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2015 Global Contact Center Survey Executive summary

June 2015



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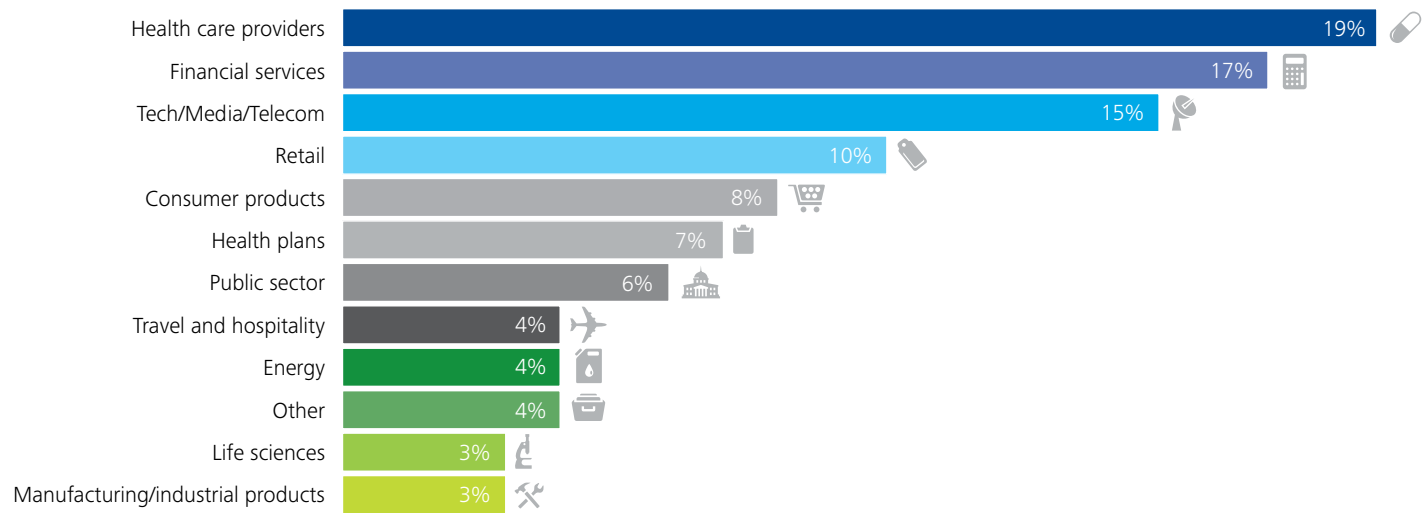
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Survey overview

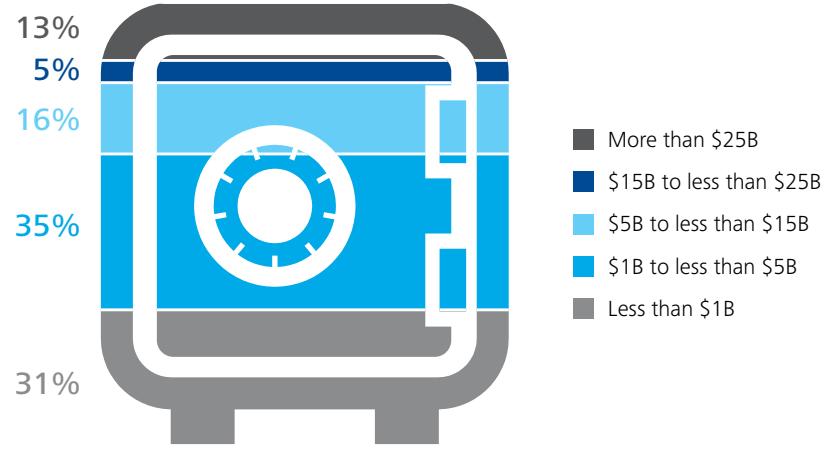
Respondent profile

- Deloitte's 2015 Global Contact Center Survey represents over 300 contact centers across the globe, spanning 12 industries.
- Over 30% of respondents have annual revenues over \$5 billion and 40% have over 10,000 FTEs
- 60% of respondent organizations have three or more contact centers and 50% have been operating contact centers for over 10 years
- 70% of respondents have mid (100+FTEs) to large (500+ FTEs) contact centers

What is your organization's primary industry sector?



What are the annual revenues of your organization?



