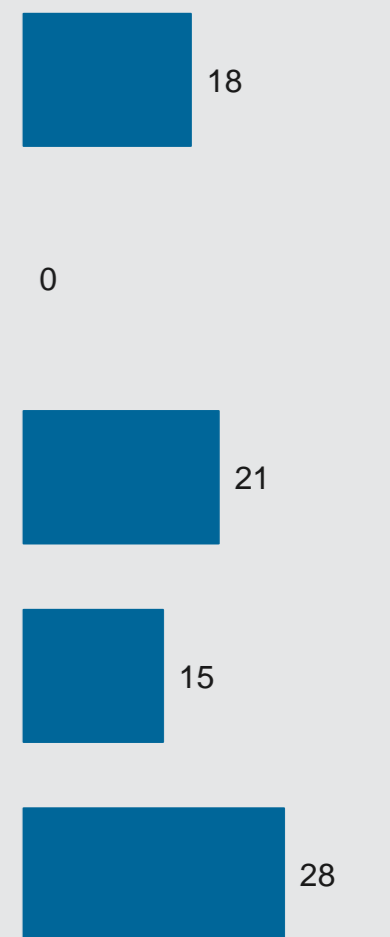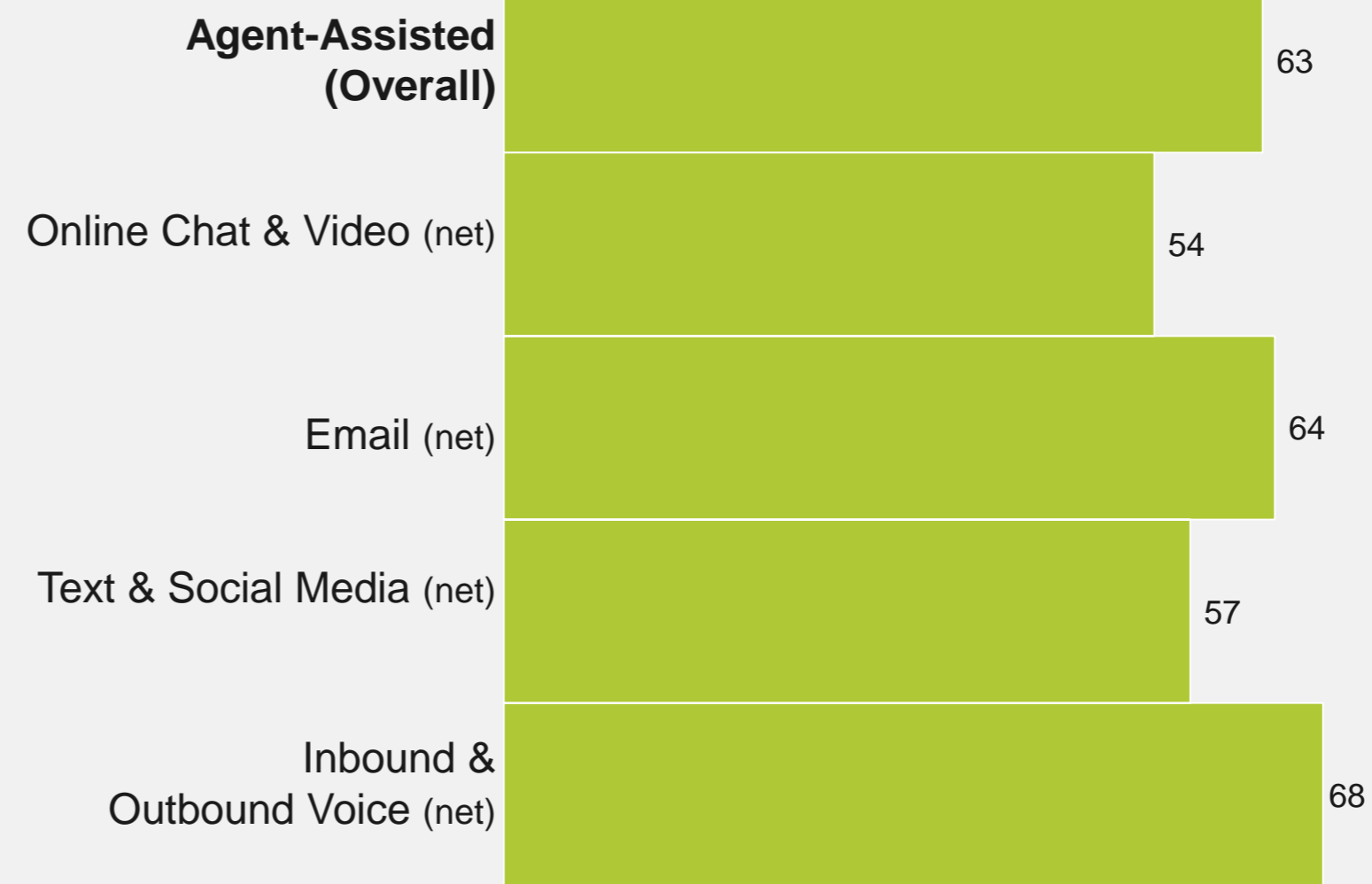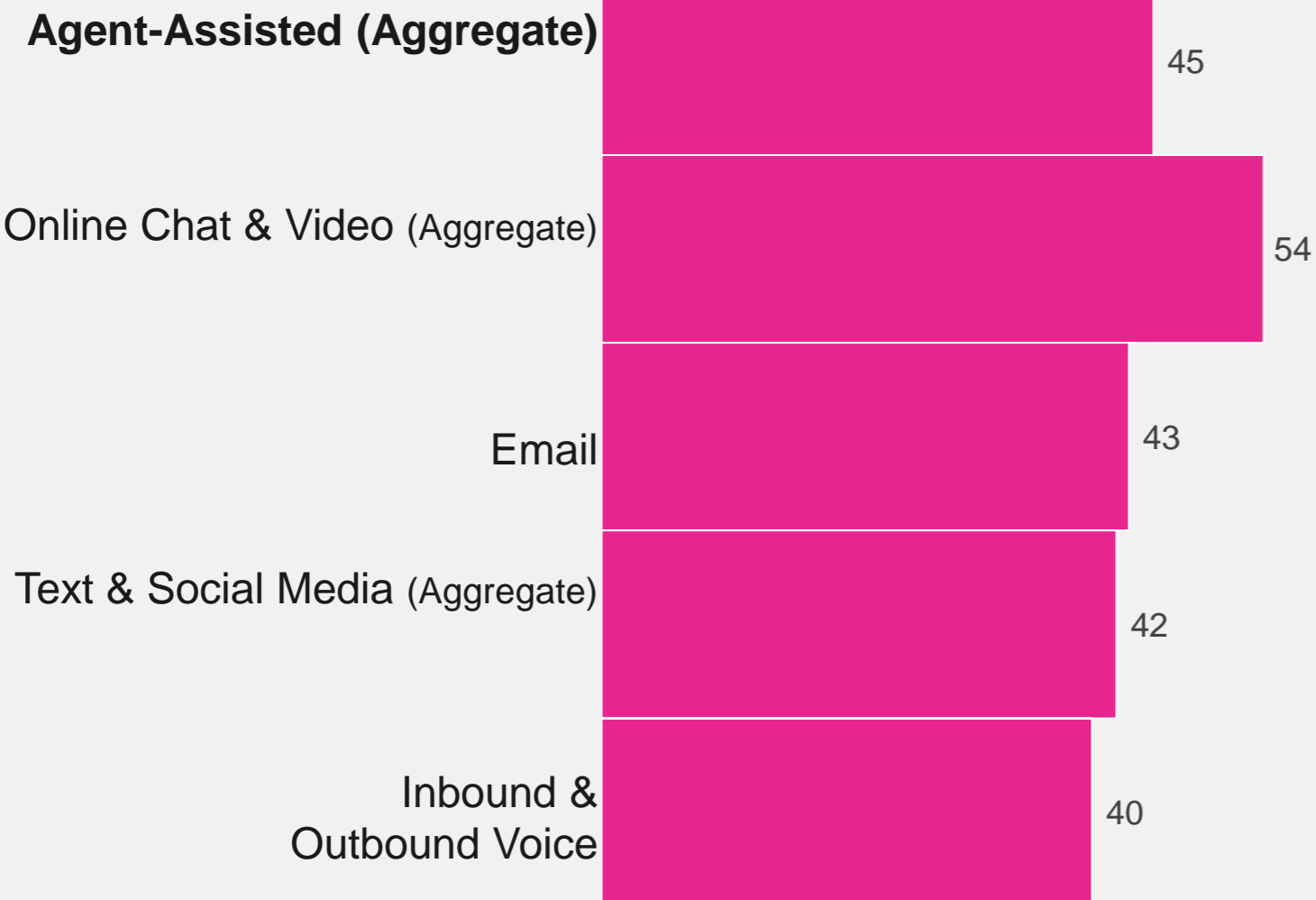## Satisfaction/Success with Using each Method of Communication (% Rating as 9/10)

