

**dimension
data**



The Multi-Channel Challenge

Chris Nunn - Head of Architecture, Collaboration



who is
dimension data

Started



Global expansion via acquisition



'Stop the bleeding'



'Profitable growth'



Technology leadership



People and culture



Services 'world best'



Managed ICT Cloud services



Brand refresh



Launched cloud services



Acquired NextiraOne

1983

1990s

2003

2005

2008

2009

2010

2011

2012

2014

2013 global
revenues of
\$6 Billion



Client-centric,
services-focused
business

73% of Global Fortune 100 and
59% of Global Fortune 500
are **Dimension Data clients**

Dimension Data today

Extensive experience in

**emerging
markets**

Over **23,000**
employees

with operations in

58 countries

across **5** regions



Over

6,000

clients across all
industry sectors



Dimension Data

Financial services

Real estate & construction

Energy & utilities

Technology

Professional services

Retail

Sport & hospitality

Travel & transport

Manufacturing

Media &
communications

Pharmaceutical

Public sector

Natural resources

Healthcare

Education

Vertical market focus

Global Contact Centre Benchmarking Report 2013/14



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dimension
data 

accelerate your ambition

Contents

- The Multi-Channel Challenge
- The Report
- Questions

1



The Multi-Channel Challenge

Four insights behind the Multi-Channel Challenge

1

Customer are hanging up

Telephone is the channel of last resort. If all else fails, call customer services

2

Customer service 4.0 is here!

Skills and competencies to serve customers in the Omnichannel age are very different to traditional customer service

3

Legacy systems are holding back progress

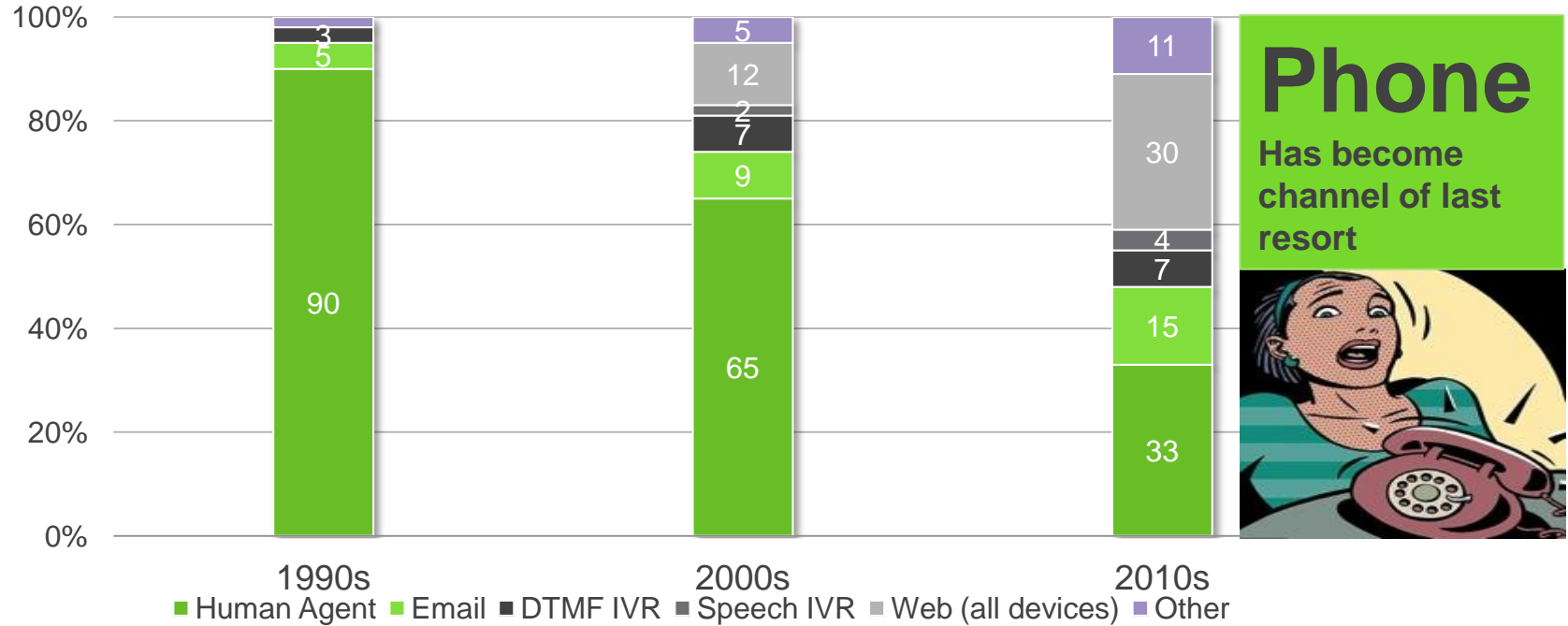
The rate of change and customer expectations means traditional technology won't deliver

