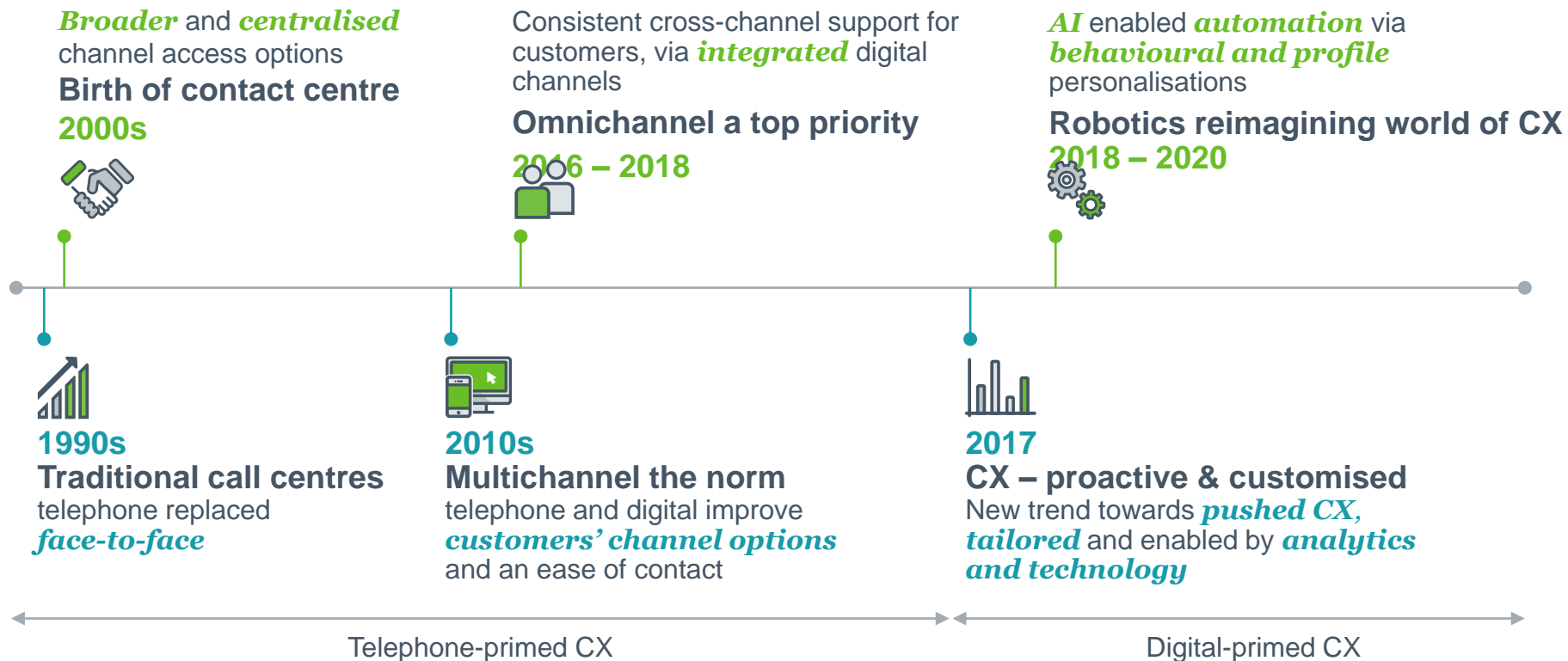
A person in a red jacket stands by the open rear door of a dark car on a desert road at night. The sky is filled with stars and the Milky Way. The car's taillight is illuminated.

2017 Global Customer Experience (CX) Benchmarking Report Global APAC/Singapore comparison

Digital crisis or redemption - *The uncomfortable truth*

20 years of benchmarking

The transformation of CX



About the 2017 Global CX Benchmarking Report

950+ data points,
90+ analysis charts
supported by **40+** industry groups

over **20** country
specific data

63% B2C 23% B2B

8% IT Helpdesk

6% Sales Operations



1351 participants from...
...80 countries contributed to
this year's global research

view data at 10 levels

including: geography, size, sector, brand
positioning, service, contact and
provider type

*analysis with
context and
recommendations
on best practices*

Research spans 14 CX industry sectors

17%
banking
and
investment

15%
professional
services

11%
Service
providers/
comms

11%
Insurance

9%
Technology

8%
Retail &
consumer
goods

7%
Public
sector

22%
from
additional
7 sectors

What's included in the 2017 Global CX Benchmarking Report?



Strategy

- Service strategy
- Multi-skilling
- Omnichannel
- Strategic drivers
- Business transformation
- Evolving workforce



Operations

- CSAT practices
- Quality management
- Ops and agents' KPIs
- Performance statistics
- Response and handle times
- Productivity by channel



CX

- Service differentiator
- CX drivers
- Capability
- Responsibility
- Trends
- Benefits



Efficiency

- Operations model and structure
- Training and HR models
- Employee engagement
- WFO approach
- Absence and attrition
- Budget allocations



Analytics

- Data collection
- BI systems
- Segmentation
- Personalisation
- Customer journeys
- Performance impact



Technology

- Key technology trends
- Architecture models
- Standardised systems
- IT sourcing, design and support
- Current and future needs
- Cloud usage and experience



Digital

- Transformation factors
- Channel interaction splits
- Customer preferences
- Mobile, Chat, etc.
- Social CX
- Proactive outbound

Digital crisis or redemption

Key findings



accelerate
your
ambition



Introduction

1: Digital dominance

The world has formed a digital skin.

2: Conscious journeys

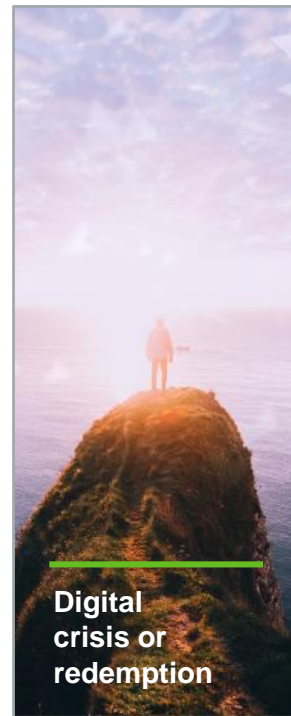
Journeys should be intuitive.

3: Data supremacy

Analyse or die.

4: Man vs machine

CX robotics creating a new reality.



Conclusion

Key findings

A person stands on the peak of a large, rugged rock formation, arms outstretched in a gesture of triumph or contemplation. The sky is a dramatic mix of deep blues, purples, and oranges, suggesting a sunset or sunrise. Large, dark, billowing clouds are scattered across the sky. Overlaid on the sky are several translucent, light blue geometric shapes, primarily triangles of various sizes, some pointing upwards and others downwards. The overall mood is one of achievement and reflection.

The uncomfortable truth

Introduction



The uncomfortable truth

High-performing disruptors are outpacing established market leaders *by committing to the opportunity created by the digital revolution.*



