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The Cross Channel Customer Experience

Challenges, Trends, and Gaps in Customer Expectations Across 16 Key Economies

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Snapshot of Key Findings by the Numbers:

90	Percent of consumers who have interacted across multiple channels in the past year
44	Percent of consumers who state that "better human service" is the best way to improve cross channel conversations
29	Percent of consumers who would like customer service to leverage Twitter to communicate with them
8	The number of frequently-used types of cross channel conversations that consumers say occur

Cross channel conversations occur when a consumer initiates a request or poses a query in one channel, and then continues that same conversation through multiple contact methods in order to reach a resolution.

Cross channel conversations have had a major impact on customer service expectations for consumers across all age groups, not just for those who are younger and more tech-savvy.

This survey asked consumers which new communication channels they prefer to use when interacting with a company, and what they think enterprises should be doing across multiple channels to address the pace of change in customer service.

In the distant past, companies across industries controlled the customer experience through face-to-face retail environments. Then, a few decades ago, a significant part of the customer service experience moved to phones and contact centers, enabling longer hours, greater convenience, and increased efficiency.

Today, companies are facing even greater customer service challenges. As baby-boomers move toward retirement, an even larger consumer population with potentially greater influence is emerging. These are the millennials, or Generation Y, born between 1982 and 2001 — a generation that readily embraces most new communications channels.

It is important to note, however, that the move toward cross channel conversations is not purely age-based. While many analysts have seen the evolution of customer service as a generational change, it is not so; cross channel conversations appeal to all ages. Virtually all types of consumers are already leveraging cross channel conversations in some form or another, whether via e-mail, smartphones, or Internet-based self-service.

Consumers today expect companies with which they do business to interact with them through a growing number of channels. These channels — while still dominated by voice — increasingly include SMS (texting), e-mail, live chat, Web self-service, and social media. Many companies have already begun adopting these emerging channels to give customers choices that go beyond traditional phone interactions.

As consumers adopt the use of new communication channels, enterprises are adjusting their entire customer service strategies. The critical challenge is to transform the customer experience from a series of single, independent channels to multiple, integrated ones.

What channels do consumers use most today? What do consumers think about the progress that has been made to-date? What new channels would they like to see implemented? And what steps do consumers believe that companies must take in order to evolve? To answer these questions, Genesys collaborated with leading industry analysts at Datamonitor/Ovum to assess the progress of cross channel conversations.

Genesys engaged an independent research firm, Greenfield Online, which conducted an online poll of consumers around the world. The 28-question survey — which covered 16 major economies in North America, Latin America, Asia Pacific, and Europe — seeks to capture the key factors that influence consumer loyalty, satisfaction, and customer service preferences. In total, 8,880 consumers from virtually every age group and income bracket were surveyed, with a minimum sampling of 500 per country, to determine what companies should be doing to improve the customer experience.

The results of the survey feedback and research are included in this report: *"The Cross Channel Customer Experience,"* which provides an in-depth look at the issue. Please note that this report presents the survey results from 16 countries; additional individual country reports will be made available separately from Genesys as those results are tabulated.

At Genesys, we believe it is important to continually gain perspective on the changing nature of customer service, as well as consumer perceptions of it. We are extremely aware of the challenges enterprises face in today's dynamic environments as they strive to deliver on their vision of a great customer experience.

We hope this survey will be of use for customer service organizations, as well as others, to help them understand the opportunities and the challenges ahead for all involved.

Key Findings

90% of Consumers Interact Across Multiple Channels

Behind the Numbers

How often do consumers interact today via multiple communication channels?

More than 90% of consumers said they had at least one cross channel conversation in the past year. Consumers were asked to identify what scenarios were applicable to them when they interacted across more than one channel. To ensure accuracy, consumers were asked to identify specific instances in which they began a cus-tomer interaction through one communication channel, and continued to resolve the same inquiry over a second one. They reported eight frequently encountered scenarios where they continued a customer service conversation while switching channels.

A 54% majority of consumers started with the Web and most then went to a "voice agent." This consumer behavior pattern is repeated in two other areas: 1) in Chart 9 where consumers, in overwhelming numbers, indicated the most satisfying channel of customer service was the phone and 2) in Chart 10 where consumers indicated that the highest priority for investment be "Better human service." This leads to the conclusion that consumers start customer service in a channel they find most convenient, but if issues arise or transactions are too complex, the best escalation is to a customer service representative who can consult and resolve the issue.