4

Scope for better use of of data

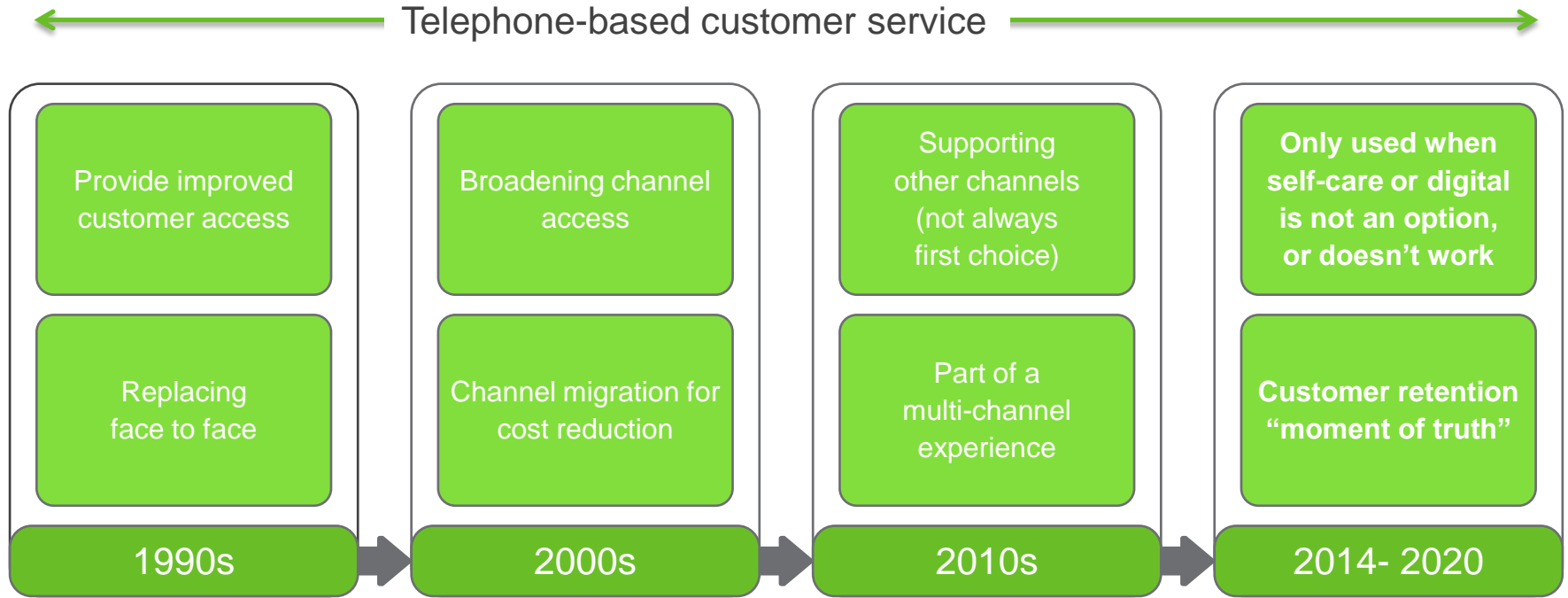
Rigour analysing customer feedback in voice, needs to be applied to all digital channels

Insight 1: Customers are reluctant to call

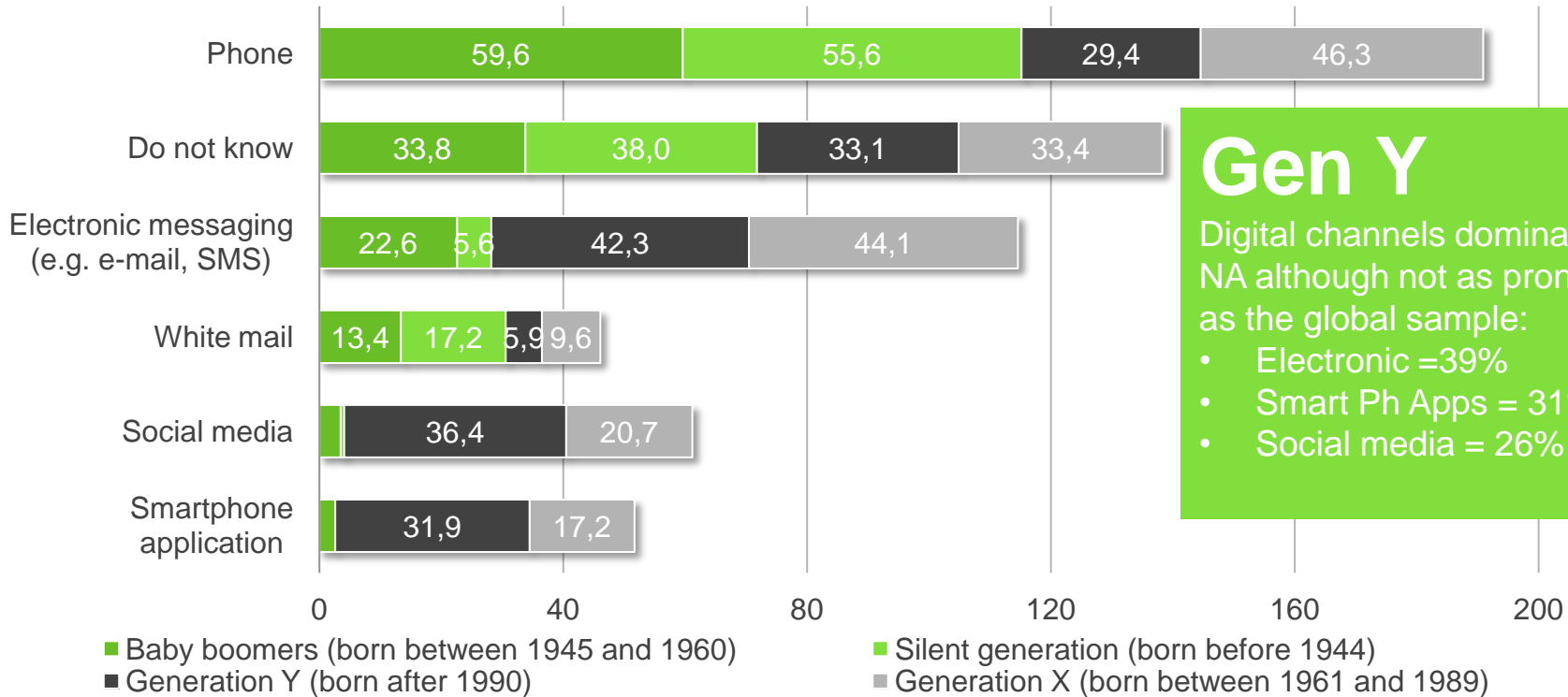


Source: Aggregated data from Dimension Data and Merchants Global Contact Centre Benchmarking Report