Consumer
% 9/10

Channel	Value
Agent-Assisted (Aggregate)	45
Online Chat & Video (Aggregate)	54
Email	43
Text & Social Media (Aggregate)	42
Inbound & Outbound Voice	40

Business
% 9/10

Channel	Value
Agent-Assisted (Overall)	63
Online Chat & Video (net)	54
Email (net)	64
Text & Social Media (net)	57
Inbound & Outbound Voice (net)	68

Gap (% Rating as 9/10)

18	
0	
21	
15	
28	

● Consumer
● Business

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 Bases: Agent-Assisted (410), Online Chat/Video (107), Text/Social (102), Voice (102), Email (99)
Total Business Bases: Agent-Assisted (299), Online Chat/Video (159), Text/Social (240), Voice (205), Email (275)

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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

● Consumer
● Business

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?

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Total Business Bases: Agent-Assisted (299), Online Chat/Video (159), Text/Social (240), Voice (205), Email (275)

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15

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

Business

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

Communication (Net)

Process (Net)

Customer Service (Net)

Solution (Net)

Channel (Net)

Website/Mobile (Net)

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Businesses believe they are quick and listen well when resolving customer problems, but also reference time, resolution, and availability for improvement areas

Business

Resolving Customers' Questions or Problems

What Company Does Well

What Company Can Improve

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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)

