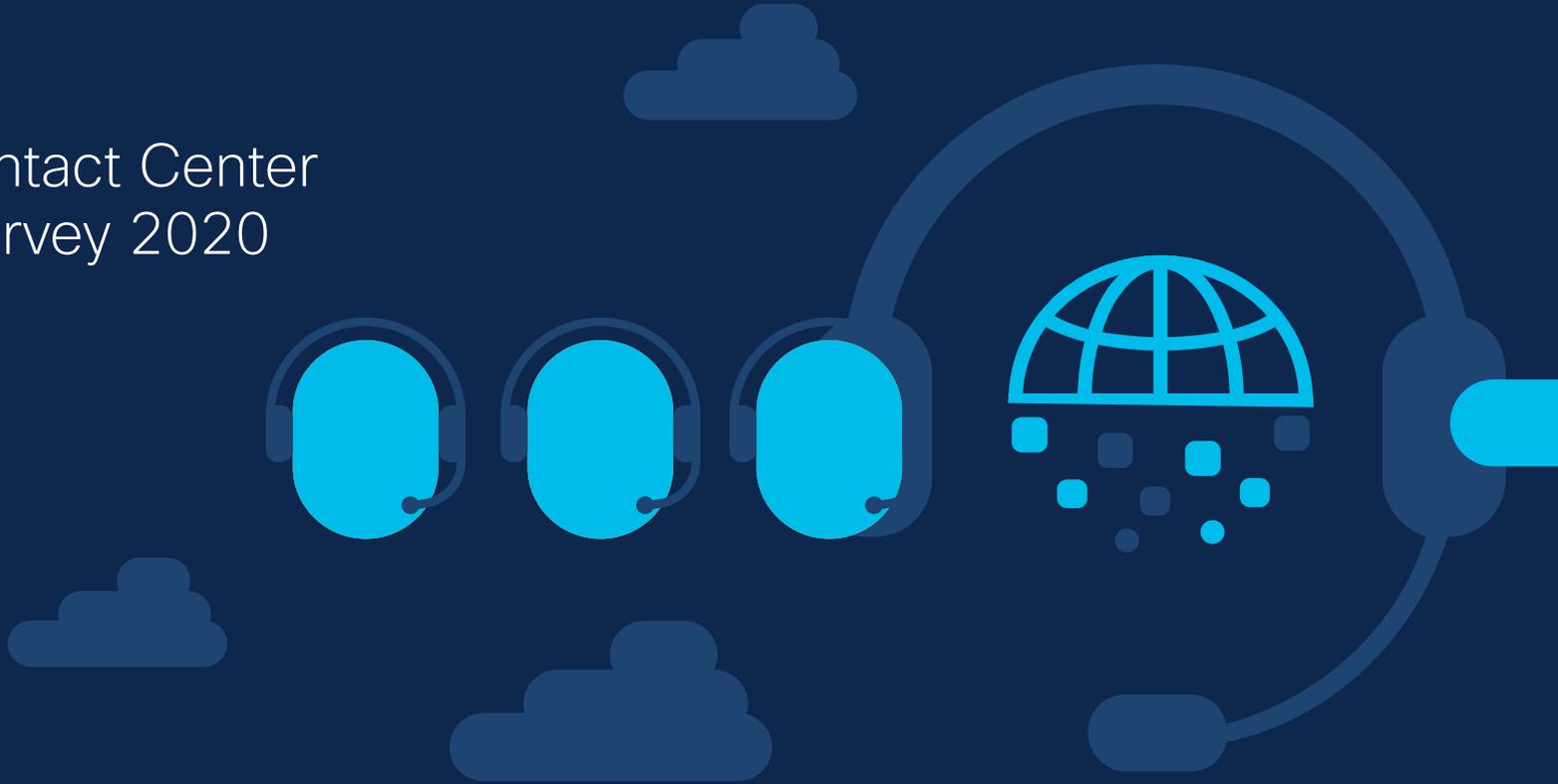


Cisco Contact Center Global Survey 2020



Overview



Introduction

Today's lightning speed competitive business environment is forcing contact centers to think outside the box and look for new and innovative ways to attain and retain customers.

