

Each lockdown phase
transfers more
customer engagement
online

E-commerce - global

**January
2020**

**16.07 billion
global visits**

**June
2020**

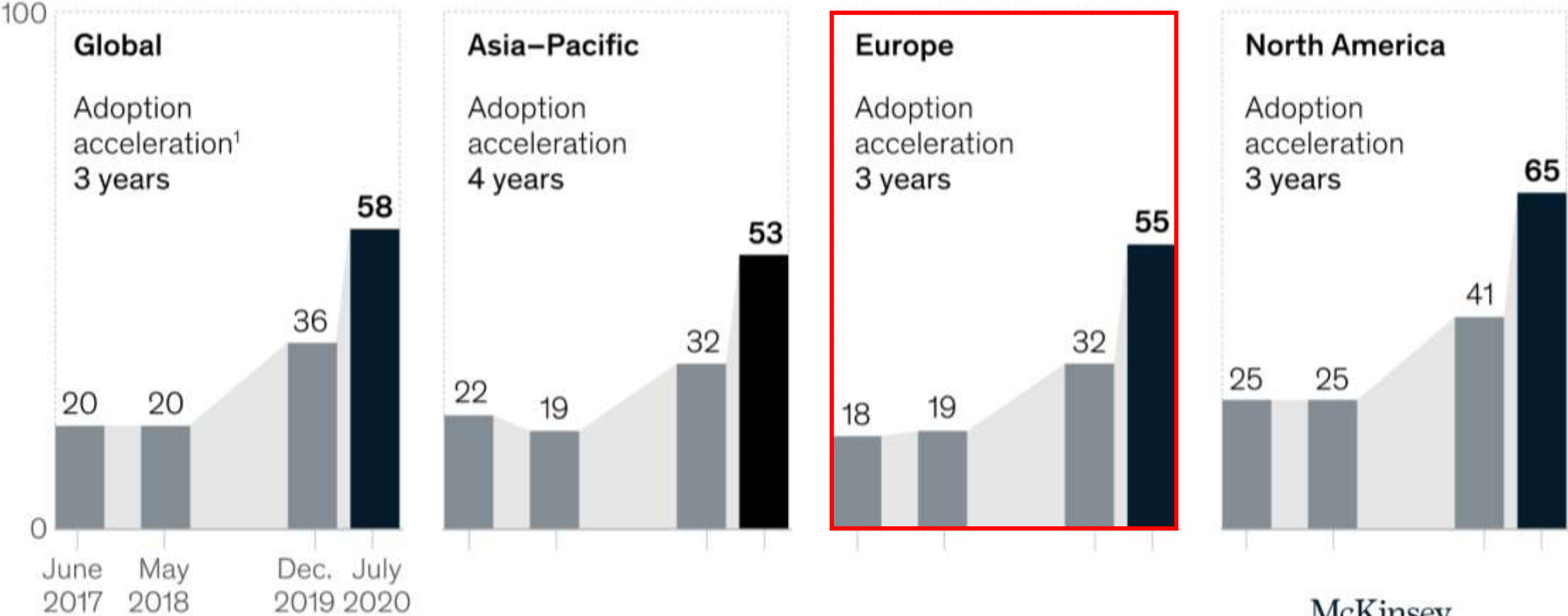
**22 billion
global visits**

statista 

COVID Accelerates Digital Adoption

Average share of customer interactions that are digital, %

■ Precrisis ■ COVID-19 crisis



McKinsey & Company

¹Years ahead of the average rate of adoption from 2017 to 2019.

Customers Change Mindset



How has your perspective about digital/online customer support changed as a result of COVID-19?



- 32.05%** More comfortable using chat/messaging/email/chatbots for all issues
- 50.12%** More comfortable using chat/messaging/email/chatbots for some issues

17.83% Less comfortable using chat/messaging/email/chatbots

AUGUST 2020 MARKET STUDY
Customer Experience Trends, Challenges & Innovations

CCW CUSTOMER CONTACT WEEK DIGITAL

Brands Re-imagine Customer Service

Before



42m assisted conversations every month

- Complex, manual back office processes
- Voice-centric interactions

In scope: €1.2bn customer operations opex¹

Vision for tomorrow



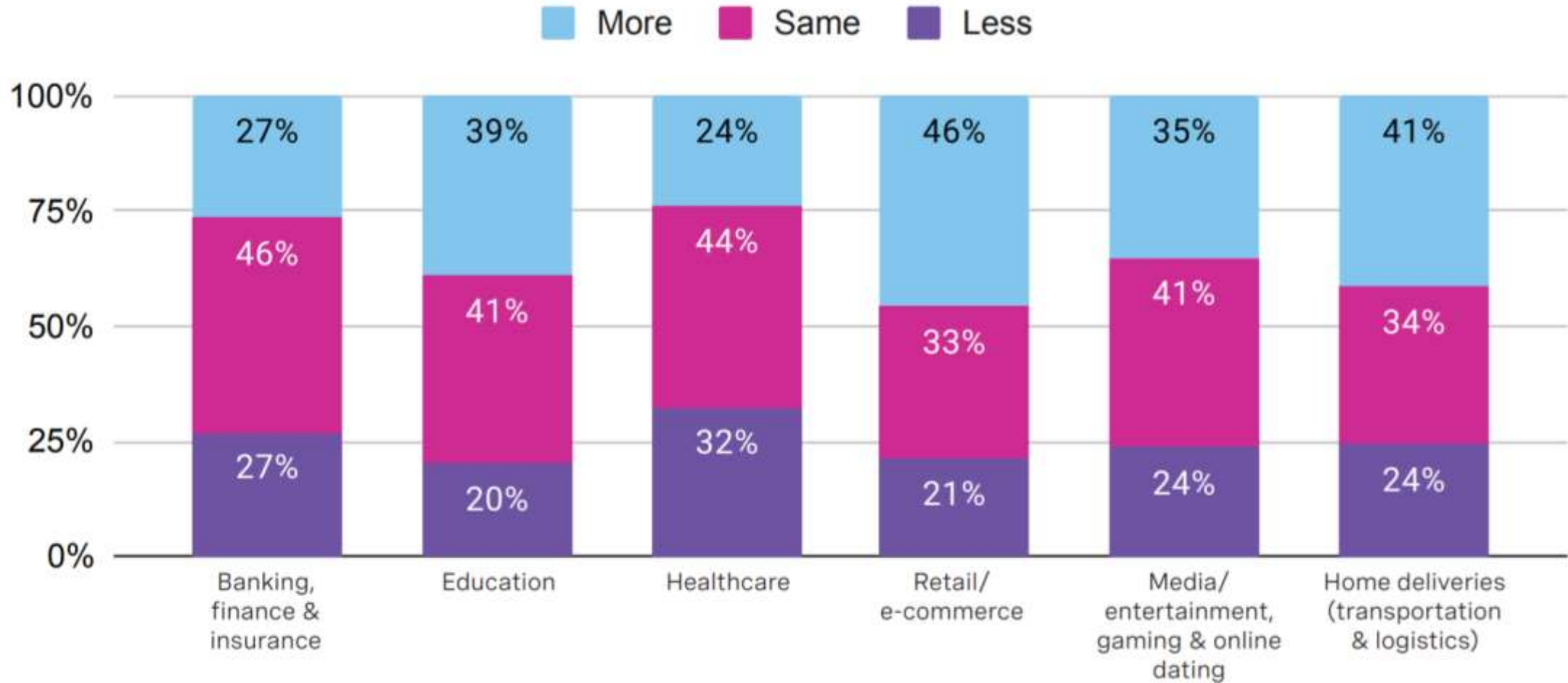
- Instant, prediction driven interactions
- Automated back-office and service

