dimension data

accelerate your ambition

20th anniversary edition

2017 Global Customer Experience Benchmarking Key Findings Report

Digital crisis or redemption

The uncomfortable truth

about us

About Dimension Data

Dimension Data harnesses the transformative power of technology to help organisations achieve great things in the digital era. As a member of the NTT Group, we focus on digital infrastructure, hybrid cloud, workspaces for tomorrow, cybersecurity, and network as the platform. With a turnover of USD 7.5 billion and offices in 49 countries, we deliver services wherever our clients are, at every stage of their technology journey. Accelerate your ambition.

For more information, please visit *www.dimensiondata.com*

About Customer Experience (CX)

Customer experience (CX) forms part of Dimension Data's Customer Experience (CX) and Collaboration Business Unit and enables over 7 billion customer interactions a year. We have 35 years' experience in planning, designing, integrating, and managing contact centres for our clients globally.

Our consulting, professional, managed, and cloud contact centre services make complex customer engagement environments simple and effective, enabling organisations to differentiate and grow the value of their customer base.

Our omnichannel, workforce optimisation, and analytics solutions integrate the physical, digital, and contact centre worlds, enabling a seamless CX which creates organisational engagement and value.

For more information, please visit *www.dimensiondatacx.com*

About Merchants

Merchants – a Dimension Data company – is a leading customer management outsourcing solution provider specialising in business process outsourcing (BPO) that delivers customer experience (CX) and customer interactions. We focus on people, process, and technology to create exceptional CXs.

We are pioneers in the contact centre industry, with 35 years of experience in creating and managing contact centre operations around the world for blue chip clients. Our services and solutions are built on tried and trusted models, systems, and processes which are based on best practice standards.

We are passionate about people. Our ability to attract the best talent, coupled with our rich history of success and innovation across different industries around the world, is what differentiates us from our competitors.

For more information, please visit *www.merchants.co.za*

about the global customer experience benchmarking report

A comprehensive, global research study ...

Frequently cited by industry analysts and quoted by the media, Dimension Data's Global Customer Experience Benchmarking Report is widely acknowledged as the most useful, authoritative, and comprehensive report of its kind. It's designed to provide a single point of reference on key aspects affecting customer interaction management within today's CX industry. We believe it's the most extensive global overview of its type.

... based on relevant research

Our Report is based on research conducted via a comprehensive survey. We refresh the survey each year to ensure we're capturing the information that's most relevant to our industry and its future.

... offering analysis and recommendations

We go beyond other reports of this type. We highlight key trends and comment on the business impact, we also offer guidance on how to achieve best practice results. This Report will provide you with the latest research findings, thought leadership insights from subject matter experts, hot topic quick tips, and infographic overviews. Result data is provided via chart or table content, each supplemented by structured commentary. For each research item, we:

- provide detailed research analysis
- present recommendations on next steps to accelerate your journey and optimise your CX solutions
- summarise the key highlights

Our online *Benchmark Results Portal* complements the Report and allows you to view all of the data at ten levels (including region and sector), export content, and build your own bespoke presentations.

About the 2017 Global CX Benchmarking Report

950+ data points

90+ analysis charts

Over 20 new questions
Research study broadened to span *entire CX spectrum*

Annual Research study celebrating 20 years of CX insights and trends

View data at 10 levels including: geography, size, sector, brand, positioning, service, contact and provider type

analysis with *context* and *recommendations* on best practices

Supported by over 40 of the world's leading industry groups and associations

Introduction

Welcome to the 2017 Global Customer Experience (CX) Benchmarking Report Summary

First published in 1997, we mark the 20th anniversary of the benchmarking report this year with a very special and newly expanded edition. Our report has been reshaped to span all aspects of CX – including the contact centre, digital, back office, and physical site operations.

This Key Findings Report is just a taste of what you can look forward to in the full 2017 Global CX Benchmarking Report. It's crammed full of insights and guidance the latest best practice customer experience approaches from across the globe.