At the same time, consumer expectations continue to rise, driven by technology advances and the vast amount of always-on digital channels available to them. In many cases, these digital interactions are outpacing human interactions, driving new ways of reaching, serving, and communicating with customers inside and outside the contact center.

Take a peek

The results of our survey gives us a peek at what contact center decision makers are thinking. What's important to them and what keeps them up at night. How they're keeping pace with demands of the business, customer expectations, and technological advances. Take a look at what we uncovered and let us know what you think.

About this survey

- Cisco interviewed **700 contact center** executives from **7** countries and over **10** industries on their challenges and successes in running a contact center.
- All survey respondents either directly influence or are directly involved in the selection or management of their contact center systems.
- **85%** of respondents have contact centers ranging from 1 to 999 agents.

Participating countries:
USA, Canada, France, Germany, Austria,
Mexico, and Brazil.



Contents

- Overview
- Key findings
- Top challenges in the contact center
- Top capabilities
- Customer experience
- Agent experience
- Artificial intelligence
- Data-driven insights
- Cloud transformation
- Open architectures
- Integrated communications suite



Key findings



Challenges

70% view security policy management, enforcement and customer data privacy as the two top challenges in contact centers



Capabilities

Over **90%** agree the most important capabilities for a contact center solution are intelligent routing, look/feel of UI, and integrated omni-channel



Cloud migration

62% plan to implement a cloud contact center within next 18 months



Artificial Intelligence

Over **80%** consider BOTS and AI robotic automation to be an important function of the contact center



Customer experience

93% agree that technology is very important in creating a better customer experience



Agent experience

93% feel technology is highly important in creating better agent experiences



Data analytics

90% consider customer journey data analytics an important function of the contact center



Integrated product suite

94% consider it important to have all their communications and collaboration functions well integrated into a single complete offer from their contact center supplier

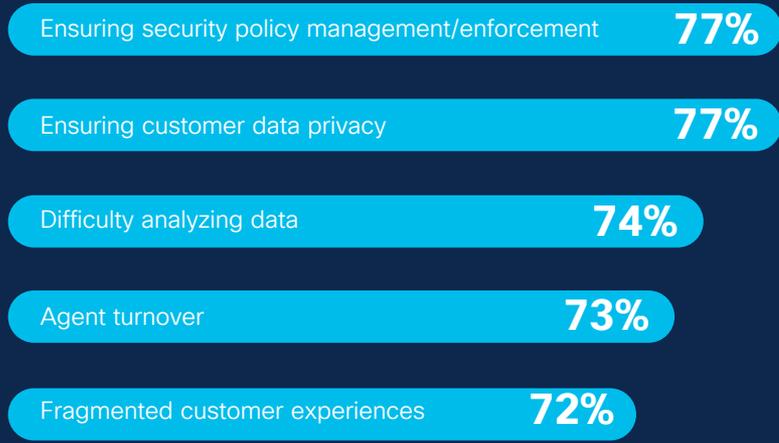


77%

Agree security and data privacy are key challenges in the contact center

Top 5 challenges for contact centers

The contact center is one of the most **mission critical** customer-facing business functions. The majority of survey respondents agree these are the most significant problems to their contact center.



Contact Center



What keeps Contact Center leaders up at night?

- 1 Security policy management/enforcement and customer privacy**
The contact center is one of the most mission critical customer-facing business functions and is often deemed “low hanging” fruit for fraud. Because contact centers process and store a great deal of customer information, in the cloud, contact center executives are challenged with staying on top of the latest security and privacy technologies and policies.
- 2 Difficulty analyzing data**
Organizational data siloes continue to inhibit exposure to the full customer journey, making it impossible for contact centers to understand what their customers are experiencing. The need to consolidate customer journey data from all digital touchpoints and systems of records – in real time, is critical to improving customer loyalty, CES, NPS, and CSAT scores.
- 3 Agent turnover**
Overwhelmed with too much information, technology and process issues, multiple disconnected applications, and lack of context about the customer has led to an increase in agent turnover resulting in time-consuming and costly onboarding costs.
- 4 Fragmented customer experiences**
Poorly designed omni-channel experiences, unintelligent routing, and the inability for contact center staff to have convenient access to experts across the organization has resulted in fragmented customer experiences that result in high churn.