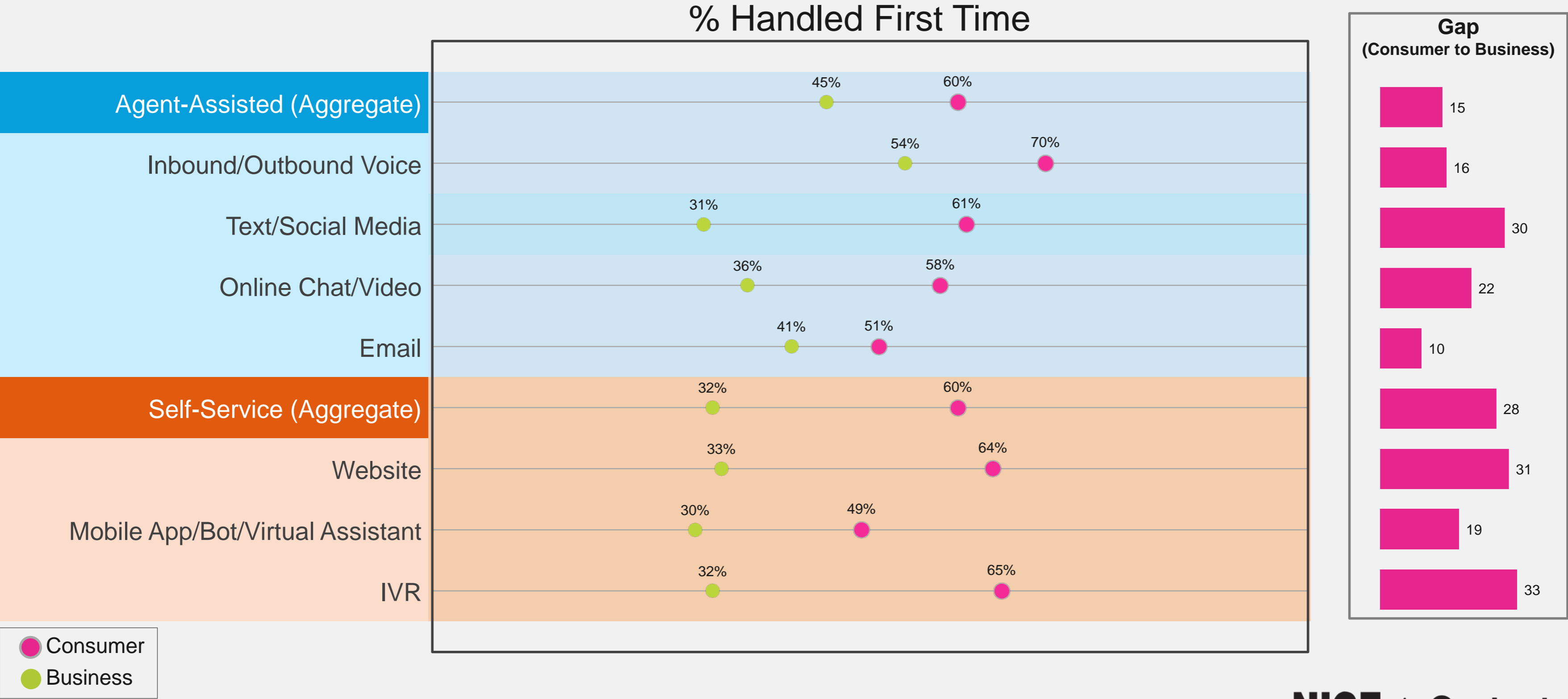|	Agent-Assisted	Self-Service
	Consumer / Business	Consumer / Business
Offering me personalized service	56% / 79%	50% / 71%
Being a convenient way to resolve my question or issue	63% / 84%	61% / 77%
Resolving my question or issue in the quickest way possible	57% / 83%	57% / 74%
Keeping my personal information secure	63% / 88%	66% / 85%