This Key Findings Report is just a taste of what you can look forward to in the full 2017 Global CX Benchmarking Report.

Relevance in the digital age requires connections with customers that not only include multiple channels, but the interconnection of those interactions.

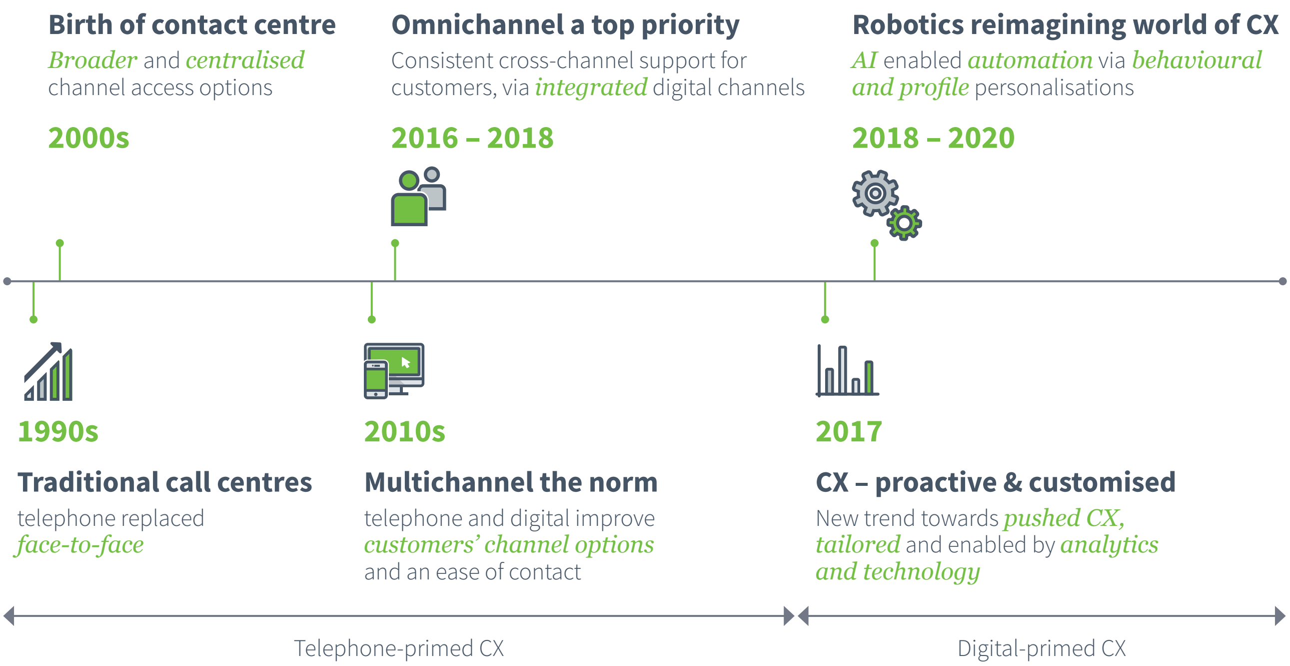
Digital crisis or redemption – the uncomfortable truth!

The research shows that digital transformation is not a debate, but a necessity to compete. In every geography, across all industry verticals, what was once viewed as a competitive advantage has now become an act of survival. Relevance in the digital age requires connections with customers that not only include multiple channels, but the interconnection of those interactions. The report shows a stark realisation that CX providers want to move faster and those who do will truly redeem themselves.

The call to action is apparent: the time to act is now.

Celebrating 20 years of CX insights and trends, our Global CX Benchmarking Report tracks an industry's evolution over two decades.

The transformation of CX



Executive summary

Customer Experience – the uncomfortable truth

The digital dilemma in enterprises is deepening and organisations must choose a path between digital crisis, or redemption. This is the clear message from this year's Global Customer Experience (CX) Benchmarking Report.