Top capabilities for contact centers

Over 90% of our survey respondents agree these are the 3 most important capabilities when selecting a contact center solution:

- 1 **Intelligent routing.** Precisely routing customers to the right resource with the right skills, the first time, plays a key role in the customer and agent experience.
- 2 **Integrated omni-channel.** Contact centers must allow their customers to reach them how they want, when they want, and over the channel of their choice.
- 3 **Look/feel of user interfaces.** Creating intuitive experiences for contact center staff enables them to stay engaged, minimizes screen-time burnout, and improves their overall productivity and efficiency.

Intelligent routing

93%

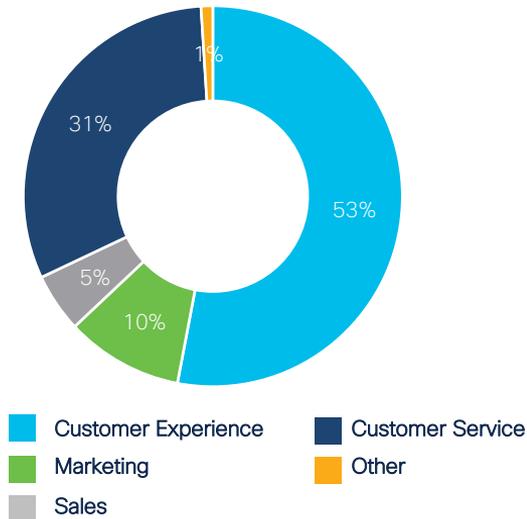
Integrated omni-channel

91%

Look/feel of user interface

91%

More than half of contact centers report into a Customer Experience Executive



Customer experience is clearly a strategic priority

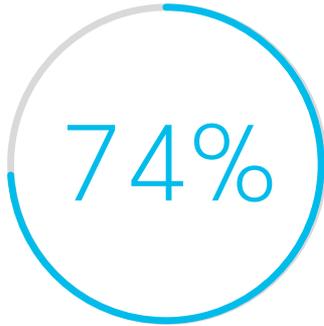
The focus on **customer experience** (CX) is at its all time high, and contact center executives clearly understand the impact this has on the success of their business.

Studies by industry thought leaders like Gartner, Forrester and McKinsey all indicate that how a company delivers goods and services to its customers is as important or more important than what it delivers.

But this is easier said than done. Adopting **customer-centric** processes, culture, and mind-set to implement and manage customer experience skillfully is challenging to most companies.

Fragmented customer experiences, siloed data, high agent turnover, lack of visibility into customer journey, and poor communications across the business remain some of the **top challenges** for contact centers in achieving their CX goals.

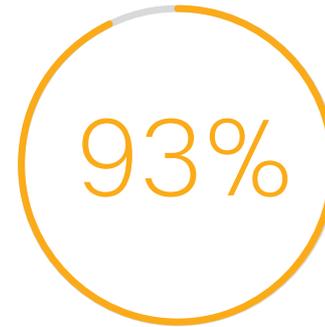
Customers are demanding better experiences



Feel agent experience has a significant impact on customer experience



Agree customer experience has a significant impact on business results (i.e. revenue or sales)



Agree technology is very important in creating a better customer experience

Innovation is viewed as critical for agent experience

Whether digital or human, **agents** are seen as the **difference-makers** in creating meaningful experiences for customers.

Our study revealed that $\frac{3}{4}$ of respondents feel that agent experience has a significant impact on customer experience.

Minimizing cumbersome, repetitive tasks, and equipping agents with AI-powered context and knowledge in real-time, **empowers** them to deliver timely and accurate responses customers expect.

Respondents indicate that improving agent morale and job satisfaction leads to **reduced turnover** which, as you can see, is super costly to the business.

Average cost to onboard an agent

Between
\$10K and \$20K

Average time to onboard an agent

2 to 4 weeks



70%

Engage with agents quarterly to identify what's working and what's not

What frustrates agents?