The Age of the Omnichannel has arrived



Which channels are being used by your customers? - Global

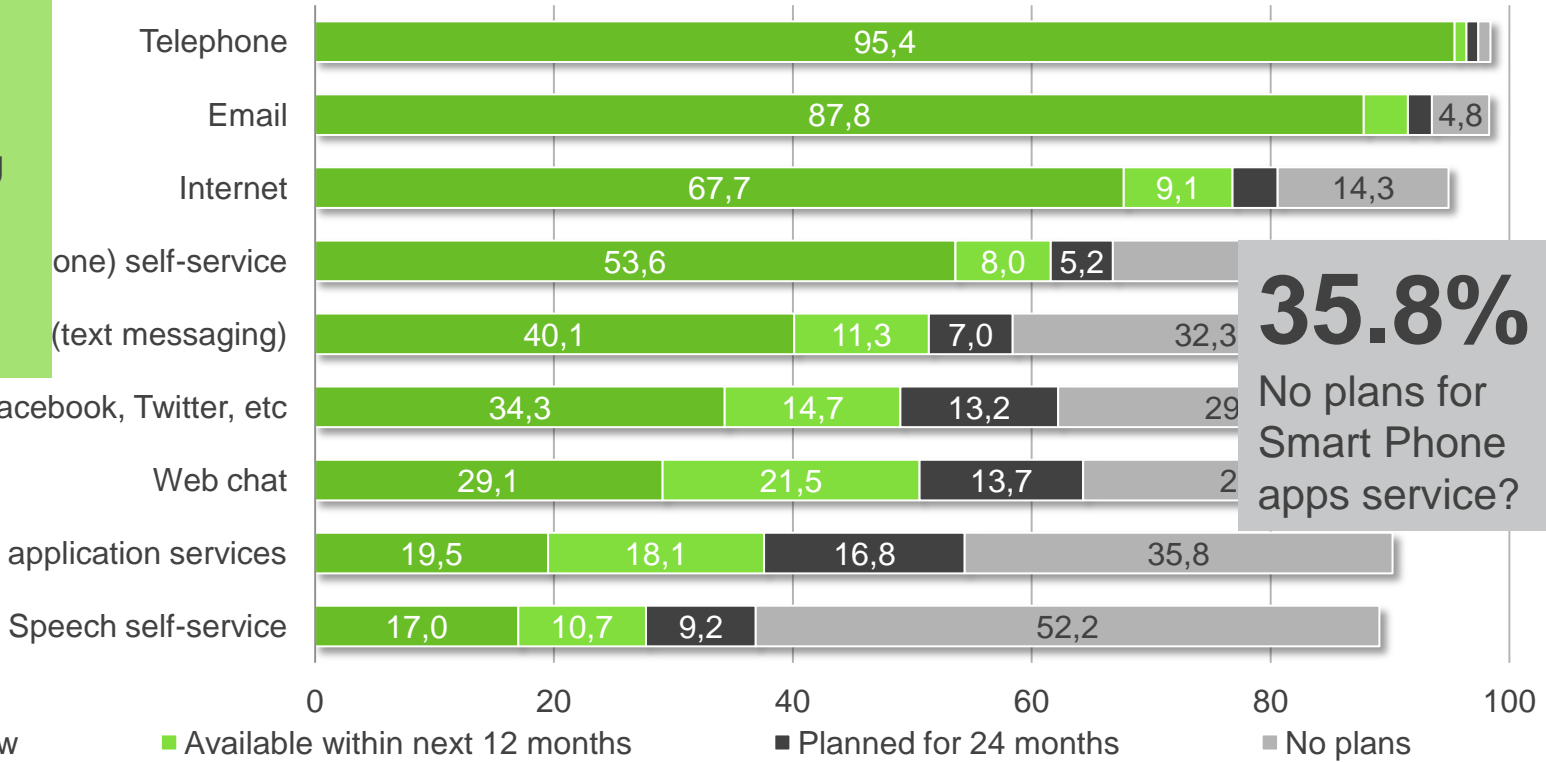


Gen Y
 Digital channels dominate. In NA although not as pronounced as the global sample:

- Electronic = 39%
- Smart Ph Apps = 31%
- Social media = 26%

Channels managed by the contact centre

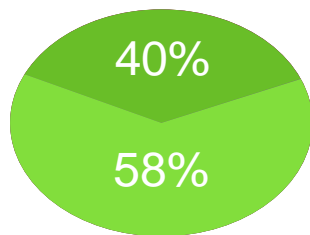
29.1%
Globally Contact Centres handling web chat
40% in Americas



35.8%
No plans for Smart Phone apps service?