There is a growing gap emerging between those committing to digitising their CX to the standards expected by modern/evolving customer types, versus those procrastinating on when and how to make their move. Fantastic levels of data can inform positive business change, but organisations frequently mishandle the opportunity by only focusing on parts of the story. The opportunity is massive, so needs to be the line of sight.

There is a growing gap emerging between those committing to digitising their CX to the standards expected by modern/evolving customer types, versus those procrastinating on when and how to make their move.

Reality out there...

The results indicate that the top factors driving digital transformation are to improve CX, closely followed by customer demands for digital. Over 84% can evidence revenue uplifts as a result of improved CX, and 79% report cost savings.

Yet, the reality is that organisations around the world are failing to implement effective digital strategies. Their customer experience solutions are now becoming disjointed, and digital is not displacing traditional phone interactions at the speed desired by customers.

Fewer than 10% of organisations polled, said that they had an optimised strategy for digital business in place, while over half (51%) reported they don't have any plan at all, or are at best in the process of developing one.

The absence of a connected digital strategy means that even when digital solutions are available, the customer is frequently not even aware of its existence.

To compound the situation, just 36% have appointed a board level executive responsible for all customer experiences. Organisational disconnects means digital solution functionality is not meeting customer requirements, with poorer than envisaged digital adoption levels.

The absence of a connected digital strategy means that even when digital solutions are available, the customer is frequently not even aware of its existence.

Organisations need a new approach...

The research indicates that just 67% of organisations are tracking customer journeys in some form, but of those, only 44% have automated processes available.

Connecting customer journeys is the second top factor to transforming CX in the next five years, but before implementing a digital strategy, organisations need to understand the patterns of their customer's journeys, and design and personalise them accordingly.

However, this cannot be achieved without understanding and harnessing mass data.

Analytics was voted the top factor that will transform customer experiences in the next five years, yet only 48% have customer analytic systems, and 36% possess big data analytic solutions. The research clearly indicates that organisations need to analyse, or fall behind their competitors.

In addition, CX robotics, in the form of automation, AI and IoT are creating a new reality, and demanding a new approach. Virtual assistant (chat bots) is voted the top channel growth focus for 2017, and IoT deployments are set to double. Emerging technologies are creating a platform for unprecedented efficiency opportunities – both in business and customer effort, and organisations need to develop or acquire new skills to support, and stay ahead of, the re-shaped environment.

Virtual assistant (chat bots) is voted the top channel growth focus for 2017, and IoT deployments are set to double.

Leaders embrace CX...

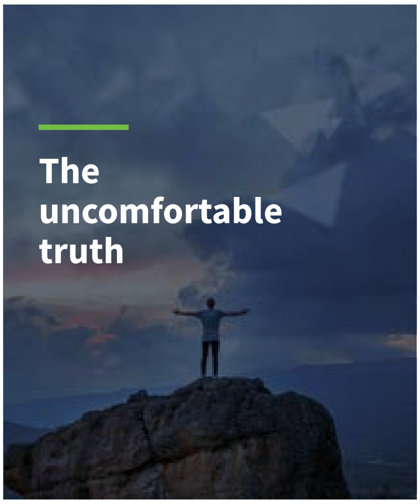
The uncomfortable truth is that high performing companies that have committed to the opportunity created by the digital revolution, are outpacing established market leaders. The benchmark research highlights that top quartile organisations are performing up to ten times better than the typical standard.

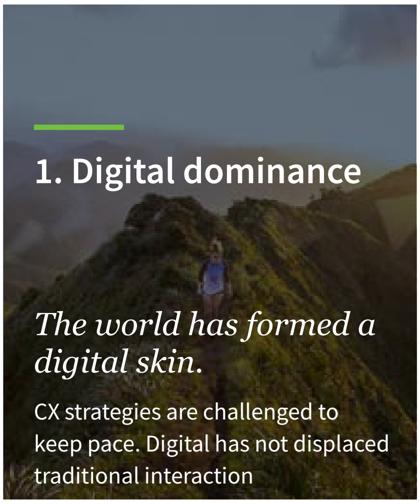
It's now a fact that the world has formed a digital skin. Business, service, technology and commercial models have changed forever. Organisations are strategically challenged to keep pace with customer behaviour.