Top 3 technology issues that frustrate agents

- 1 Disconnected back-end systems
- 2 Too many applications to use
- 3 Cumbersome desktop user interfaces

Top 3 business process issues that frustrate agents

- 1 Cumbersome and repetitive tasks involved in closing out tickets
- 2 Slow processes due to outdated technology
- 3 Too many steps involved in processes

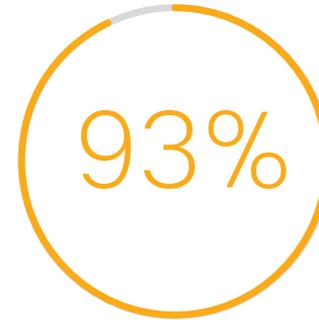
Agents rely heavily on technology to do their job well



Agree that user experiences are important to their agents



Agree that agents working through technology issues or process issues is their greatest challenge



Feel technology is highly important in creating better agent experiences



Artificial intelligence is key for augmenting the contact center

We're in the midst of some of the greatest technological advances in **artificial intelligence** (AI) and its derivative technologies, including machine learning (ML) and natural language processing (NLP).

AI is being used in the **contact center** to amplify its performance, solving a number of problems, and creating efficiencies by offering new ways to automate tasks before, during and after the customer interaction.

Customers expect to have easy AI **self-service** options when doing business with a company. Yet we learned from our survey that only **48** percent of contact centers have deployed customer-facing **chatbots**.

Chatbots, conversational IVRs, and **intelligent agents** improve the agent-customer experience, helping to minimize agent burnout, while improving the quality of time spent with customers who need help from a human agent.



AI amplifies
the contact
center's ability
to perform at
a higher scale



Consider BOTS
and AI robotic
automation to be
an important
function of the
contact center



Experience a
reduction
in call volumes
when
chatbots are
deployed



Say having too
many manual
processes and lack
of automation is a
significant problem
in the contact center

67% share data with a specific set of organizations outside the contact center

CEO 52%

CMO (Marketing) 31%

CRO (Sales) 21%

CXO (CX) 20%

CTO/CPO (R&D) 34%

CFO (Finance) 26%

CIO (IT) 34%

Customer loyalty starts with data

When a customer has a bad experience, the business should know about it. **Data analytics** provides insights into a customer’s journey, behaviours and patterns and enables contact centers to become **proactive** versus reactive in delivering the experiences their customers expect and demand.

We learned from our survey that most contact center business leaders consider end-to-end real-time and historical reporting an important function of the contact center. And many indicate that the inability to track customer journey/history of interactions is a significant problem for the contact center.

Data, when combined with **artificial intelligence**, provides a powerful tool to enhance how contact centers engage with their customers proactively and uncover the “truth” of how customers are experiencing their brand. In this way, businesses can change those experiences to make them better and **more profitable**.

Data-driven insights are central to the business

Over half of companies are sharing contact center data analytics with their CEO



Consider customer journey data analytics an important function of the contact center



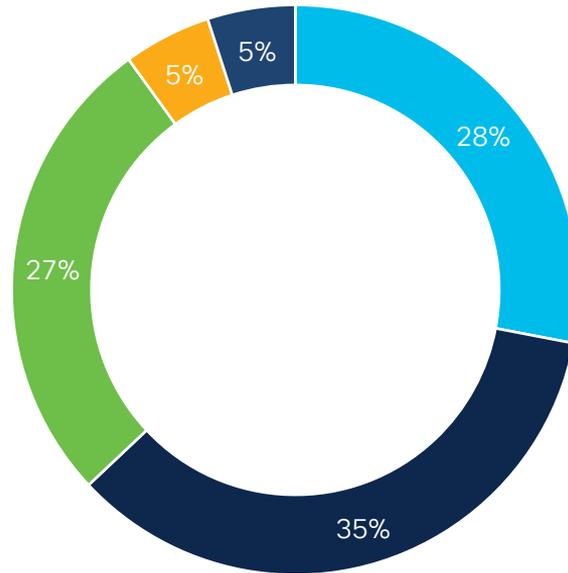
Say that inability to track customer journey/history of interactions is a significant problem for the contact center



Consider end-to-end real-time and historical reporting an important function of the contact center

The cloud transition is happening now

How soon do you plan to implement a cloud-based contact center?