81% of companies recognise CX as a competitive differentiator

CX is the no1 most important strategic performance measure

79% can evidence cost savings; 84% an uplift in revenue/profits



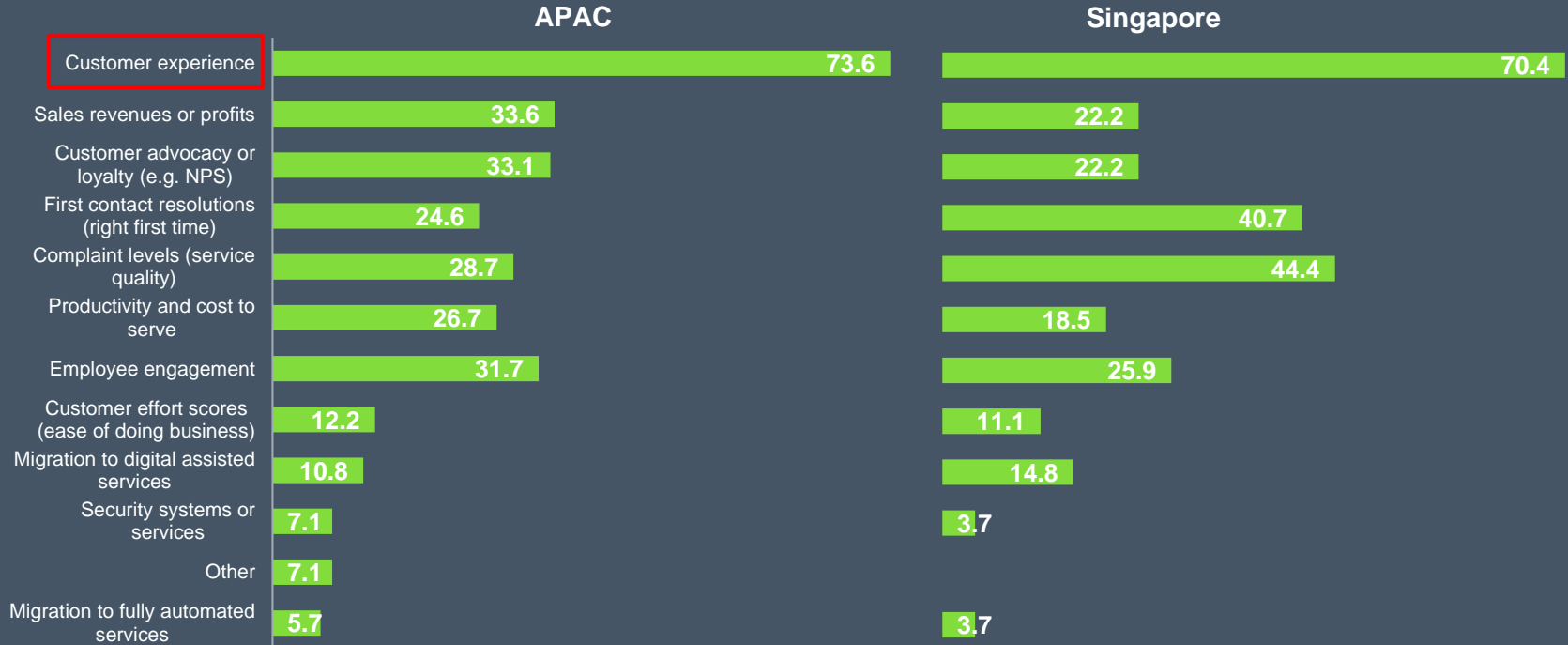
Just 13% self-rate their CX delivery at 9/10 or better

Only 10% consider their digital business strategy to be optimised

36% don't have a single manager responsible for CX; Of those who do, just 36% are at board level

Top strategic performance measures

CX remains most important strategic measurement for organisational performance



What are the top three performance measurements according to your company's board or executive team?

Benefits evidenced by improving CX

Business benefits increased significantly, once CX improved

79% can evidence cost savings, 84% an uplift in revenue/ profits, and 85% appreciate its impact on employees

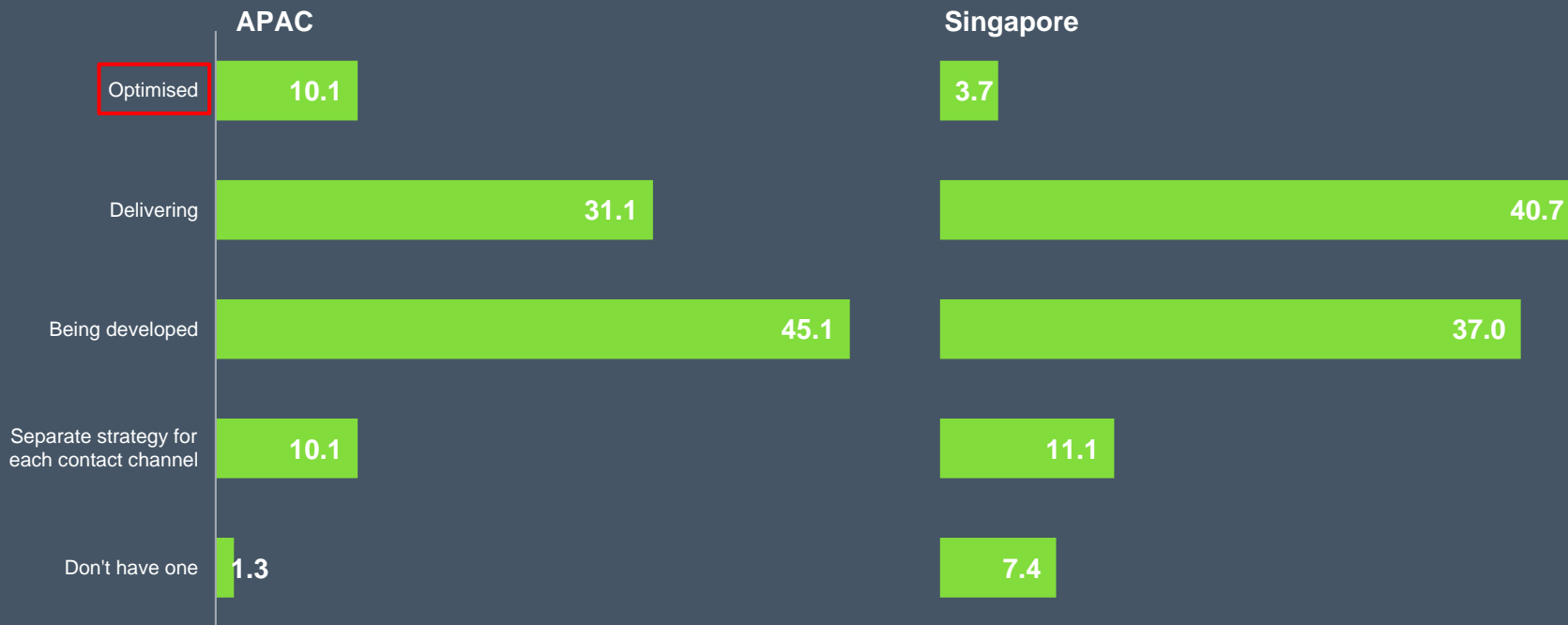


What business benefits can be evidenced by an improving CX capability?

Digital business strategy

Less than 10% of respondents have an optimised digital business strategy

51% are at best in the process of developing the company's strategy for digital business

