2021
State of the Contact Centre Survey

Presented By

Table of Contents

About CSPN

Over the past 20-years, CSPN has helped over 1000+ clients to design, develop, and deliver high-impact training with the goal of making remarkable differences in the lives of employees and customers. CSPN leverages human-centered design principles and best practices in adult learning to drive high engagement and content retention.

CSPN helps organizations answer two strategic questions:

✓ **How do we create happier customers?**
✓ **How do we create happier employees?**

CONSULTING
Human-centered Design that helps organizations improve their customer experience

LEARNING
Engaging and evolved instructor-led and online adult learning that drives business results

COMMUNITY
Annual calendar in-person and online professional development events

20+
Years of Service

1,000+
Clients

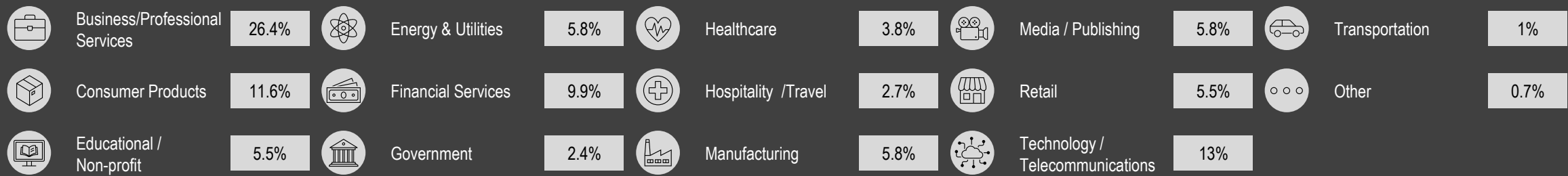**98%**
Averages NPS

10
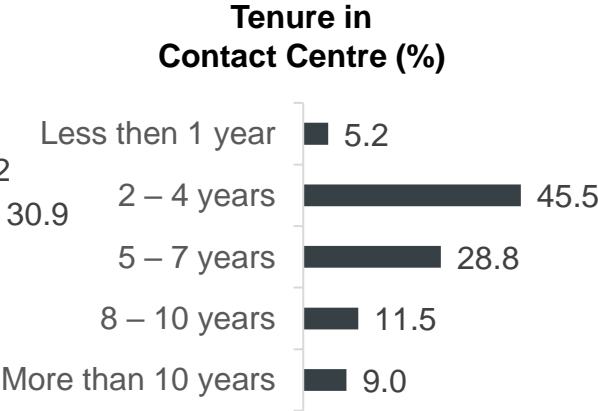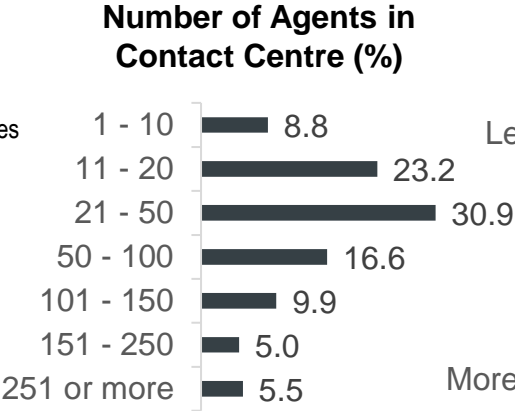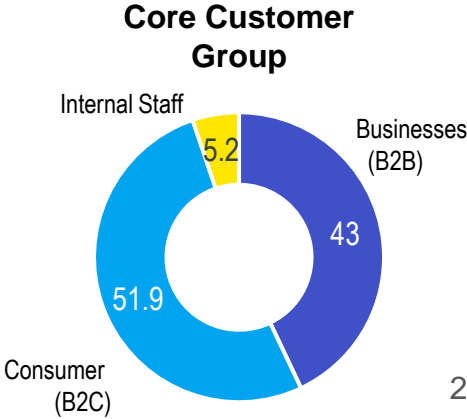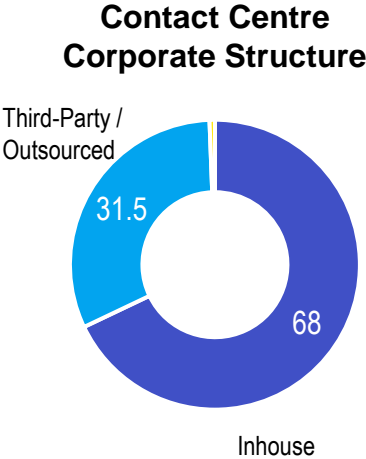Designations & Certifications

15,000+
Members

15+
Public Sector Vendor of Record Agreements

2021 State of the Contact Centre Highlights

In Q1 2021, the Customer Service Professionals Network Inc. ("CSPN") canvassed over 400 organizations across Canada to understand the key trends influencing how contact centres are operating. The survey was conducted in the height of the COVID-19 pandemic and included responses from over 14 industries.