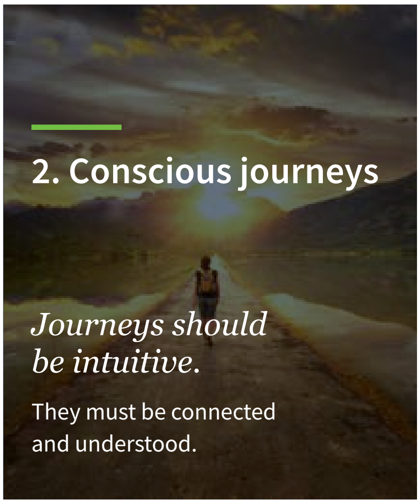
We've seen that digital transformation both accelerates opportunities and causes disruption. Pioneers of the digital age have reimagined business models and processes that have changed customer behaviour forever. If you want to ensure the future success of your organisation, you will need to make the right choices in your CX and digital strategies.

2017 *Key findings*

Digital crisis or redemption







Introduction — Key Findings

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

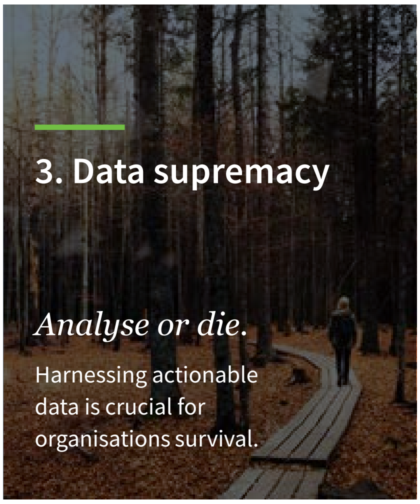
79% can evidence cost savings; 84% an uplift in revenue/profits

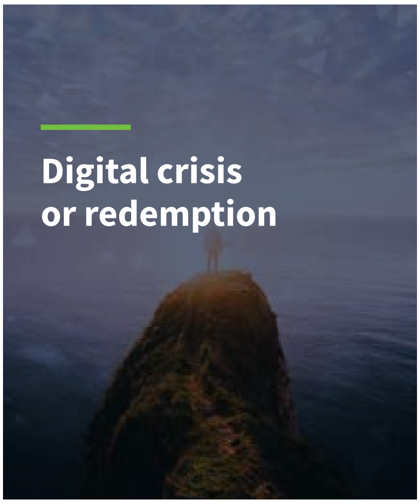
Just 13% self-rate their CX delivery at 9/10 or better

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

Organisational recognition of CX as a differentiator is evident. It's cited as the most important strategic performance measure, building customer trust and delivering tangible benefits on commercial performance, employee engagement and customer loyalty. However, disjointed strategies, disparate management and inconsistencies in approach are damaging customer experiences.





Key Findings
Conclusion

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 behaviour.*

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 fullyautomated 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

Customer demand for digital solutions has never been greater, yet digital interaction levels have fallen short of forecast. Management is being stretched by an ever-expanding channel suite to support new technologies that are being deployed as they evolve. Some have optimised their digital strategy and are surging forward. Others are increasingly disjointed, and are focusing instead on fixing fragments of the customer experience – it's the entire journey that counts.

Conscious journeys

Seamless, proactive, reactive, connected, automated and analysed. Omnichannel isa 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

Understanding user behaviours, patterns and transaction value potential across each channel path is crucial. Organisations are struggling to track customer journeys that now frequently start on one channel, hit a few more and end elsewhere. Choice is crucial, but so is the functionality and consistency of experience. Most companies are prioritising omnichannel solutions, designed specifically to connect the customer journey. However, those systems will only flourish if they are designed on solid process, validated by analytics and have robust review mechanisms that help identify problem hotspots and customer frustration points. Silo management is affecting the effort, and organisations need to ensure they are structured to facilitate the omnichannel vision.