Providing me with the most complete information about my question or issue	56% / 81%	61% / 75%
Helping me discover something new or useful for my needs	NA	41% / 74%
Being an effective way for a company to proactively recommend something new or special for my needs	53% / 77%	NA
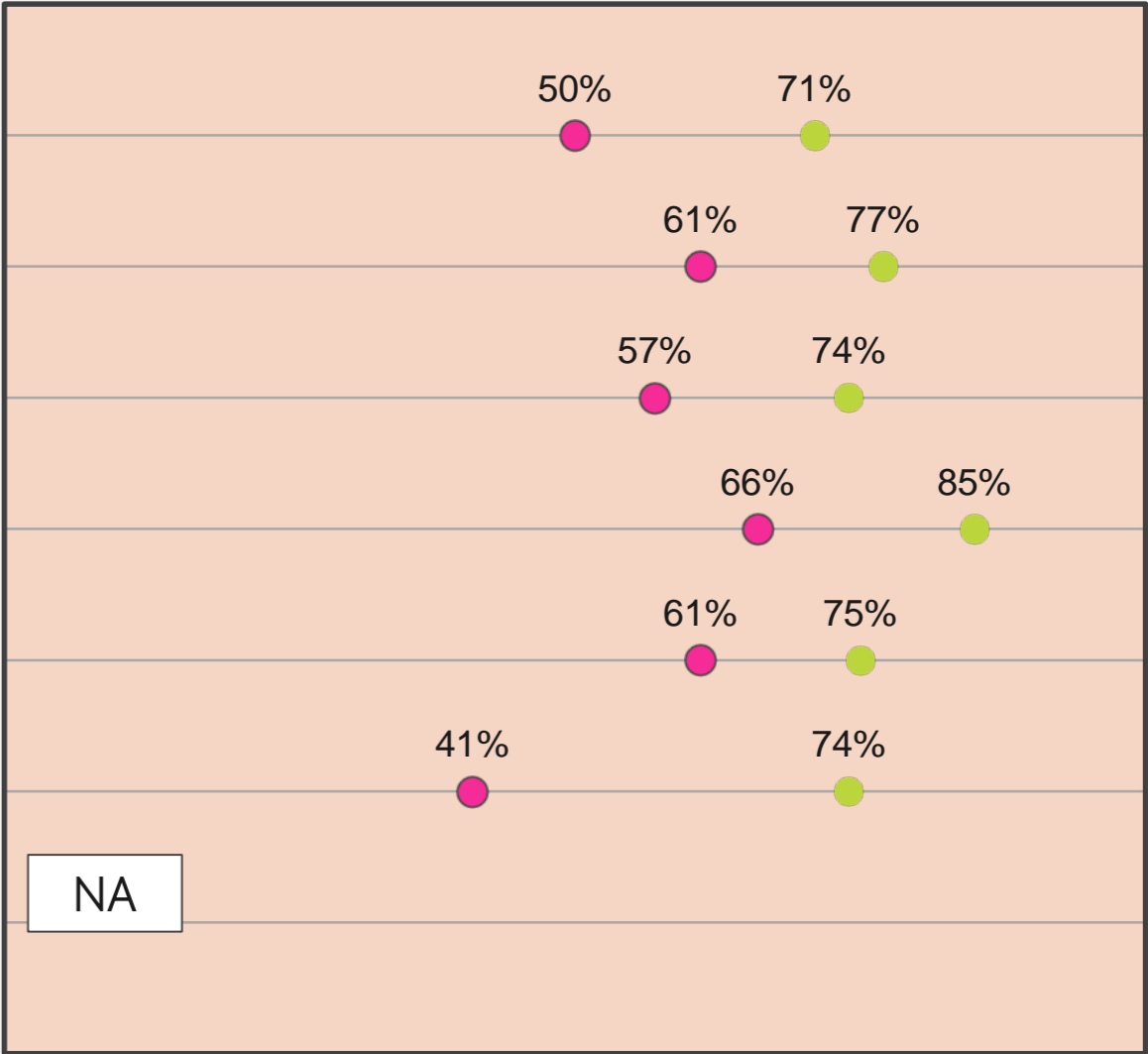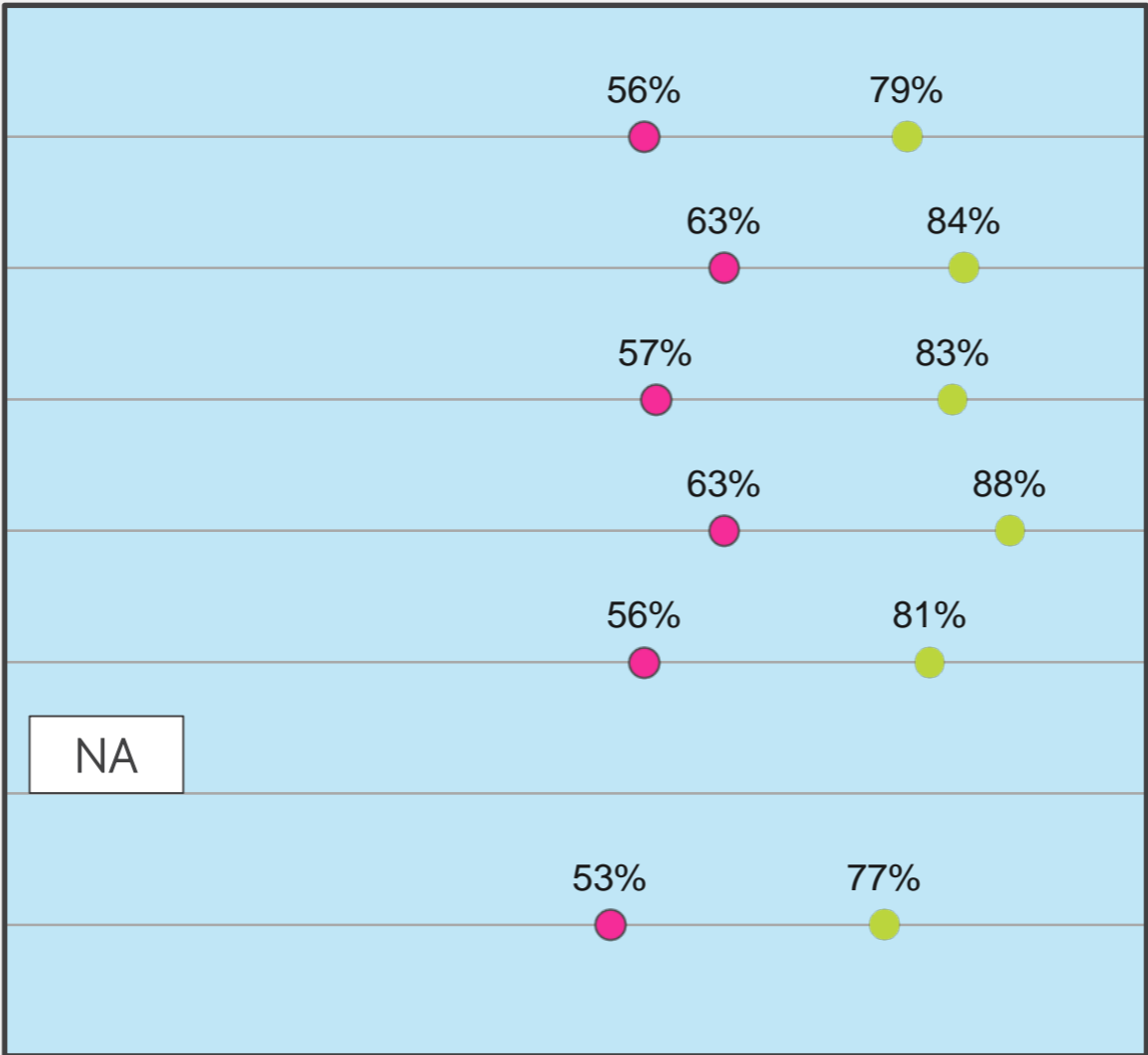
Legend:
- ● Consumer
- ● Business