Chart 1: Reported paths of actual and desired cross channel conversations

START FROM	GO TO Web	Voice agent	IM / Chat / SMS agent	Call back to phone/mobile
Web		32%	22%	
E-mail		23%		
Social media		11%		
Fax	7%			
Voice agent				15%
Mobile/SMS		5%	10%	

Generational Differences in Preferences

Consumers were also identified by age group to determine whether any particular scenario applied largely to a certain specific generation. The survey found that there were some significant differences based on age for the starting point of cross channel conversations. Younger consumers, under the age of 27, said they started on the Web and moved to IM or chat more frequently than consumers in three other age groups: 27-43; 44-62; and above 62. For example, 26% of those under age 27 said they had begun a transaction on the Web and moved to chat or IM, compared to 22% of those from 27-43, followed by 20% from 44-62, and 15% of those above 62.

Chart 2: Comparing age groups in cross channel conversations from Web to IM or chat
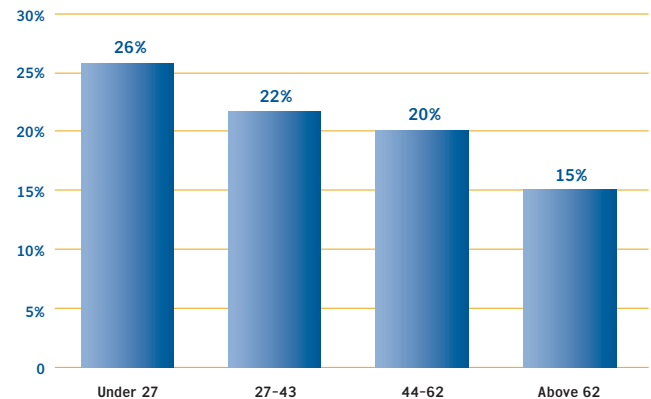

A small, but significant, number of consumers are already starting out in social media and moving to engage with customer service. Just over 11% of consumers overall reported doing so, but among those under age 27, a full 15% reported doing so.

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Chart 3: Comparing age groups in cross channel conversations from social media to assisted service
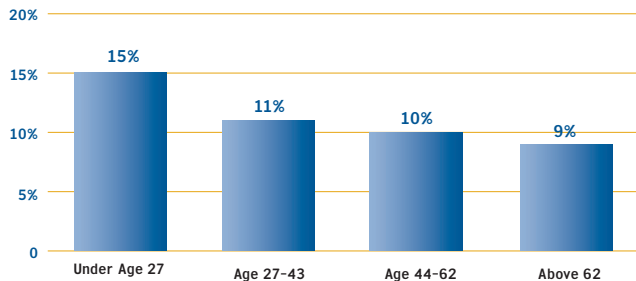

All Ages Embrace New Communication Channels

One of the drivers toward moving to cross channel conversations is the rate at which consumers are starting out in new communication channels. For example, consumers who start out on the Web are more likely to require chat, voice, or some other communication channel. By that measure, cross channel conversations should rise, as consumers are rapidly embracing the Web, chat, SMS, and e-mail. Overall, a significant number of consumers from all age groups are leveraging new channels of communication for customer service engagement, with the highest uptake in e-mail.

When asked whether they had interacted with a customer service organization via the Web, overall usage was higher for younger age groups, but still significant. Use of e-mail is high for all age groups, with little difference between them.

*Chart 4: Generational comparisons for e-mail*
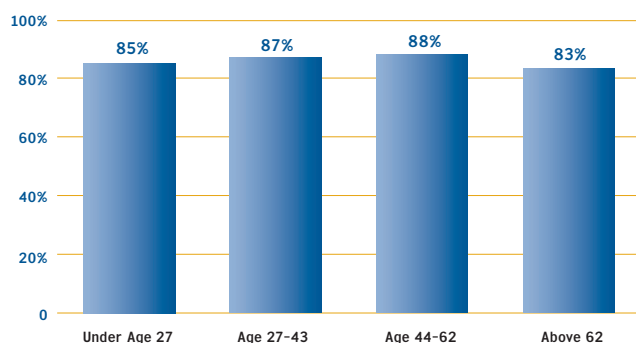
Web self-service also shows significant traction, with over 80% of all consumers responding that they have used Web self-service in the past year.