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Key Findings of the 2015 Global Contact Center Survey

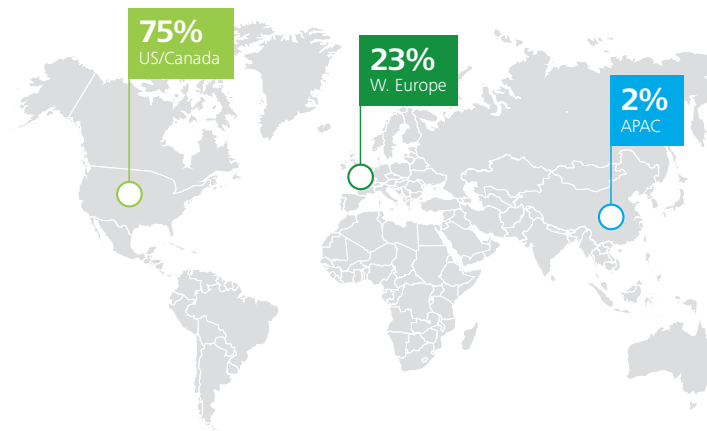
Geography

- 75% of respondents are headquartered in US/Canada — of them, 60% have operations outside of US and Canada and 25% operate in over 10 countries
- Companies in US and Canada have most of their contact centers in US/Canada, followed by APAC
- Companies in Western Europe have most of their contact centers in Eastern Europe, followed by Western Europe
- Labor cost, labor availability, and proximity to corporate headquarters were identified as the top three location considerations

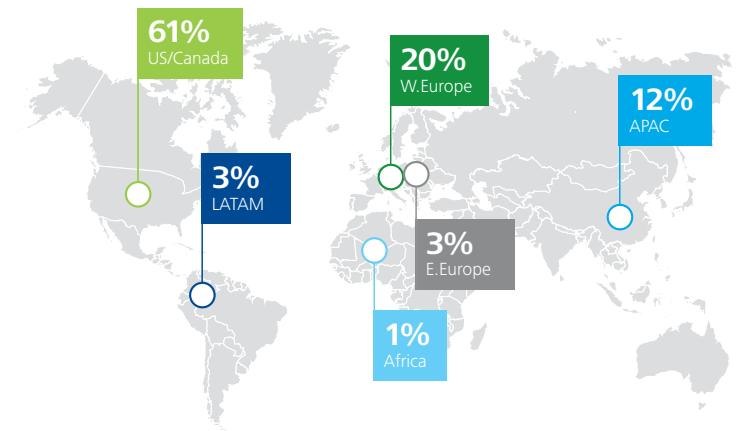
Organization and scope

- 73% of contact centers serve B2C customers — over 60% provide customer service, followed by sales at 14%
- 74% of contact centers report to a single department versus 37% in 2013 — Operations, at 62%, dominate the reporting structure
- Nearly 60% of respondents hold the CXO accountable for the customer experience delivered through the contact center(s)

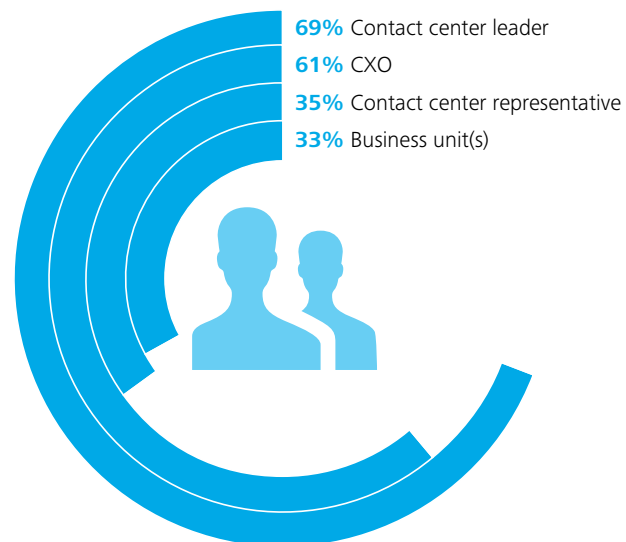
Where is your organization's headquarters located?



In which region are your organization's contact center(s) located?



Who is responsible for the customer experience within the contact center(s)?