Ambition: 40% reduction in contact frequency by March 21

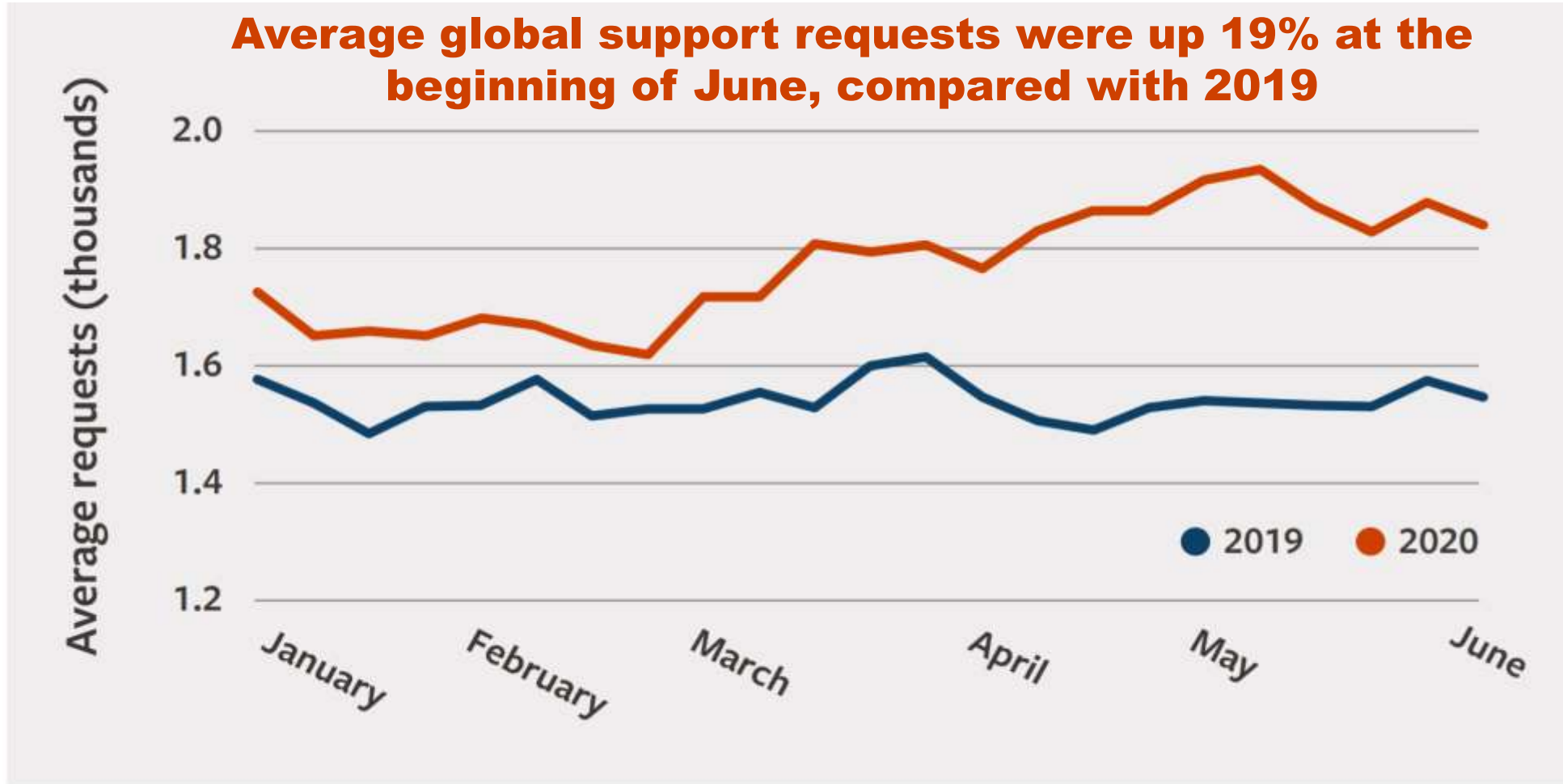
Poll

Customer Engagement
Habits Are Changing

Frequency of Engagement Since Pandemic

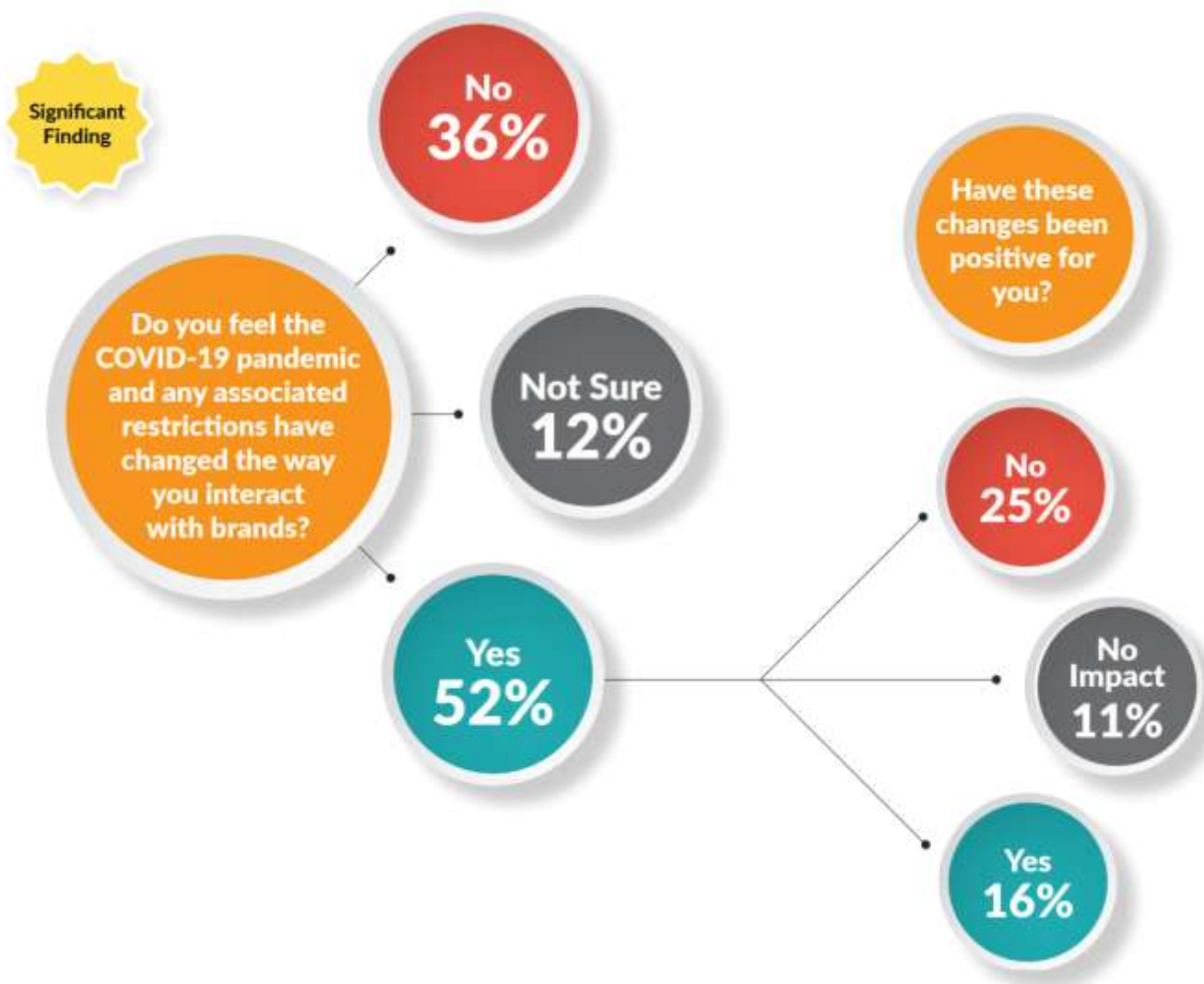


Frequency of Engagement Since Pandemic



Source: Zendesk Benchmark Snapshot

Customers Are Experimenting

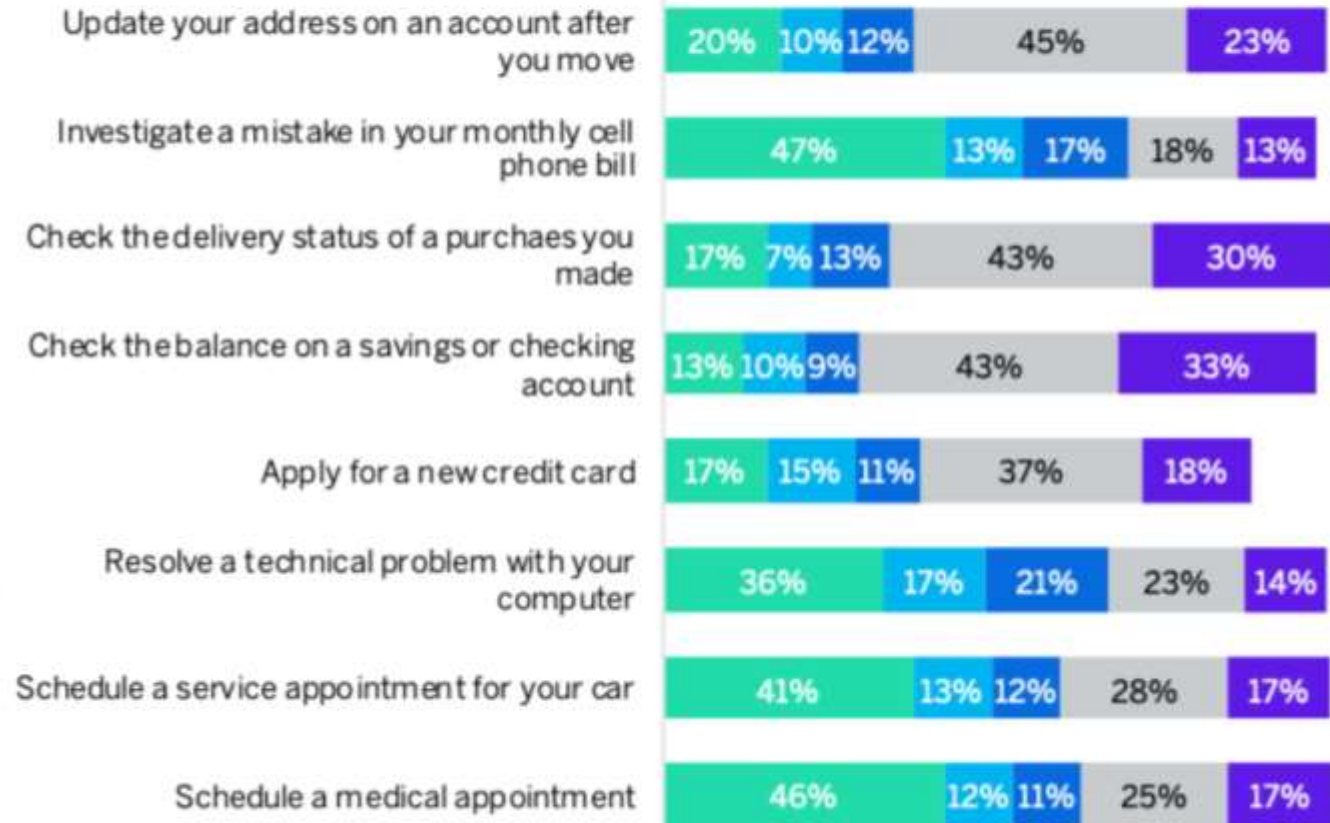


Choice Is Expected



In which of the following ways would you prefer to do the following activities?
(Select all that apply)

- Talk to someone on the phone
- Meet with someone in person
- Chat with a person on your computer
- Self-service on your computer
- Self-service on your mobile phone



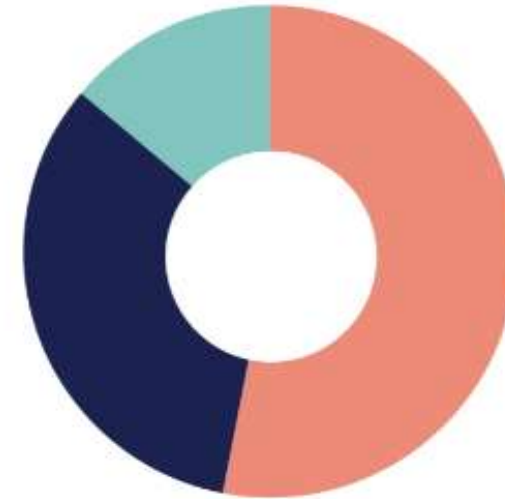
Base: 10,000 U.S. Consumers
Source: Qualtrics XM Institute Q2 2020 Consumer Benchmark Study

www.xminstitute.com
Copyright © 2020 Qualtrics*

More Open to Self Service



Are you comfortable solving customer service issues on your own (without help from a representative), such as via chatbots, FAQ pages, instructional videos, or automated voice menus?

