



# Contact Center Key Market Transitions



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# Five Key Transitions: Customer Care

Increased visibility of service quality by CEO

# Service Quality Key to Customer Loyalty

As products commoditize, *service quality* has the highest impact on customers' decisions to leave or stay.



Source: Harvard Business Review, 2004; Monitor Group (Rayport, Jaworski)

# Which list would CEOs prefer to be on?

The McGraw-Hill Companies

# BusinessWeek

MARCH 5, 2007 [www.businessweek.com](http://www.businessweek.com)

## CUSTOMER SERVICE CHAMPS

Our first-ever ranking of companies where the consumer is king. Here's the magnificent 25...

1. USAA
2. Four Seasons
3. Cadillac
4. JetBlue
- 4 Nordstrom

...AND ONE EXTRAORDINARY STUMBLE

PLUS:  
WHY TOYOTA IS SO AFRAID OF BEING NO. 1 (P.42)  
WHAT CARL ICAHN IS TARGETING NEXT (P.68)

vs.

## Customer Service Hall of Shame

Company	Percentage
Sprint	40%
Bank of America	30%
Comcast	30%
Time Warner Cable	29%
AT&T	26%
Citibank	24%
Wal-Mart	23%
Verizon	22%
Wells Fargo	21%
DirecTV	20%

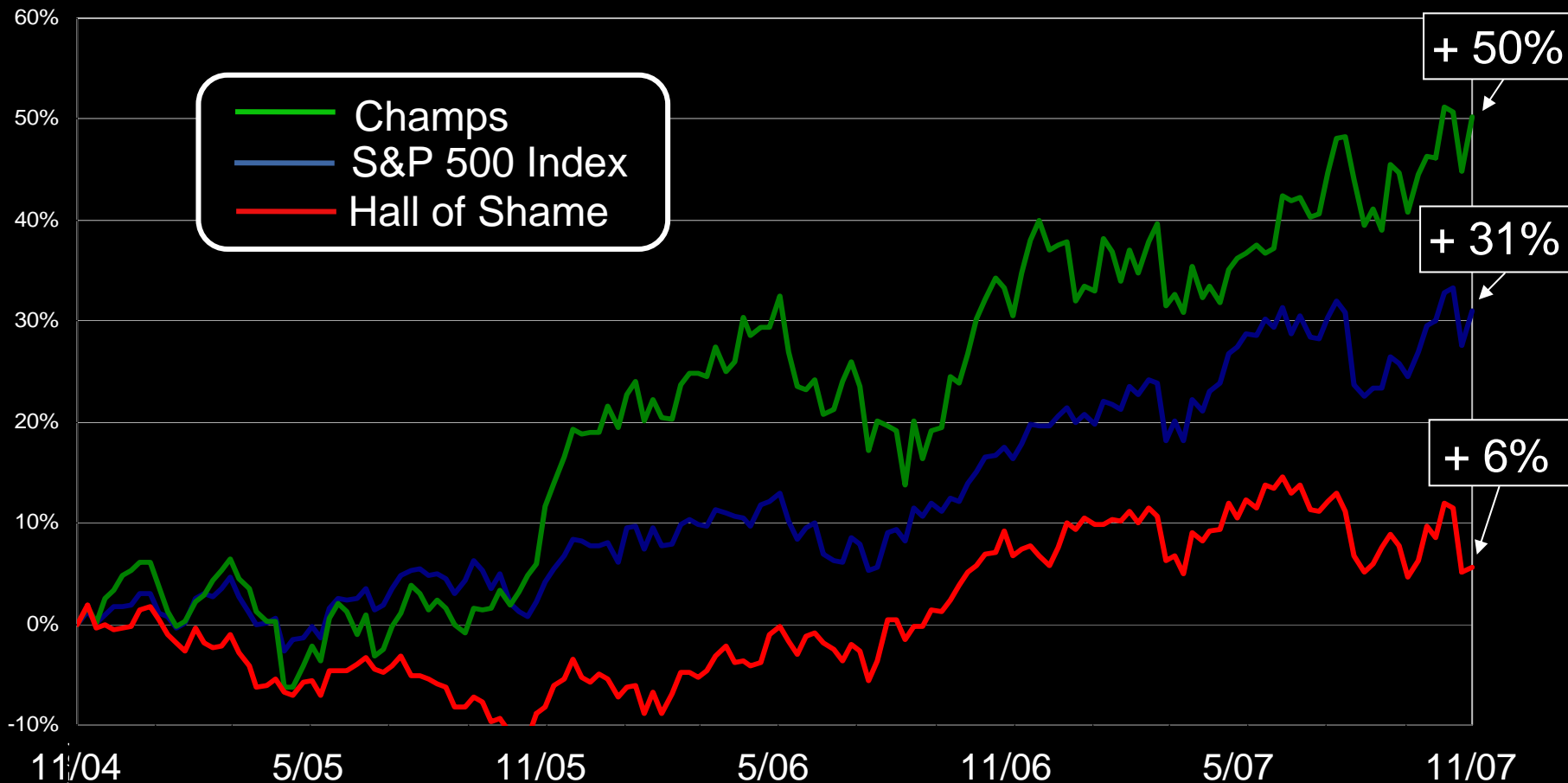
Ranked by percentage of respondents who rated a company's service "poor."