400+ Organizations

Contact Centre Corporate Structure

- Third-Party / Outsourced: 31.5
- Inhouse: 68

Core Customer Group

- Internal Staff: 5.2
- Businesses (B2B): 43
- Consumer (B2C): 51.9

Number of Agents in Contact Centre (%)

- 1 - 10: 8.8
- 11 - 20: 23.2
- 21 - 50: 30.9
- 50 - 100: 16.6
- 101 - 150: 9.9
- 151 - 250: 5.0
- 251 or more: 5.5

Tenure in Contact Centre (%)

- Less then 1 year: 5.2
- 2 – 4 years: 45.5
- 5 – 7 years: 28.8
- 8 – 10 years: 11.5
- More than 10 years: 9.0

Industry	%	Industry	%	Industry	%	Industry	%
Business/Professional Services	26.4%	Energy & Utilities	5.8%	Healthcare	3.8%	Media / Publishing	5.8%
Consumer Products	11.6%	Financial Services	9.9%	Hospitality /Travel	2.7%	Retail	5.5%
Educational / Non-profit	5.5%	Government	2.4%	Manufacturing	5.8%	Technology / Telecommunications	13%
Transportation	1%	Other	0.7%				

Strategy

Contact Centres play pivotal roles in shaping how an organization interacts with its customers. To assess what strategic role contact centres play in their organizations in 2021, the survey asked:
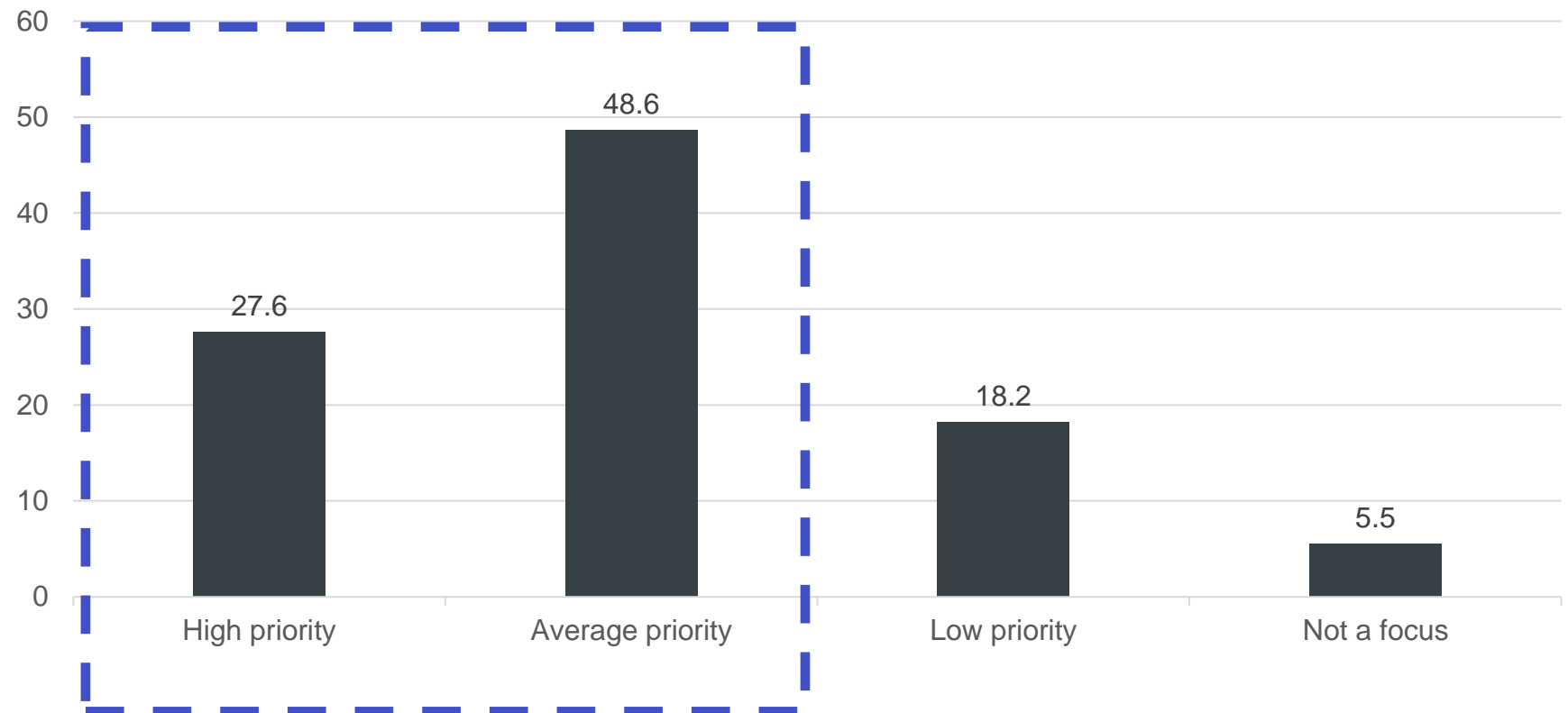
- **What investment priority is placed on your contact centre?**