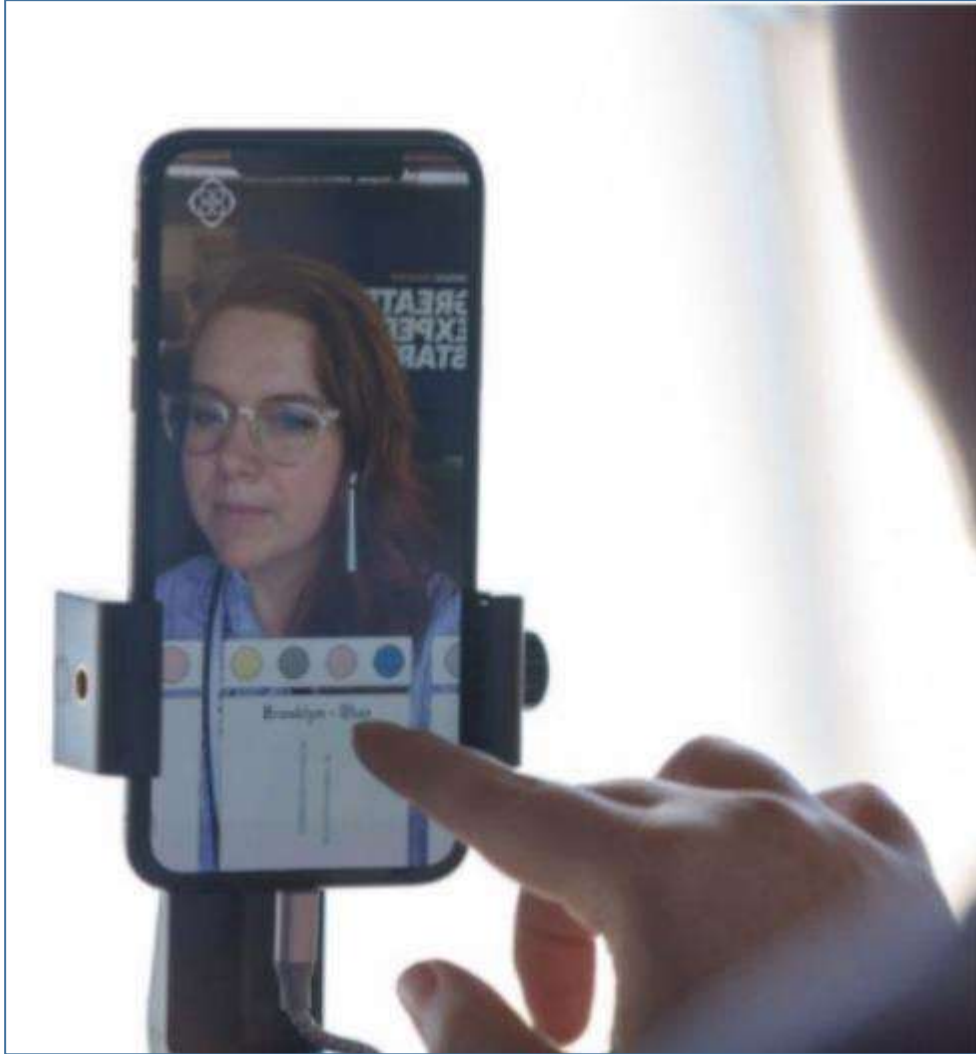


53.14%
Yes - already comfortable using these self-service tools

33.09%
Could be comfortable in the future, but you haven't yet had much success with bots or voice menus

13.77%
No - support should always come from an employee

Contactless Engagement



 KENDRA SCOTT



jlandpartners 
@jlandpartners



Whether welcoming a new addition or navigating your baby's latest milestones, our nursery advisors are on hand to help 🧡

You can now book a free 1 hour video call with one of our specialist Partners & receive advice from your own home.

Book here: johnlewis.com/our-services/n...



10:47 AM · Apr 16, 2020

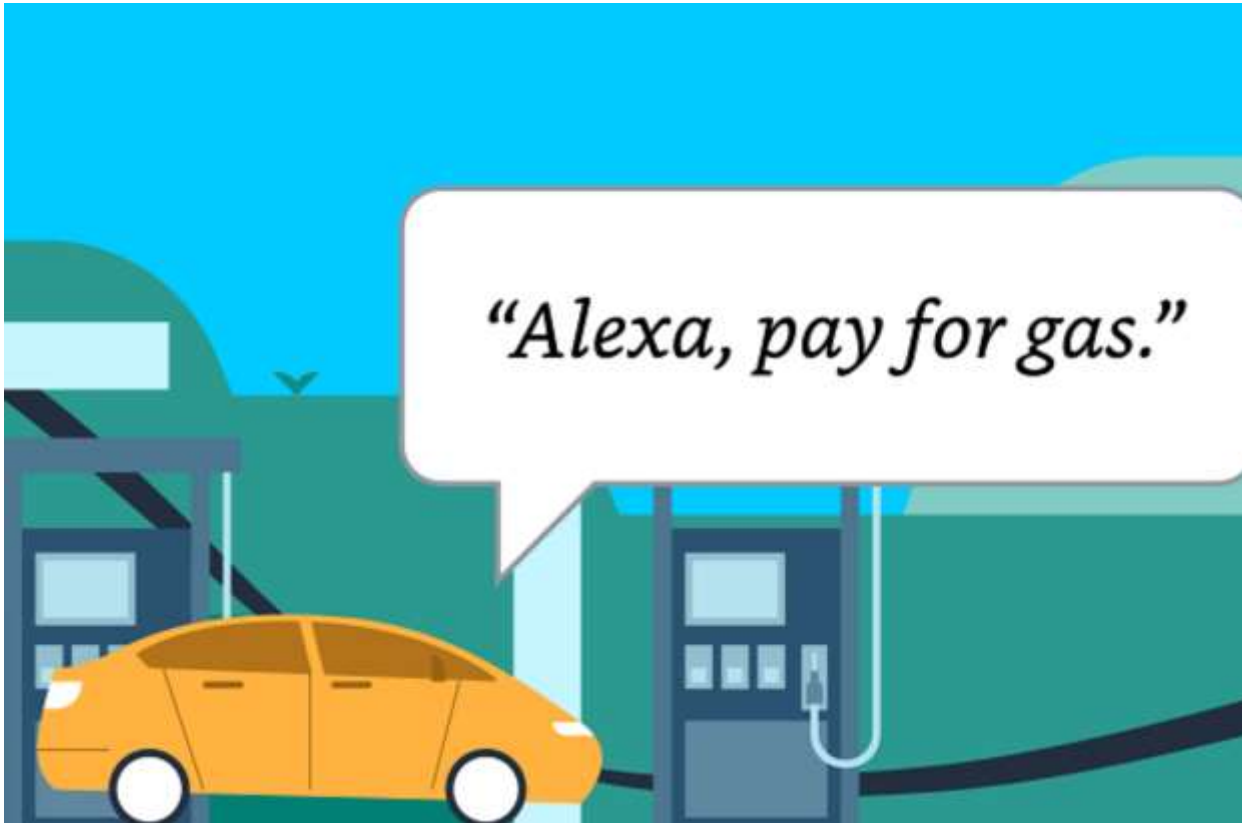


8

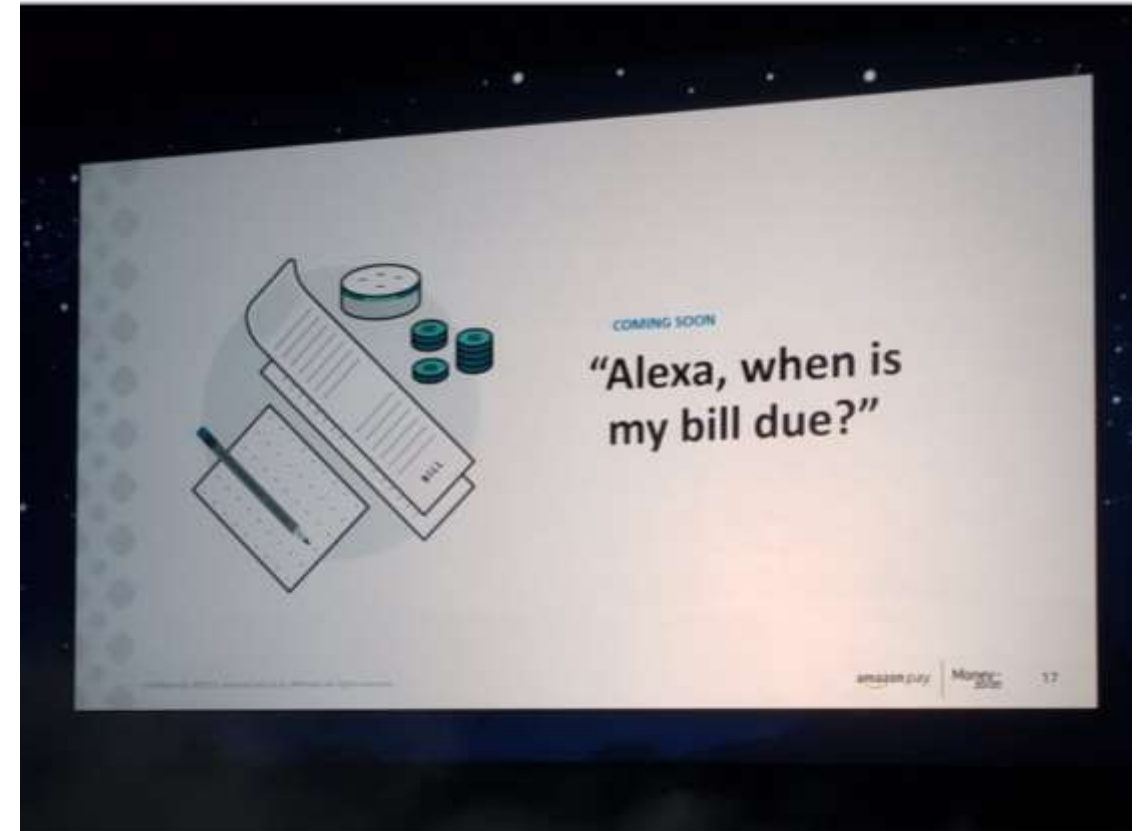


See jlandpartners's other Tweets

Contactless Engagement



Fuel payments at more than 11,500 Exxon and Mobil gas stations in the U.S



Amazon India supports bill payment for electricity, gas, water, post-paid mobile and broadband