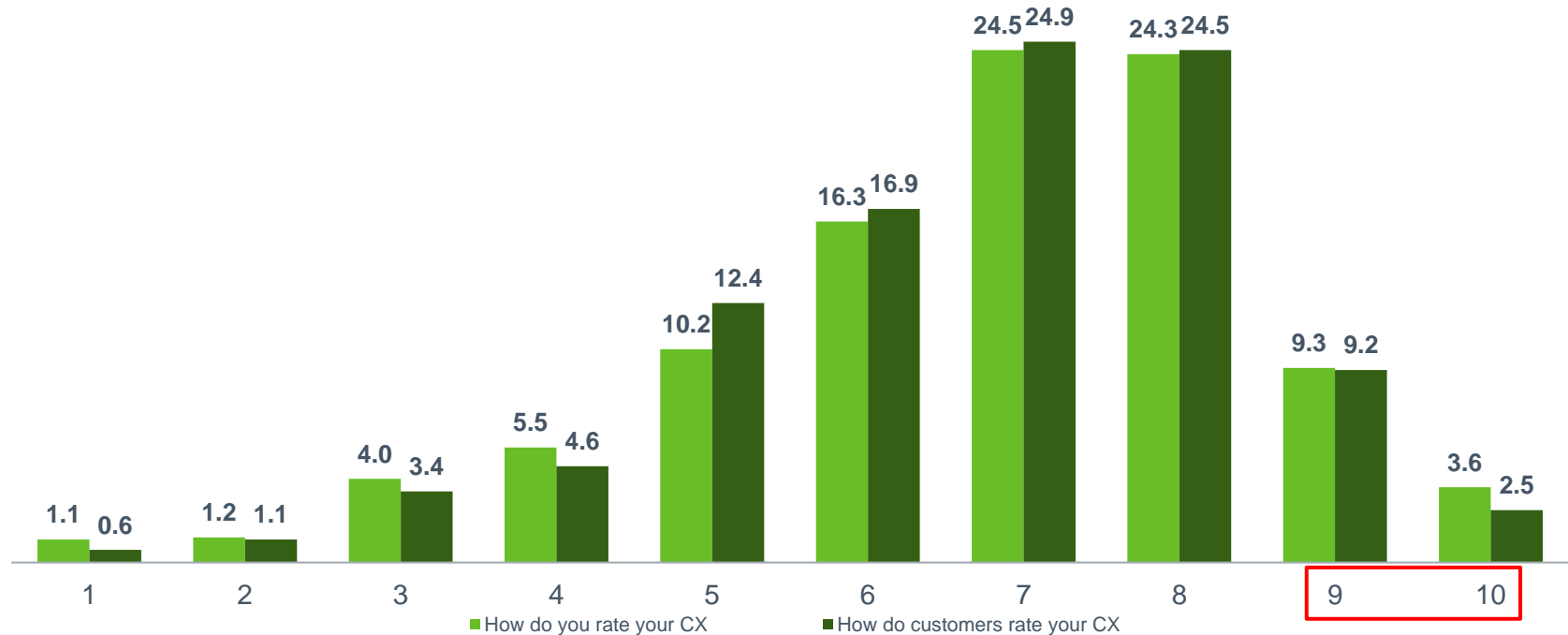


How would you describe your company's strategy for digital business?

Organisations' rating of CX capability

Just over a third of the respondents believe their CX will receive a rating of eight out of ten, or more.

One in five (22.0%) organisations self-rate CX delivery at five out of ten, or worse.



On a rating of 1-10, how would you/ your customers' rate your organisation's CX capability?

A woman is hiking on a narrow dirt path along a grassy mountain ridge. The sun is low on the horizon, creating a warm, golden glow across the landscape. In the background, a city is visible in a valley, surrounded by rolling hills and mountains. The scene is peaceful and scenic.

Digital dominance

Key finding



Digital dominance

The world has formed a digital skin. Business, service, technology and commercial models have changed forever. *Organisations are strategically challenged to keep pace with customer behavior.*



9 channel choices the norm, *will rise to 11 by 2018; CX no1 driver for digital*

70.7% forecast increases in assisted-service volumes; *78% a rise in fully automated contacts*

Virtual assistant (Chat bots) top growth focus in 2017 ; *IoT to double*



Customer awareness of solution and functionality not meeting user needs *top factors hindering digital transformation*

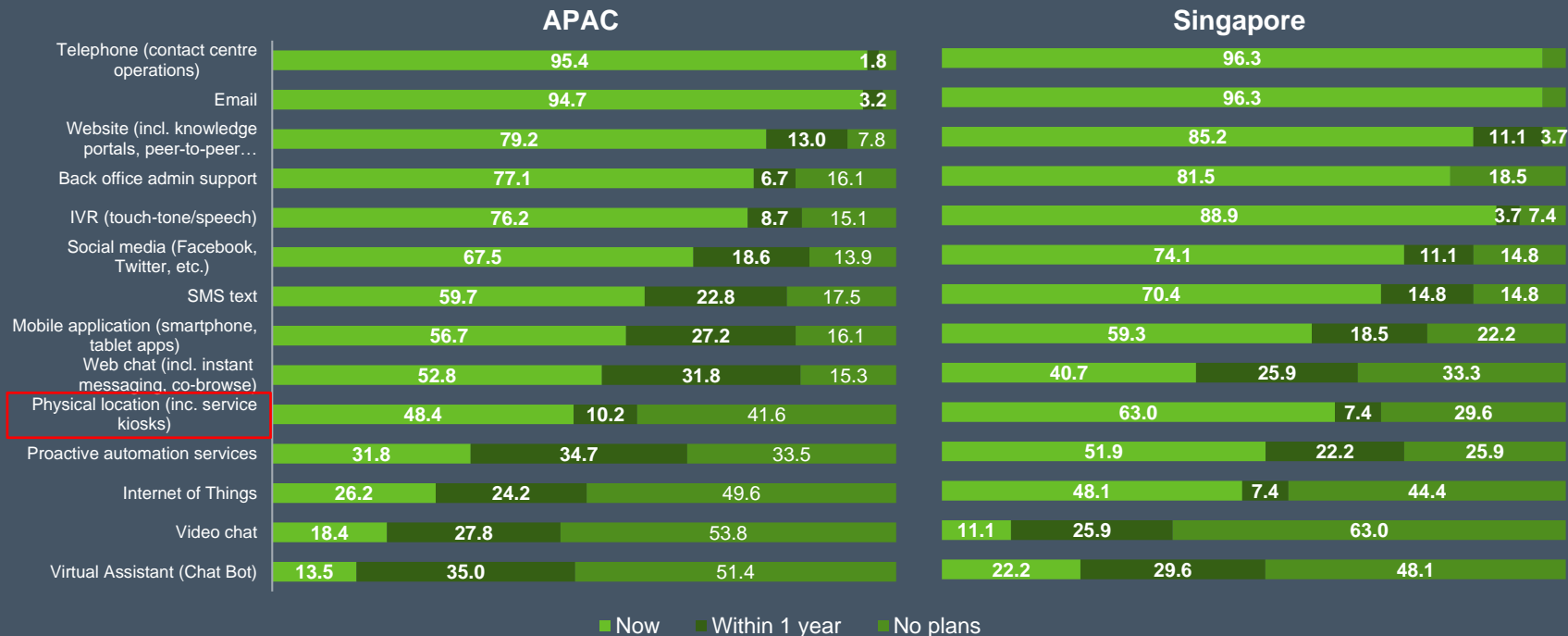
Actual split of interactions *falling short of desired model*

Majority are not tracking cost per transactions *on digital solutions*

Services supported

Average of nine channel choices now the norm, it'll soon rise to 11

Virtual assistant (chat bots) provide largest area for growth; IoT surging in tandem with proactive automation services



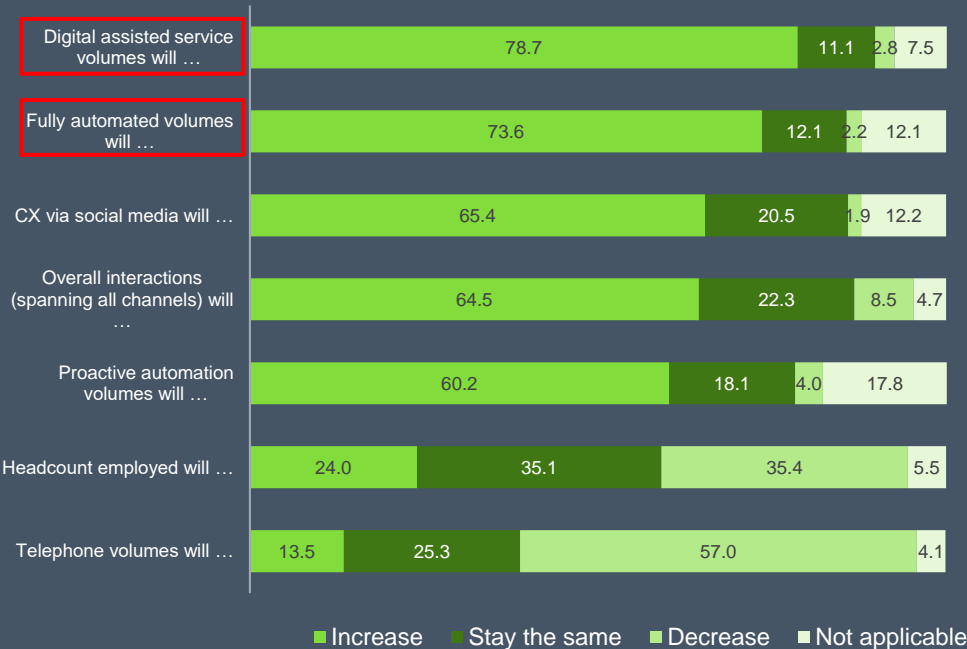
What services can your organisation support, now and in the future?