- **What are the top three (3) priorities for your contact centre?**

- **What are the major strategic challenges you are facing within your contact centre?**

Strategy

Overall, **~75%** of organizations were placing **a high or average priority** signaling that contact centres continue to be on the agenda for strategic investment within organizations.
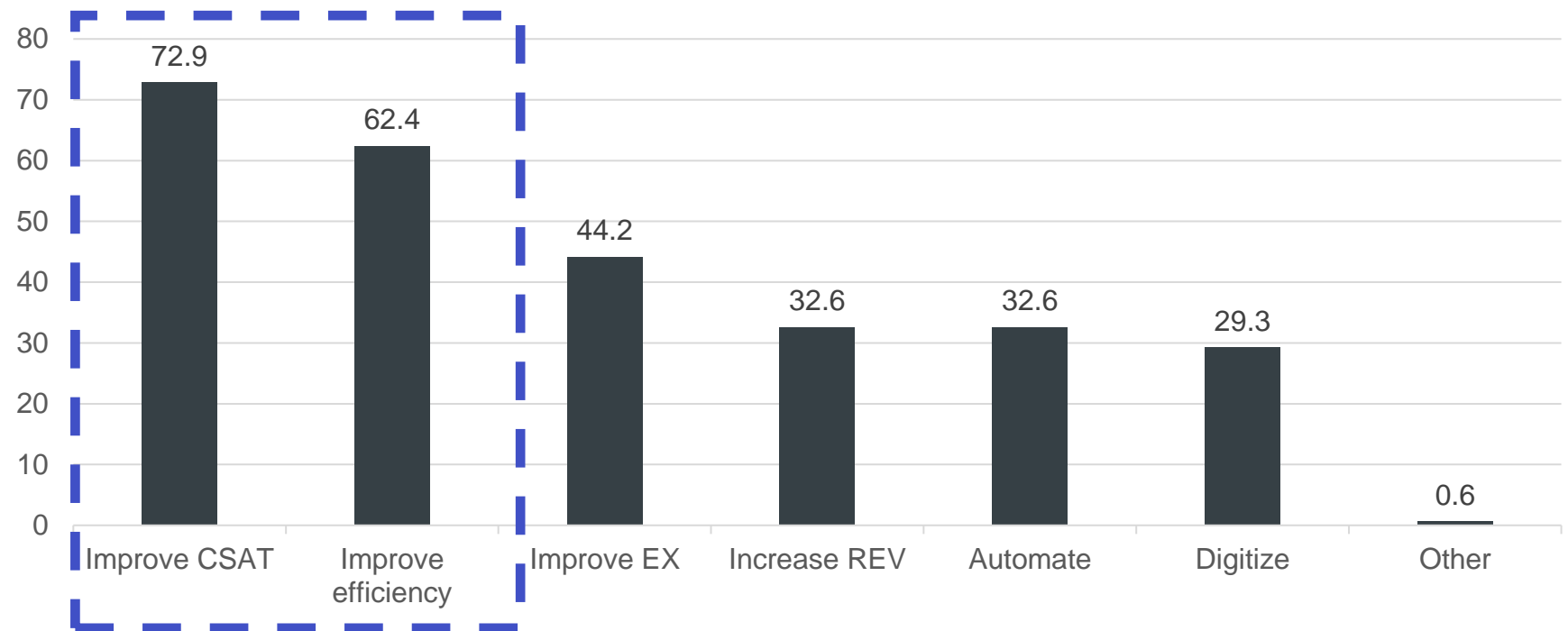
What investment priority is placed on your contact centre?

Category	Value
High priority	27.6
Average priority	48.6
Low priority	18.2
Not a focus	5.5