Voice Remains Strong



36% of 18 -24 year olds agreed that it has been vital to telephone a business during the pandemic

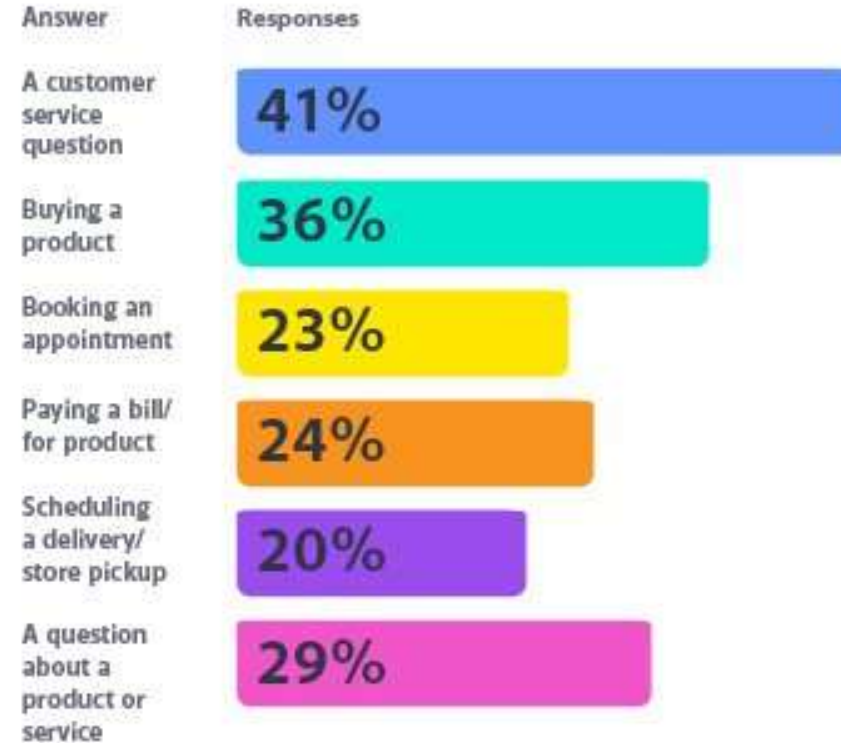
41% of UK consumers say phoning call centres has replaced face-to-face and in-store interaction with brands

Source: Netcall with Arlington Research

Asynchronous Messaging Is A Win-Win



Nearly 70% Of Consumers Moved to Messaging During the Pandemic

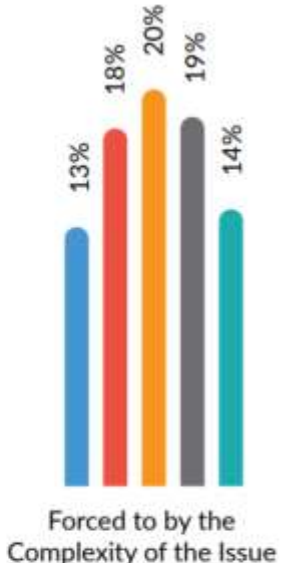
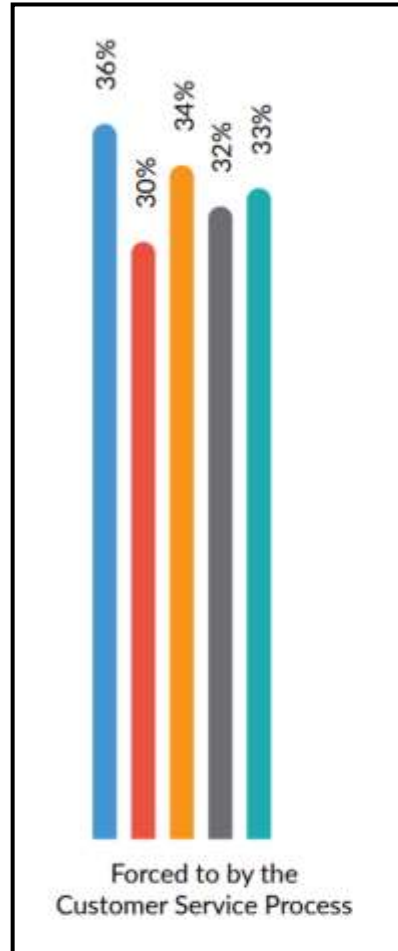


 Conversocial

Volume 8:
The Definitive
Guide to Customer
Experience 2021

Customer Experience
Matters Even More

Multi v Single Channel Outcomes



● 2016 ● 2017 ● 2018 ● 2019 ● 2020

Why did the process take you across multiple channels?

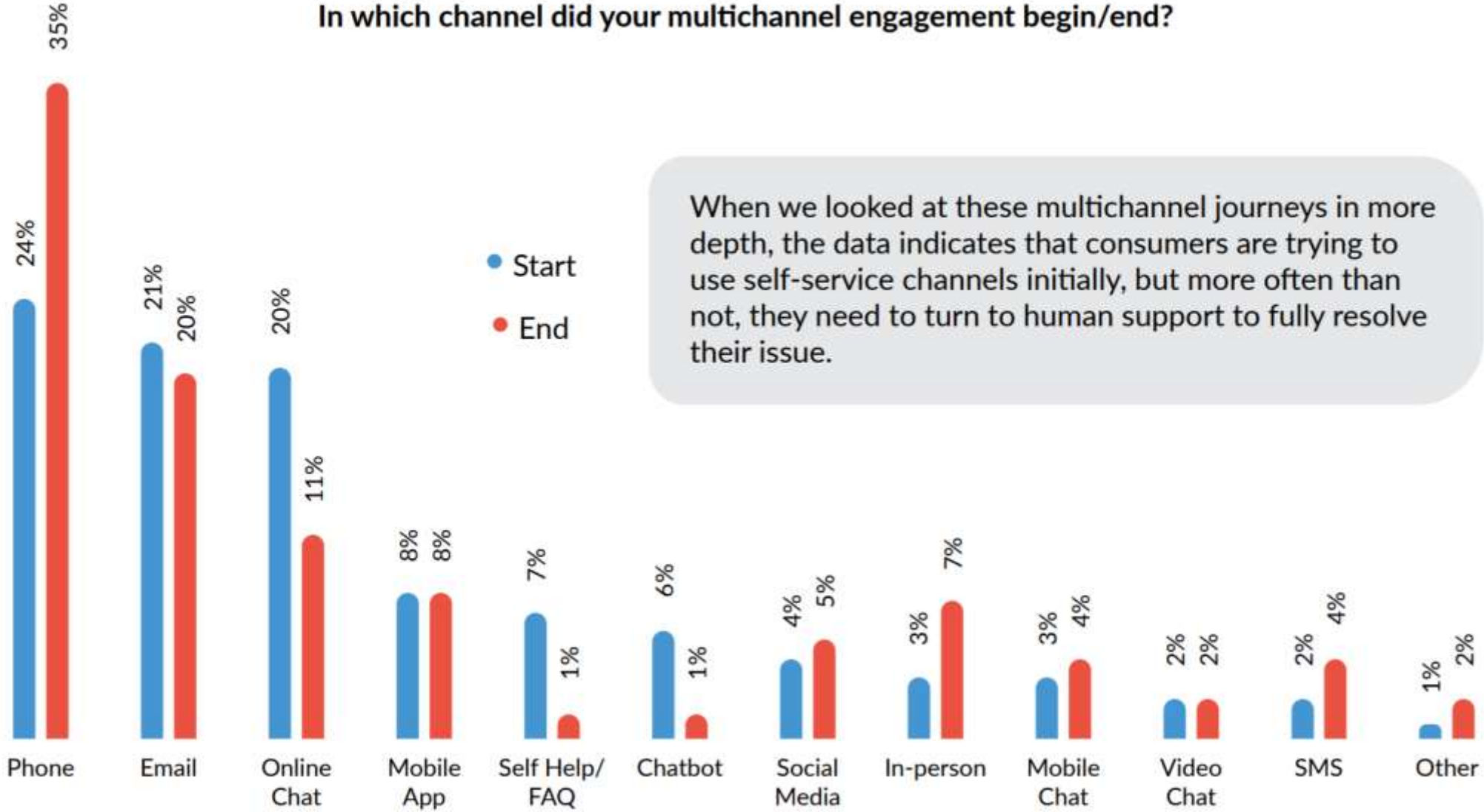
WhosOn Live Chat

Currently, our claims agents are only available over the phone. They'll be happy to help you with this so please call them on 0333 321 9800. They're open Monday to Friday, 9am - 6pm. Unfortunately we don't currently have facility to do this over chat, as the claims team are a separate department, therefore we don't have access to their systems. I'm really sorry for the inconvenience caused, I wish I could be of more help.



Voice Remains Strong

In which channel did your multichannel engagement begin/end?