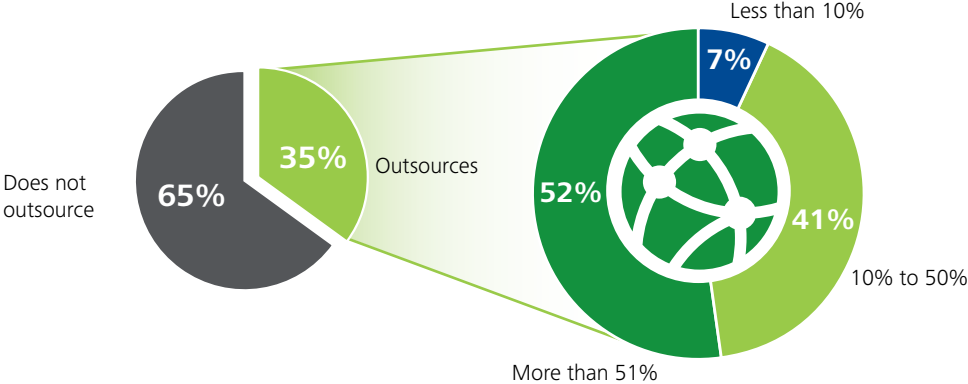


Key Findings of the 2015 Global Contact Center Survey

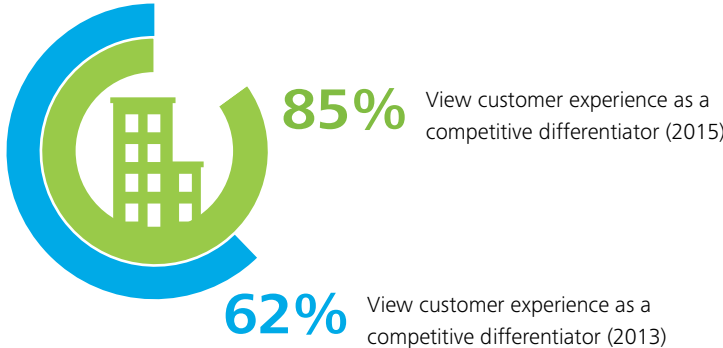
Operations

- 35% of the respondents outsource their contact centers, and of them, more than half outsource over 50% of their resources
- A quarter of respondents employ remote representatives, and of them, 70% employ less than 10% of the representatives as remote resources
- 25% of contact centers are not even measuring employee satisfaction; those that do, identify "1-on-1 feedback" as the most effective in measuring it
- Half of the respondents believe that contact centers plays a primary role in customer retention – 70% of Health Plans believe that
- Most respondent organizations view customer experience as a competitive differentiator
- Accuracy and quality of information, access to the contact center, and first contact resolution were identified as the top customer experience attributes

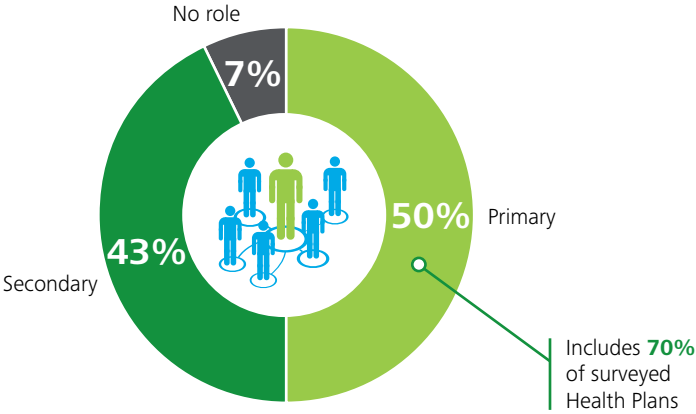
35% of the respondents outsource their contact centers, and of those, more than half outsource over 50% of their resources