Strategy

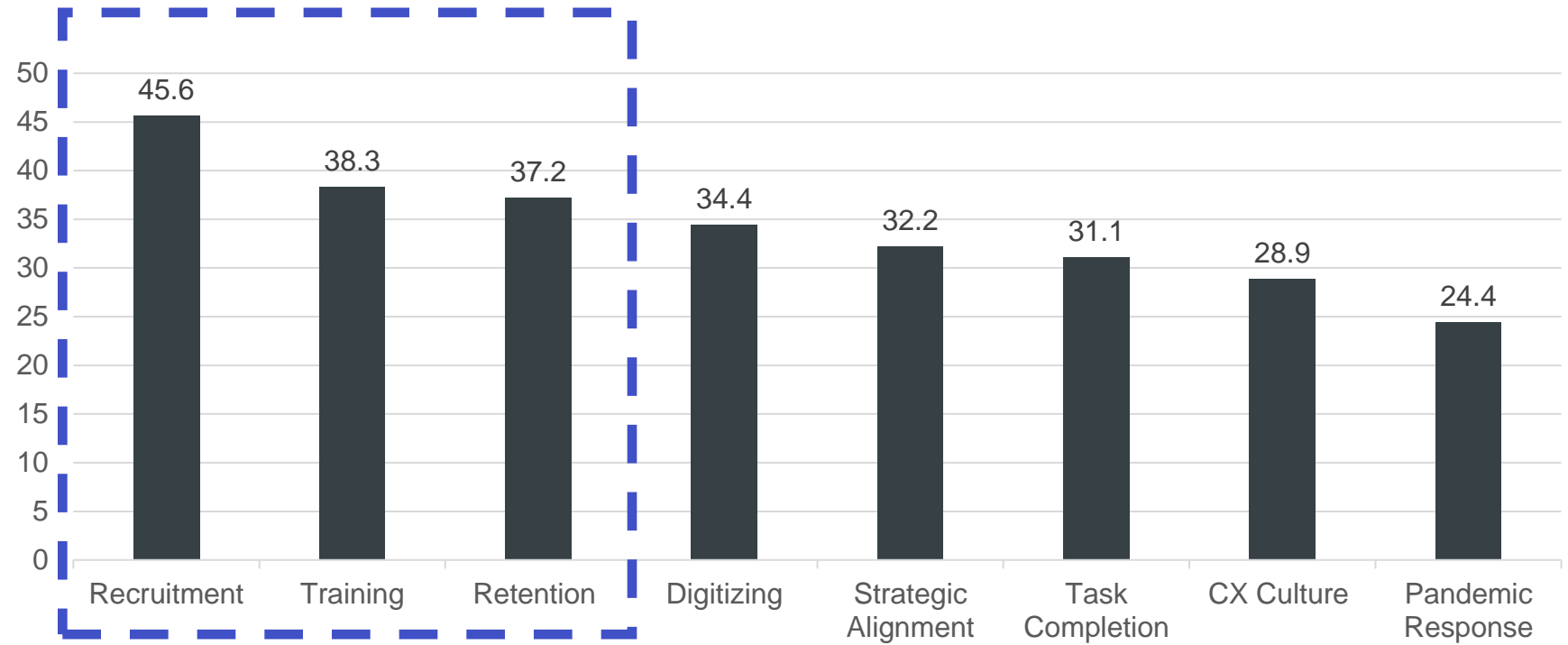When asked their top three priorities, **improving CSAT** and **efficiency** were clear priority leaders signaling a consistent focus on improving the customer experience, while delivering cost and time savings.

What are the top three (3) priorities for your contact centre?

Bar chart showing:
- Improve CSAT: 72.9
- Improve efficiency: 62.4
- Improve EX: 44.2
- Increase REV: 32.6
- Automate: 32.6
- Digitize: 29.3
- Other: 0.6

Strategy

While there is greater diversity in challenges facing contact centre leaders, it is clear that **talent management – Recruitment, Retention, and Training** – remain the largest challenges.

What are the major strategic challenges you are facing within your contact centre?

Talent

As contact centres recruit new talent, new recruits are most sought after for their communication skills.

When workers look for their new job, the two competing priorities of **quality of work environment** and **ability to work remotely** top their priority lists.

Our survey asked:

- **What are the top skills sought during the recruitment process?**

- **What training methods are most commonly used?**

Employee Priorities

Top Priorities

Quality of Work Environment
33%

Ability to Work Remotely
26%

Sense of Community
11%

Training & Coaching
11%

Ease of use of Systems
11%

Opportunity for Advancement
8%

Clear Metrics
8%

Talent

What are the top skills sought during the recruitment process?
Percentage of respondents who seek these skills during recruiting
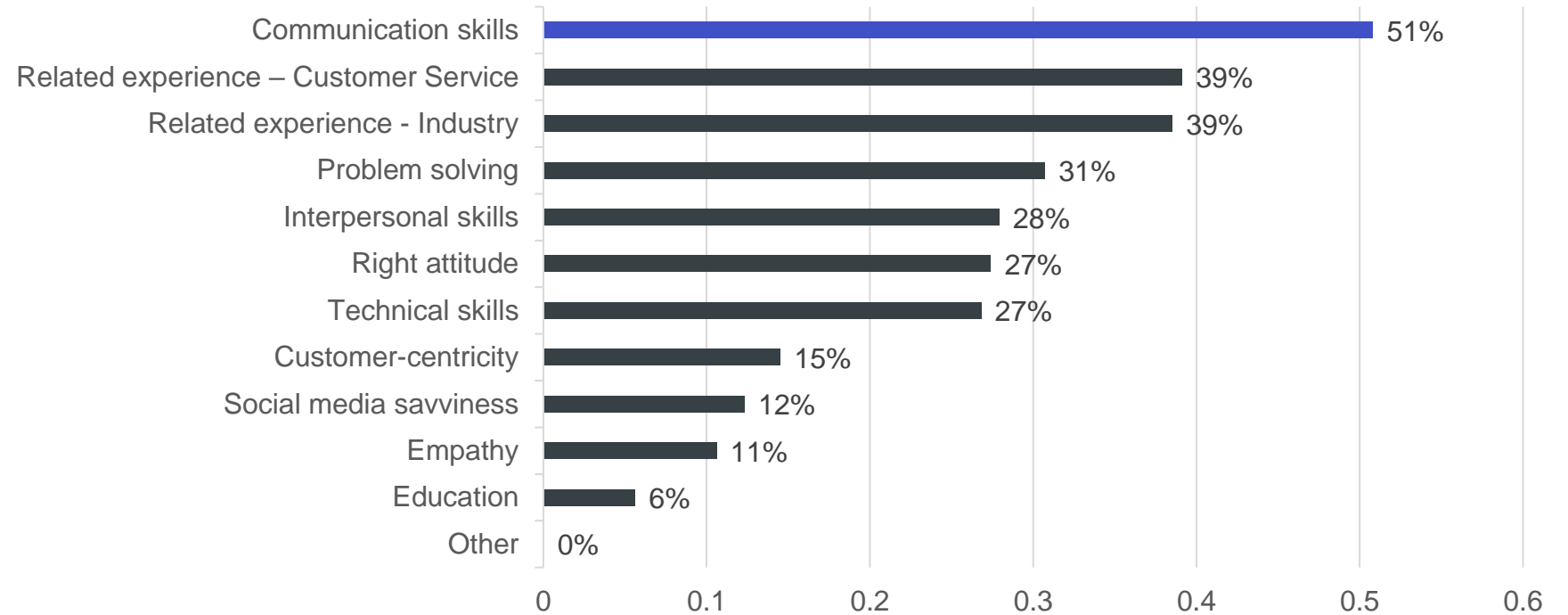
While both service and industry experience matter for hiring managers, the ability for new employees to communicate remain the most sought-after skill.

Skill	Percentage
Communication skills	51%
Related experience – Customer Service	39%
Related experience - Industry	39%
Problem solving	31%
Interpersonal skills	28%
Right attitude	27%
Technical skills	27%
Customer-centricity	15%
Social media savviness	12%
Empathy	11%
Education	6%
Other	0%

Talent

External training courses continue to be the most common for critical skills, followed by virtual webinars and in-person training.

What training methods are most commonly used?