MSN-Zogby Poll

Source: Business Week, March 2007; msn money, April 2007

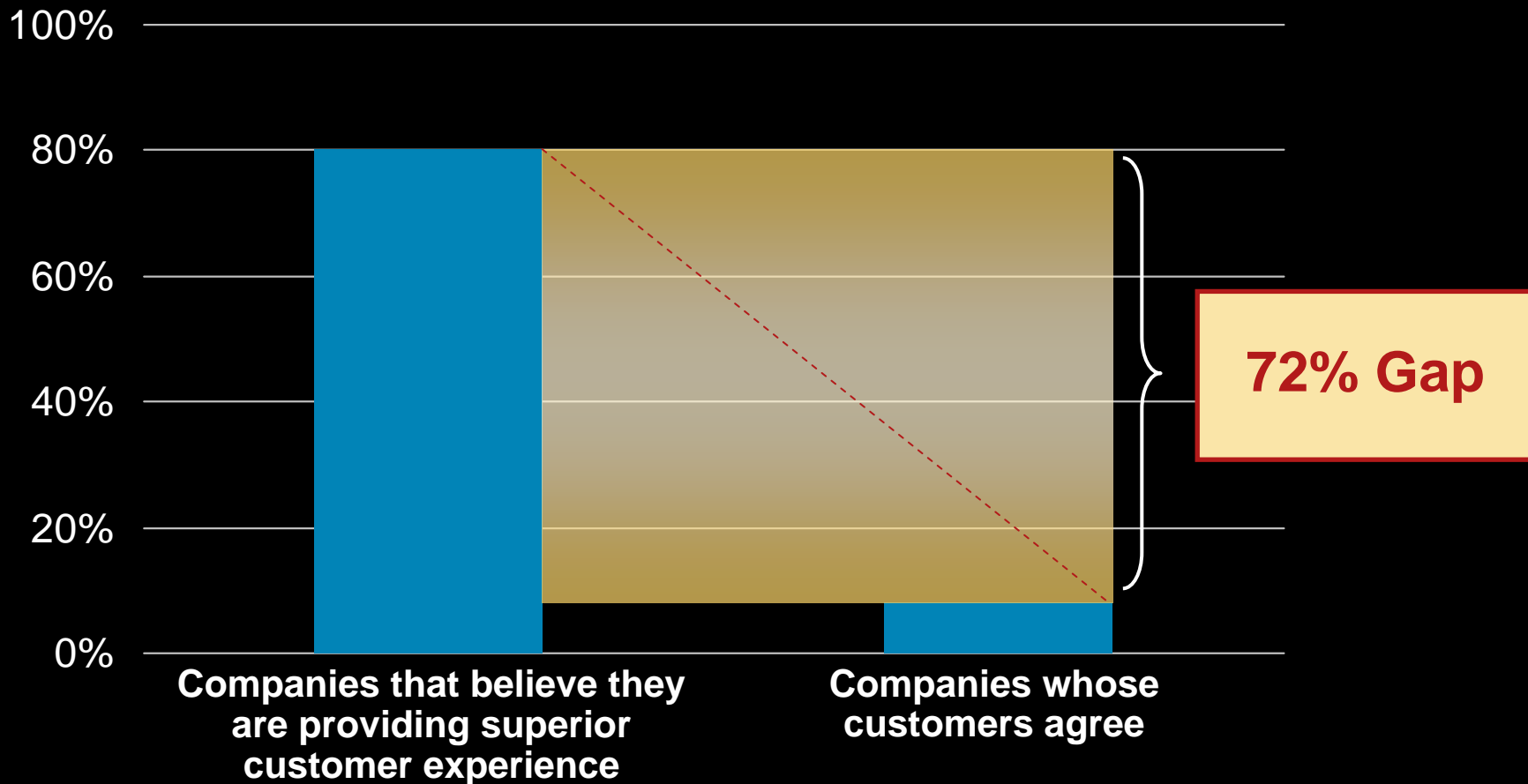
# Customer Service Really Does