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

Scale: Excellent, Very Good, Good, Fair, Poor.

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How does the service experience impact Key Metrics?

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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

Channel	Business	Consumer
Agent-Assisted (Aggregate)	45%	60%
Inbound/Outbound Voice	54%	70%
Text/Social Media	31%	61%
Online Chat/Video	36%	58%
Email	41%	51%
Self-Service (Aggregate)	32%	60%
Website	33%	64%
Mobile App/Bot/Virtual Assistant	30%	49%
IVR	32%	65%

Gap (Consumer to Business)

Channel	Gap
Agent-Assisted (Aggregate)	15
Inbound/Outbound Voice	16
Text/Social Media	30
Online Chat/Video	22
Email	10
Self-Service (Aggregate)	28
Website	31
Mobile App/Bot/Virtual Assistant	19
IVR	33

Legend: ● Consumer ● Business

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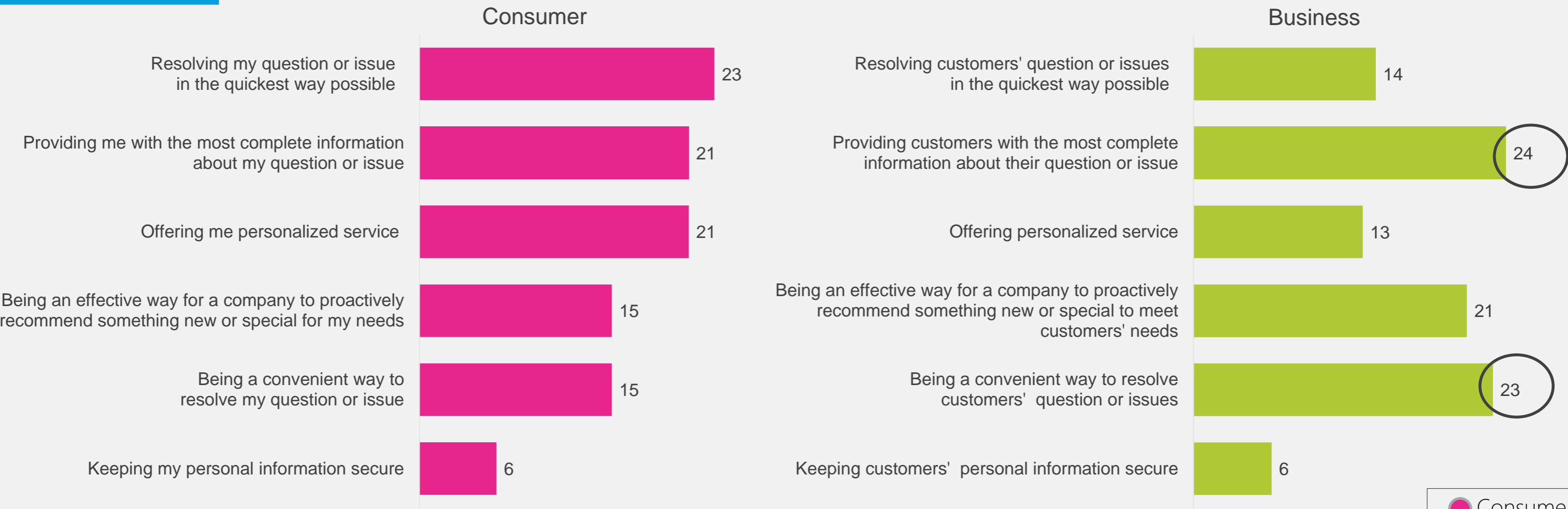
- Personalization is also more important to customers; lower importance to businesses

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.

Consumer

Characteristic	Value
Resolving my question or issue in the quickest way possible	23
Providing me with the most complete information about my question or issue	21
Offering me personalized service	21
Being an effective way for a company to proactively recommend something new or special for my needs	15
Being a convenient way to resolve my question or issue	15
Keeping my personal information secure	6

Business

Characteristic	Value
Resolving customers' question or issues in the quickest way possible	14
Providing customers with the most complete information about their question or issue	24
Offering personalized service	13
Being an effective way for a company to proactively recommend something new or special to meet customers' needs	21
Being a convenient way to resolve customers' question or issues	23
Keeping customers' personal information secure	6

Legend: ● Consumer ● Business

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 n = 410
Consumer R2 = 0.686

Total Business n = 299
Total Business R2 = 0.48

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Top Self-Service channel drivers of success for businesses are similar to top drivers for customers – being quick and providing the most complete information
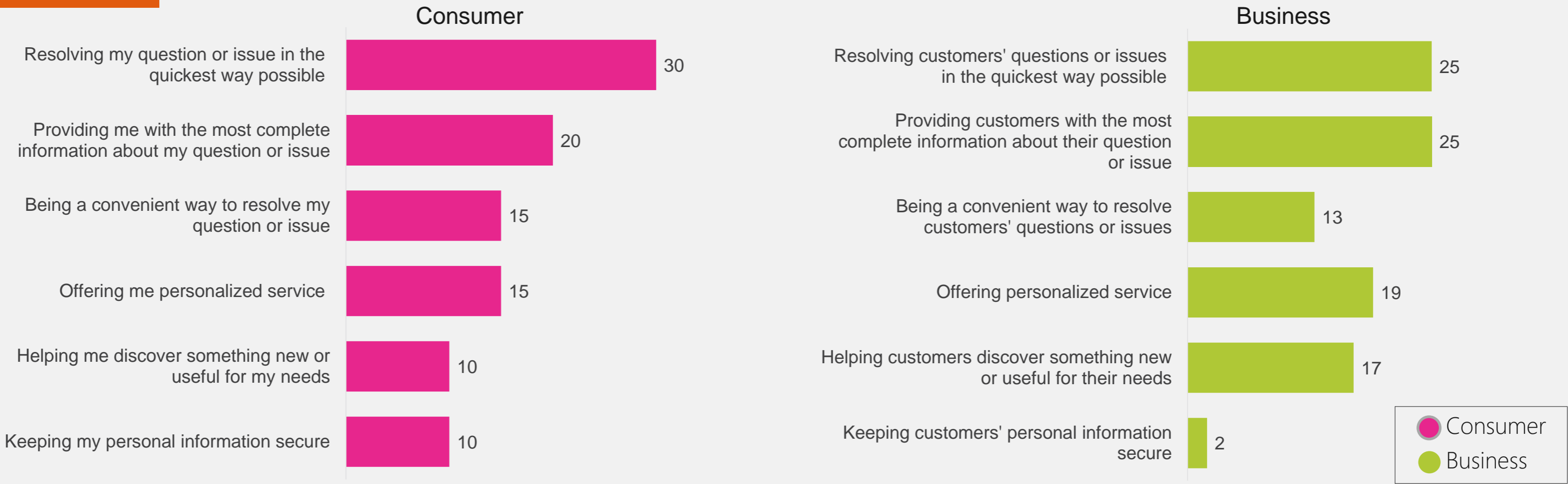
- Quick resolution is especially important to customers, placing 1.5 times more importance on quickness compared to complete information (businesses put equal weight on both items) – indicating that businesses may be somewhat underestimating the important of quickness in Self-Service channels