Chart 5: Generational comparisons for overall use of Web self-service
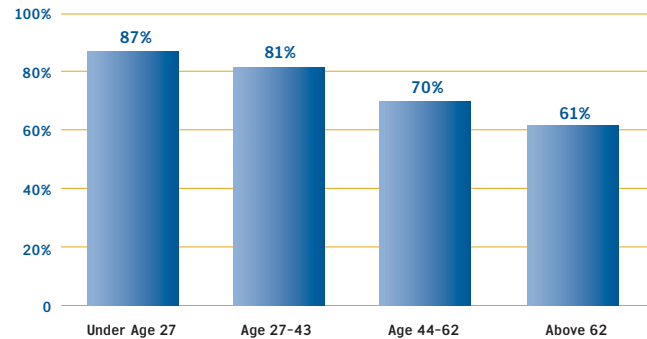
Web chat is also being embraced for customer service, and shows slightly more difference in the breakdown by age group, with the youngest consumers more likely to have engaged in it than older consumers.

*Chart 6: Generational comparisons for overall use of Web chat*
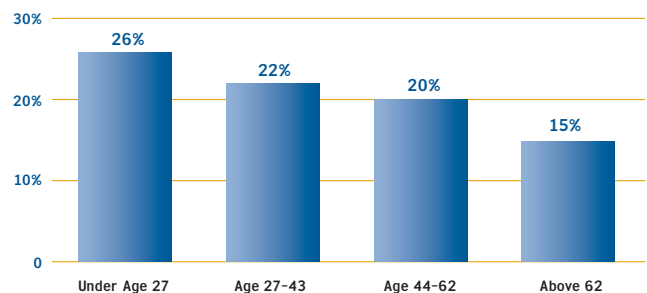
Text messaging (SMS) is still less popular than other new channels, though it is gaining ground. Overall 8% of consumers said that they have used SMS for customer service in the past year.

On a global basis, SMS is equally popular among all ages for customer service. For example 23% of consumers under the age of 27, said they interacted via SMS this year, compared to 22% in all other age brackets.

Chart 7: Generational comparisons for overall use of SMS text messaging
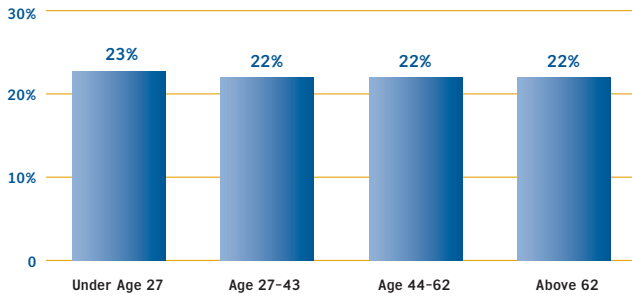
Comparing Progress among Industries

No industry had a large lead in delivering cross channel conversations. However, the financial services industry has a leading position, followed by consumer product companies. While financial services rated the best, consumers did not identify any industry as doing an excellent job of delivering integrated cross channel conversations.

Chart 8: Which industry does the best job of customer service?
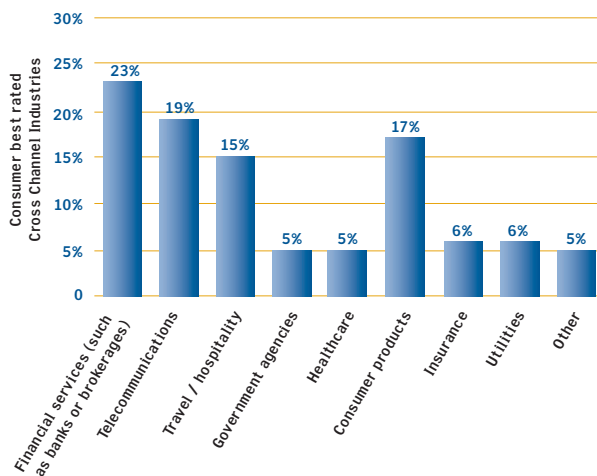
Best Communication Channels

Consumers were also asked to select the most satisfying areas of customer service. When asked to cite the areas where companies are most effective, consumers selected their preferred channels of interactions (first or second choice). The consumer's first choice is shown in blue, and the second choice in red.