Digital transformation of CX in next two years

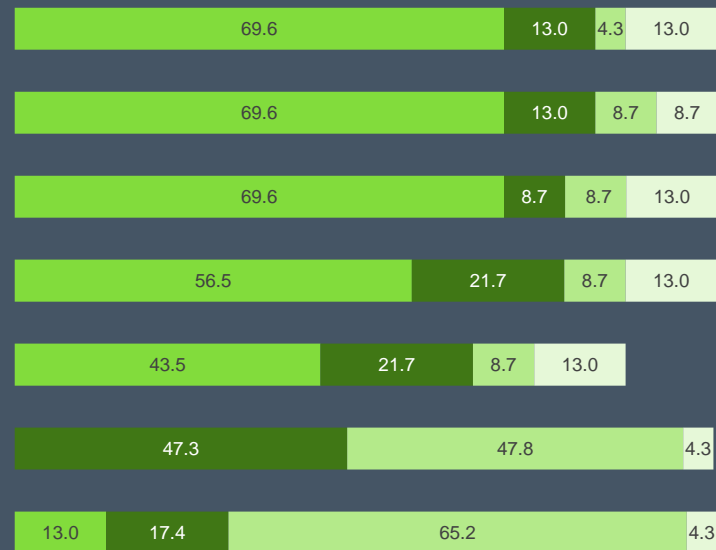
62% forecast a rise in overall customer interaction levels in coming two years

71% anticipate increases to fully automated contacts volumes, while 56% expect transactions via telephone to fall

APAC



Singapore



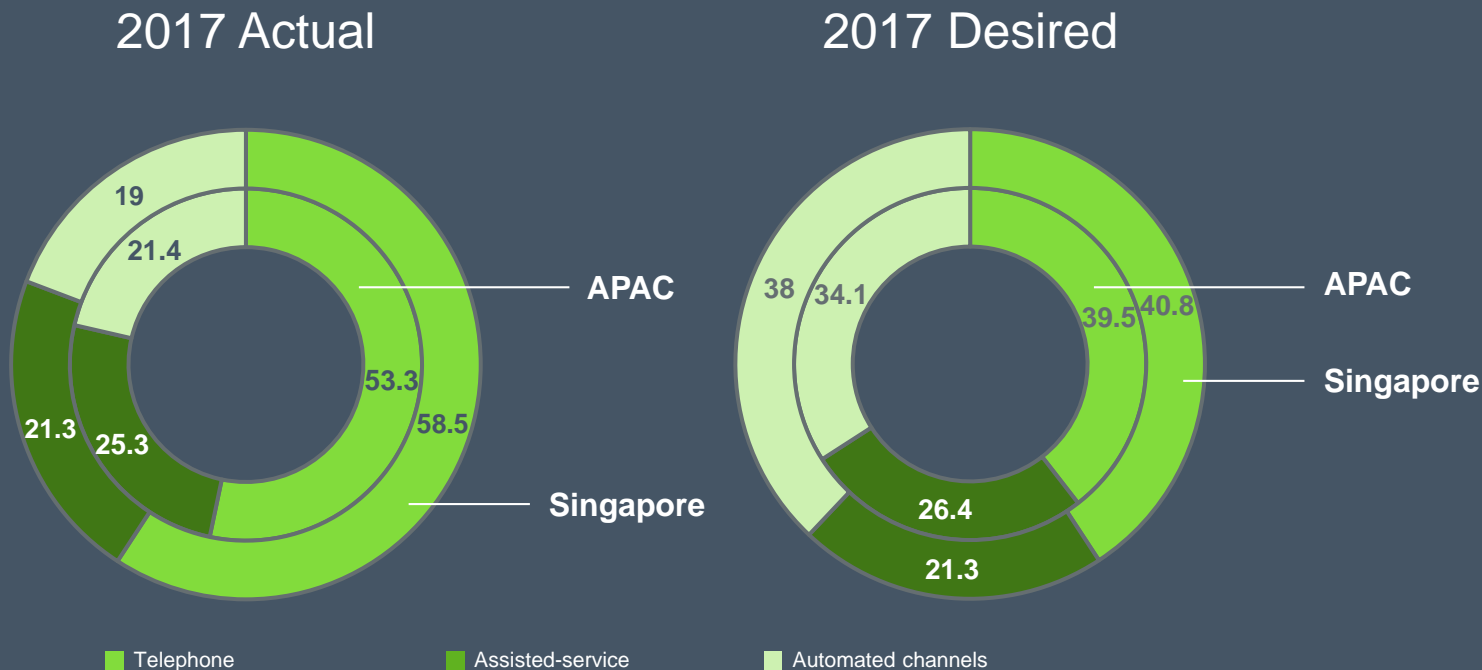
■ Increase ■ Stay the same ■ Decrease ■ Not applicable

How will digital transform your CX operations in the next two years?

Desired interaction split

Actual split of interactions falling way short of desired model

Evidence of a pragmatic and balanced approach towards migrating agent based interactions towards partial/full automation



What is your desired split of customer interactions by channel grouping?

A person with a backpack is walking away from the viewer on a long, straight path that stretches towards a bright sunset. The path is flanked by a calm body of water that reflects the golden light of the sun. In the background, there are dark, forested mountains under a sky filled with dramatic, orange-hued clouds. The overall mood is peaceful and contemplative.

Conscious journeys

Key finding



Conscious journeys

Seamless, proactive, reactive, connected, automated and analysed. Omnichannel is a priority but the customer *journey patterns need to be understood, designed and personalised.*



Connecting customer journeys 2nd top factor to transforming CX in next 5 years; 76% already have some channels connected

67% can now track customer journeys in some form, of those 44% have automated processes available



8% have all channels connected; just another 22% have most connected

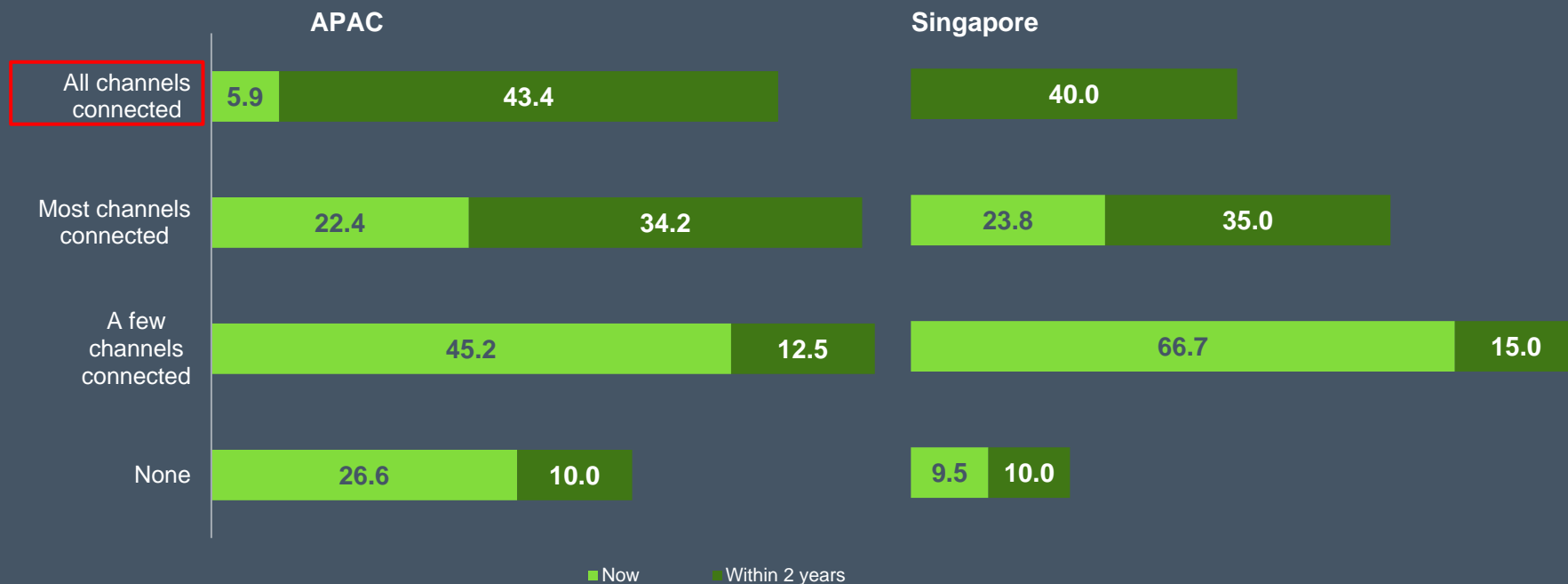
58% channels are being managed in silos; 42% channel data not actively shared between teams