Perennial Problem: The Cost Centre Mindset

▲ efficiency



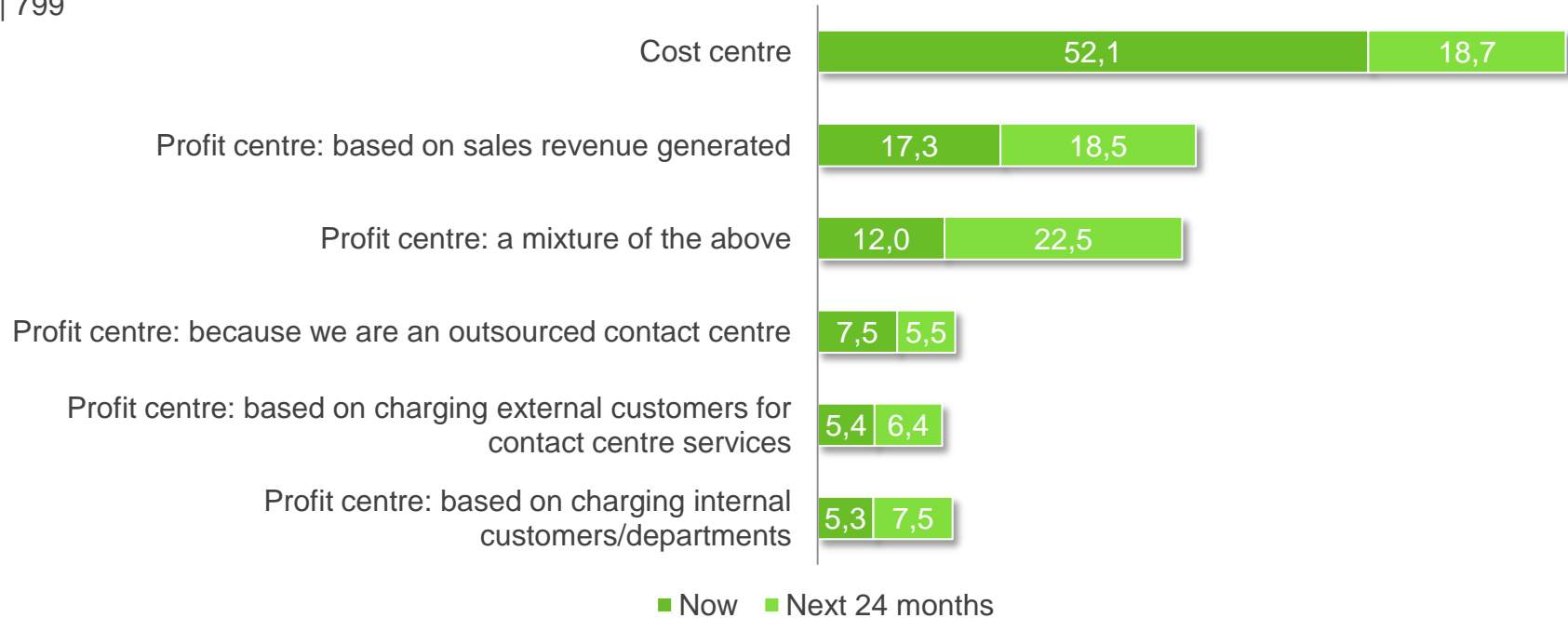
▼ cost



Financial status

What is the financial status of your contact centre in your organisation?

n | 799



Insight 2: New Skills and competences

Changing customer preferences...

...means contact centres need to raise their game

Market trends

What are the top three trends affecting your contact centre?

