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CCA RESEARCH COMPENDIUM 2013/14

An essential reference source for customer contact professionals

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Foreword

We understand that making informed decisions about the strategic direction of your service operation is a challenging and often daunting task. Our research projects are designed to offer views, opinions and trends on topical issues to support your transformational objectives.

In this year's Compendium, we are delighted to bring you the synthesis of our learnings from the last year in a concise and informative report.

One of the most valuable services CCA provides is collating, analysing and sharing information from across sectors, geographies and specialisms. We are a critical conduit for intelligence gathering and debate and committed to advancing and expanding understanding of customer contact and service operations and strategies.

The research outputs were generated in collaboration with many of our members and benefited greatly from the collective wisdom of our expert networks: Industry Council; Customer Experience Network; BPO Council and Suppliers Council; all of whom helped get to the heart of issues impacting on customer contact and service operations.

CCA has unrivalled access to executives from global brands spanning a wide range of industry sectors, as well as executives from public sector organisations. Our research also benefits from the perspective of outsourcing partners who provide frontline services on behalf of private and public sector clients and industry suppliers.

CCA Special Advisers, who are eminent experts in customer behaviour, consumer trends, workplace dynamics and organisational structures, also played a significant role in steering our research activities.

Our partners make a vital contribution by enabling us to create a detailed picture of trends in customer contact and customer service operations. In the last 12 months executives from Arise, Capita, KANA, Kcom, Plantronics, Verint and Webhelp, worked closely with CCA, sparking new ideas, providing insight and helping shape projects.

I trust you will find lots of valuable information in our Research Compendium and I look forward to sharing the results of our new research projects for 2014/15, with our exciting, new programme planned to commence in January 2015.

Anne M Forsyth

Anne Marie Forsyth
Chief Executive

Executive Summary:
Dealing with perennial issues in a rapidly changing landscape

The CCA research programme conducted throughout 2013/14 has demonstrated that digital innovation is continuing to bring wide ranging changes to the market. In multiple instances perennial challenges are being faced by organisations, but technological change is re-shaping both how these issues play out and also the toolkit of solutions from which contact centre professionals can choose.

10 significant issues we uncovered in 2013/14 were:

1. Continuing rise in the importance of mobile as smartphone and tablet penetration grows exponentially in a single year;
2. Fragmentation in consumer behaviour and preferences presenting ongoing challenges for service provision;
3. Issues with a deepening digital divide as customers most adept at using social media get more attention from organisations;
4. Organisations are struggling to see the value of social media being realised, despite considerable resource investment into supporting it;
5. As was found in the previous year's research, the majority of customers would rather self-serve via websites if transactions are simple;
6. But on the other side there is growing recognition that nurturing a flexible workforce is crucial to dealing with the complex contact which is left behind;
7. Legacy systems are a continuing problem with organisational silos negatively affecting the ability to improve customer experience;
8. Agents are also struggling with legacy systems which are limiting their capabilities to resolve issues within a single contact;
9. Obtaining a single view of the customer remains a significant challenge for most organisations;
10. Complaints are on the rise with an upturn in the number of ways consumers can contact organisations and resolve issues, and there appears to be an increasing role for intermediary organisations.

Complex operating environment

The rapid proliferation of mobile devices has continued during the last year and this has contributed to the emergence of an even more highly complex operating environment. The upsurge in smartphone and tablet usage has not been distributed evenly, however. Neither are digital consumers a homogeneous group with generation Y wanting to engage with organisations in a completely different way from their parents or grandparents.

Multi-channel and social media

Organisations have continued to invest heavily in multi-channel in the past 12 months and social media is a key recipient of funds. This is linked to its status as a disproportionately loud voice that has shifted the power away from the traditional modes of contact. Agile digital natives can unleash value-destroying social media storms that cause severe reputational damage to companies and their CEOs. However, there is a persistent digital divide which means that some consumers are struggling to engage with organisations as attention moves away from their channels of preference.

Building agility and flexibility

Contact centres face a significant challenge in managing demand especially given the complex consumer landscape already outlined. It is contended, that if organisations are more open to flexible approaches to work they can reap substantial rewards. There is no one-size fits all approach, but if both technological constraints and mindset difficulties can be overcome, building in agility can be a gamechanger.

Dealing with legacy

Legacy systems are considered to be the main barrier to obtaining a single view of the customer which is ever more crucial in the multi-channel age. Although there is virtually universal acknowledgement that IT solutions are available that can overcome and eradicate the constraints imposed by legacy systems, there is a tendency to focus on short-term costs savings above those which will deliver a differentiated and enhanced customer experience.

The future of complaints

Complaints are increasing as consumers can register dissatisfaction and seek resolution in multiple ways. There has been an increase in mainstream media-based consumer champions, ombudsmen and other intermediary organisations which has resulted in highly competent, capable and enabled complainants. Strategic responses are necessary to avoid privileging some customer complaints above others.

1.

Through the Eyes of the Customer – Statistics

Squeezed consumers

- 43% of consumers reported that they are spending less than they were prior to the recession and this has led to a greater focus on the price and efficiency of service.

Preferred Channel Use

- 37% of consumers are most happy to use an organisation's website when purchasing a product or service;
- For customer service and complaints, however, consumers prefer to make contact via telephone (35% and 24% respectively) or email (21% and 29%) over websites (9% and 8%).

Open to persuasion

- 44% of consumers indicated that they could be persuaded to switch from phone to another channel if they were incentivised, the remainder were ambivalent or unlikely to switch.

Feeling valued

- 77% of consumers reported that valuing their time is the most important thing a company can do to provide them with good online customer service.

Statistics are excerpts from a selection of CCA research reports produced in partnership with Cisco (January 2014) and Kcom (November 2013) as well as supplementary information from Forrester[1] .

[1]http://blogs.forrester.com/kate_leggett

2.