72% fail to collect data to review and optimise journey patterns; 76% can't identify blockages in process that will impact CX

Omnichannel strategy

41% now have, or are striving towards, a full omnichannel strategy

70% currently have no, or very few channels connected

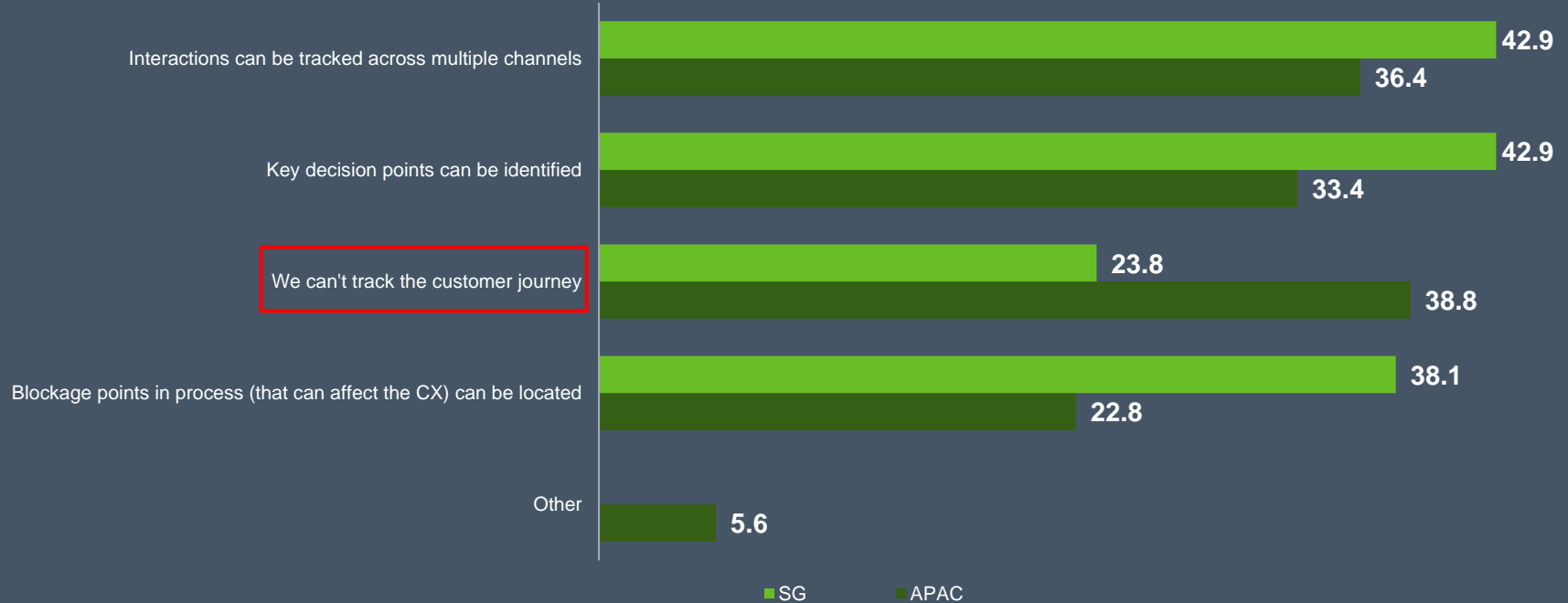


How many of your contact channels are covered by an omnichannel (connected customer journey) strategy?

Tracking customer journeys

Noticeable improvements but visibility of the CX journey still low

Just 38% can track an interaction that spans multiple channels; A third have no ability to track



How well can you track the customer journey across your service channels?

Challenges of tracking customer journeys

System integration issues are still the biggest challenge

58% compound the problem by operating channels in silos; and a quarter of technology teams are unclear on operational needs

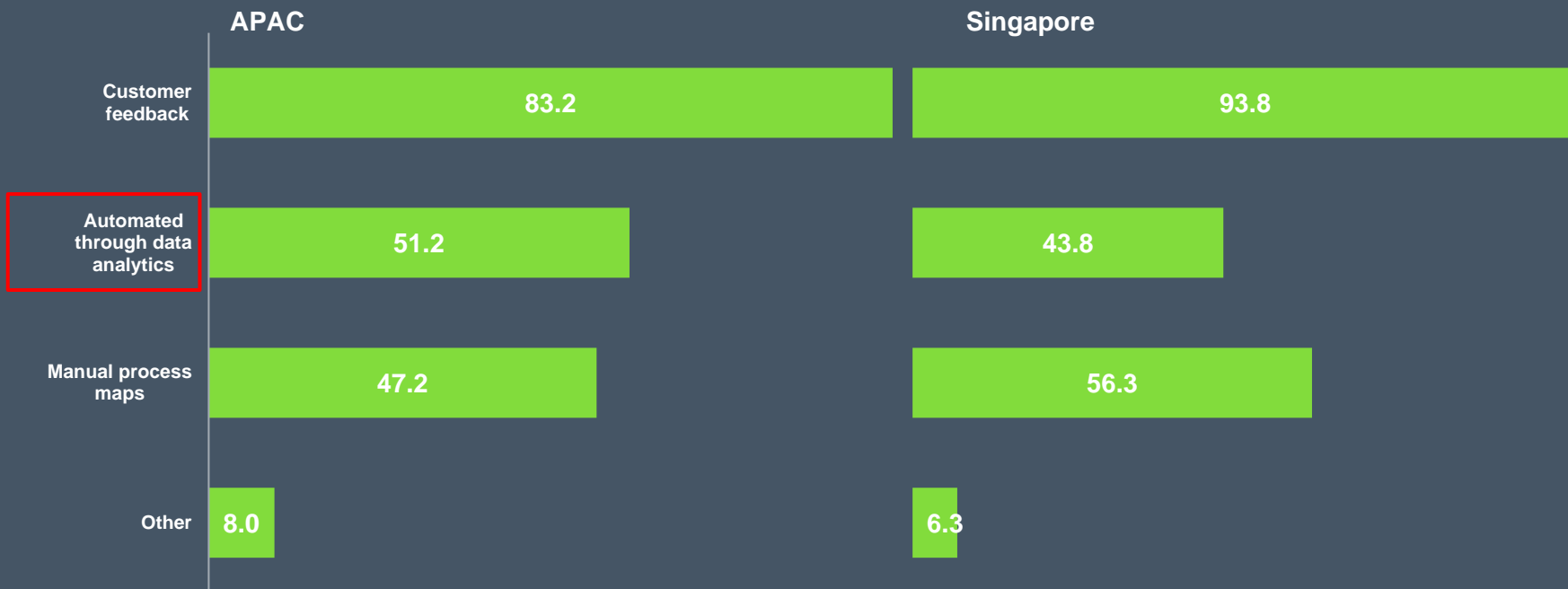


What are the main challenges you face when attempting to track customer journeys?

Methods to track customer journeys across multiple channels

Manual systems remain the norm

Automation levels are rising though, and 44% are using data analytics to track interactions across multiple channels



What methods do you use to track customer journeys spanning multiple channels?

A photograph of a person walking away from the camera on a wooden boardwalk that winds through a forest. The ground is covered in a thick layer of fallen orange and brown autumn leaves. Tall, thin trees line the path, and sunlight filters through the canopy in the background. The overall mood is serene and contemplative.