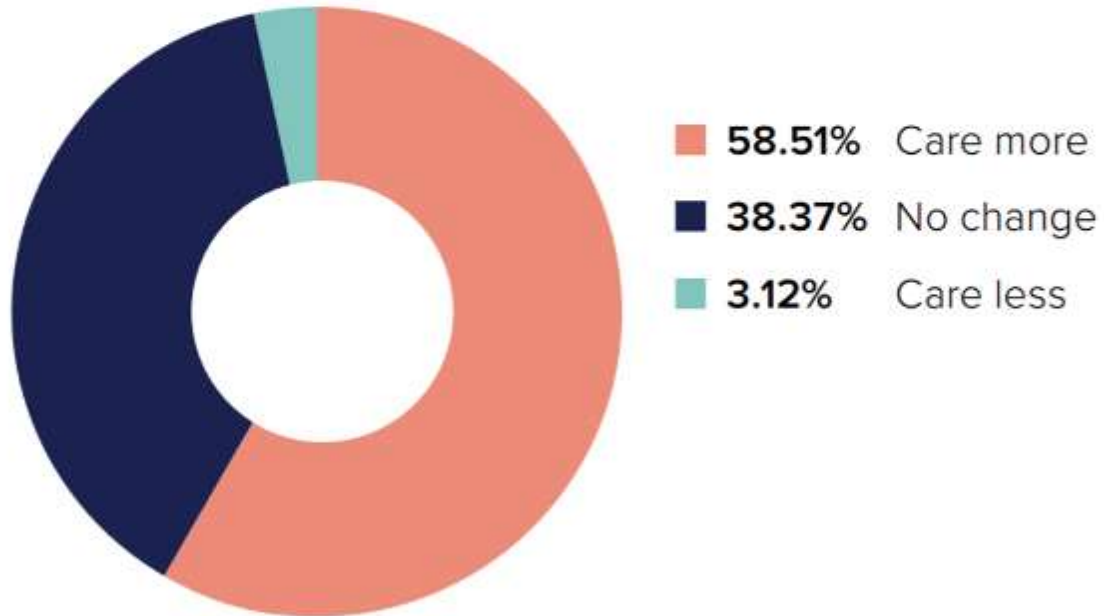
When we looked at these multichannel journeys in more depth, the data indicates that consumers are trying to use self-service channels initially, but more often than not, they need to turn to human support to fully resolve their issue.



2020 Consumer Experiences and Opinions:

Priorities & Consequences

Following COVID-19, do you care more or less about the customer experience when deciding which companies to support and buy from?



Source: August 2020 Market Study by Customer Contact Week "Customer Experience Trends, Challenges & Innovations"

Loyalty Investment

Marketers will re-emphasise the value of their loyalty programs

Already, media money is shifting into retention methods such as **customer service**. We predict that spend on loyalty will increase by **30%** in 2021



Loyalty Has A High Bar



**Purchase
More***

**Recommend
Company****

**Forgive
Company***

**Trust
Company***

Base: 10,000 U.S. Consumers, 20 Industries
Source: Qualtrics XM Institute Q2 2020 Consumer Benchmark Study
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Loyalty Has A High Bar



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Qualtrics
XM institute™

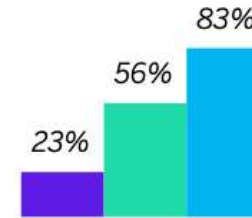
Low Rating

Neutral Rating

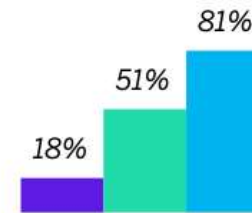
High Rating

Success

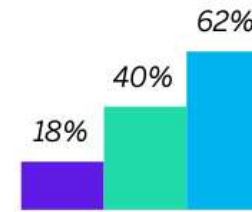
Purchase More*



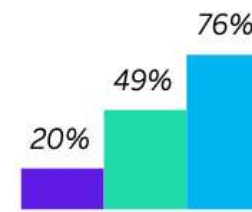
Recommend Company**



Forgive Company*



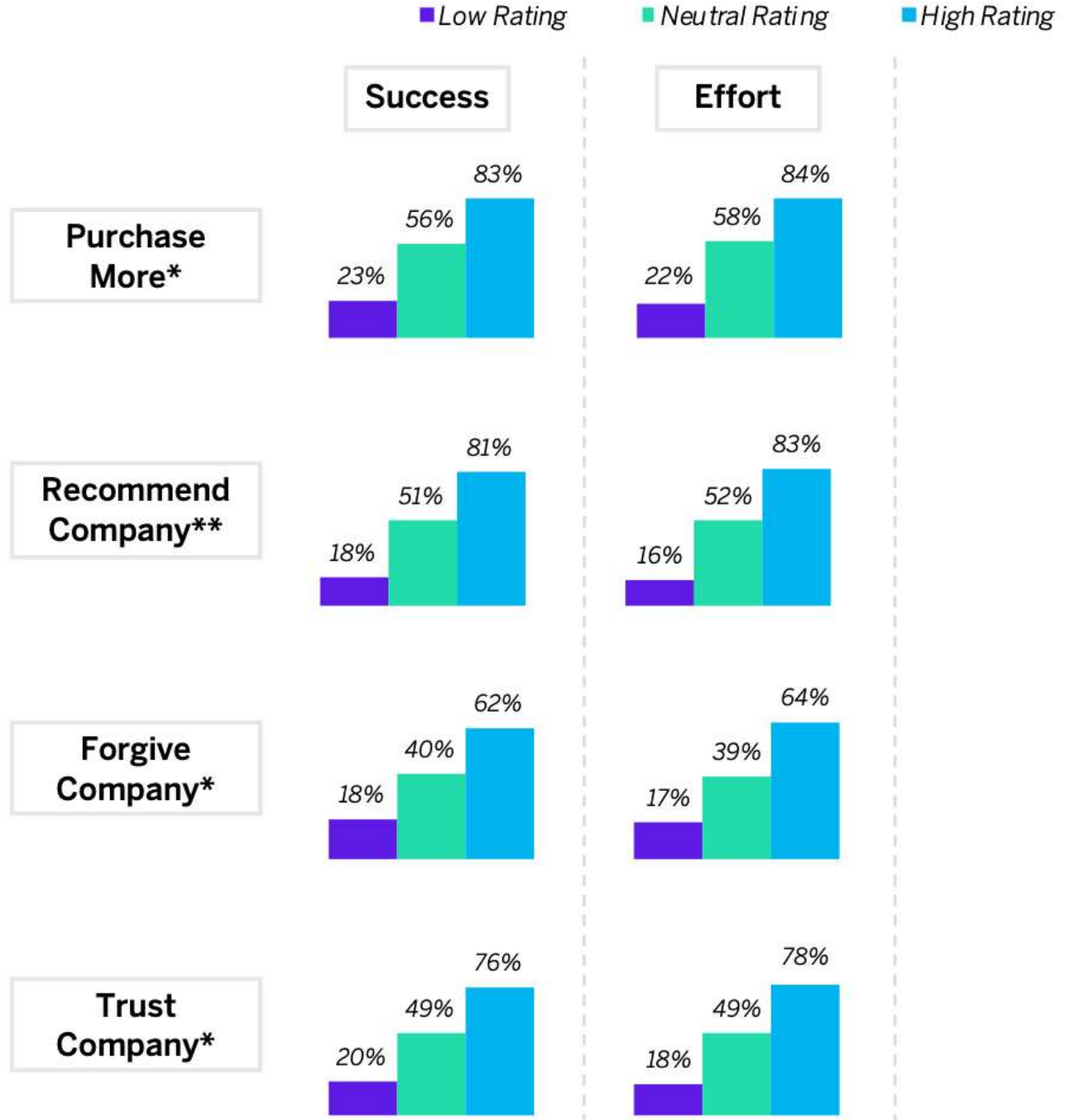
Trust Company*



Loyalty Has A High Bar



Base: 10,000 U.S. Consumers, 20 Industries
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Loyalty Has A High Bar



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■ Low Rating ■ Neutral Rating ■ High Rating

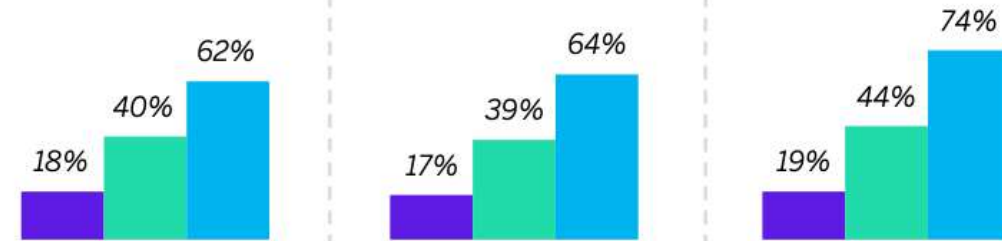
Success Effort Emotion

The average company saw the percentage of calls scored as “difficult” double from **10%** to more than **20%**.