The Digital Consumer

Fast facts on the digital consumer

- 61% of the UK population have a smartphone (up 10% from 2013);
- 83% of adults now go online using any type of device in any location;
- One third of mobile users now say they buy things via their phone (33% vs 23% in 2012) or use their phone to check their bank balance (34% vs 25% in 2012);
- 44% of the UK population own tablets (this has doubled since 2013);
- There are 24 million active daily Facebook users in the UK;
- There are 400 million Tweets every day in the UK;
- 68% of adult smartphone users say they use their phone in stores;
- 66% of smartphone owners are more likely to shop at a store that has a useful mobile app[2];
- 56% of people who buy things online say they often read user reviews;
- Word-of-mouth generates more than twice the sales of paid advertising and is the primary factor behind 20-50% of all purchasing decisions;
- Omni-channel consumers constitute about 70% of retail spending in the UK;
- 55% of online adults reported that they were likely to abandon their online purchase if they couldn't find a quick answer to their question;
- 71% of Britons reported that they are 'always looking at screens'.

(Sources: Cisco (January 2014), Ofcom Media Attitudes Survey (2014) & Ofcom The Communications Market Report (2014), Forrester 'mobile moments', Deloitte multi-market study[3] Forrester study[4]).

[2]http://apigee.com/about/

[3]http://www.thedrum.com/opinion

[4]http://blogs.forrester.com/kate_leggett

These statistics belie a highly complex landscape. Digital consumers are not a homogenous group and the speed of technological change and demographic shifts have led to increasingly fragmented preferences and behaviours. Customer experience professionals need to consider factors like age when targeting services to ensure consumers can interact in a way which best suits their needs and preferences.

Silver Surfers Vs Generation Y

10 million people in the UK are over 65 years old and according to current projections that will nearly double by 2050. While one-in-six of the UK population is currently aged 65 and over, by 2050 one in-four will be. The number of people aged 65 and over accessing the internet has risen by more than a quarter in the past year and this change has been largely driven by a three-fold increase in the use of tablet computers (from 5% to 17%). However, there are significant gaps between the products and services currently available and what consumers say they need for their health and well-being in the 'golden' years[5]. At the other end of the age spectrum, the most importance device for 16-34's is their smartphone (47% for 16-24's)[6]. Organisations are therefore challenged with providing choice to an increasingly fragmented, but also demanding customer base.

The 'Culture of Now'

Globally 82% of respondents said they felt the world was changing too fast and 45% said they felt overwhelmed by choice. According to Ipsos Mori, the net effect of this could be to crush our attention spans even more. In terms of implications for customer service, this is likely to continue the trend towards customer demand for instant answers and immediate resolution to issues[7].

Digital Divide

Socio-economic factors also play a role in determining the level of access to information and communications technology and although there have been overall increases in access to technology, some groups remain reliant on more traditional forms on contact. Within consumer research conducted for a CCA Report 'The Future of Customer Service' produced in partnership with Kcom from November 2013, it was found that a significant proportion were without tablet (59%) or smartphone (32%) access. The majority of consumers who did possess these technologies did not use them for interacting with organisations beyond very basic, routine information gathering. Customers also have many more ways to complain, with the loud voice of social media guaranteed to get a speedier response and consumer champions encouraging them to aim for the top. This raises the question as to whether certain groups are preferenced as they are digitally enabled and can choose to leapfrog preliminary stages of contact or complaints to access a response from further up the hierarchy.

3. Technological Innovations in the Contact Centre

It has been widely reported that many legacy organisations are struggling to adjust to a digital future. A global survey of CIOs by Gartner's Executive Programs found that 70% of CIOs are intending to change their technology and sourcing relationships in the next two to three years for a variety of reasons linked to problems with their organisations keeping pace with digital change[8]. The research conducted by CCA in 2013/14 confirmed some of these issues:

- 32% of organisations strongly agreed that technological advances were going to change the way consumers contact organisations over the coming four years;
- 18% strongly agreed that increasing smartphone and tablet usage would be a game-changing trend[9].

Focus on cost saving

The findings from research launched in January 2014 'Customer Experience: measuring the value of effective strategy' produced in partnership with Cisco suggest that the emphasis of organisations in the adoption of new technology was chiefly around achieving cost reduction rather than service differentiation:

- 49% of respondents thought that workforce management technology offered the most effective route to achieving cost savings within the contact centre;
- 25% of organisations reported that CRM integrations offered the most effective route to achieving cost savings within the contact centre;
- Skills-based routing was considered the optimum investment for offering a more differentiated customer service (30%) followed by call recording (27%) and quality management (27%);
- CRM integration topped the list of planned investment in the next 12 to 18 months (41.5%), followed by customer feedback surveys via SMS (32%) and joint third was email management and also workforce management systems.

Tapping expert knowledge and making the most of customer data

Despite a realisation that greater complexity of enquiries requires greater expert knowledge and collaboration, research has demonstrated relatively low current use of technologies designed to address this issue, for example:

- Only 15% of organisations currently use knowledge management systems and only 15% use presence-based expert escalation.

[5] http://www.nielsen.com/us/en.html
[6] Ofcom Media Attitudes 2014
[7] Available at: http://www.telegraph.co.uk/technology/news

4.

Simplifying Good Customer Experience

For customer service professionals the power of customer data is also crucial. In the right hands knowledge of consumer behaviour and patterns can turn around a failing organisation into an industry trail blazer. For example, the Netflix model very cleverly uses customer data, collected over many years, about people's viewing habits and selecting a theme, cast, and launch approach that scientifically predicts which shows would be a winner[10].

Taking action to meet the demands of a multi-channel environment

Across the research, customer contact professionals highlighted interest and investment in social media and multi-channel:

- More than one-quarter of organisations are planning investment in both social media management and also monitoring;
- 38% are looking to invest more in technologies which will enable them to respond to growing customer contact via mobile devices;
- Only 8% said they currently provide differentiated service using mobile, while customer satisfaction for smartphone apps languishes at 42%;
- 45% of respondents reported that their senior management are embracing and investing in new customer service channels like social as part of a joined up customer engagement strategy;
- 51% of contact centre professionals report that senior management take a keen and regular interest in any negative PR or social media chat resulting from poor customer service[11].