Matter

Service perception is correlated with stock performance.



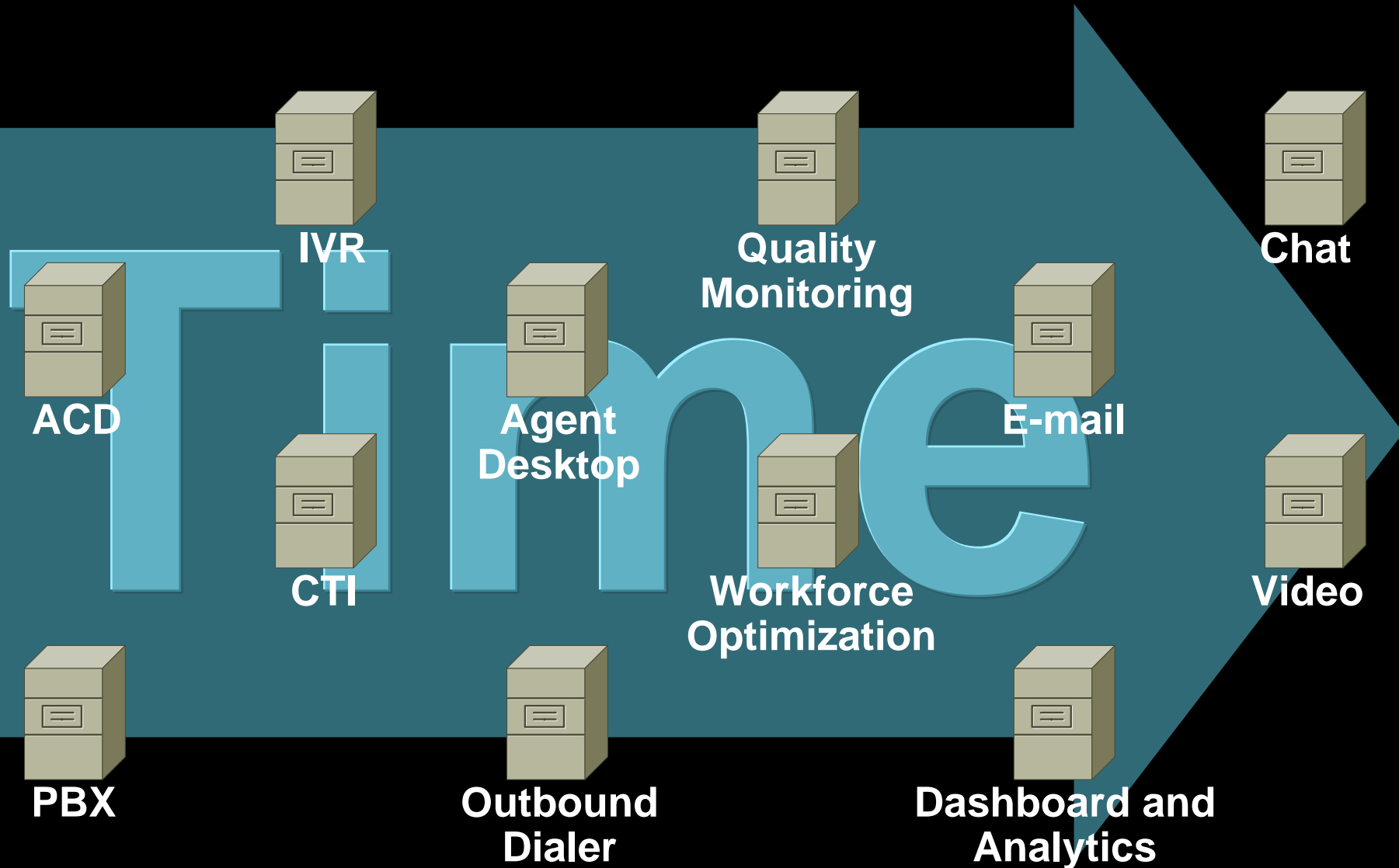
# Most Don't Know the Damage They're Doing