n | 808

1 Customer needs



Migrating customers to self-service channels



2 Process optimisation or automation



Customer lifetime value (CLTV) management



3 Managing increased complexity



Technology developments



Staff multi-skilling



Increased regulation/legislation



Evolving multi-media channels



Offshoring/outsourcing



Social media

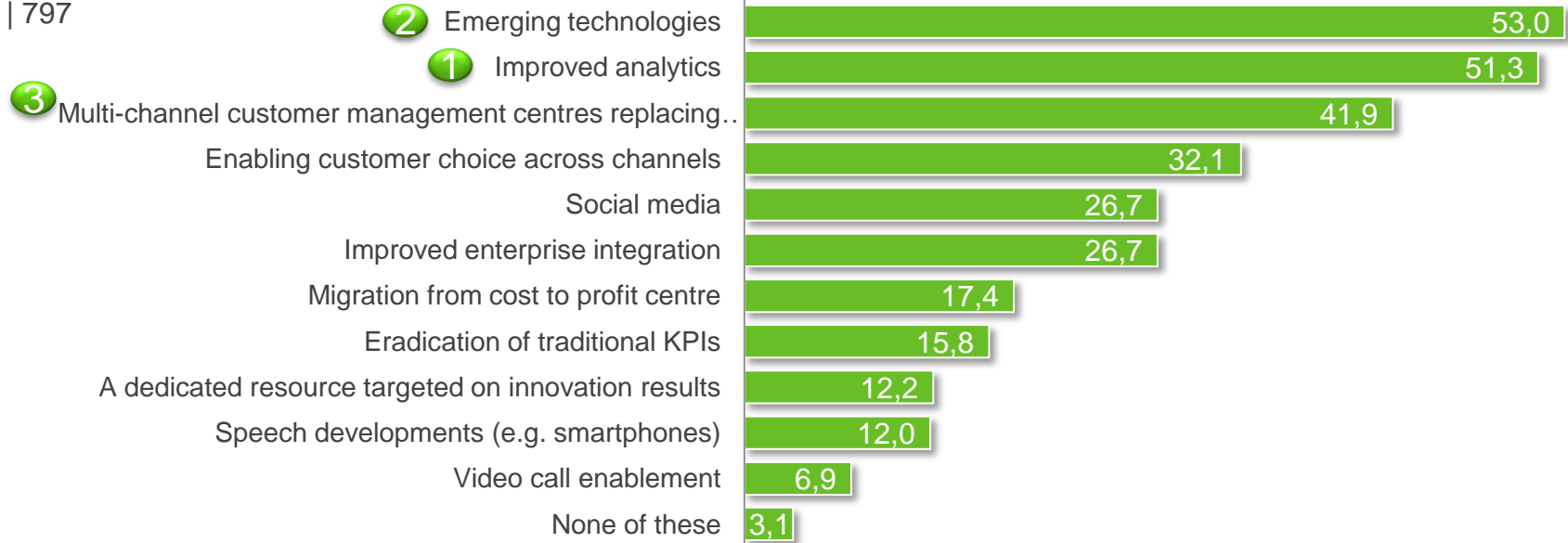


Rank 1 Rank 2

Key innovation areas

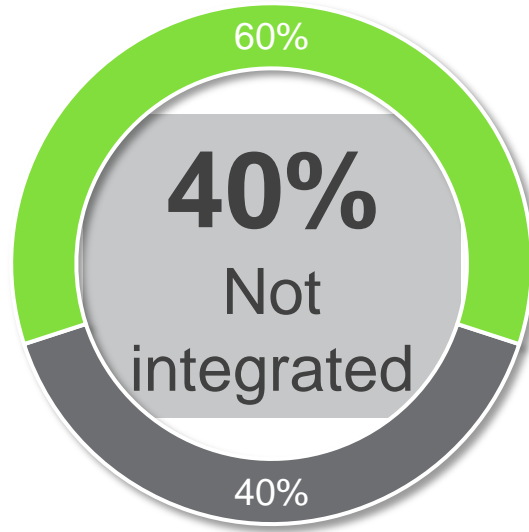
What are the key innovation areas that will benefit your contact centre?

n | 797



Insight 3: Legacy Systems

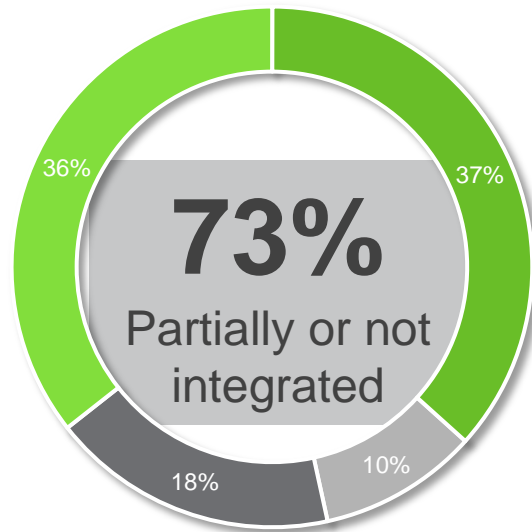
Contact Centre technology
part of the enterprise architecture?



■ Not integrated ■ Integrated

Lack of integrated channels

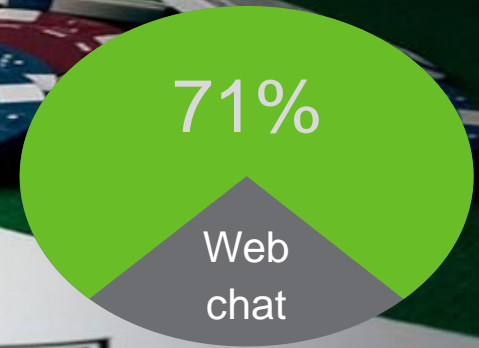
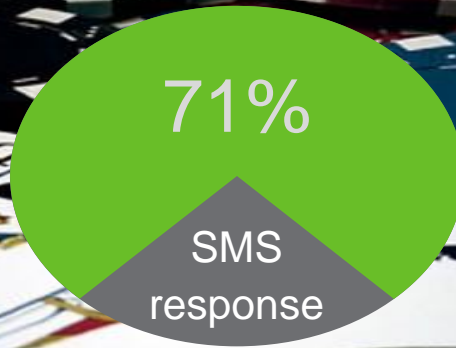
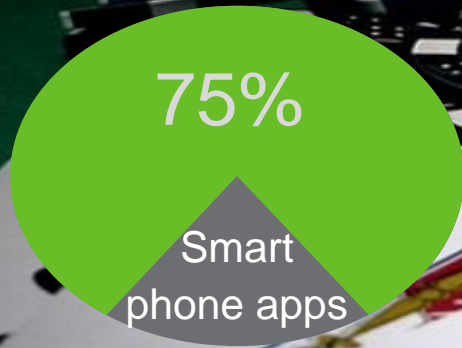
How integrated are customer contact channels?



■ Fully ■ Mostly ■ Partially ■ Not at all

Insight 4: Use of Data: Contact Centres Trump Card?

Lack of customer feedback
from new channels but....