Social media is a disproportionately loud voice but one which can be used to the advantage of customer experience professionals. It represents a huge opportunity to get the attention of senior management if undertaken with care.

73% of members believe it is always important to reduce the amount of effort the customer has to make when engaging with an organisation

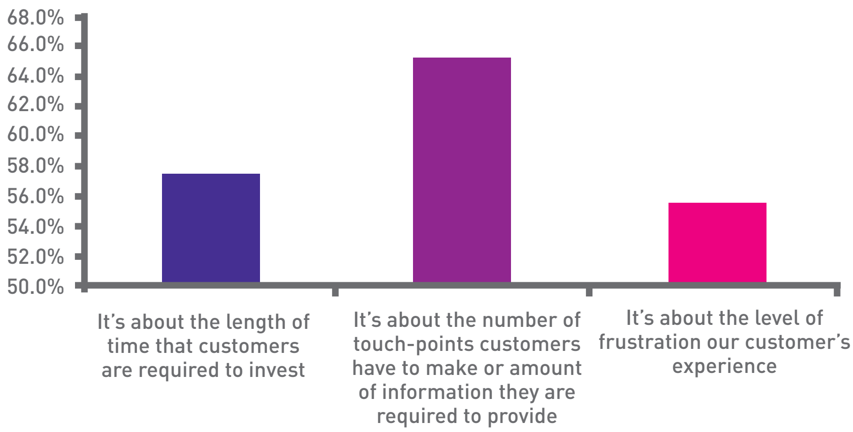
Organisations make things too hard for customers

Research produced in partnership with Capita, which was released in January 2014, found that contact centre professionals overwhelmingly agreed that organisations do make things too hard for customers currently:

- More than 90% of the customer contact professionals surveyed, in their personal experience as a customer, had terminated an interaction with an organisation because it was too hard

The report: 'How hard is it to make life easier or customers? The value of measuring customer effort', asked senior contact centre professionals to select issues which define their understanding of customer effort from a list of three - the most commonly selected issue was 'the number of touch points customers have to make or the amount of information they are required to provide'. 'Time invested by customers' and 'levels of frustration' came almost equal second, cited by 57% and 56% of respondents (Figure 1).

Figure 1: When thinking about customer effort specifically, what is your understanding of effort (please select all that apply?) 66% selected the number of touch-points customers must make or amount of information they must provide. (Source: CCA member survey, 70 organisations, September 2013)



[8] http://www.gartner.com/newsroom/

[9] 'The Future of Customer Service' Kcom (November 2013)

[10] http://www.theguardian.com/uk/commentisfree

[11] Data gathered from CCA Reports 'Customer Experience: measuring the value of effective strategy' (produced in partnership with Cisco, January 2014) and 'Why Customer Service is a critical Boardroom issue' (produced in partnership with Kana, February 2014)

Measuring Customer Effort

- Only around 30% of CCA members currently measure customer effort;
- Most organisations that measure customer effort do not rely on it as a standalone performance metric - 82% said they use it in conjunction with other measures

Three key reasons were provided as the rationale for measuring effort:

1. 42% said it helps them to quickly identify parts of the customer journey causing customers pain;
2. 30% said it helps them to improve their customer journey mapping;
3. 21% said it helps them to identify faults in processes that can be fixed for customers' benefit

A joined-up response and holistic approach to monitoring effort is required, but this is not currently common practice, the survey showed. Most organisations measure channels individually for effort with only 25% having a single omni-channel view. This in part reflects a broader strategic issue for UK contact centres which is that between 70% and 80% operate in silos and do not have a single view of customer interactions across every channel in real-time.

The Role of Agent Effort

Research produced in partnership with Plantronics conducted in September 2014, 'Agent Effort: The benefits of making it easier for your agents to do business with your customers' asserted that although many businesses have actively begun thinking about reducing customer effort, but if agents still aren't equipped with the right skills, technology and knowledge, organisations could still be letting customers down.

5. Flexible Working

New government legislation allowing employees the 'right to request' flexible working has been announced in the UK. It has been contended that offering flexibility in a number of ways including in terms of working times, locations and patterns of working can bring a range of advantages both to employers and employees. These include: accessing a wider talent pool, retaining staff, improving morale, reducing absenteeism and improving productivity from the employer point of view. From the employee side, workers may be better able to manage any caring responsibilities and family commitments as well as reducing childcare costs. Flexible working can offer organisations an excellent opportunity to mitigate the increased complexity being faced by contact centres.

Greater complexity in the contact centre

Despite a greater willingness towards self-service[12], it is clear that consumers wish to carry out more complex interactions with a real person. 30% of consumers would select telephone or email as their first choice for a customer service enquiry and 49% would prefer this for making a complaint.

The implications of greater complexity for contact centre professionals:

- 60% identified a need for improved technology;
- 89% predict increased handling time;
- 81% say more training is needed;
- 60% say different key performance indicators are required

Research from CCA 'Creating An Agile Workforce: The Secret to Service Improvement & Cost Reduction', produced in partnership with Arise Virtual Solutions, found, in a survey of 77 organisations, that contact centres face a significant challenge in providing detailed resourcing in order to manage demand despite the ability to forecast. It is contended by the report that if organisations are more open to flexible approaches to work they can reap substantial rewards.

[12] 35% of consumers regarding self-service as their first choice for purchasing products or services according to CCA Research 'The Future of Customer Service' Kcom (November 2013)

Home working

Homeworking can offer a great opportunity for some organisations to introduce a more flexible approach to work. CCA Research produced in partnership with Plantronics 'Homeward Bound; an analysis of home-working trends in customer service' launched in July 2013. Of the senior contact centre professionals surveyed in the report:

- 59% have either implemented home-working, are trialing or investigating it; and
- 61% plan to increase home-working in future

Improved flexibility for the workforce was named as a main benefit by 92% of respondents, edging benefits to the business into second place with 73% citing improved flexibility for resourcing as a benefit (Figure 2).