Data supremacy

Key finding



Data supremacy

The importance of understanding and harnessing (mass) data is now critical to performance, the *number one trend to reshape the industry – analyse or die.*



Customer analytics was no2 factor towards positive improvement in last 5 years; it's been voted no1 for next 5 years

Top benefit (58%) of analytics is improving customer journey

42% can now offer customised CX



Only 48% have customer analytic systems; 36% possess big data analytic solutions

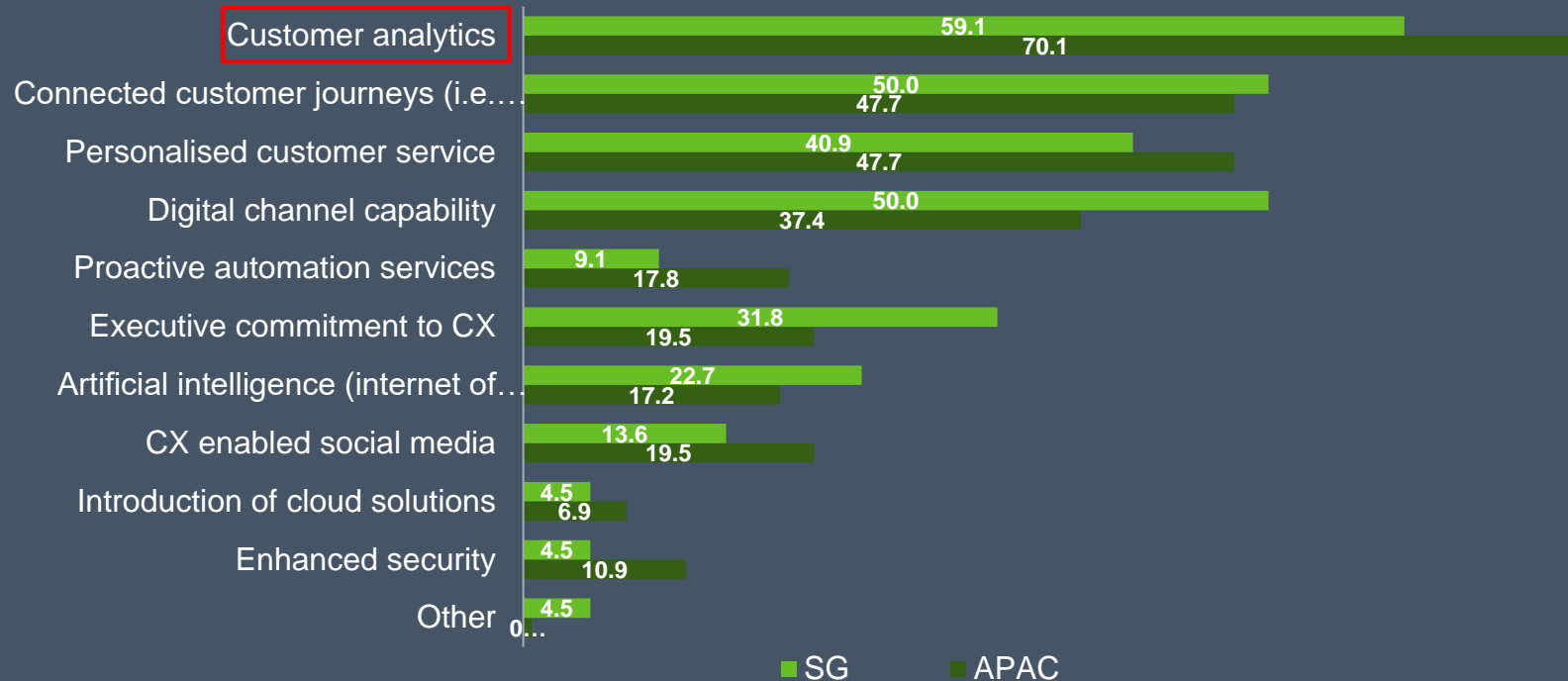
29% using analytics to inform channel/contact management strategy

Just 54% have agent analytics; 42% of analytic systems don't meet current needs

Trends that will reshape CX – next five years

Analytics voted top factor that will reshape CX industry - for third year running

Personalisation rising at pace, as attention shifts to robotics and automation

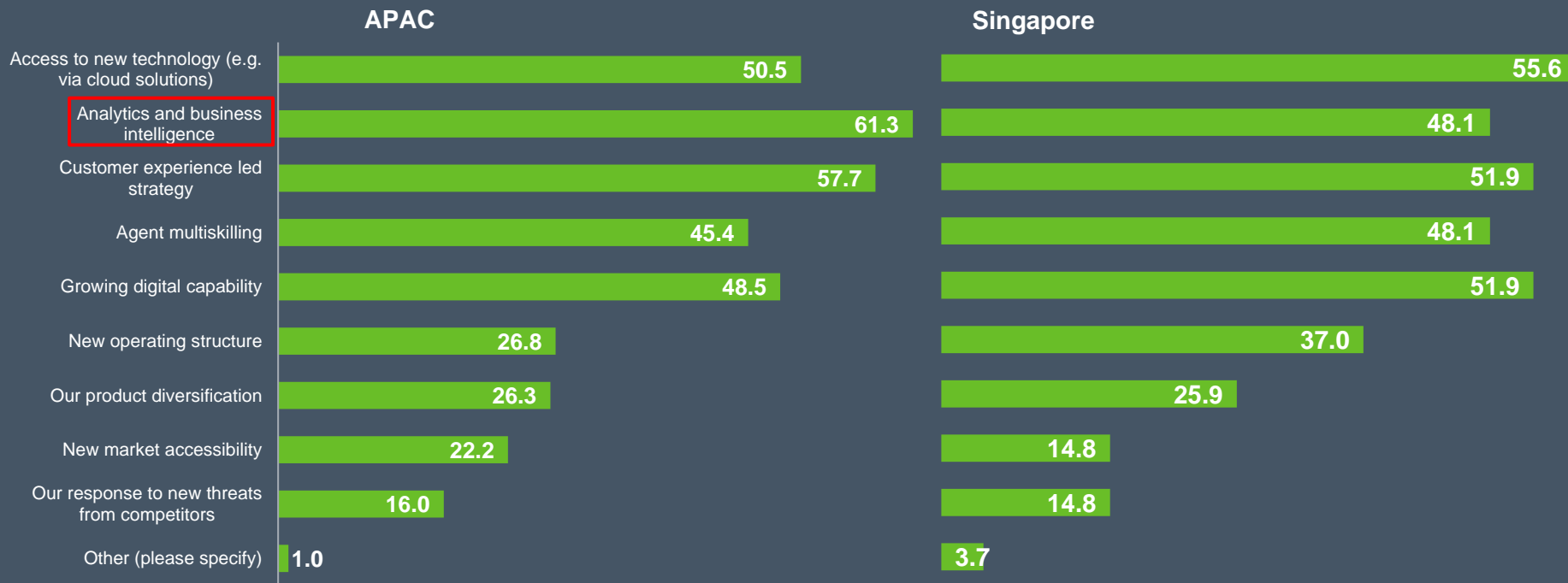


What are the top three things that will reshape your CX capability during the next five years?