Percentage of respondents who use these training methods

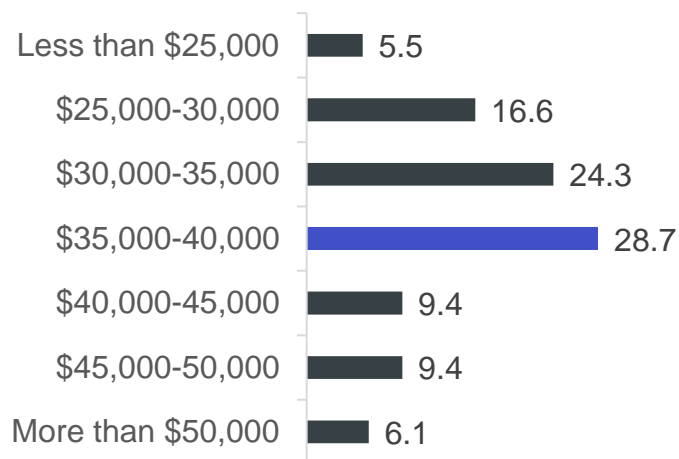| Classroom based (internal)	Virtual Instructor-led Training	Webinar	E-learning	Job shadowing / coaching	Use of external courses
70%	52%	76%	48%	46%	84%
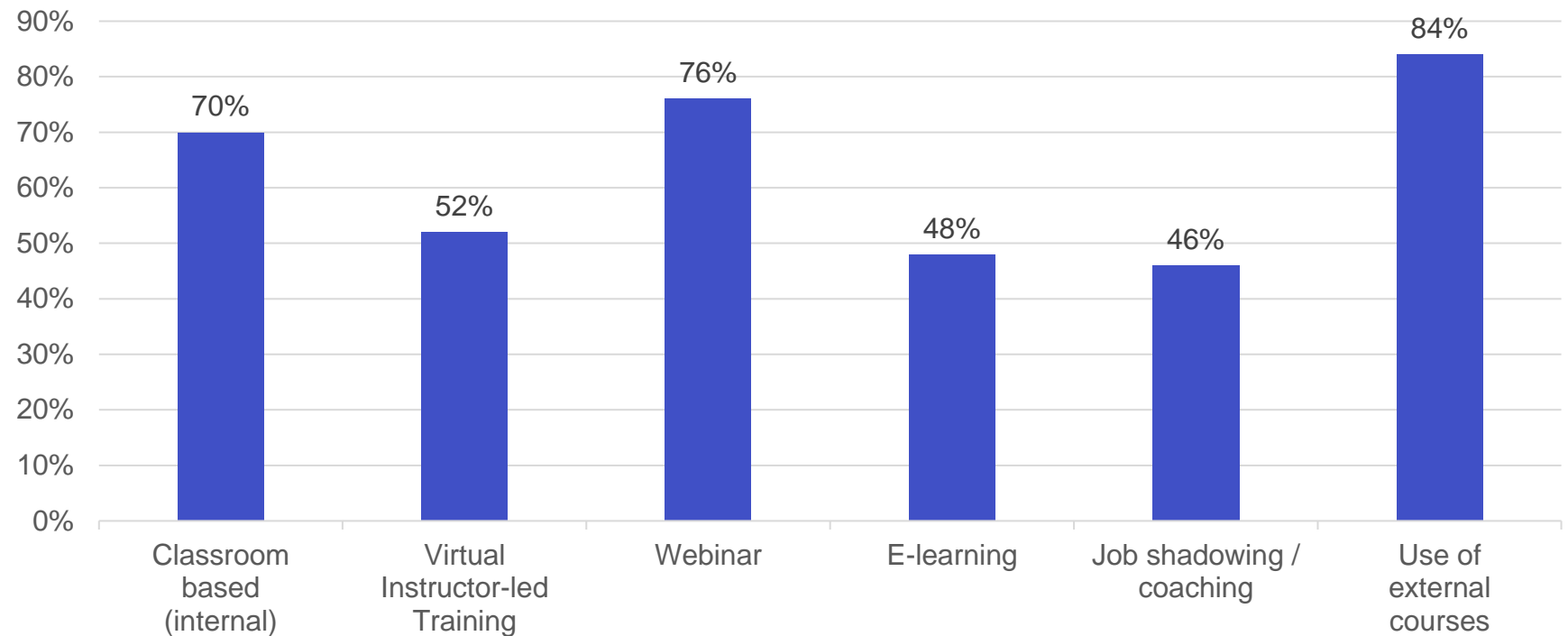
Talent

The COVID-19 pandemic saw unpresented changes to remote working and the remote workforce is forecasted to continue to grow beyond the pandemic. As organizations shift the geography of their workforce, they do not believe that on-premise vs. remote work will drive different pay rates.
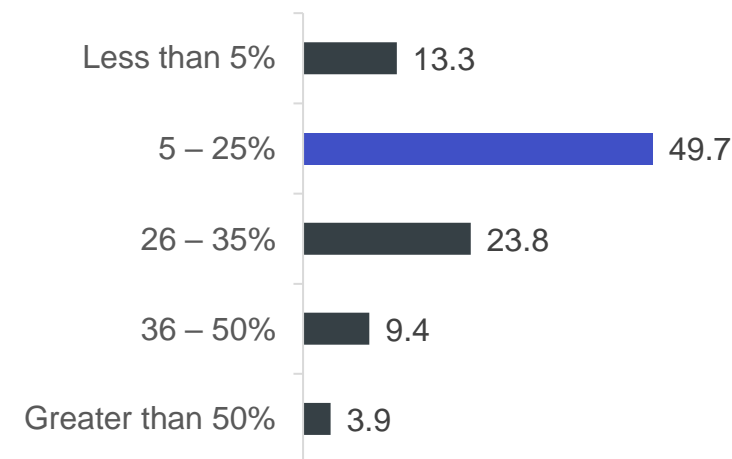
What percentage of agents will work remotely before and after the pandemic?