Home-workers can be used to perform split shifts or 'micro shifts' of as short as 30 minutes to manage surges in demand. It is far less easy to persuade in-house workers to be this flexible as it may not be worth their while driving or taking public transport to work for such a short period. For home-workers, they just log on and start working and then return to their personal lives.

Main Barriers

Technology concerns dominate when it comes to identifying barriers to home-working with reliance on broadband connectivity emerging as the top barrier for 62% of respondents, despite increasing high speed broadband rollout in the UK. More general technology constraints were cited by a further 52% as a barrier while security and compliance and regulation concerns emerged as barriers for a significant number of members (47% and 45% respectively).

What do you think are the main BENEFITS of implementing home-working for your organisation? (Please select as many as you think are relevant.)

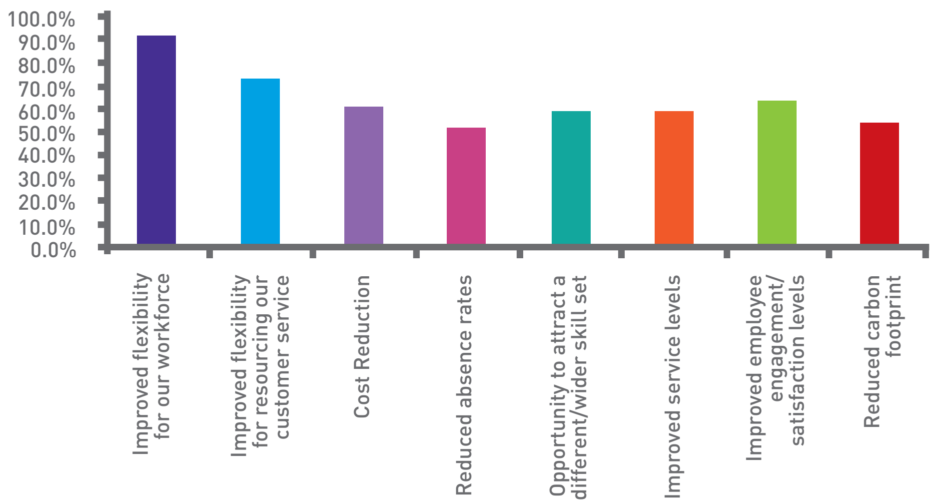


Figure 2 – What do you think are the main benefits of implementing homeworking for your organisation (survey of 77 organisations, July 2013)

6.
Moving Beyond Legacy Constraints

There are one million people working in some 6,000 contact centres across the UK and many of those centres are equipped with IT systems and infrastructure that are nearing the end of their lifespan which implies a period of substantial investment is overdue. CCA Research 'Customer Experience: measuring the value of effective strategy' (January 2014) produced in partnership with Cisco found that legacy systems are considered to be the main barriers to obtaining a single view of the customer (see Figure 3):

72% of contact centre professionals cite legacy systems as main barrier.

The research produced in partnership with Cisco found similar issues around legacy systems making it hard for agents to do their job properly. For example:

- 49% of agents are required to know between 6 and 15 different systems

This disconnect between the contact centre and the boardroom, coupled with enterprise-wide siloed structures and mentalities, partly explains why contact centre directors find it hard to build alliances of power. It also explains why they also frequently fail to make a compelling business case for essential investment in modern, agile and efficient technology solutions capable of responding to customers' needs in a multi-channel service environment.

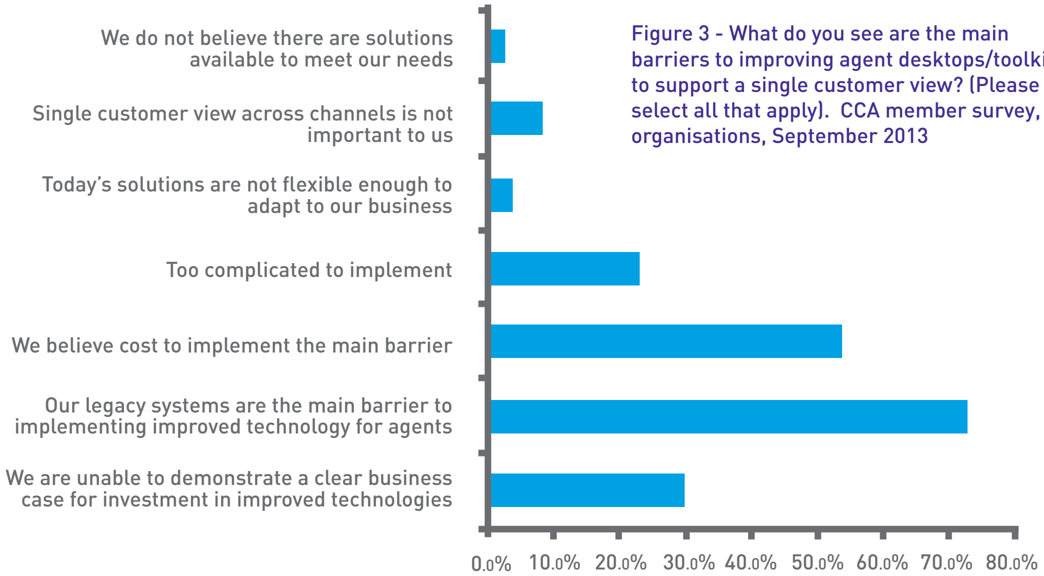


Figure 3 - What do you see are the main barriers to improving agent desktops/toolkit to support a single customer view? (Please select all that apply). CCA member survey, 82 organisations, September 2013

CCA Research produced in partnership with KANA 'Why Customer Service Success is a Critical Boardroom Issue' (February 2014) found that some organisations could be grappling with as many as 15 separate systems as a result of mergers and acquisitions in the sector, particularly in financial services, utilities and telecoms. A trio of statistics from previous CCA research reports also suggests a large number of organisations are currently finding it difficult to deliver a quality service in a complex omni-channel environment:

- 46% of contact centres do not use real-time collaboration;
- more than 50% of organisations struggle to track customers across channels; and
- as many as 80% of organisations still work in silos

Solutions are there - why are they not being used?