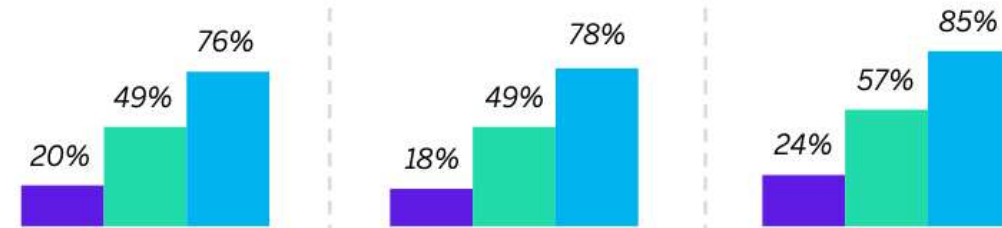
Issues directly attributed to the pandemic were rife ...from travel cancellations to appeals for bill payment extensions... **increasing customer emotion and anxiety** on the calls, leading to more instances of escalation, which furthered the complexity and efficiency of resolving queries

Source HBR AI analysis of more than 1 million customer service calls March 11th-26th 2020

Forgive Company*



Trust Company*



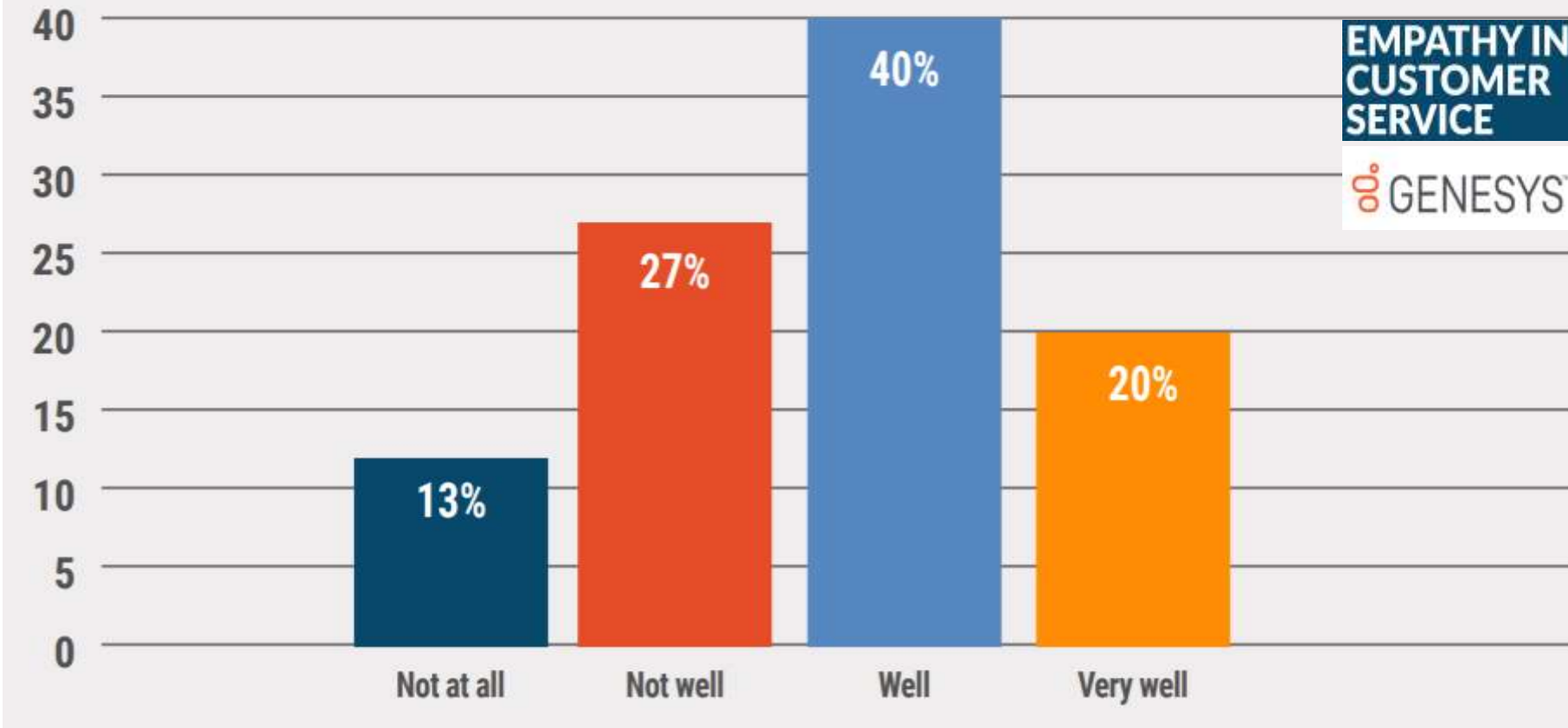
Empathy & Emotion Matter

Low Rating

Neutral Rating

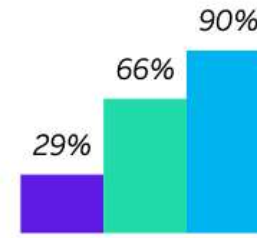
High Rating

Figure 4. How well do you think your emotional state was acknowledged and understood?

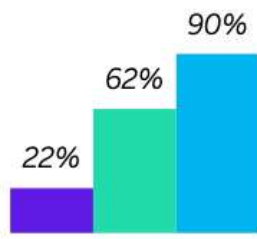


Emotion

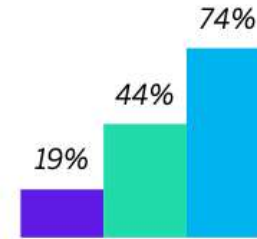
Purchase More*



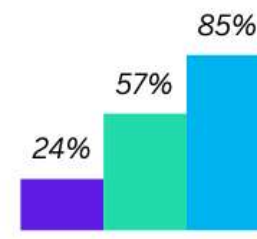
Recommend Company**



Forgive Company*



Trust Company*



Quiz

Automation Keeps
Growing

More Value - Less Grunge

Activities, not occupations: Rather than replacing entire jobs, robots will automate particular tasks within those jobs.

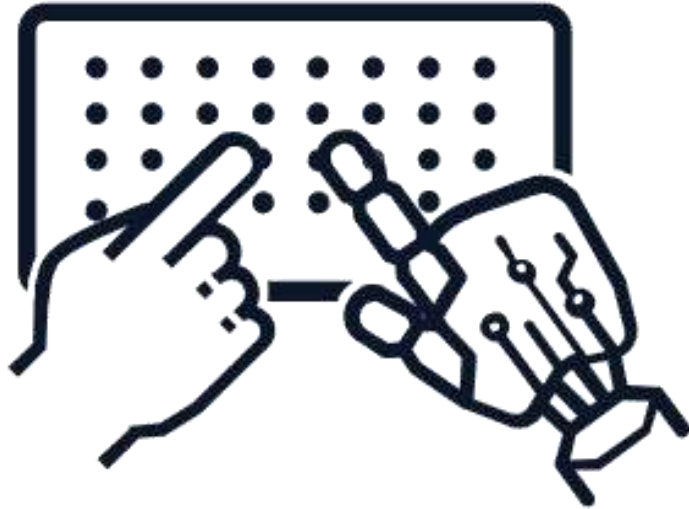
% of time spent on tasks susceptible to being automated