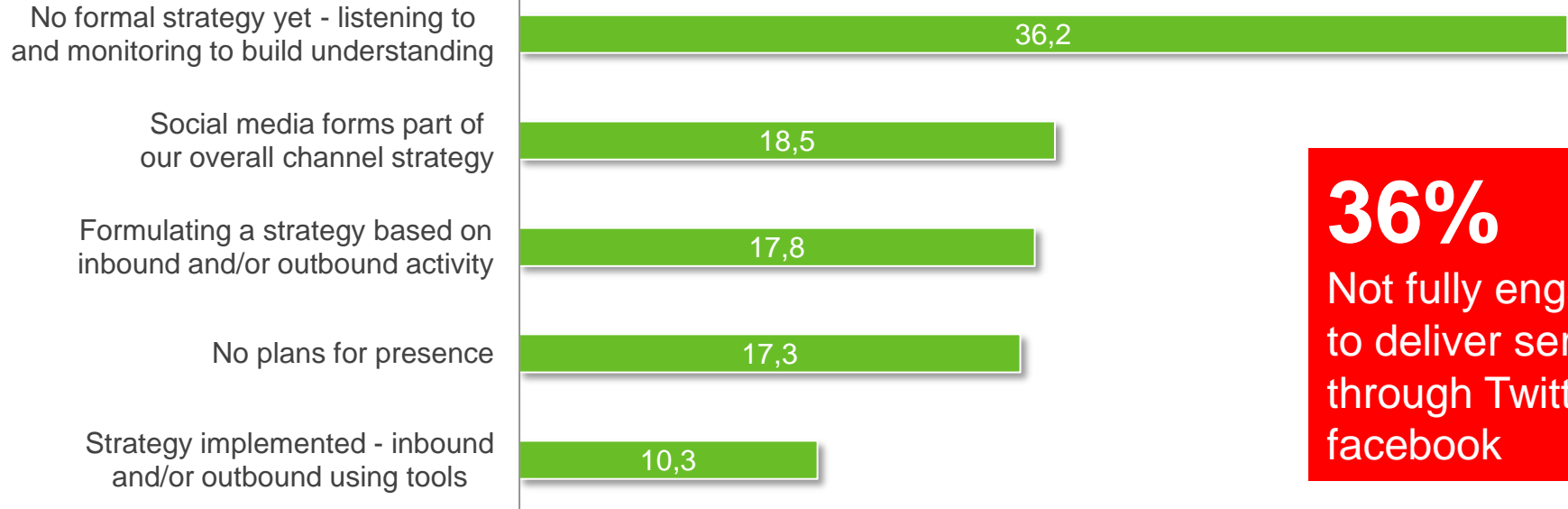


.... 95% of Contact Centres
monitor CS feedback

Social media strategy development

How developed is your social media strategy?

n | 799



36%
Not fully engaged to deliver service through Twitter or facebook

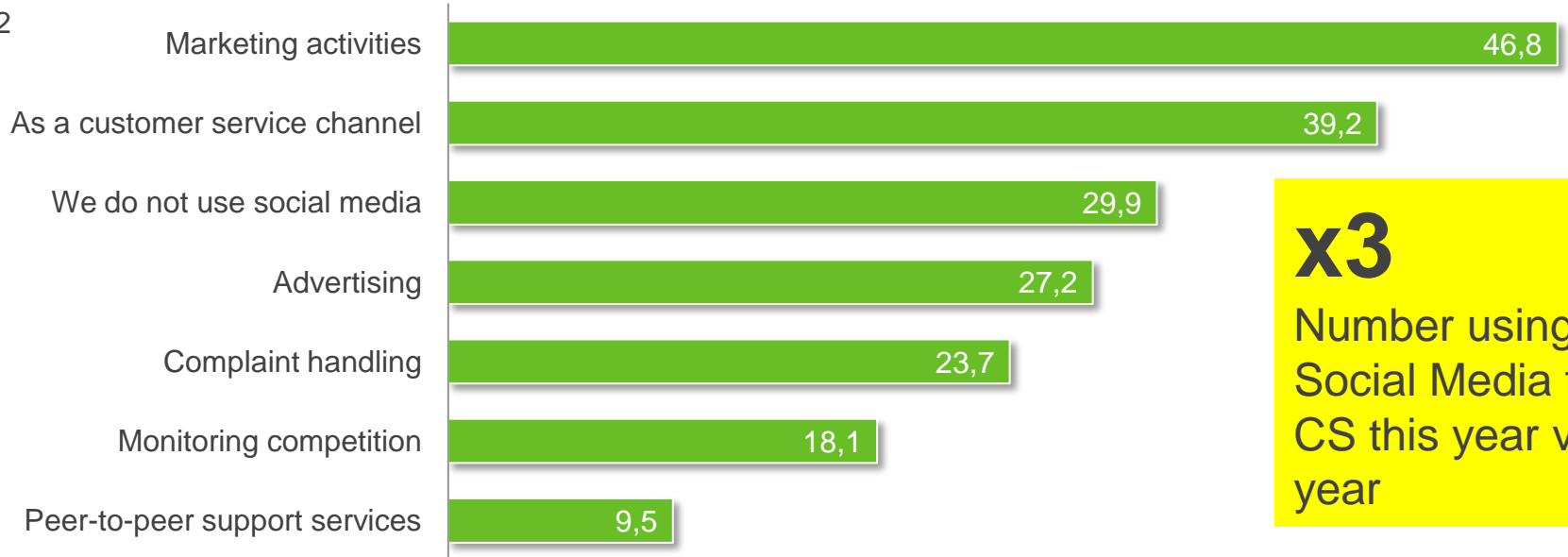
Nearly double the number of 'fence-sitters' than any other category.