There is a wide gap between *what companies think* they are delivering and *what customers think* they are getting.



Source: James Allen, Bain & Company, October 2005

# One Culprit: Silos in the Contact Center



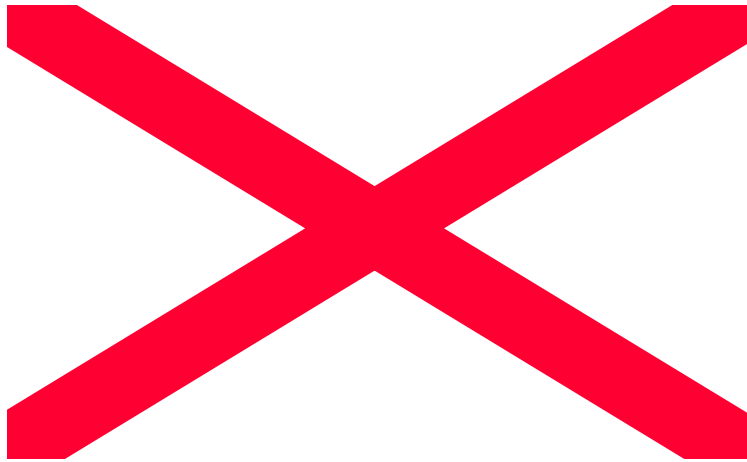
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Migration from TDM to IP for voice

# IP Past the Tipping Point for Enterprise

IP Migration



Source: Gartner (2006), Synergy Research (2006)

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Enterprise IP Telephony (Lines)

IP Contact Center (Seats)