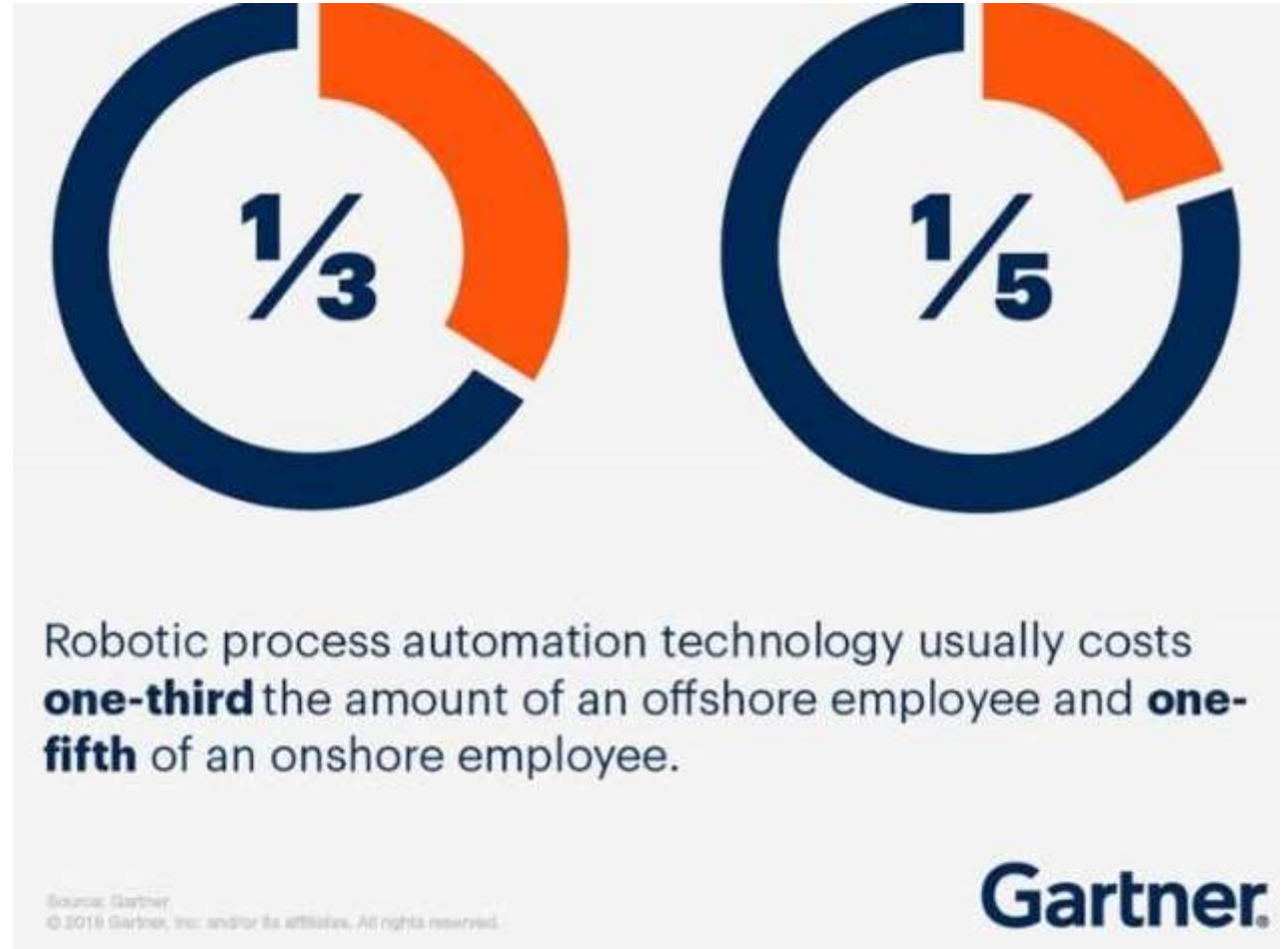
GET AUTOMATED

McKinsey&Company

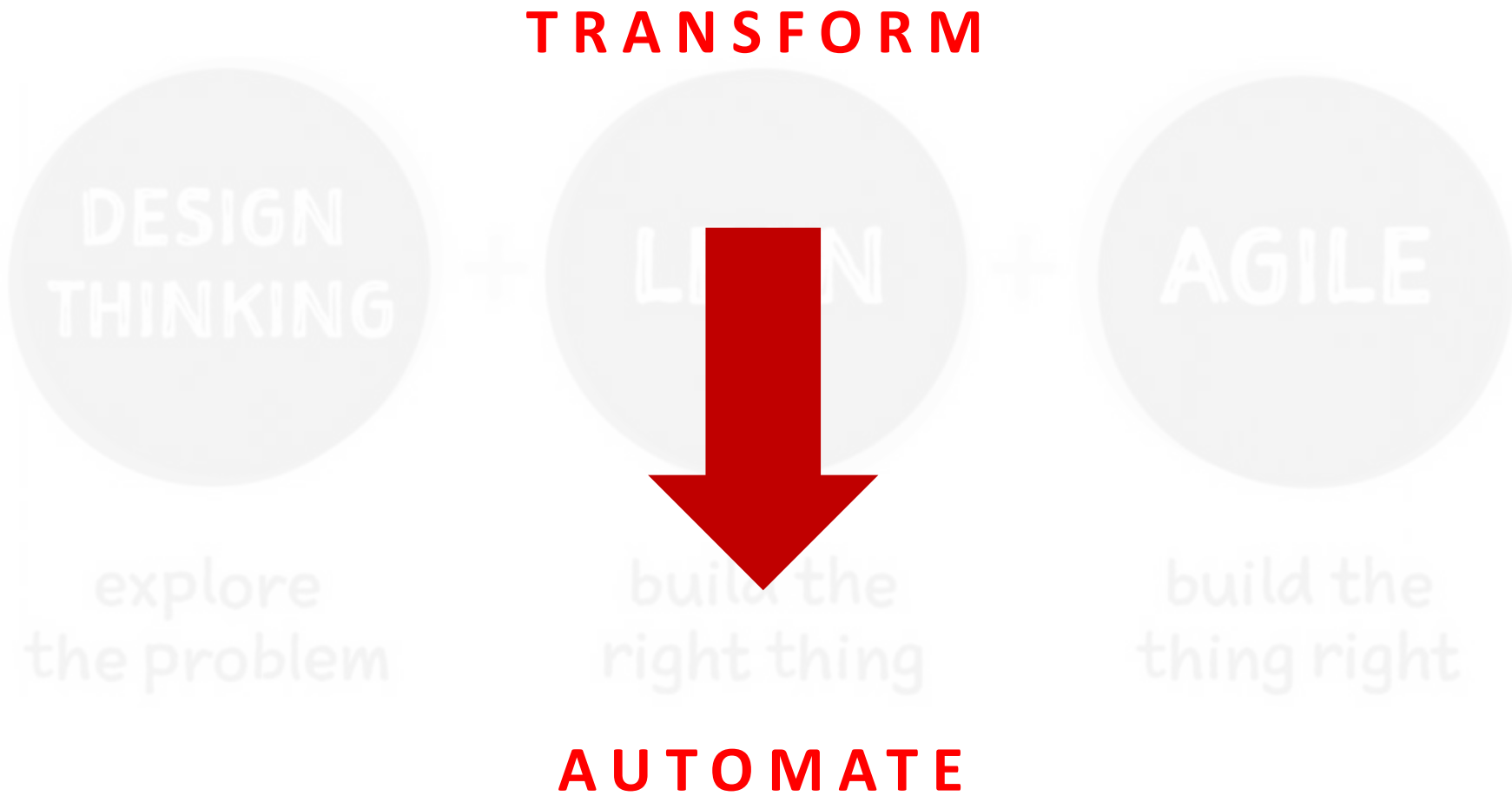
Tactical Automation



Reduce manual, error-prone and repetitive tasks of data entry, navigation and process fulfilment

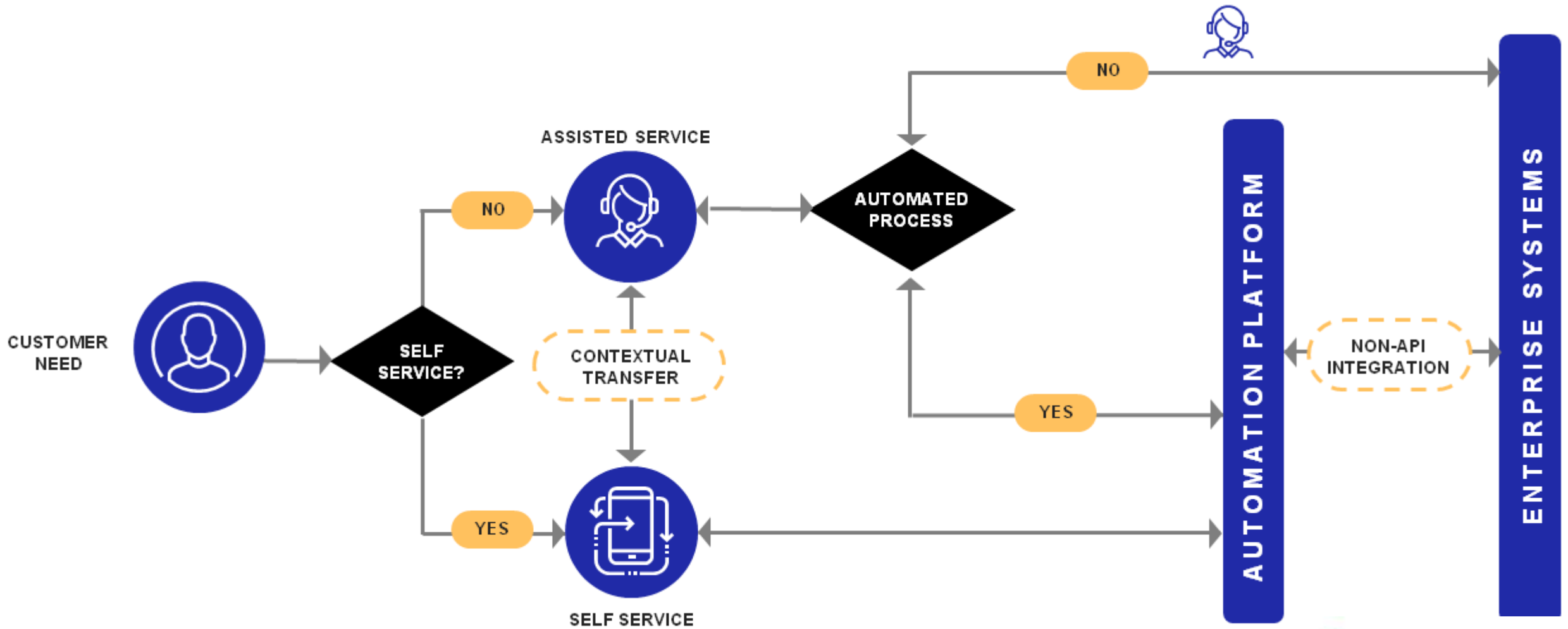


Strategic Automation



Predictive & Real Time
Become Key

Intent Driven Routing



Predictive Assistance

Amazon Connect: What we heard from customers

Agents need the right info
at the right time

WISDOM

Give agents the right
data about products
and services

CUSTOMER PROFILES

Give agents data
on a customer's
related activity

We want to identify and react
to customer issues in real time

REAL TIME CONTACT LENS

Know when to step in to
solve an issue and improve
customer experience

Help us optimize customer
service agents' time

TASKS

Make follow-up
tasks easier

VOICE ID

Optimize agents'
time on the phone



Insights Driven Improvement

Contact Lens for Amazon Connect

Contact center analytics for Amazon Connect



Activate Contact Lens with a single click in Connect

Automatically transcribe and analyze customer calls

Get full text transcription with speaker detection

Analyze sentiment, long periods of silence, and times when an agent and customer are talking over each other

Search all transcriptions for keywords, phrases, and analysis criteria

Re-organising to adapt
faster

Keeping Up



Mark Evans
Managing Director,
Marketing & Digital

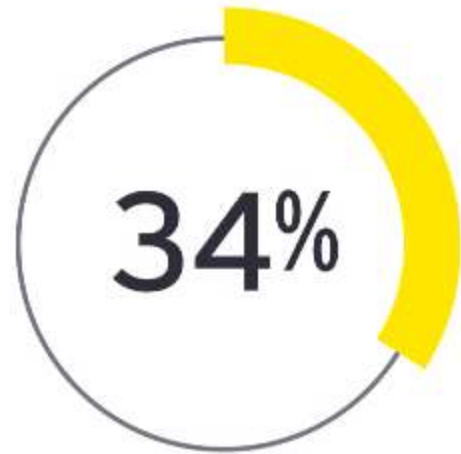


*“It’s a head-office-wide roll-out of a fully cross-functional agile operating model. The core investment is fundamentally in new mindsets and behaviours to support a **full agile model.**”*