Although there is virtually universal (98%) acknowledgement that IT solutions are available that can overcome and eradicate the constraints imposed by legacy systems - some contact centre leaders are focusing more on solutions which will deliver costs savings than on those which will deliver a differentiated and enhanced customer experience.

7.
The Contact Centre as a Strategic Tool

According to CCA Research 'Customer Experience: measuring the value of effective strategy' produced in partnership with Cisco (January 2014), fewer than half (48%) believe that their contact centre is regarded as of strategic importance to the wider organisation despite the fact that agents have a direct influence on important metrics which ultimately impact on the bottom line, such as customer churn and retention, upselling, cross-selling, Net Promoter Scores, and complaint resolution. Nevertheless, the common view of contact centres by the wider enterprise tends to be as cost centres rather than as value-add centres.

CCA Research produced in partnership with KANA 'Why Customer Service Success is a Critical Boardroom Issue' (February 2014) found that 60% of organisations surveyed do not believe that senior management currently place improving customer service as a means of driving revenue 'at the heart of everything they do'. Only 44% of respondents believe that customer satisfaction ranks in the top five priorities for their senior management.

A recent business survey conducted by the Economist's Intelligence Unit[13] found that 84% of companies believe that customer service is either very or moderately important to their financial performance. Nonetheless, the survey also found that, of the nearly 1000 companies surveyed across Europe, North America and Asia, most still struggle to recognise and measure the impact of customer experience. Without this all important evidence, it remains extremely difficult for customer experience professionals to leverage investment. Less than a quarter (22%) of those surveyed had managed to find metrics to confirm the impact of investment in customer experience on the bottom line. Part of the problem, as argued by the report, is that customer service is under-represented at board level, and globally only 28% of companies have a head of customer service on the board. Investment to replace outmoded systems is regarded by customer service leaders as essential in underpinning efforts to attain and maintain first-class service delivery. Helping the board also see the benefits to the bottom line could help to secure that investment.

Winning investment

Members of CCA expert networks advise that discussions with boards on Return on Investment (ROI) in customer contact technology should span three areas:

- Operational Impacts - These include: First Call Resolution rates; reducing call waiting times; reducing abandoned calls; transferring fewer calls; reducing avoidable contact; and better process engineering
- Customer Experience Impacts

These include: engendering greater customer satisfaction and loyalty; boosting customer advocacy; reducing customer effort; increasing trust in the organisation

- Bottom Line Benefits - These include: customer retention; repeat sales; up-selling; cross-selling; increased market share

The survey showed that senior management has a greater propensity to back new initiatives if they have a clear view of when they will generate a pay-off. Members were asked to rank in order of importance the most likely reasons for senior management to support a new customer service initiative. The chief reason, selected by 36% of respondents was that it demonstrates an ROI within an acceptable timeframe (see Figure 4).

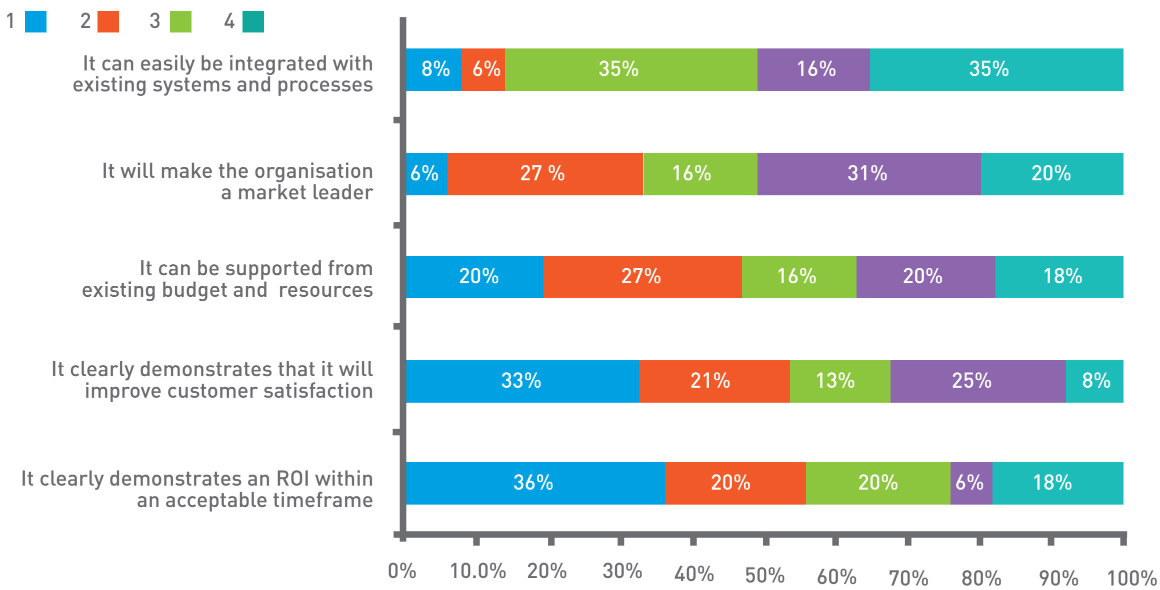


Figure 4 - When a new customer service initiative is supported at a senior level, it's most likely because (Please rank in order of importance where 1 is the most important and 5 is the least important)

[13] http://www.bdointernational.com/Return-on-service/Pages/Executive-summary.aspx

Identifying short, medium and longer term benefits makes sense, although members of CCA expert networks maintain that strategic investment should be less about 'quick wins' than delivering ongoing benefits.