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

The depth of the data that's available is unprecedented. Digital footprints are fueling the volume of mass data, which, to be effective, needs to be (where merited) transitioned into actionable micro-level personalisation. Customer analytics was the second top influencer of positive business change in the last five years. It's been elevated to being the single largest transformation tool in the coming five years. The benefits of analytics are enormous, but many organisations are running blind, or with systems that can no longer cope with their needs. The message is simple: ensure that your data is founded on consistent, but open principles, and most of all, if it's used well, it will translate to performance supremacy.

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

The 2016 benchmarking report was framed around the theme of 'Digital needs a human touch'. In other words, digital needs design, ownership and, especially, a human touch to be effective. As channel options have grown, complexity has increased too. It's created a stretch (that is yet to be overcome) where there's a lack of management fundamentals once commonplace in traditional service centres. Operations are being asked to deliver expert solutions that they've only just started learning as they go. Agents are handling the fallout and being asked to resolve what are increasingly complex customer escalations. Organisations need to ensure that their new digital systems are supported from design, through to deployment and operational practice and review, to remedy service issues, and to not becoming a part of the problem. The process is ongoing, so agility of the approach is essential.

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

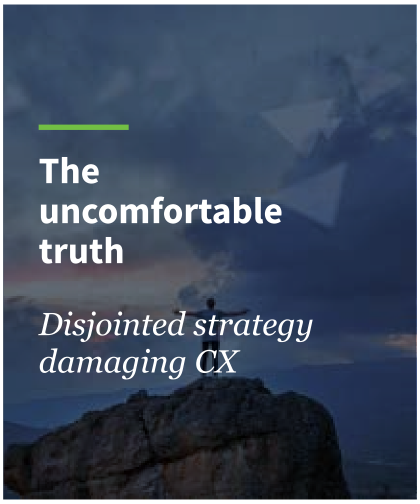
Quality controls on digital up 49% since 2016, but still way behind more established phone

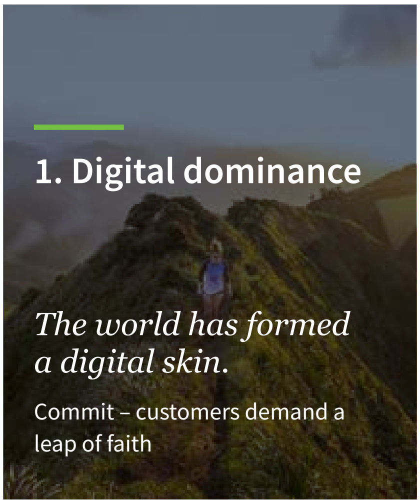
Less than half of operations are fully involved in design of technology systems

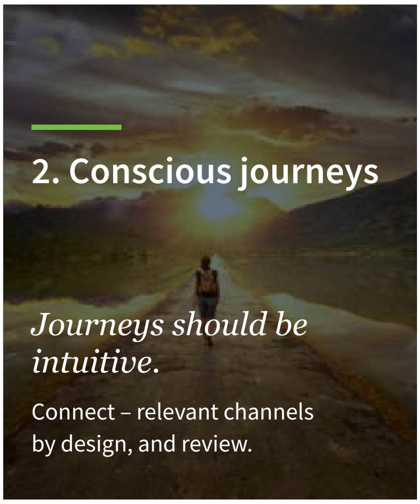
Digital is only as good as the CX strategy it serves - the way it's designed, it's integrated technology enablement, and the actionable data analytics used to validate the paths taken. Organisations need to create an environment where displacement of legacy processes, assets and operations are seen as a natural transition, and not a threat. Only then will established organisations remain relevant and competitive. It becomes a real crisis or redemption issue, dependent on whether organisations have a clear strategy and can harness capabilities in a holistic designed manner. Layering on automation to poor processes and siloed functions will fuel increased fragmentation, increase costs and widen inability to compete. At the same time, silo management, limited or no omnichannel capability, and a poor perspective of performance outcomes, will also impact the sustainability of a business.