A reflection perhaps that for many organisations social media still hasn't been fully handed over to contact centres

Social media use

What do you use social media for?

n | 802



x3

Number using
Social Media for
CS this year v last
year

Summary

INHIBITORS

- Legacy technology
- Lack of skilled staff
- Lack of integration



ENABLERS

- CC Analytics
- Customer Experience Management expertise
- Operational practices
- New operating models

Four insights behind the Multi-channel challenge

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The screenshot shows a web-based report interface. At the top right, there are navigation buttons for 'HOME' and 'ANALYSIS'. The main title is '2013/14 global contact center benchmarking report'. Below the title, there are two tabs: 'Context' and 'Strategy and development', with the latter being selected and marked with a checkmark. Underneath, there are two sub-sections: 'Self-service' and 'Workforce optimization'. On the left side, there is a 'Questions' section with a search bar and a list of five questions. On the right side, there is a 'Results' section showing a bar chart for 'Filtered/Current (2013)' with categories like Telephone, Email, Internet, IVR (touchtone) self-service, SMS (text messaging), and Social media - Facebook, Twitter, etc. The IVR, SMS, and Social media bars have numerical values next to them.

HOME ANALYSIS

2013/14 global contact center benchmarking report

Context Strategy and development

Self-service Workforce optimization

Update ▶

Questions

Type a few letters or words to perform a partkey or word search on questions

Search: Go Clear

- 2.1 What channels are managed by the contact centre?
- 2.2 What percentage of contacts are handled by these channels?
- 2.3 Why do you use these channels?
- 2.4 Which of the following best describes the current development state of your contact centre?
- 2.5 If you have a defined contact centre development strategy, which of the following items are included?

Results

filtered on year:Current (2013)

Filtered/Current (2013)

Telephone	
Email	
Internet	
IVR (touchtone) self-service	53.6
SMS (text messaging)	40.1 11.3 7
Social media - Facebook, Twitter, etc.	34.4 14.7

Report Overview

About the 2013/14 Report

817 companies took part in this year's survey

79 countries participate

80/20 split in-house/outsourced

11 industry sectors

Endorsed by 33 of the world's most important industry associations

The Global Contact Centre Benchmarking Report

Strategy and development

Operations

Customer
interaction
management

Self-service
channels

Workforce
optimisation

Technology

- Acknowledged as the industry leader in customer management and contact channel benchmarking
- 15 years of trends, performance data and best practice information
- Provides trends, business impacts and recommendations on over 350 performance metrics
- Online Benchmark Comparison Portal (filters by region/sector/size/type)

Representation by industry

Percentage	n 817
Financial services	22.6
Service providers and telecommunications	17.1
Business services	10.5
Government and education	9.3
Travel and transportation	9.1
Technology	8.2
Consumer goods and retail	7.5
Healthcare and pharmaceuticals	5.4
Automotive and manufacturing	5.3
Utilities and energy	3.4
Media and entertainment	1.6

Regional representation

Percentage	n 817
Africa	19.5
Americas	15.4
Asia-Pacific	18.9
Australia and New Zealand	11.1
Europe	10.6
Middle East	10.3
United Kingdom	14.2

15.4 represents 122 contact centres in the Americas region

Benchmark Comparison Portal



HOME ANALYSIS

2013/14 global contact centre benchmarking report

Context **Strategy and development** Operations Customer interaction management

Self-service Workforce optimisation Technology

Update ▶

Questions

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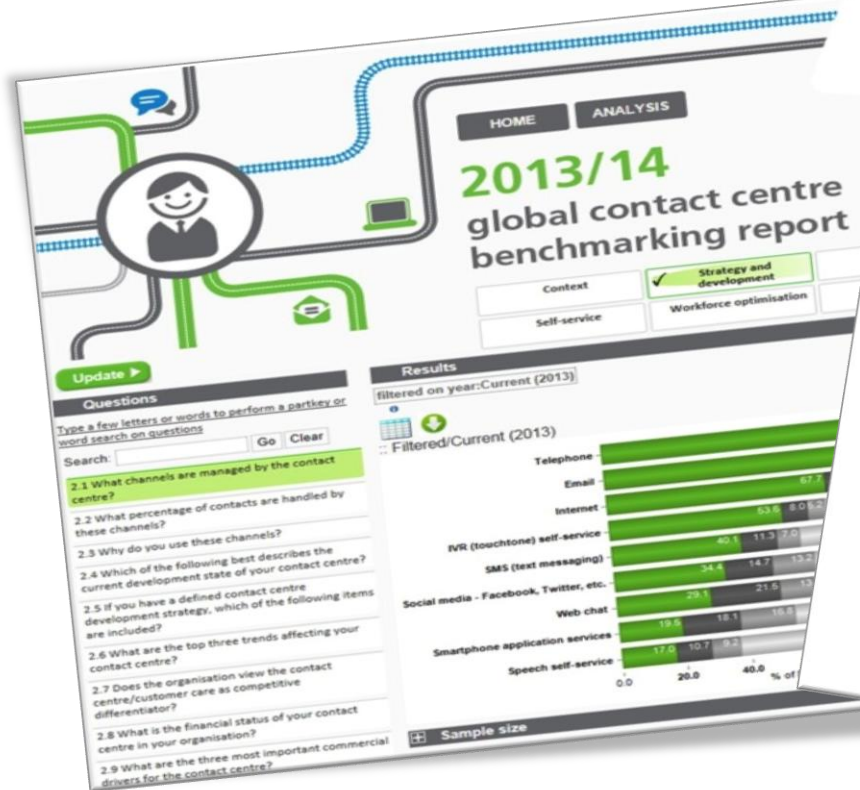
filtered on year: Current (2013)

Filtered/Current (2013)

Channel	Now	Available within next 12 months	Planned for 24 months	No plans
Telephone	96.4			
Email	87.8	4.8		
Internet	67.7	9.1	14.3	
IVR (touchtone) self-service	53.6	8.0	5.2	27.0
SMS (text messaging)	40.1	11.3	7.0	32.3
Social media - Facebook, Twitter, etc.	34.4	14.7	13.2	28.8

Legend:
 No plans (light grey)
 Planned for 24 months (medium grey)
 Available within next 12 months (dark grey)
 Now (green)

Two products



Comparative Benchmarking

Gain competitive advantage by understanding your capabilities and planning for improvement

Knowing where you need to improve means knowing what you are doing both right and wrong. How do you stack up against your peers?