- 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.

Consumer

Driver	Value
Resolving my question or issue in the quickest way possible	30
Providing me with the most complete information about my question or issue	20
Being a convenient way to resolve my question or issue	15
Offering me personalized service	15
Helping me discover something new or useful for my needs	10
Keeping my personal information secure	10

Business

Driver	Value
Resolving customers' questions or issues in the quickest way possible	25
Providing customers with the most complete information about their question or issue	25
Being a convenient way to resolve customers' questions or issues	13
Offering personalized service	19
Helping customers discover something new or useful for their needs	17
Keeping customers' personal information secure	2

● Consumer
● Business

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

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

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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)

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

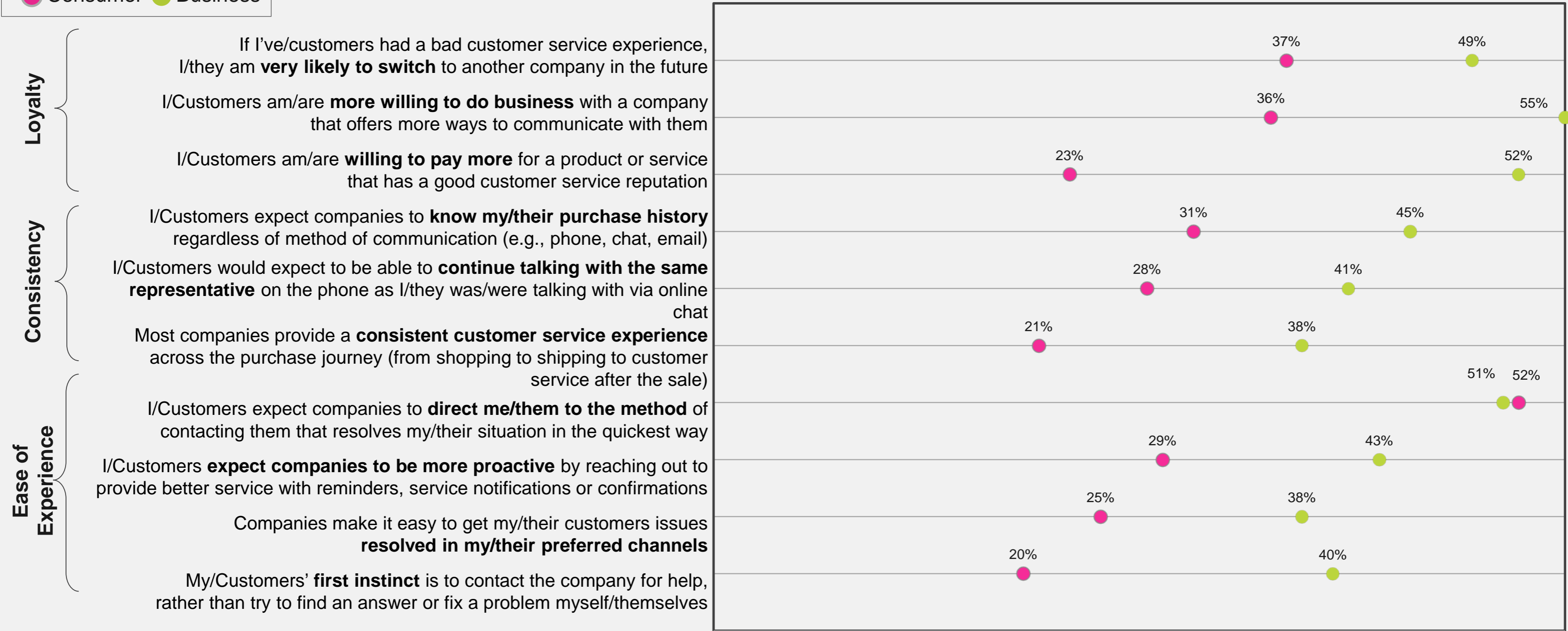- Businesses believe that customers have higher expectations of businesses than reality. The biggest gap is with customers' willingness to pay more when a company has a good customer service reputation

Legend: ● Consumer ● Business

Channel Attitudes (% Strongly Agree)

Loyalty

If I've/customers had a bad customer service experience, I/they am **very likely to switch** to another company in the future — Consumer 37%, Business 49%

I/Customers am/are **more willing to do business** with a company that offers more ways to communicate with them — Consumer 36%, Business 55%