We say...

Digital crisis or redemption







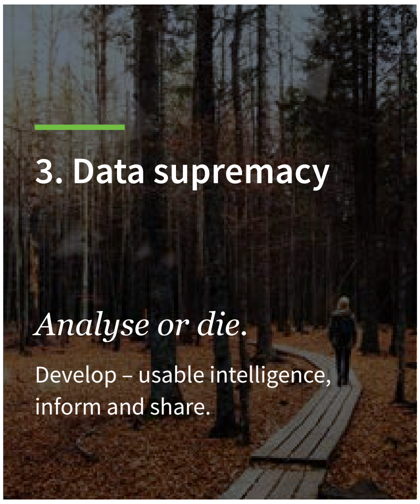
Introduction

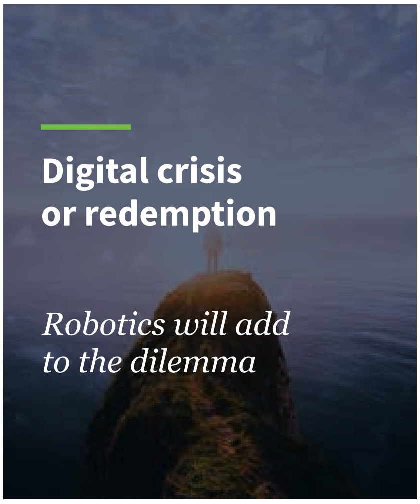
Key Findings

The 2017 benchmarking report includes information on all aspects of CX in the organisation and everything decision-makers need to know to make informed decisions about their digital transformation journeys. Read a synopsis of the findings of each chapter below:

Strategy. CX is crucial to organisational strategy. Why? CX is proven to increase customer loyalty, commercial performance and employee engagement. CX enables transformation. It's recognised as a market differentiator for most. Organisations and customers alike are embracing digital capability, yet the transformation and challenge to provide great CX is becoming more complicated.

Disparate systems are a challenge, and disparate management are a threat. Omnichannel solutions are deemed critical, yet most organisations struggle to optimise their strategy for digital, if it even exists. It's causing CX to become disjointed. CX transformation needs a strategy. Connected CX journeys need design. Robotics is a reality and the speed of change means future proofing your technology, and your approach on the human touch.





Key Findings Conclusion

CX. There's an overwhelming appreciation from organisations on the importance of CX. Establishing trust is the leading driver of CX, followed by the matching of service experiences to brand values. More than eight in 10 companies recognise CX as a differentiator, and it's the number one indicator of strategic performance. It drives revenues, is proven to reduce costs and even adds to employee engagement levels, yet just one third of operations rate their own services at a level of eight out of 10 or better.

CX delivery is being damaged by a lack of process management, particularly across the expanding choice of digital pathways. Personalisation, intelligent automation and the ability to connect customer journeys powered by intelligence from analytics, will do most to reshape CX capabilities in the next five years. CX has to adapt by committing to the opportunity created by the digital revolution.

Analytics. It has again been voted as the top factor that will change the customer experience industry. Yet, many organisations only look at superficial data to determine how to make improvements in service offerings. Without a strong practice focused on collection and analytics of data, it's impossible for an organisation to deliver personalised experiences to customers.

Also, without centralised sources of data, analytics can be difficult. Data management and systems integration are major challenges to implementing analytics, as well as a lack of communication within the organisation to drive customer experience improvements.

Digital. CX and customer demand for digital are the top considerations for driving digital channel strategies. Yet digital uptake levels are behind forecast. They are slowed by solution functionality that's not meeting customer needs and poor marketing of the solution existence. CX is core to digital transformation, and digitally-relevant businesses are focusing on aligning system user experiences, both internally and externally to drive positive disruption.

This means not only changing the CX with a new application or with improved customer service, but re-arranging the entire organisation to become more agile and responsive to customer needs. Innovation is key, and organisations need to build an internal competency that enables them to continuously adapt and thrive through explorative innovation and prototyping. The development of this competency starts with strong leadership and an innovative culture, which in turn best serves customer needs.