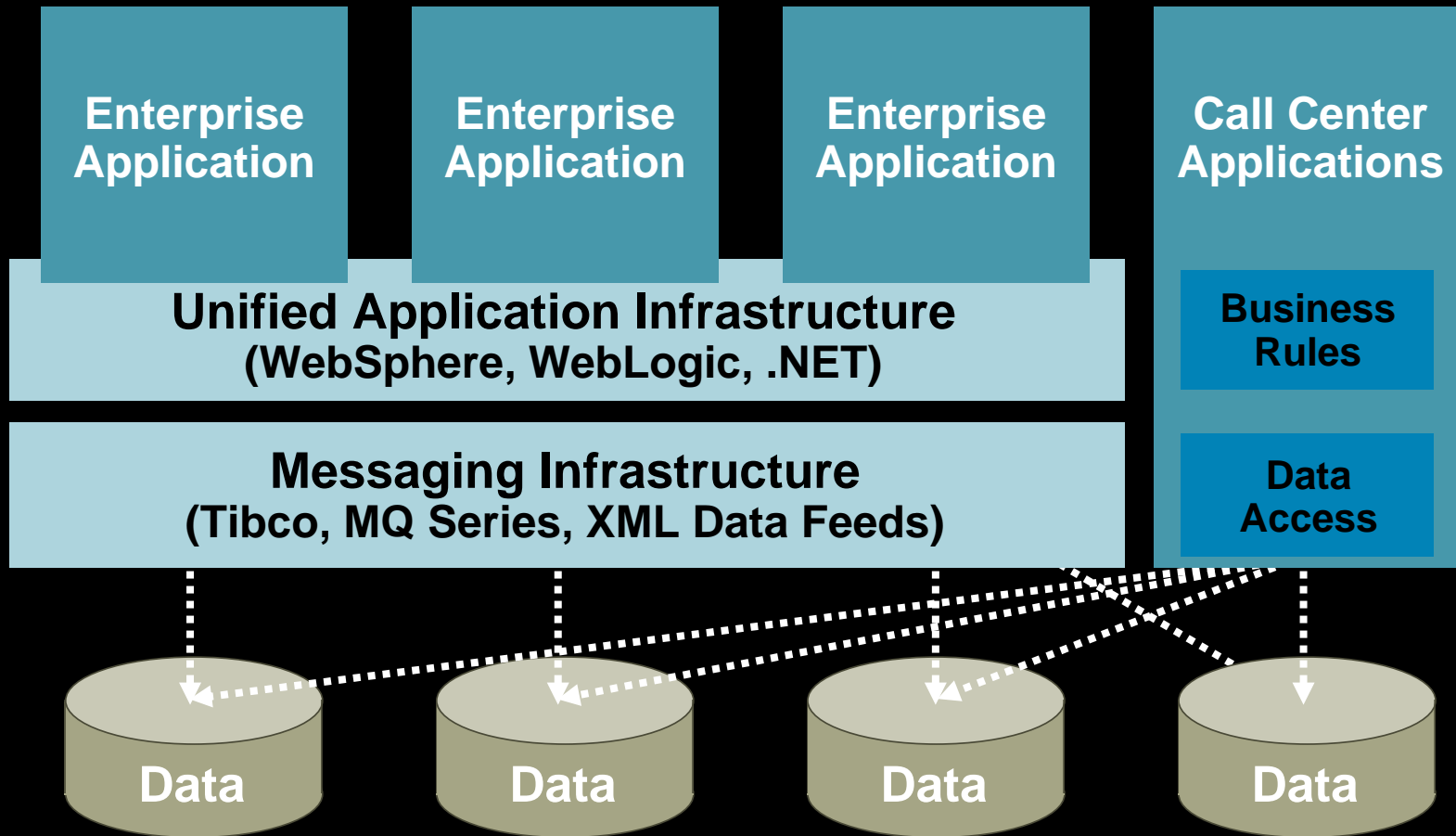
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