Using social to get the board's attention

45% of organisations reported that their senior management are embracing and investing in new customer service channels like social as part of a joined up customer engagement strategy. A further 25% stated that their organisation is planning in this area and it is, indeed, on its way.

Just over half (51%) of respondents agreed that their senior management take a keen and regular interest in any negative PR or social media chat resulting from poor customer service. A further 40% reported that occasional events would trigger this interest.

8. Key Recommendations

Innovation through insight preferences the systematic collection of information about stakeholder needs, market dynamics, and how organisations work. The contact centre is an obvious source for this insight with mountains of data collected and analysed on all these facets on a daily basis. As this compendium has demonstrated there are a broad range of issues; some perennial and others linked to rapid and complex changes within the marketplace. There is both convergence and divergence in how organisations, from diverse places and sectors carrying out varying activities, are approaching these issues and considerable insight can be drawn from the experiences of other contact centre operators.

A careful sifting of the extensive research CCA has undertaken in the last 12 months brings to light a number of challenges and opportunities common to most contact centre operations regardless of sector.

We have identified 10 issues that warrant attention for those looking to excel regardless of sector or size.

Key recommendations include:

1. Showing that you and your organisation value your customer's time is the most important thing you can do for them;
2. Be aware of how fragmented your customer base is in terms of channel preferences so that you do not exclude or undervalue key groups;
3. Look beyond basic cost savings when investing in technology in order to broaden benefits towards delivering a more differentiated and enhanced consumer experience;
4. When used with care, social media can effectively grab the attention of senior management;
5. But don't forget to listen to the voices of customers using more traditional channels;
6. Use metrics like customer effort to help find out which parts of your customer's journey are causing pain;
7. On the agent-side, review which part of the processes they are carrying out are negatively impacting on their ability to meet customer needs;
8. Consider how flexible working might benefit your organisation and your employees;
9. Remember to mine the rich seam of customer data which is collected on a daily basis;
10. Try to encourage strategic investment in the contact centre by arguing for those which will deliver on-going investments rather than just quick wins.

9.
CCA Research Institute

CCA Research Institute comprises an elite group of Partners and Fellows drawn from organisations that have demonstrated significant depth of knowledge, expertise and experience in managing or meeting the needs of world-class customer contact operations. It also includes leading academics and other experts who are leaders in this field.

CCA sets the research agenda in collaboration with members of the Research Institute and CCA Industry Council. The Institute's work is very much futures-focused and designed to ensure members keep abreast of rapid changes in consumer behaviour, technology and working practices. Research topics span critical operational and strategic issues.

Research Partners can commission a bespoke project, selecting either a short 'express' project or a more comprehensive report including a members' survey, consumer research and expert interviews.

CCA works with partners to develop compelling narratives from the research outputs and also undertakes to present the findings to members and to assist in disseminating the findings more widely. Partners play an active role in structuring lines of enquiry, identifying expert contributors and participating in research briefings, webinars and other events.

Key benefits of becoming a Research Partner and commissioning a project:

- Alignment with the leading research centre for customer contact and service
- Opportunity to influence the direction of new leading-edge research programme
- Exclusive access to our network of senior customer contact decision-makers
- Detailed analysis and commentary from our panel of industry experts
- Access to the latest data on consumer trends authoritative research collateral for promotion of research findings
- Input on PR campaign from CCA
- Licence to use findings for your own thought-leadership purposes

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Special Advisers & Expert Contributors

CCA works closely with a wide-range of distinguished experts including academics, consultants, media and expert facilitators, dedicated to serving the needs of delivering cutting edge thought-leadership and content.

With a depth of experience and insight, we are delighted to share some views below on their areas of expertise:

Over the next 2-3 years, how should organisations respond to a growing consumer complaints culture?

Melanie Howard, Chair, The Futures Foundation

"Taking a longer term view of complaints is necessary to transform attitudes - from irritant to an integral part of the customer experience. In the shorter term, the most important shift that organisations should make with regard to customer complaints is to welcome them as a source of invaluable information about what is going wrong from the consumer perspective. Properly analysed, complaints will enable a more proactive approach to reducing the issues experienced with products and services and thus create a virtuous circle. Social media listening will also provide early warning and insights into how to stem any forthcoming tide, but will remain peripheral rather than central to the real heart of the customer experience."

Will voice call volumes reduce as a result of more efficient self-serve? What factors will mean ongoing human interaction for service?

Professor Carsten Sørensen, London School of Economics

"The interaction between technology and people is a complex one. ABS breaks can lead to faster and more reckless driving. Alcohol test automats in French bars lead to punters betting on who could drink most and still drive – as the data on alcohol levels became clear to all and sundry. If the ongoing relationship between organisation and customer is deeper, more frequently changing as the needs and offerings change, and importantly, if the provisions of self-service are not sufficiently able to meet the changing demands for deep engagement, then the calls will increase rather than decrease.

Simple connectivity is excellent for simple problems, but complex problems require complex means of engagement. If we are all happy having US Marine style crew cuts, there is no need for lengthy discussions with the barber/hairdresser. The more specific and individualised service we demand, the more negotiation is required for such personalisation. While some of this negotiation can be automated, other aspects can be better handled by humans. When our shopping on-and off-line is self-serviced picking and checkout, then there will be a competitive advantage of the exotic human touch providing more open-ended problems solving and empathy."

Is trust in corporates showing signs of recovery following the recession?

Veronica Hope Hailey, Dean of University of Bath Business School

"Research here at the University of Bath shows that, surprisingly, for some corporates trust never went away despite the recession.

High performing organisations are those that invested through the good times. They kept trust high on the agenda when there was no need to. They managed to lead their people through difficult times whilst maintaining their trust.