Chart 9: Preferred communication channels
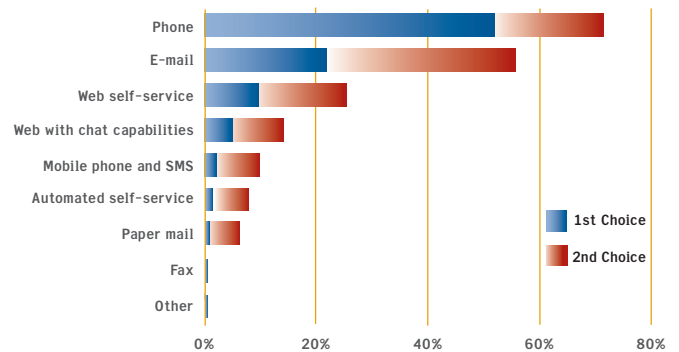
Areas Needing Improvement

When asked where they would most like to see companies deploy additional methods for customer service communication, consumers overwhelmingly asked for better integration of human contact center agents with other channels. They also wanted newer delivery methods, including avatars, social forums, and multimedia.

*Chart 10: Most requested areas of investment*
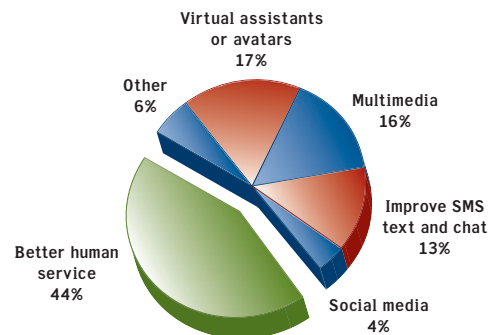
Consumers overwhelmingly said they would like more proactive outreach. More than 86% of consumers said they would find proactive engagement either a "strong benefit" or would "welcome proactive assistance" when they were stuck on the Web or in self-service.

Chart 11: Consumer views of proactive contact

Welcome 42%
No thanks 14%
Strong plus 44%
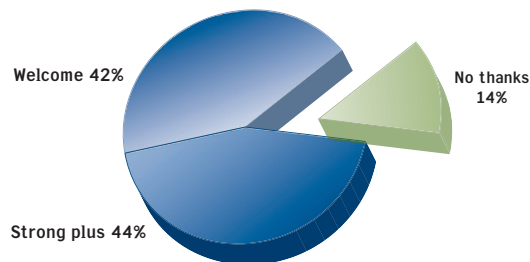
Consumers are starting to use social media in small, but still significant, numbers. When asked whether they would like to receive updates via Twitter, 29% of all consumers said yes, although the number is likely to grow in the near future, as younger consumers become a focal point.

Chart 12: Would you sign up to use Twitter for customer service updates?

No 43%
Yes 29%
Unsure 28%
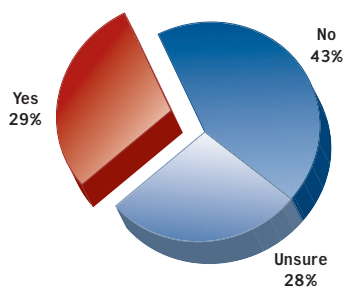
Conclusion

While many enterprises have accelerated their implementation of select, new communication channels, very few have tied them together into a complete system of customer care.

Companies need to assess their existing communication channels and determine how to make interactions more convenient across multiple channels. It is imperative that an enterprise engage consumers on the customers' terms or risk losing them.

To provide the best customer experience, enterprises need technology to retain the context of a customer transaction as it moves across channels. For example, this context includes the identity and intent of the customer, so that a customer who escalates from self-service to an agent will not have to repeat information such as an account number or query that they already provided in the other channel.

While younger consumers are more likely to embrace new channels, they are not alone, and consumers from all age groups are starting to engage with customer service across more than one channel.

Consumers will welcome companies who create a single customer view and are more proactive in their interactions.

And, lastly, companies need to become more personalized in their overall treatment of consumers by integrating customer data and developing processes that recognize the value and history of each customer.

This initial global survey is part of a series conducted by Genesys in partnership with key industry thought leaders, such as Datamonitor/Ovum. For more information, please visit: **www.genesyslab.com**

Genesys Worldwide

Genesys is the leading provider of software to manage customer interactions over the phone, Web, and mobile devices. The Genesys software suite manages customer conversations across multiple channels and resources — self-service, assisted-service, and proactive outreach — to fulfill customer requests, optimize customer care goals, and efficiently use resources. Genesys software directs more than 100 million customer interactions every day for 4,000 companies and government agencies in 80 countries. These companies and agencies can leverage their entire organization, from the contact center to the back office, to dynamically engage with their customers. As a result, Genesys stops customer frustration, drives efficiency, and accelerates business innovation. For more information, go to www.genesyslab.com.**Americas**

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