I/Customers am/are **willing to pay more** for a product or service that has a good customer service reputation — Consumer 23%, Business 52%

Consistency

I/Customers expect companies to **know my/their purchase history** regardless of method of communication (e.g., phone, chat, email) — Consumer 31%, Business 45%

I/Customers would expect to be able to **continue talking with the same representative** on the phone as I/they was/were talking with via online chat — Consumer 28%, Business 41%

Most companies provide a **consistent customer service experience** across the purchase journey (from shopping to shipping to customer service after the sale) — Consumer 21%, Business 38%

Ease of Experience

I/Customers expect companies to **direct me/them to the method** of contacting them that resolves my/their situation in the quickest way — Consumer 52%, Business 51%

I/Customers **expect companies to be more proactive** by reaching out to provide better service with reminders, service notifications or confirmations — Consumer 29%, Business 43%

Companies make it easy to get my/their customers issues **resolved in my/their preferred channels** — Consumer 25%, Business 38%

My/Customers' **first instinct** is to contact the company for help, rather than try to find an answer or fix a problem myself/themselves — Consumer 20%, Business 40%

QCA_01 - 10. For each of the statements below, indicate how strongly you agree or disagree.
Base: Consumer (n=718) Total Business (n=300)

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

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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

Channel Preference	Consumer (% Ranked as 1st, 2nd, 3rd, Least Preferred)					Business (% Ranked as 1st, 2nd, 3rd, Least Preferred)				
	Least	#1	#2	#3	Total	Least	#1	#2	#3	Total
You call the company (live representative)	4	37	16	14	67	3	31	11	12	54
You visit the company's website	1	19	15	15	49	4	11	13	11	36
You email the company	4	12	17	15	45	6	6	13	16	34
You start an online "chat" session	5	10	17	12	39	5	5	6	5	16
You call the company (IVR)	12	6	9	11	25	6	6	10	4	21
You use the company's mobile app	4	5	7	7	19	4	4	4	7	16
The company calls you	8	4	6	8	19	6	8	6	6	20
You use a "virtual assistant"	9	2	2	3	7	6	3	6	5	15
You text with the company	8	1	3	3	8	9	3	3	5	10
You communicate through social media	22	1	3	6	10	8	3	4	7	14
You have a video chat	16	1	3	3	7	6	3	6	5	15
You use a home electronic assistant device	6	1	1	2	5	9	2	3	2	7

Agent-Assisted   Self-Service

Least Preferred   Ranked #1   Ranked #2   Ranked #3

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

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, 2xd, 3rd percentages due to rounding

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Selected reasons for each method being companies' "least preferred" channel of communication with customers

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

	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
Self-Service	Sometimes the issues are too complicated to resolve this way and realize the frustration it causes to customers Not personalized	Least personal feel when interacting with a client, catches them at bad times and annoys This method is too similar to telemarketing It's not efficient. Customers are annoyed by it often times	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 as interactive has other options	Not up to date w/ current windows Java update, often crashes Certain demographics do not use it Not reliable	It's just not accurate enough Customers like dealing with real people Not as reliable as the other services	We prefer a more warm and personal touch The information obtained by the home electronic assistant may not be accurate Takes extra time

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

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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

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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

● Consumer
● Business

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)

*Sample size low, less than 50

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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

Business

% More likely to happen in the coming year
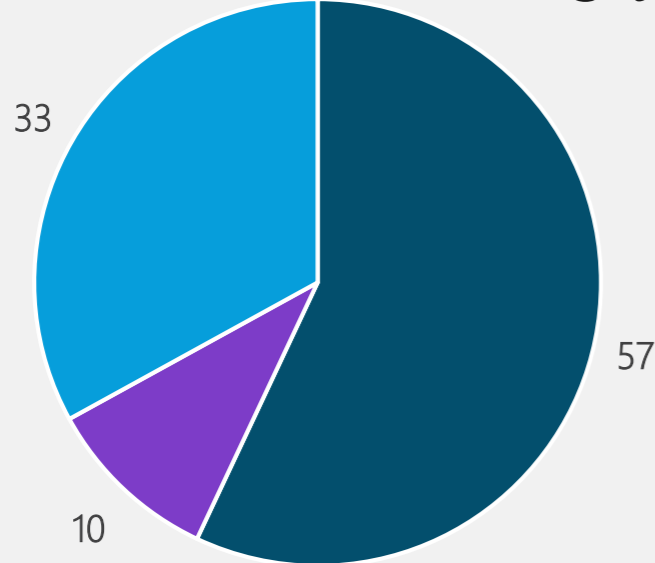
33

57

10

- ■ 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

% among companies who need more resources

An overall <u>increase in the number</u> 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 in the number</u> 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