Category	Before COVID	After COVID
Less than 25%	38.5	31
Between 25% -49%	29.1	35
Between 50% - 74%	14	16
Greater than 75%	12.3	13
Not applicable	6.1	4

■ Before COVID
■ After COVID
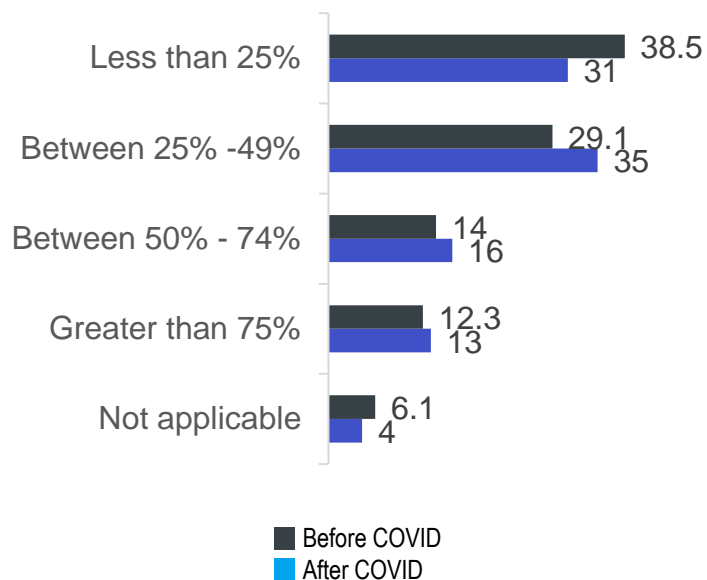
What is the average base salary for your agents?
(Percent of respondents)

Category	Value
Less than $25,000	5.5
$25,000-30,000	16.6
$30,000-35,000	24.3
$35,000-40,000	28.7
$40,000-45,000	9.4
$45,000-50,000	9.4
More than $50,000	6.1

What is your annual agent turnover?
(Percent of respondents_

Category	Value
Less than 5%	13.3
5 – 25%	49.7
26 – 35%	23.8
36 – 50%	9.4
Greater than 50%	3.9

Talent

What are the most critical skills in your contact centre?

Legend:
- ■ Management Recognizes Importance of Skill
- ■ Training Exists to Improve the Skill

Chart data:

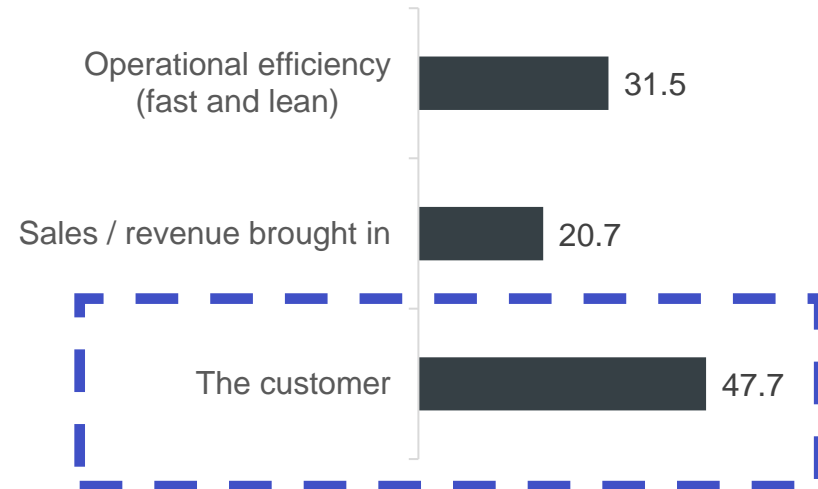| Skill	Management Recognizes Importance of Skill	Training Exists to Improve the Skill
Customer Service Fundamentals	52%	35%
Effective Communication (Voice)	58%	38%
Effective Communication (Email and Chat)	72%	42%
Handling Challenging Situations	70%	53%
Emotional Intelligence	68%	40%
Sales Fundamentals	66%	27%
Technical Skills	64%	40%
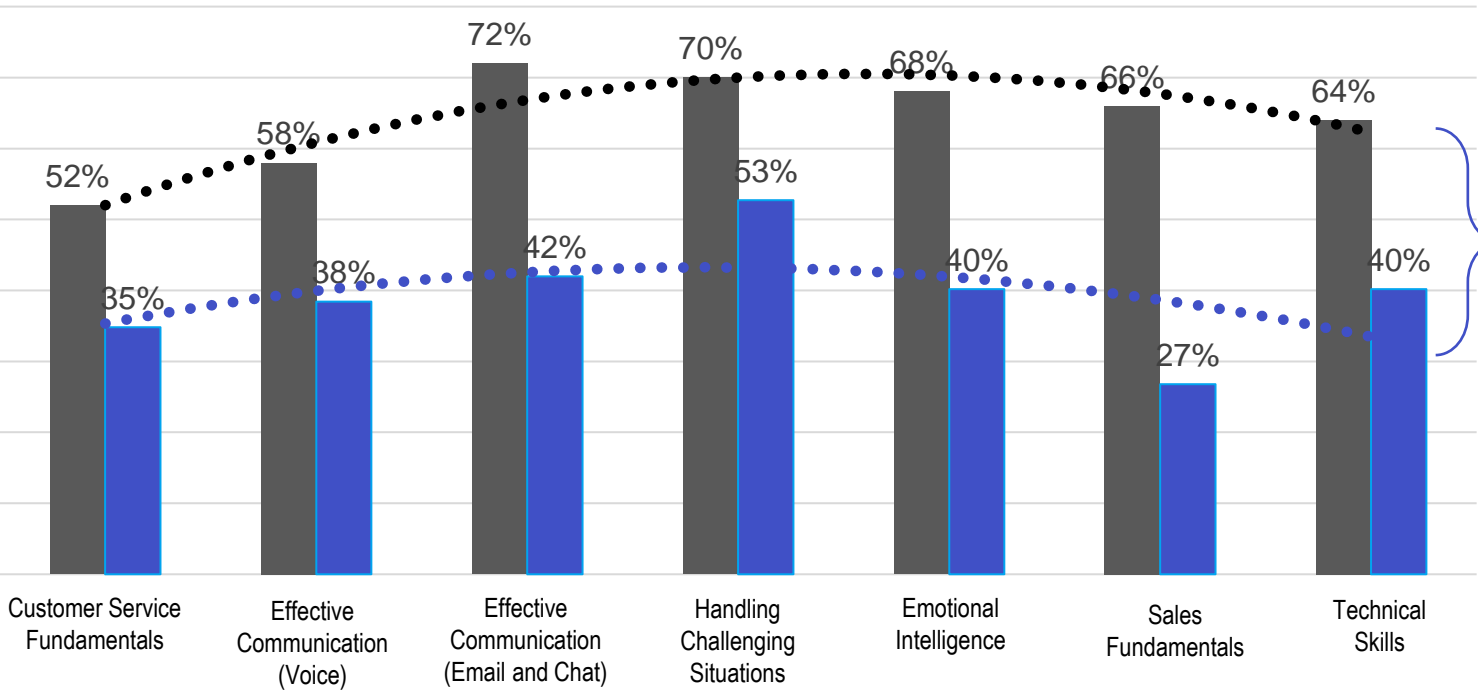
What managers expect