62%

plan to implement a cloud contact center within the next 18 months

- Already have implemented
- Within the next 6 months
- Between 6-18 months from now
- More than 18 months from now
- No current plans to transition to cloud

Cloud benefits are clearly understood

Top 3 reasons for transitioning their contact center to the cloud

A vertical strip on the left side of the slide featuring a background of soft, white and light blue clouds against a pale sky. A dark blue horizontal bar is overlaid on the middle of this strip, containing white text.

The cloud enables emerging technologies, faster deployment of new capabilities, scale, and ease of integration of channels and applications.

- 1 Easier to manage and scale
- 2 Keep software current at all times
- 3 Continuous feature delivery of advanced capabilities

Contact centers see strong incentives for moving to cloud

Top 3 business outcomes expected from moving their contact center to the cloud

- 1 Improved IT efficiency
- 2 Better customer experience
- 3 Enhanced agent productivity



Some businesses have near and long-term plans to move to the cloud.

However, due to the large investments made in contact center technology and integrations, and due to migration complexity, many are thinking about how, when, or if they should go to cloud.

This trend holds across segments and geographies.



Those who own their contact center system, agree **seamless** integration and **access to cloud** services is highly important

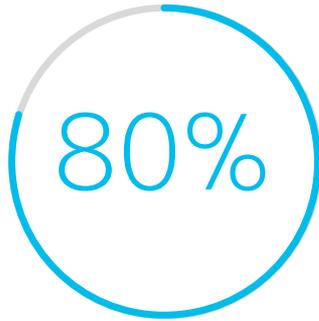
Contact centers view seamless integration to cloud services as highly important

Top 3 reasons why some contact centers have no current plans to transition to the cloud

- 1 We want to maintain control
- 2 We are too invested in on-premises
- 3 Complexity involved in transitioning to cloud



An open platform is essential for contact center integration with applications



Consider having Integration with a voice (PBX) communication system and UCC (messaging) system important to the contact center



Contact centers are connected to three or more systems and applications



Contact centers are integrated with other business applications such as CRM, ERP, and ticketing

True productivity gains require a fully integrated product suite



Say poor communication across organizations is a significant problem in their contact center



Consider it important to have all collaboration functions well integrated into a single complete offer from their contact center supplier

Businesses are seeing that many contact center interactions are requiring real-time expertise beyond the contact center to the rest of the organization, including **experts** and **teams**.

But most organizations have a proliferation of disjointed communication, messaging and collaboration tools that are **not integrated** with the **contact center**. This in fact worsens agent workloads, amplifies organizational silos and strains IT resources.

2/3

Contact centers are using subject matter experts during customer interactions

Contact centers depend on subject matter experts

Top 3 reasons for integrating the contact center with UC and collaboration systems

- 1 Having easy directory and chat integration to be able to reach subject matter experts (SME) with a single click
- 2 Being able to consult a SME via chat during calls with customers
- 3 Being able to screen-share with SME to view information relevant to the call



Three actions to consider

Cloud is the vehicle for innovation. Chart your course in three critical areas.

- 1 **Agent innovation:** Enhance and augment their experiences with an eye on retention.
- 2 **Journey and sentiment analytics:** Leverage data-driven and cloud-powered insights to understand how your customer relationships stand.
- 3 **Self-service and exception management:** Build the business case for new forms of self-service with the understanding that human assisted exceptions will become the norm.

Cisco is a global leader in cloud contact centers, delivering the most complete contact center portfolio, combined with world-class cloud calling, meetings, team collaboration, and customer experience management solutions, and the most advanced audio/video devices and headsets.

Cisco is the market-share leader for contact centers. We're number one in North America and number two worldwide. We have more than 30,000 loyal customers and more than 3 million agents installed globally.

Our cloud solution is based on Webex, one of the world's best known, scalable, and reliable cloud platforms. Cisco releases a significant cloud update every month and a major on-prem update semi-annually, advancing our commitment to providing all customers advanced technology and business success.

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