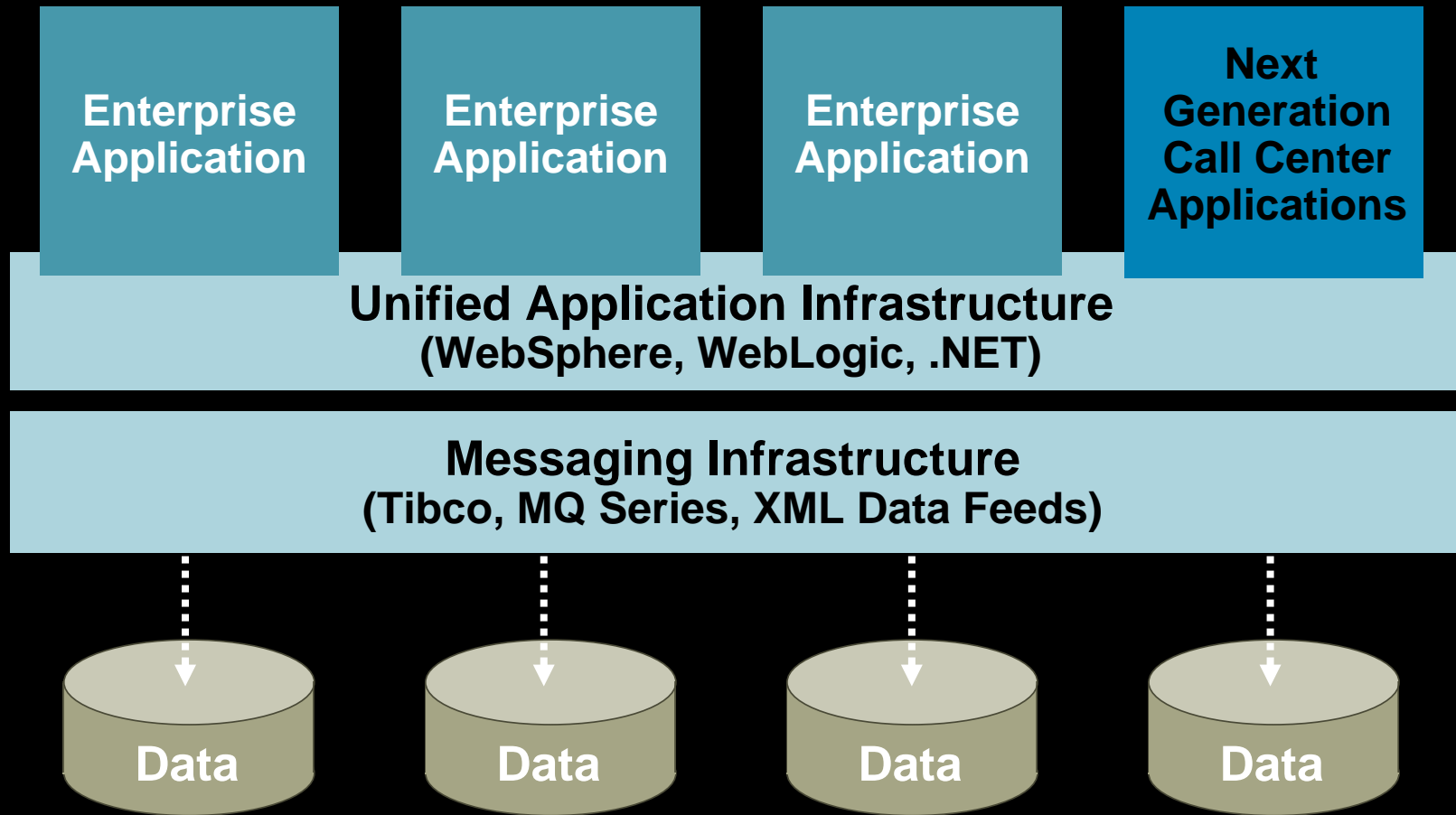
Migration from TDM to IP for voice