For other organisations, and for some sectors, they still have some significant trust repair work to do and we will be supporting them in that endeavour."

How will the digital divide affect an organisation's response to consumers over the next 2-3 years?

Liz Barclay, expert consumer journalist, author and broadcaster

"There's a tendency to forget the 'have nots' in the rush to digital. Those without access to digital technology aren't all luddites. They may lack connectivity or income rather than digital desire. It's make your mind up time. Will you offer your services across the whole range of channels or will you decide you don't need non-digital consumers? Either way's OK but you must get your messages straight: clear, concise, consistent, effective and empathetic communications that explain what, where, when and how. If there's nothing for the non-digitals above all explain why."

What is the single biggest change, from a workplace ergonomics perspective, that will impact customer service?

Philip Vanhoutte, SVP and Managing Director Europe & Africa, Plantronics

"A recognition that the work being undertaken is changing, and that we need new spaces to work in effectively.

Communicate spaces for energetic phone calls, but with no sound pollution to other areas. Collaborate spaces to bring people together easily. Concentrate spaces to allow text based work (social media, web chat) in near silence, and with a virtual 'do not disturb'. And contemplate spaces to enable rejuvenation for higher performance.

By inspiring our employees with these workspaces, their enthusiasm will be raised, and this in turn will inspire and enthuse our customers."

What is the biggest single factor that will impact customer service through contact centres over the next three years regarding consumer behaviour?

Ben Page, Chief Executive, Ipsos Mori

"The single biggest customer behaviour impact on contact centres is technology. The more channels open for customers to engage with a business the more complexity there is for contact centres to manage.

Customers see a company/brand as one entity whether they phone a contact centre, email or tweet about an experience. There is likely to be an evolution in the role of the contact centre to integrate with these channels in order to satisfy an increasing appetite for immediate and personalised responses to enquiries. As the customer journey differs then the management of this experience and understanding of customer requirements will need to shift to keep pace with more demanding customer behaviour. This so called evolution however, will need to be controlled in order to keep focus on the core function of the contact centre i.e. customer service and brand experience."

Research Programme 2015

CCA has been the definitive source of thought-leadership in our industry since 1994. We have a deep understanding of your needs and have created a portfolio of services for senior executives designed to accelerate change in organisations where customer service is a key differentiator.

CCA Industry Council Leadership Forum drives our annual research programme. The service blends a quarterly programme of research, benchmarking , collaborative case studies and future-scenario building, all designed around four major topics agreed by the group.

All projects are managed by CCA in collaboration with academics, consultants and expert facilitators, dedicated to serving the needs of all members of CCA Industry Council Leadership Forum.

For 2015 we have commissioned leading futures-expert, Melanie Howard to lead the group through specially designed scenario exercises. Using scenario building techniques and practices the group will develop a likely scenario for each topic. In addition CCA Special Advisers contribute to each quarter's activity offering you access to the latest and most robust programme in our market-place.

2015 – The Programme

Quarter 1: The Future of Customer Complaints: CEO and Boardroom complaints management

Today we have many more ways to complain than ever before with the loud voice of social media guaranteed to get a speedier response. Agony aunts in the press will advise consumers to aim for the top and many large organisations have specially designated Chief Executive Complaints departments with teams of employees dedicated to respond.

Complaints management seems to have moved from an operational headache to a source of strategic insight in many organisations, but too many are hampered by the legacy of disparate silos, which prevent the truth about customers' experience being reported.

With a particular focus on CEO and Boardroom complaints management, the Forum will benchmark critical processes and strategies across sectors.

Quarter 2: The Future of Social – Customer service in 140 characters

Social media has become a dominant force in consumer culture and is being successfully adopted by some of the world's leading businesses. Some are using social media as a meaningful way of deepening relationships with their customers. Customers are connecting and having conversations about organisations through social media, whether they are actively engaged or not, and brands risk being compromised if they fail to participate.

Participants will have an opportunity to shape a bespoke research project looking at the latest trends from organisations, consumers and social media experts to help shape and influence future social media strategies.

Quarter 3: Understanding and improving customer service: Raising the bar

Accepted and longstanding processes and mechanisms for organising customer service have been disrupted. There is a clear understanding that better alignment is required in joining up the organisation.

Putting customer service at the heart of your organisation is not a new concept however for organisations to progress and survive, the urgency of this shift is growing.

The biggest competitive threats increasingly come from new entrants - operating without legacy. This means considering radical changes to business model. Leapfrogging your own legacy – from IT systems to organisational design – is a prerequisite for sustained success.

Customer service professionals need to be able to articulate the ROI on customer service improvements in more compelling ways to Boardroom decision makers – who in turn will have to own the investment case for more proactive and intuitive customer service offers.

Quarter 4: Digital transformation – what does good look like?

Digital transformation – the use of technology to radically improve performance or reach of enterprises – is becoming a hot topic for companies across the globe. Executives in all industries are using digital advances such as analytics, mobility, social media and smart embedded devices – and improving their use of traditional technologies to change customer relationships, internal processes, and value propositions.

How can senior executives successfully lead digital transformation? While many experts urge companies to get started on the digital transformation journey, few tell how to do it. Whether using new or traditional technologies, the key to digital transformation is re-envisioning and driving change in how the company operates. That's a management and people challenge, not just a technology one.

Research Partners

We greatly value the support and input of our Research Partners in our annual programme. Our partners are global corporations who provide leading-edge products, solutions, and consultancy to both public and private sector enterprises engaged in customer contact and customer service operations. We welcome approaches from potential new partners on appropriate research topics.

2013/14 Partners

Arise

'Creating An Agile Workforce: The Secret to Service Improvement & Cost Reduction'

Arise is a work-at-home, business process outsourcing company that uniquely blends crowdsourcing innovation, cloud-based technology and operational efficiencies to power its services and solutions.
www.arise.com

Capita

'Customer Effort – How hard is it to make things easy?'