Our Comparative Benchmarking services are designed to identify your contact centre's current capabilities, discover areas of best practice and present opportunities for learning and improvement. The findings serve as a valuable baseline that enables the setting of realistic objectives, standards for best practice, supports decision making and defines targets for improvements in line with the organisation's customer management strategy.

Your business challenges

As businesses search for ways to drive improved performance in contact centres, it is important to first benchmark performance against best practice. The understanding this creates helps organisations define organisational objectives and set a clear path for which development can be measured.

Your business challenges may include:

- Identifying areas of best practice
- Identifying opportunities for greater efficiencies and service delivery improvements
- Understanding the drivers of performance and knowing on them
- Finding ways to drive costs down
- Setting the strategic planning process for customer management
- Comparing subcontracted and in-house operations performance
- Identifying gaps and in-house operational performance
- Engineering contact centres
- Using customer service as a key differentiator

Our solution

Comparative Benchmarking is a critical element to enable the understanding of the contact centre's capabilities and solutions. Our global benchmarking solutions also provides you with the most up to date and balanced insight to your customer services organisation.

Our approach helps businesses develop a clear strategic direction by providing:

- A benchmark against the global standard for strategic and operational performance of your organisation's contact centre
- Insights gathered through questions to gain a consistent and objective means of performance comparison

Merchants' experience in the contact centre industry spans 30 years and includes the design, development and operation of contact centres around the globe. Globally, we help organisations benchmark their capabilities and performance against best practice standards.

As an investment based on Merchants' global standard maturity model showing your centre's current state of development, a future state outline which shows your desired future capability, and access to a benchmarking portal allowing you to compare and conduct your own data against global benchmarks.

Merchants' customer web-based tools and 30 years experience in HR, management, benchmarking covering all aspects of operations, innovation and thought leaders, best in class understanding and specialist skills ensure we combine strategic understanding and practical knowledge and experience to support performance improvement.

Lots of collateral ...

dimension data

Benchmarking bite series

Self-service development – Opportunity being neglected
Relative to others in your industry and geography, at what stage of development is your company's self-service is?

Region	Percentage
North America	42%
Europe	38%
Asia Pacific	28%
Latin America	18%
Africa	12%

Observations

- Self-service is the top most important market trend causing affecting contact centers, yet an astounding 64% of respondents believe their solution is at least equal to their competitors.
- Only 11.3% of those surveyed believe they are slightly ahead of the industry/geographical norm, and an even smaller percentage believes to be significantly ahead.
- A huge opportunity is being missed to differentiate on service and reduce cost to serve.

Implications

- Self-service is the primary contact channel for customers, but is afforded less operational or organizational attention and infrastructure causing a loss of fundamental basis of primary and secondary interactions causing a loss of primary and secondary interactions.
- Over 30% of respondents believe they still to utilize customer satisfaction measurements on self-service, which demonstrates a need to increase to trusted management information intelligence.
- The 7.7 suite presents a vast opportunity for organizations to better serve their customer's needs, but a massive risk if who opt to ignore.

Recommendations

- Assign clear self-service ownership and dedicated management resources to drive value that can be measured against clear objectives.
- Ensure that the contact center is in place to manage problem areas and issues as improved access to reduce the risk of further deployments either through poor technology can often be traced to existing solution being a pragmatic approach to engineering exercises can quickly remedy and provide more ROI.

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Benchmarking bite series 1 of 52
Further information and back issues available at www.dimensiondata.com/whitepapers
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white paper

Service Operations in the Public Eye

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Global Contact Centre Benchmarking

What is series

Cloud-based contact centre services

Cloud computing is a model for enabling convenient, on-demand network access to a shared pool of configurable computing resources (e.g. networks, servers, storage, applications, and services) that can be rapidly provisioned and released with minimal management effort or service provider interaction.

In essence, the on-demand nature of a cloud service means it is available to you at the time you need it, and you pay for what you use.

In a world of tight and falling margins, you generally expect to get what you pay for. It is a case of technology may not always match your requirements. As a cloud-based user, you may also have to factor in changes and management reports.

Cloud services support organizations by providing technology services at a much reduced cost, while delivering a level of flexibility to adjust services to meet local requirements. This flexibility enables contact centres to match service providers fairly easily if they need enhanced functionality or do cover the service is not quite what they expected.

By giving organizations the opportunity to easily add new services or expand existing capabilities, contact centres are being introduced to a whole new level of freedom. They can avoid having to control capital expenditure in the best of both worlds – functionality and reduced cost without the limitations.

Cloud-based service adoption looks set to grow in contact centres over the next few years. At the same time, we expect to see organizations looking for new technologies to differentiate their services and better manage their operating costs, seeking cloud services only where it makes sense to do so. This new hybrid cloud model gives contact centre service based on customer service to be ahead of the competition.

As organizations seek to replace new technologies and functionality, it is well to formulate a well-designed strategy that manages the benefits of technology, contact centre service technology service offerings and the integration requirements, with existing contact centre and business systems. This strategy to contact centre service offerings will find them also playing in a most niche market – and will have to be able to manage through advanced services, but should always be considered in light of a broader context.

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3



Questions



Thank you

For more information or to participate in next year's study, please contact

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