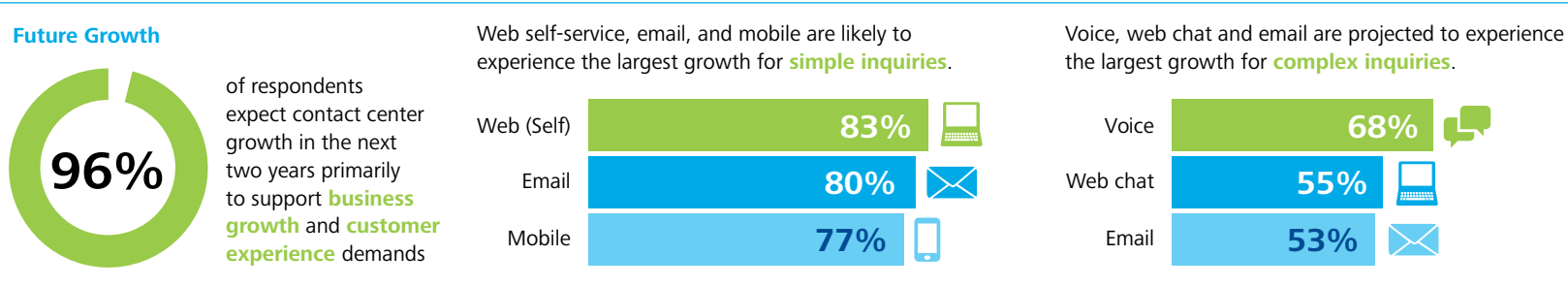
85% of respondents view customer experience as a competitive differentiator, compared to 62% in 2013



Half of respondents believe that contact centers play a primary role in customer retention



Path forward



Strategic focus	Customer satisfaction, closely followed by cost are the two most important objectives of the contact centers	→	Cost alone will decline significantly as an important contact center's strategic objectives in the next two years; Business Insights will emerge as an important objective to maximize
SaaS-based solutions	CRM is leading the way in SaaS based solutions, with WFM being the lowest user of SaaS based solutions	→	SaaS is expected to be used by at least 25% of respondents across all solutions in the near future CRM will continue leading the way in SaaS based solutions in the next two years, but WFM will make the biggest leap from 10% to 30%
Employee engagement	Addressing "Schedule compliance and effectiveness" is the top priority today	→	Focus will shift to addressing "Process adherence" and "Access to skilled/qualified talent"



Index of survey questions

The content of the complete survey results includes participant answers to the following questions:

- Which industry segment does your company serve?
- What are the annual net revenues for your organization?
- What is the size of your organization in FTEs?
- In how many countries does your organization operate?
- Select the regions in which your organization operates.
- Organization name:
- Corporate headquarters:
- Respondent contact information
- Which department(s) do contact center(s) report to within your organization?
- How many contact centers does your organization have?
- Please provide the information for each contact center. If your organization has more than 10 contact centers, please answer these questions about the 10 largest contact centers or the ones with which you are most familiar.
 - Please answer the following for the entirety of your contact centers within the organization (number of internal representatives, number of outsourced representatives, number of remote/work at home representatives, percentage of annual employee turnover)
 - Does your organization plan to consolidate, deploy new or relocate contact center(s)?
 - What are the top 3 locations you are considering or would consider for new contact center(s) location or contact center(s) relocation?
 - What are the main drivers of growth within your contact center(s)?
 - Which would be the likely approach to increasing the size of your contact center workforce?
 - For which channels do you expect to see contact volumes increase in your contact center(s) over the next two years?
 - Specific to the contact channels your contact center(s) provide, what are your top priorities over the next two years?
 - How would you describe your contact channel strategy within your contact center(s)?
 - Which channels have you been able to integrate as part of your channel strategy?
 - Do you plan to develop a contact channel integration strategy within your contact center(s) in the next 2 years?
 - Which of the following are among your reasons for not planning a contact channel integration strategy in the contact center(s)?
 - In the next two years, where do you expect to derive the most business value as a result of reporting and analytics-driven improvements?
 - Which solutions do you currently use or plan to use in the next two years?
 - What are the primary drivers for moving to or considering a move to cloud-based contact center solutions?
 - Do you plan to address any of the following employee-related challenges in your contact center(s)?
 - Do you measure contact center employee satisfaction?
 - Please mark the following methods of measuring contact center employee satisfaction as not used, ineffective, or effective.
 - Please mark the following methods of increasing contact center employee satisfaction as not used, ineffective, or effective.
 - Who is primarily responsible for (who "owns") the customer experience within the contact center(s)?
 - Do you view the customer experience provided through the contact center(s) as a competitive differentiator?
 - Please rank the following list of customer experience/interaction attributes provided by the contact center(s).
 - What are the primary drivers of a poor customer experience within the contact center(s)?
 - Please select from the following list the three most effective ways in which your contact center(s) capture customer feedback.
 - What role does the contact center(s) play in customer retention?
 - How does your organization weigh the importance of cost, revenue, customer satisfaction and/or business insights gathered within its contact center(s)? How do you think will that change in the next 2 years?
 - How important are the following strategic objectives for your organization's contact center(s)?

Contact us

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