Capita is the UK's leading provider of business process management and integrated professional support service solutions.
www.capita.co.uk

Cisco

'Measuring The True Value of An Effective Customer Contact Strategy'

Cisco is the worldwide leader in networking that transforms how people connect, communicate and collaborate.
www.cisco.com

KANA

'The Future of Email Management' and 'Customer Service Strategies & Tactics to Increase Engagement in the Boardroom

KANA Software, Inc. is a global leader in customer service solutions used by more than 900 organizations worldwide.
www.kana.com

Kcom

'The Future of Customer Service'

KANA, a Verint® Company, is a leading provider of on-premise and cloud-based customer service solutions.
www.kana.com

Plantronics

'Homeward Bound: An analysis of home working trends'

'Agent Effort – The benefits of making it easier for your agents to do business with your customers'

Plantronics is a pioneer in intelligent communications systems including audio headsets, noise-cancelling technology and personal speakerphones.
www.plantronics.com

Webhelp UK

'An analysis of current trends in contact centre outsourcing'

Webhelp UK is a market leading provider of innovative outsourcing solutions.
www.webhelp.com

Verint

'Why you need your customers to complain'

Verint Systems Inc provides solutions that help organisations capture and analyse customer interactions, sentiments and trends across multiple channels, improve performance and optimise the customer experience.
www.verint.co.uk

Strategy, Thought-Leadership, Senior Executive Engagement

Products & services to support senior executives responsible for the management of customer service operations.

Industry Council Thought-Leadership Forum

Future strategies & scenario planning

A senior thought-leadership group engaging in and exchanging the latest thinking, benchmarking data and directing CCA's annual research programme. Participants explore the issues and challenges most likely to impact the delivery and direction of service in the next 18-24 months.

Who should take part? Directors responsible for service transformation

Customer Engagement Network

Challenge your customer measurement methodologies

Access the latest thinking from academia, facilitated benchmarking workshops and best in class case study presentations with 40+ customer service/experience/insight managers. Participants access the best tools, techniques and tactics to support their customer service strategy.

Additional products and services:

Customer Experience Benchmarking:

- Map and compare your methodologies and approach to customer experience measurement using CCA Global Standard© Module 1 focusing on quality, insight and business improvement

Who should take part? Executives charged with analysis and interpretation of the voice of the customer

CCA Research Institute©

Improve your knowledge and understanding of consumer trends, industry issues and technology developments

CCA Research Institute is the leading authority in futures-focused research for customer contact. More than a decade of authoritative independent research has been collated on a wide range of issues impacting the effectiveness of customer contact and customer service operations. Outputs and findings are shared across the CCA network.

Who should take part? Anyone seeking to improve their knowledge and understanding of consumer trends in the customer contact/customer service industry

CCA Research Institute
insight that flows to the workplace

BPO Users Strategy Forum

Leverage better partnerships and define win-win contracts in the BPO market-place

A forum focusing on the challenges and opportunities facing organisations that outsource all or part of their customer contact operations currently, or that are considering doing so in the future.

Who should take part? Individuals responsible for the management of the partnership and agreements with BPO providers

Operational Excellence

Products and services to support the management and development of day to day customer service operations.

CCA Global Standard© – 'Raising the bar'

Diagnostic tool-kit assessing the quality and effectiveness of multi-channel contact centre operations

Developed by industry, for industry over a period of 14+ years, CCA Global Standard© is a set of key principles which have been defined and agreed by industry experts and stakeholders. Following extensive consultation with industry, Version 6 was launched in June 2014 and reflects the challenges of delivering multi-channel services to a mobile always on consumer.

Products and services include:

- **Global Standard© Tool-Kit** – self-assessment and gap analysis to map status of operation against Global Standard© criteria
- In-house workshops to promote engagement and facilitate understanding and adoption of Global Standard© principles
- Independent assessment leading to accreditation for contact centre operations
- Industry recognition and reputation as "Centre of Excellence"

Centres of Excellence Programme

Raising awareness and sharing examples of best practice across the customer service industry

A showcase of leading organisations defined by their innovative approach to delivering great customer service for both internal and external customers.

Products and services include:

- On-site visits including host case-study presentation, CCA update and group discussion
- Webinar series featuring guest presentation from CCA Global Standard© Accredited Members focused on sharing examples of leading practice

CCA Annual Convention & Gala Dinner

The definitive industry event bringing together customer service professionals across industry to learn, share and innovate

Celebrating 20 years experience, no other event comes close in size, scope, breadth and depth of content

Access to the event includes:

- **CCA MBA for Customer Service** – a one day programme designed to challenge participants to explore their roles and consider how these will change in a rapidly evolving and always-on world
- **CCA Global Standard V6 Showcase** – an indepth review of Version 6 requirements and how others are successfully applying the criteria to their customer service operations and demonstrating real time improvements
- Invitation to a VIP reception to celebrate success and achievement in the customer service industry
- **CCA Excellence Awards** – an independent awards programme managed by CCA but wholly judged and reviewed by representatives from across industry
- **CCA Gala Dinner** – a celebration and opportunity to reward your team including announcement of the winners of CCA Excellence Awards programme

Next Steps

If you are interested in any of the information contained within this document and would like to find out how to become involved please get in touch.

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Acknowledgements

We would like to extend particular thanks to Industry Council members whose input is greatly appreciated. They include:

Whether you are an existing member or you are thinking of joining, we would like to extend a warm invitation to become involved in our exciting programme of events for 2013/14. You can get information about upcoming events via our website but if you want a personal guide on how to get the best out of CCA, we recommend talking to our friendly team who can create bespoke packages to meet the specific needs of your organisation.

Our services include: study tours; workshops; webinars; special industry group meetings; participation in our research programme; access to our archived research via our Learning Zone; Global Standard© accreditation; annual Excellence Awards programme; and Annual Convention, an unmissable event which brings all of our annual output and learning together in master classes, keynote presentations and innovation theatres.

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