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 <u>more</u> resources (people and/or technology) for agent-assisted communication. Which one of the reasons below is driving that need more so than the other?
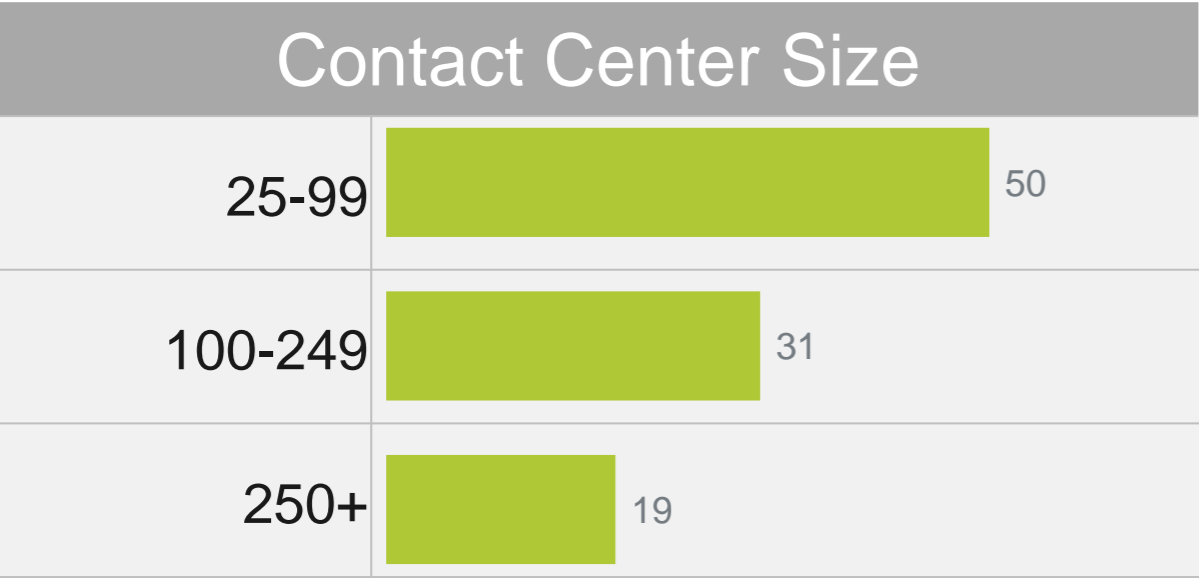T3.3. You mentioned your company will need <u>less</u> resources (people and/or technology) for agent-assisted communication. Which one of the reasons below is driving that need more so than the other?

Total Business Base: T3.1 (n=300) T3.2 (n=170) T3.3 (n=31)

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FIRMOGRAPHICS

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Firmographics

Contact Center Size

Size	Value
25-99	50
100-249	31
250+	19

Company Size

Size	Value
50-249	27
250-499	18
500-999	22
1,000-4,999	18
5,000+	16

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
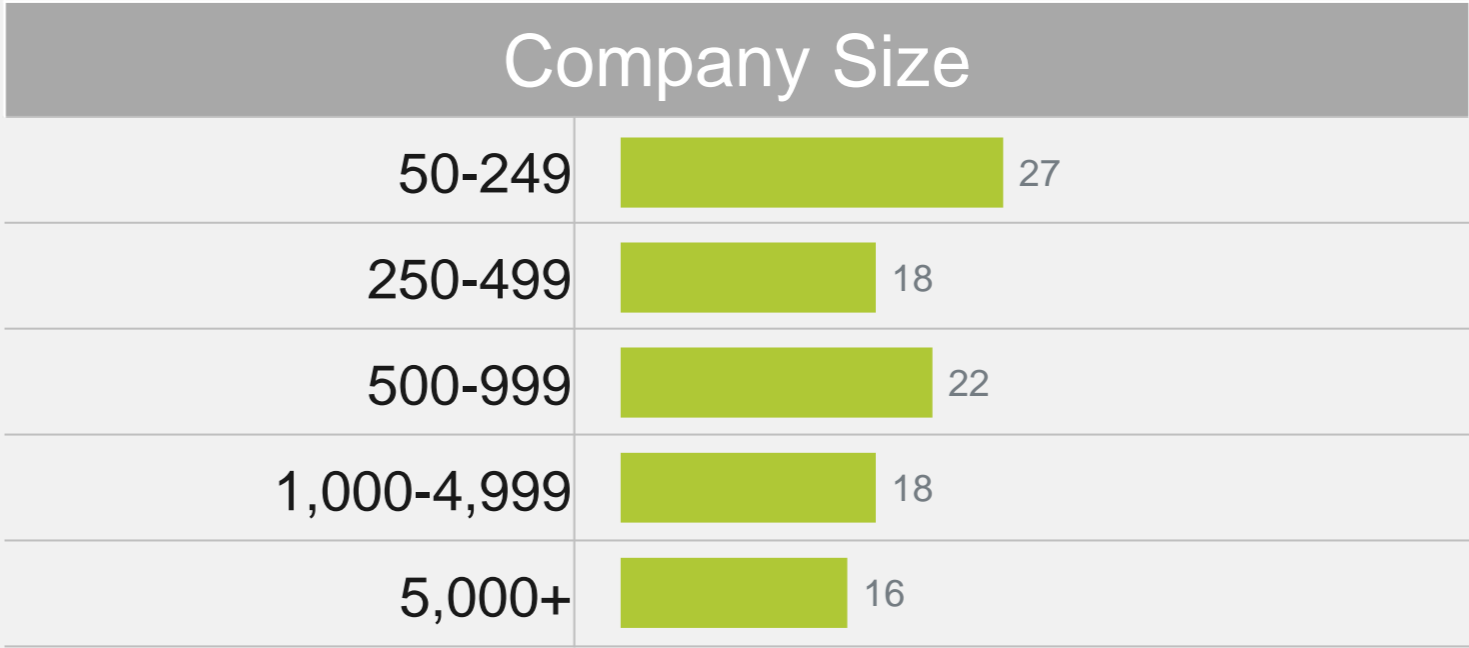
Quotas*

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

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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 <u>good</u> 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 <u>could be improved </u>so that next time you would be more satisfied? Base: Rated communication method as 1-8. n=411
QCH5_1. And <u>what does your company do particularly well</u> to promptly resolve customers' questions or problems? Please be as specific as possible. n=300
QCH5_2. And in what ways <u>could your company improve</u> 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 <u>within</u> a 'net' category

2.
QCH5_1. And <u>what does your company do particularly well</u> to promptly resolve customers' questions or problems? Please be as specific as possible. n=300
QCH5_2. And in what ways <u>could your company improve</u> 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

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Thank You

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