Positively transforming services - last five years

Technology flexibility is key to transforming CX

Business intelligence is powering new strategies, capability, and an evolution in operating models

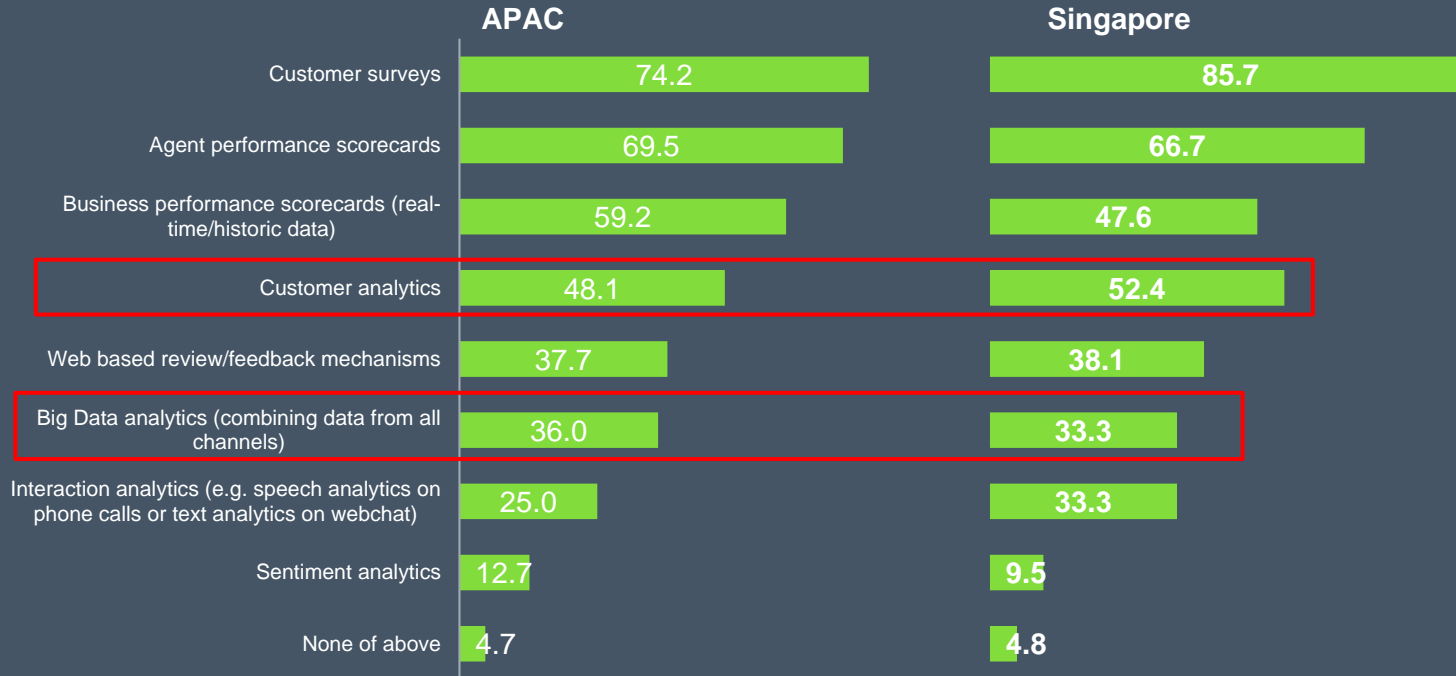


Which factors have contributed most to positively transforming your services in the last five years?

What business information tools are available?

Usage of Big Data analytics has grown by 75%, but it's only available to a third

Capability beneath expectation – only half have customer analytic systems in place





Man vs machine

Key finding



Man vs machine

CX robotics in the form of automation, AI and IoT are creating a new reality, demanding a new approach. *Human cost and productivity is challenged as these capabilities improve.*



Top 5 channel focus areas:

1. **Virtual assistant (chat bots)**
2. **Instant messaging (incl. web chat)**
3. **Mobile apps**
4. **Video chat**
5. **IoT**

Phone volumes have dropped by 17% since 2015



Transaction complexity *contributing to absenteeism levels double that in 1997*

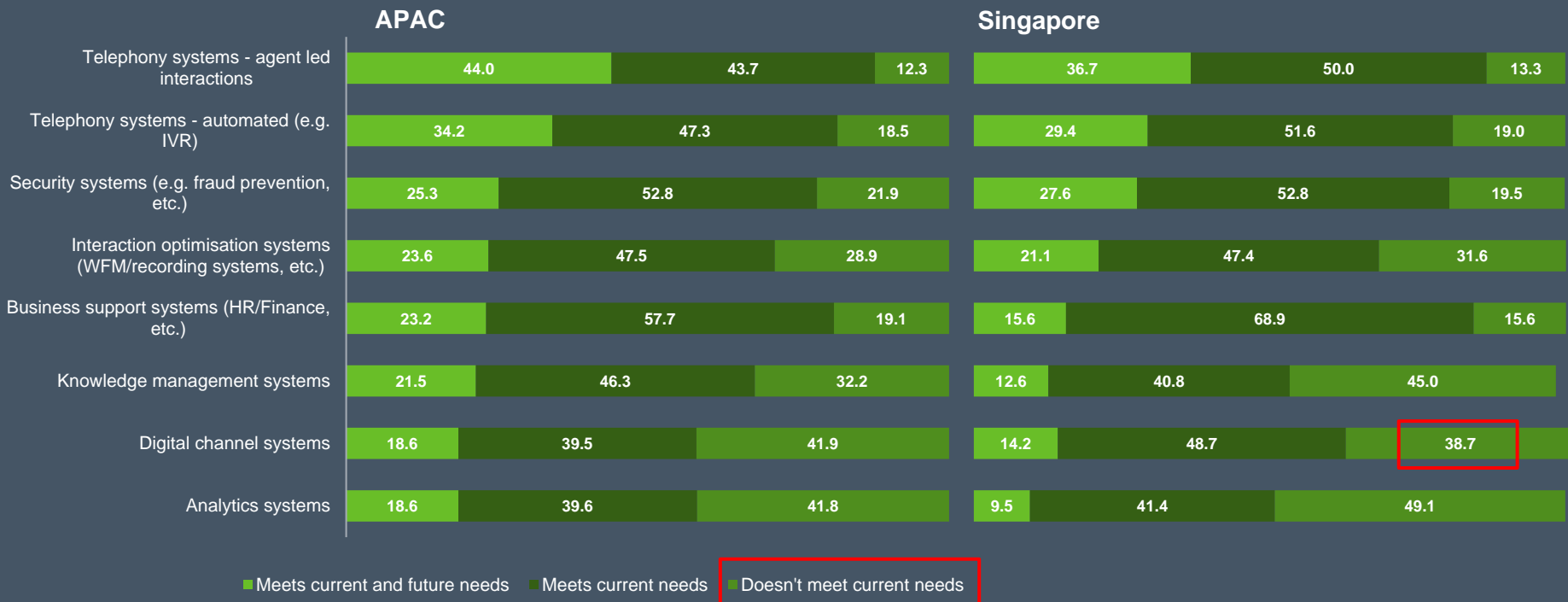
Agent average length of service *28 months*

First contact resolution *on digital paths lagging phone, 56% say phone volumes will drop further through end 2018*

How does technology meet current and future needs?

Digital systems fall short for 42%, the same number reporting inadequate analytics

The number of companies who fear digital channel technology won't meet future needs has increased to 81%, as more than ¼ say current systems are failing against existing requirements