Adoption of SOA for enterprise applications

# SOA: Little Impact on Contact Center Today

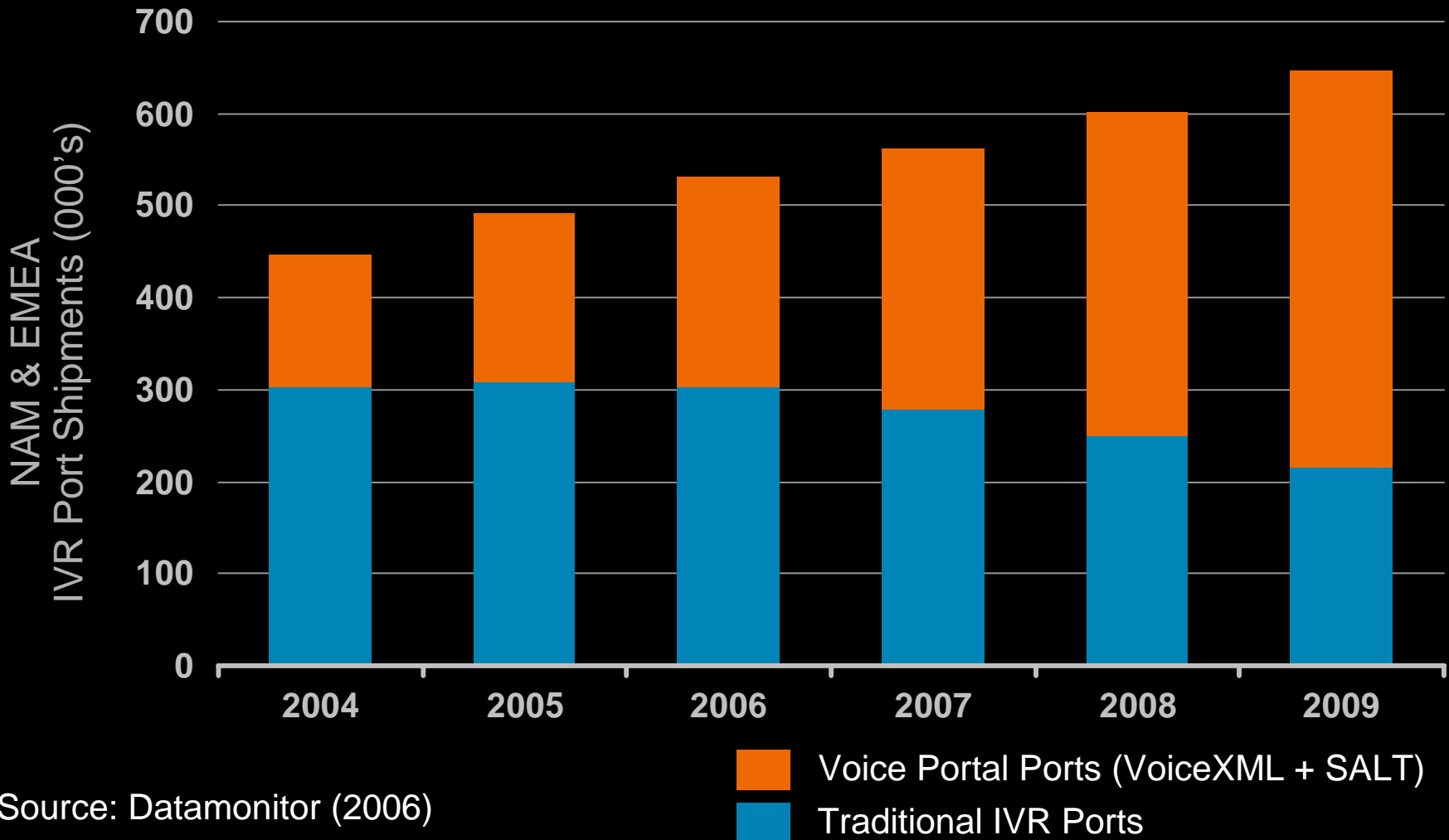


# Application Convergence in Contact Center



# Standards Adoption in Self Service

Voice portal shipments overtake traditional ports by 2007.



Source: Datamonitor (2006)

# Architectural Revolution (not Evolution)

The contact center will look very different in a few years.

Function	Contact Center Architecture	
	Current	Emerging
Scripting	Proprietary	VXML, CCXML
Call Control	ACD, PBX	CCXML, SIP
“Agent” Availability	ACD	Presence Server
Voice / Data Alignment	CTI	VoIP (SIP)
Routing Logic	Proprietary	SOA-based business rules
“Agent” Desktop	Proprietary, fat client	Portal-based, personalized
Reporting	Proprietary	Enterprise BI suites

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Web 2.0: Changing usage patterns

# Customer Driven Care

Identify

Relate

Engage

Predict

## Customer Demand

You will know me when I contact you

## Predictions

- Agents will not need to authenticate callers
- Personalization will be the norm, not the exception
- Cross channel sessions will be consistent – 100% of data from a web session will persist to the phone

# Customer Driven Care

Identify

**Relate**

Engage

Predict

## Customer Demand

You will take my problem as seriously as I do

## Predictions

- **Sophisticated crisis management techniques will be applied broadly to customer service**
- **Every employee will be available to provide customer service**
- **Customers will no longer need to escalate to supervisors**

# Customer Driven Care

Identify

Relate

**Engage**

Predict

## Customer Demand

You will work around my schedule and lifestyle

## Predictions

- No caller will ever be put on hold again
- SMS will account for 60% of all written care communications
- Half or more of all customer issues will be resolved by customer generated content in expert communities

# Customer Driven Care

Identify

Relate

Engage

Predict

## Customer Demand

You will anticipate my needs in advance

## Predictions

- Moods and contact intent will be anticipated by the enterprise
- Caller will go to the right place the first time - even if that is outside of the contact center
- 20% of all care calls will not happen at all

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Web 2.0: Changing usage patterns

Software as a Service

# New Generations Defined By Disruptive Applications and Delivery Models



## Web 2.0 Services

eBusiness Collaboration utilizing the Network as the Platform



## Client Server

ERP and Financial Applications Delivered to PC Clients



## Mainframe Computing

Batch processing of pre-written instruction code is the birth of application computing



Each generation characterized by a disruptive new class of applications