Well-Being & Mental Health



We need to remove as much friction out of daily work life

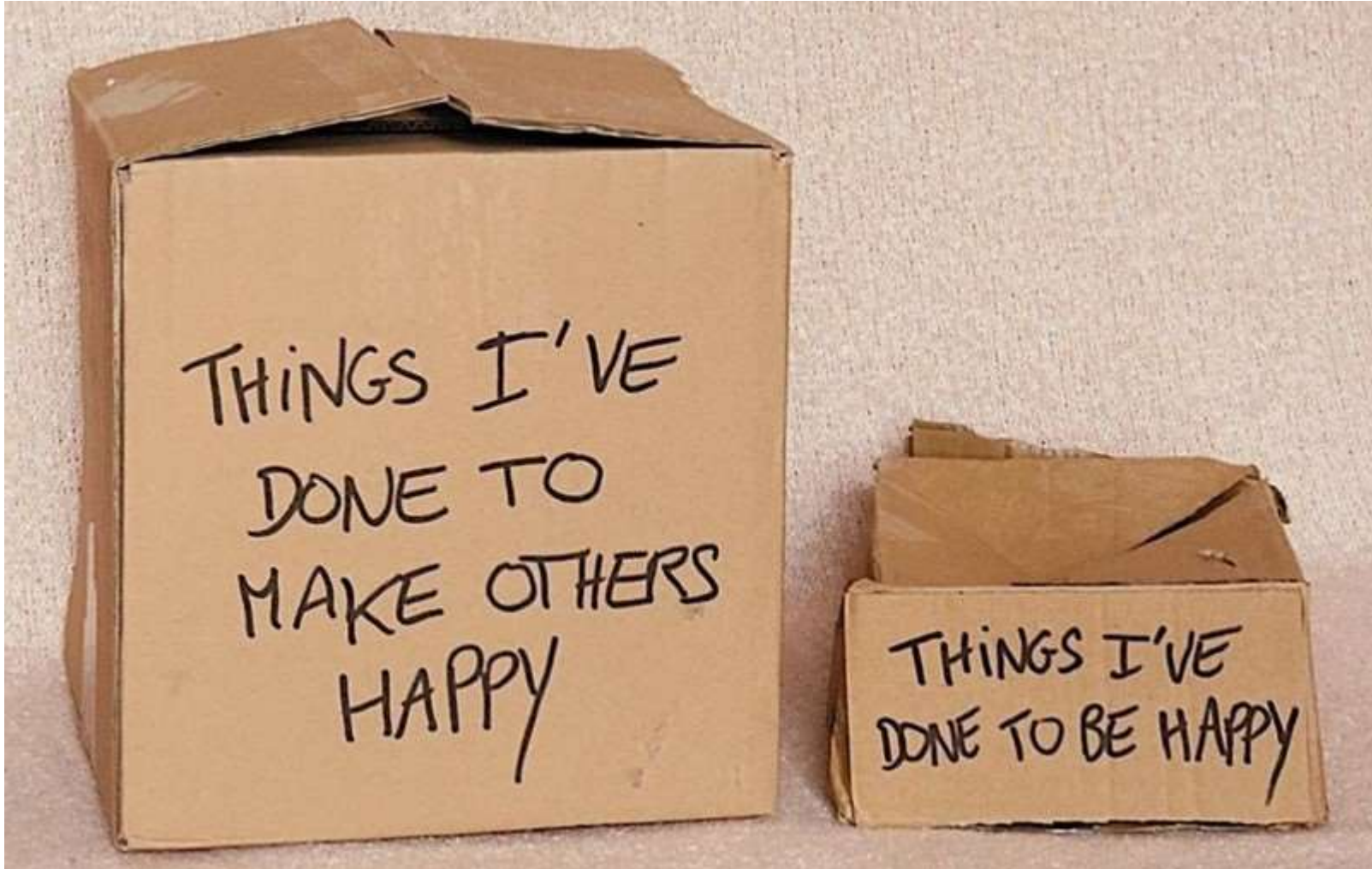


of households believe people in their household are **struggling to manage their work/life balance while working from home** due to the COVID-19 situation

EY consumer research of 2,500 UK households, 27 May-1st June 2020



Too Busy for Me?



Personal Resilience



"OK to not be OK"

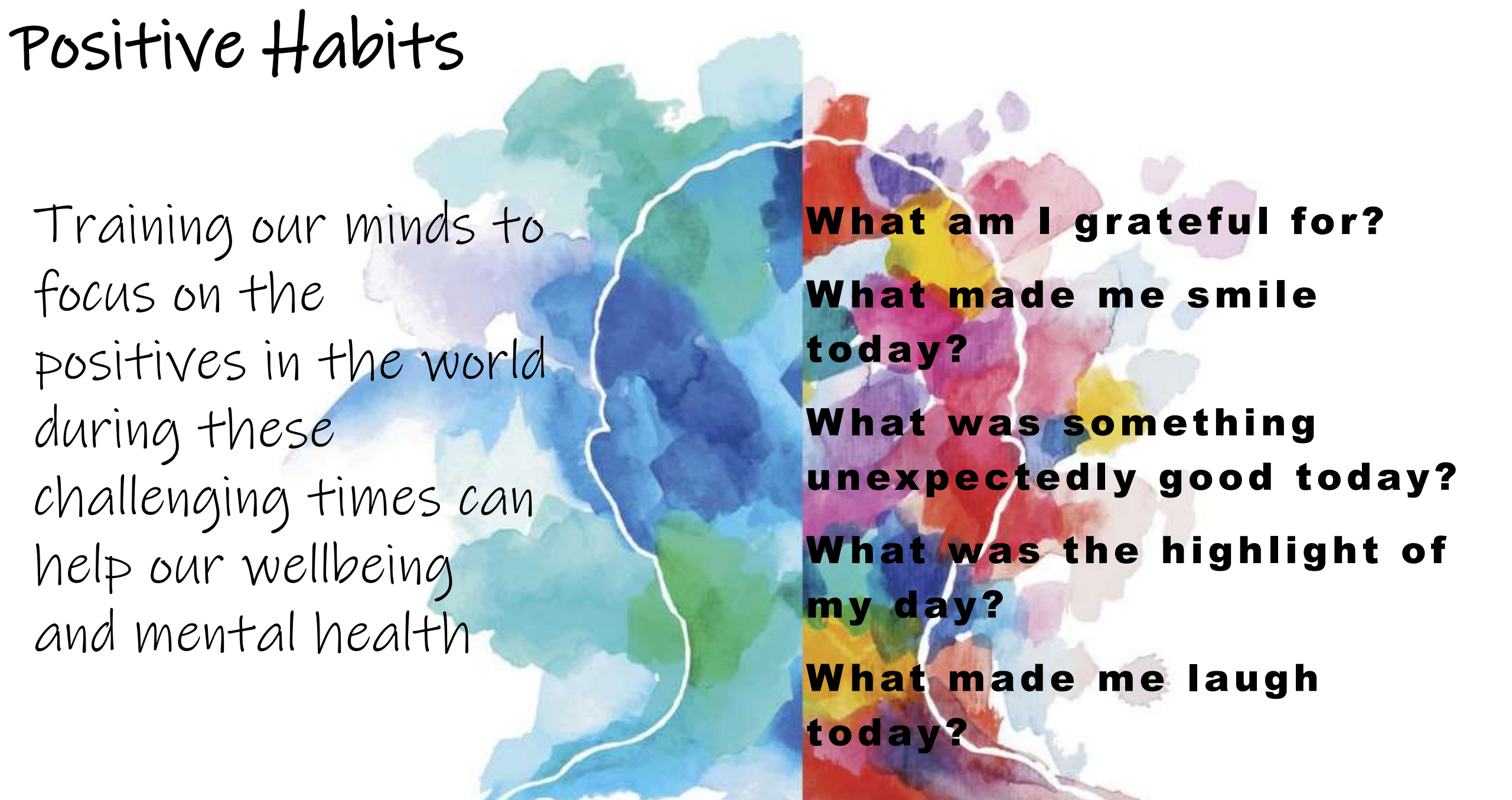
University of Oxford's Saïd Business School produced evidence of what many people have long suspected – happier people do a better job.

Its six-month study of 1,800 contact centre workers at British telecom firm BT found a clear causal effect of happiness on productivity. Happy employees not only worked faster, making more calls per hour, but also achieved 13% higher sales than their unhappy colleagues.



UNIVERSITY OF
OXFORD

Positive Habits



Training our minds to focus on the positives in the world during these challenging times can help our wellbeing and mental health

What am I grateful for?

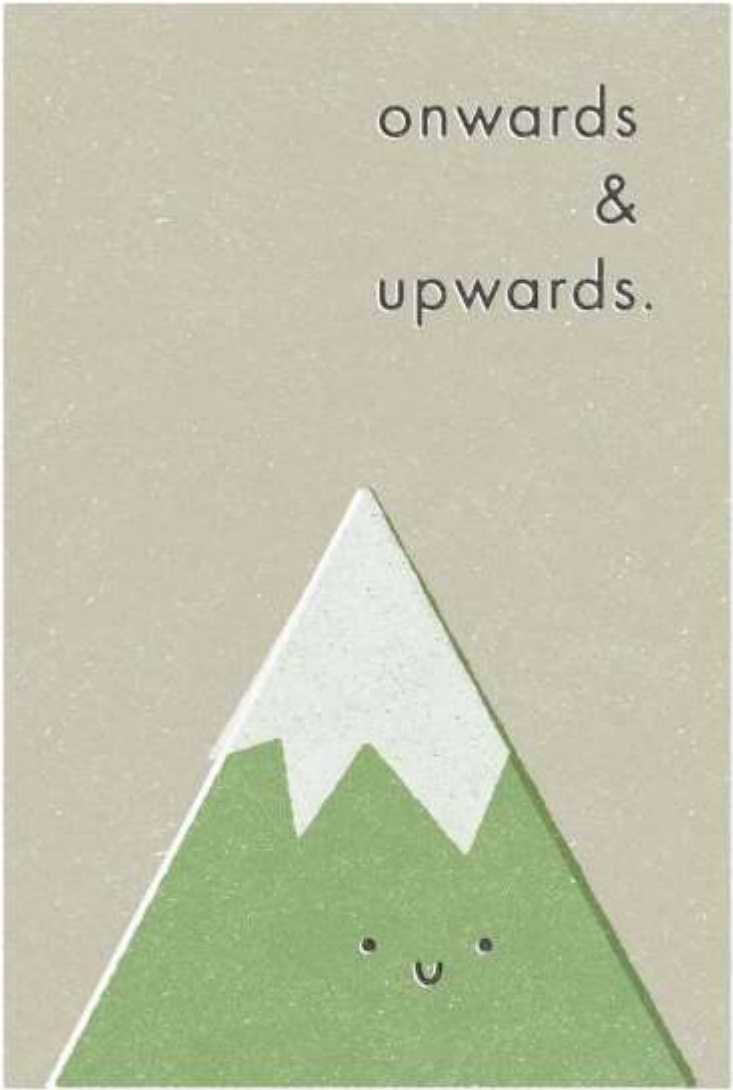
What made me smile today?

What was something unexpectedly good today?

What was the highlight of my day?

What made me laugh today?

Leaders setting the
right example



work
career
business
performance
responsibility

life
health
family
friend
happiness



Showing vulnerability

Poll