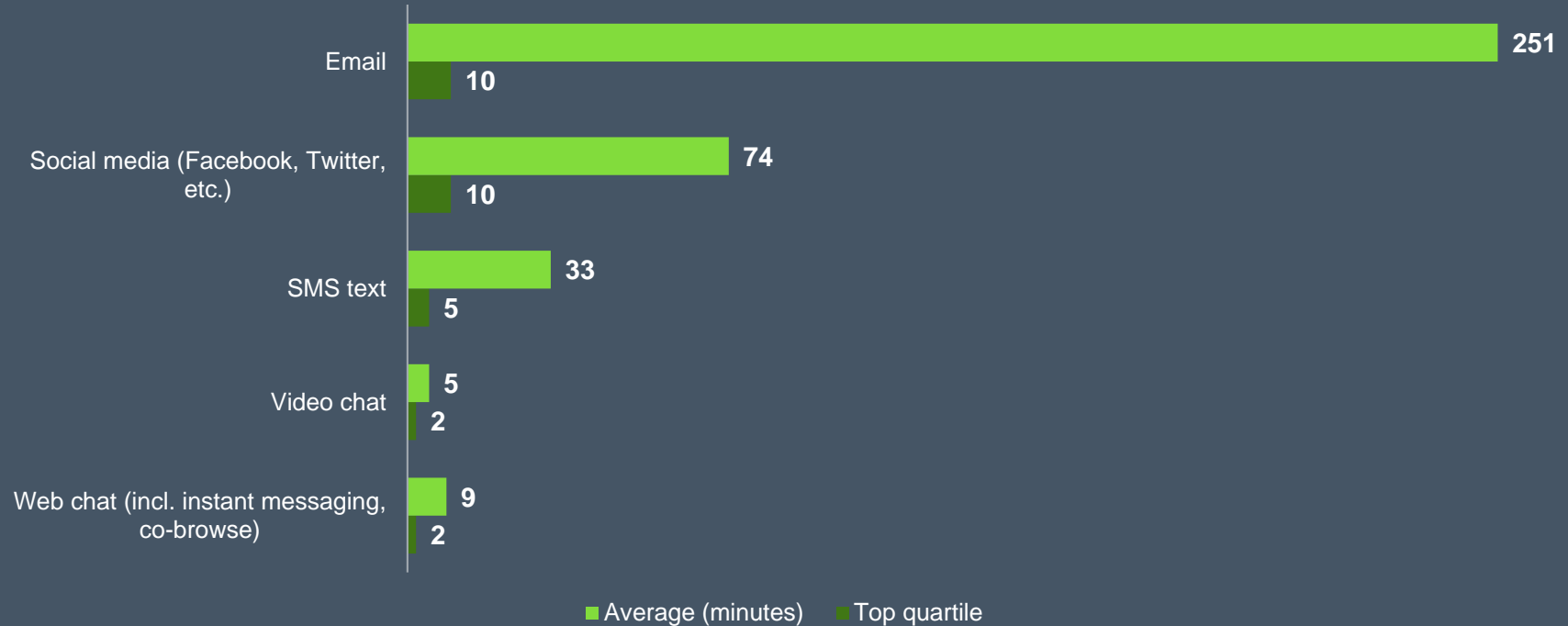


How well do the following technology systems items meet your current and future needs?

Response times – Assisted-services

Digital response times improve; exceptional results from top quartile

Compare 4.33 hour email average against the 10 mins benchmark at top quartile or 74 mins average on social to upper quartiles 10 minutes

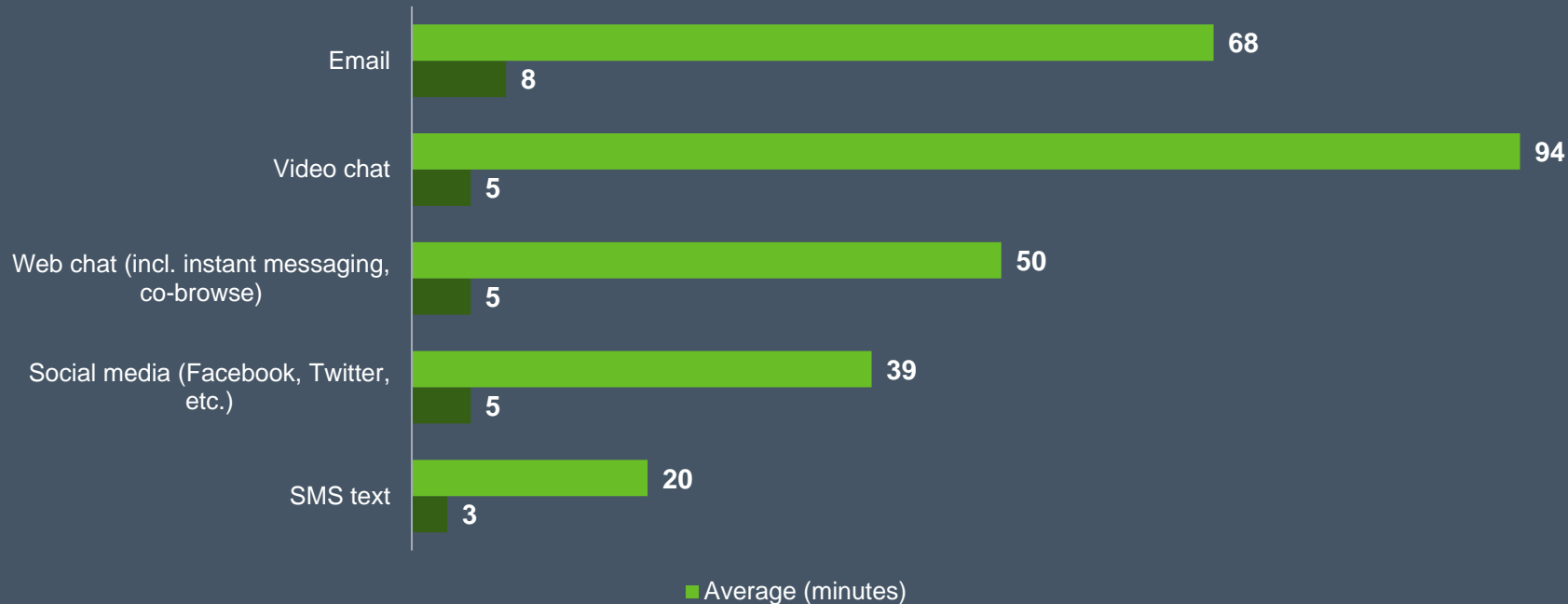


What is the average response time for the following assisted-services?

Handle times – Assisted-services

Handle times are decreasing quickly

Top quartile performance demonstrates the “art of the possible” with handle time range of three to eight minutes



What is the average handle time for the following assisted-services?

A person stands on the peak of a grassy cliff, looking out over a vast ocean under a dramatic, colorful sky at sunset or sunrise. The sun is low on the horizon, creating a strong glow and silhouetting the person. The sky is filled with soft, wispy clouds in shades of orange, pink, and blue. The ocean is calm, reflecting the light from the sky. The overall mood is contemplative and serene.

Digital crisis or redemption

Conclusion



Digital crisis or redemption?

Pioneers of the digital age have reimagined business models and processes that have changed customer behaviour forever. *The choices you make in your CX and digital strategies will define the future success of your organisation.*



Intelligence powering new strategies, capability, and operating model evolution

Top quartile performances evidencing 'art of the possible'

Investment on technology and facility rises, as percentage of budget spend on human resource drops



Measure

Disparate management the biggest threat to omnichannel

Quality controls on digital up 49% since 2016, but still way behind more established phone

Less than half of operations are fully involved in design of technology systems

Digital crisis or redemption

We say...



accelerate
your
ambition

*Disjointed strategy
damaging CX*

**The
uncomfortable
truth**

Introduction

**1: Digital
dominance**

*The world has
formed a digital
skin.*

*Commit –
customers demand
a leap of faith.*

**2: Conscious
journeys**

*Journeys should
be intuitive.*

*Connect – relevant
channels by design,
and review.*

**3: Data
supremacy**

Analyse or die.

*Develop – usable
intelligence,
inform and share.*

**4: Man vs
machine**

*CX robotics
creating a new
reality.*

*Advance – your
digital strategy
with flexibility and
data.*

*Robotics will add to
the dilemma*

**Digital
crisis or
redemption**

Conclusion

Key findings

How we deliver CX *for our clients*



accelerate
your
ambition



Benchmarking Comparison services

Benchmark your CX and contact centre operations against industry and regional benchmarks, as well as best practices.



20 years of benchmarking

1351 participants from 80 countries contributed to this year's global research report



Contact Centre Development

Understand the current state of your contact centre and take steps to optimise its integration with your organisation



Customer Experience Maturity

Understand the current state of your customer experience and take steps to mature it in your organisation



Omnichannel optimisation

Assess your digital experience elements and create a transformational plan for improvement



Digital experience capability

Assess and optimise omnichannel interactions and value, across all client channels and touchpoints



Technical and Support services

We help you design, implement, support and optimise your infrastructure, improve operations and reduce cost



Managed Services

We take over your day-to-day operations to enhance your IT and business functions, and enable IT agility and scalability

Consulting services

A person in a red jacket stands next to a dark car on a desert road at night. The car's taillight is illuminated. The background shows a vast, dark landscape under a starry night sky with the Milky Way visible.

Thank you.

2017 Global Customer Experience (CX) Benchmarking Report

Digital crisis or redemption - *The uncomfortable truth*