Operations. Productivity and the human cost of CX are being challenged as automated solutions improve. There's evidence of a clear breakdown between the strategic relevance of CX and operational management techniques, as complexity and commercial pressures increase. Productivity has replaced first contact resolution as the top operational focus. CX performance, the top strategic performance indicator, drops to third top priority.

The benchmarking results highlight significant inconsistency in operational process between new digital and traditional CX channels. Ease of resolution is what counts most to the customer, but cross-channel delivery is inconsistent, and overall, performance levels are falling short. Operational structures and design need to go digital if they are to keep up with evolving customer demands.

Ease of resolution is what counts most to the customer, but cross-channel delivery is inconsistent, and overall, performance levels are falling short.

Efficiency. Organisations struggle between a strategic desire to evolve and a silo management operating model that hinders digital and workforce optimisation. Efficiency levels are further challenged by the absence or inconsistent use of core support technologies (service efficiency systems are not being utilised to their full potential). Although complexity levels are growing and cost pressures are returning, some organisations are operating without knowledge and workforce management systems.

Agent analytics and a surge in e-learning techniques have emerged as 2017's top optimisation priorities. Employee skills and experiences are now a premium. Yet, agent absenteeism is twice that of management, and has doubled since our first report 20 years ago. Emerging technologies are creating a platform for unprecedented efficiency opportunities – both in business and customer effort. However, resources will need new skills, and operating models need to be structured to support the re-shaped environment.

Technology. It was voted as the number one enabler to positively transform CX services in the last five years. Yet, over a quarter of organisations say that their technology systems are failing to meet their current needs. Omnichannel solutions that integrate enterprise systems and connect customer journeys is the top technology trend for 2017, but nearly seven in 10 organisations currently have none, or very few, channels connected. The ability to customise has emerged as a new top focus, and analytics is cited as the top factor to reshape CX in the next five years.

Cloud continues to grow as a model in public, private and hybrid forms. Over eight in 10 existing users say cloud has provided access to new functionality, with future proofing a key benefit. Significantly, three quarters of users also say cloud enables omnichannel capability via integrated platforms. Robotics will add to the dilemma, and technology strategies need to evolve and become agile in connecting growing enterprise requirements. Thinking of CX technology as a connected element in a holistic enterprise IT eco-system and overcoming traditional work splits between business and IT adopting new concepts as swarming, will be key for success.

For more information...

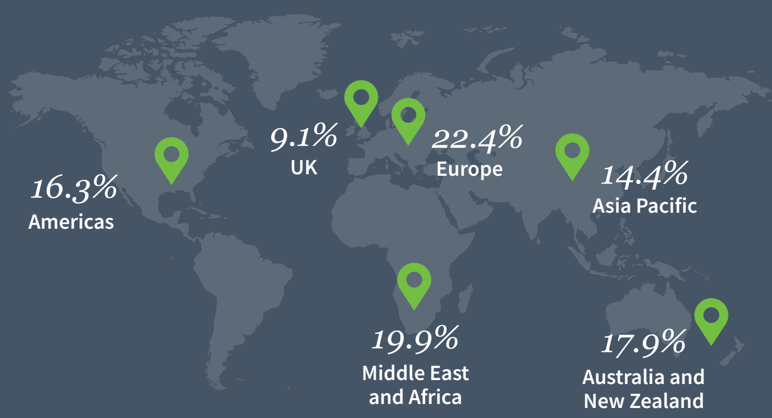
... and to order your copy of the complete 2017 Report visit:
www.dimensiondata.com/benchmarking

Sample

1351 participants | *80* countries | *14* industry sectors

Spanning all aspects of CX, data from our deepest sample in 20 years can be viewed at 10 different levels

Regional *representation:*



Representation *by industry:*

17.0%	Banking and investment
14.6%	Professional services
11.0%	Service providers and communications
11.0%	Insurance
8.7%	Technology
7.5%	Retail and consumer goods
7.3%	Public sector
22.9%	from **additional** 7 sectors

Service *type:*

62.5% B2C	*23.4%* B2B	*6.2%* Sales	*7.9%* IT helpdesk

Provider *type:*

84.4% In-house	*15.6%* Outsourced

Number of *employees:*

0-50	51-100	101-200	201-500	501-1000	1000+
25.7%	*12.7%*	*11.0%*	*13.8%*	*11.0%*	*25.8%*

Operation *type:*

14.9% Telephone	*80.0%* Multichannel
1.7% Digital	*1.5%* Physical site
1.9% Back-office services	

Interaction *mix:*

51.0% Inbound	*3.8%* Outbound	*42.1%* Split of inbound and outbound	*3.1%* Administrative services

Brand *positioning:*

24.0% Prestige brand	*45.5%* Premium brand	*19.4%* Mid-level brand	*4.3%* Budget brand	*6.8%* Unsure

How we've designed our research

The Report is designed to provide context and easy-reference access to the information sets:

- Each chapter begins with a summary overview infographic.
- These are followed by a Q&A style introduction and expert insights to the findings.
- Feature articles on trending topics enrich the content.
- Detailed analytical findings follow each chart and table, with recommendations on how to implement best practices.

Typically presented as global statistics, all of the data in the 2017 Benchmarking Report can also be accessed interactively on our online Benchmarking Results Portal for a more customised view. The Portal enables multidimensional filtering of the data, for example, by region, sector, and size, or by a single filter at a time.

Your privacy

We stringently protect all data and ensure the privacy of all participants' information. We only publish the company names of participants who provide us with express permission to do so. Data is used only for the purposes of research. Our full privacy policy can be accessed via our Benchmarking Report website:

www.dimensiondata.com/benchmarking

The Benchmarking Results Portal enables multidimensional filtering of the data, for example, by region, sector, and size, or by a single filter at a time

Benchmark Results Portal

The online Benchmark Results Portal was established to enable a much deeper analysis of the annual benchmarking results. The portal is available to qualifying survey participants, or with the purchase of the Report.

The 2017 Benchmark Results Portal allows you to…

- view all of our global research
- use an intuitive design to search for content by section, question or topic
- perform data filters at multiple levels, including by region and/or country, industry sector, contact centre size, service, provider, and contact type
- compare historical data for trend analysis
- access headline commentary on the research findings
- view 950+ performance metrics
- export the relevant graphs straight to your desktop
- convert all of the charts in the Portal to data table format
- 'ask an expert' and receive guidance and information from our subject matter experts

Contact *cc.benchmarking@dimensiondata.com* for further details and information on how you can secure access.

Additional information

Report pricing

2017 Report – USD 1,750 (20% discount for partner association members)

2016 Report – USD 995

Order via our website *www.dimensiondata.com/benchmarking*

Participate – get the report free

You can secure a free copy of the Global Customer Experience Benchmarking Report by participating in our annual research programme.

Register your interest at *www.dimensiondata.com/benchmarking*

Subscribe to updates

To ensure you receive regular updates on the latest content/material or if you need to update your contact information please visit our website *www.dimensiondata.com/benchmarking*

Consulting

Please contact us for more information about Dimension Data's consulting services via *cc.benchmarking@dimensiondata.com*

Participant benefits

Each participant completing our annual benchmarking questionnaire receives:

- a free electronic copy of the latest Global Customer Experience Benchmarking Report, valued at USD 1,750
- access to our online Benchmark Comparison Portal
- access to year-round benchmarking outputs in different formats (industry vertical reports, infographics, video highlights and more)

Register now at:
www.dimensiondata.com/benchmarking

Reference the benchmarking results

We want our benchmarking content to be accessible and easy to reference. Any part of the Report may be reproduced or used in extract form as long as the material is appropriately credited and referenced as being extracted from 'Dimension Data's 2017 Global Contact Centre Benchmarking Report'.

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