Training Gap

Existence of Training to improve Skills

Organizations are consistently under investing in training to help close critical skills gaps.

Talent

A customer's sentiment is the largest impact driver on culture; when clients are happy or unhappy, it impacts the workplace culture.

From an agent's perspective, what are the biggest factors that impact culture?

Factor	Value
Operational efficiency (fast and lean)	31.5
Sales / revenue brought in	20.7
The customer	47.7

Improving the Customer Experience by Improving the Employee Experience

As a result of the COVID-19 pandemic, customer service teams are in higher demand than ever before. At the same time, customer expectations are higher than they have ever been, while customer loyalty is dwindling.

The emphasis of support interactions today is on soft skills like perception and empathy, relying on agents to relate to their customers' issues and put themselves in their customers' shoes. This has resulted in a need for frontline employees to take on the additional impact of their callers' emotions and needs, on top of what they're dealing with themselves personally.

When left unchecked, this can lead to an emotional burden on the agent's shoulders, leading to lower performance, increased levels of burnout, dissatisfaction with their job, and higher levels of turnover

Our research found that from an agent's perspective, **47% say that the biggest impact or detractor on culture was the customer.** From this, it's clear that consistently handling negative interactions from customers is detrimental to how an agent feels about their role, their team, and their culture. At the same time, **33% of respondents cited the quality of the work environment as their top priority**.

This tells us that contact centre teams value having a positive work environment, but may be struggling to actually achieve it because of the impact customer interactions can have on an agent. Indeed, the customer experience and the employee experience are inextricably linked.

But when using empathy to relate to your customers' frustrations is a core part of the job, **how can organizations ensure that their agents are feeling supported and valued**?

Medallia

A HOLISTIC VIEW OF THE AGENT EXPERIENCE

Modern contact centres need a method for keeping a pulse on their frontline team to understand how they're doing, what they need, and ensuring that they are adequately equipped, trained, and supported by their organization.

How agents are being treated by organizations is now a key factor in influencing where these agents decide to work, and when they decide to leave. From our research, we found that **49.7%** of respondents report that the **average annual turnover for agents in their contact centres is 5-25%**.

If agents don't feel supported by their leaders, their team, or their organization, the odds of them moving on become much more likely.

To help your contact centre team feel engaged, motivated, and supported in their roles, it's crucial to have a **customer insights system in place that informs your agent coaching program**.

Engaged employees are not only less likely to skip work, quit, and make mistakes on the job - they're also more likely to contribute to improvements in customer service, team productivity, sales, and profits, pointing to an important correlation between employee engagement and customer satisfaction.

Organizations that integrate analytics as part of their overall customer service operations see major benefits, including improvements in customer satisfaction and employee engagement. That's why it's important for employers to incorporate tracking key customer satisfaction metrics - including CSAT, NPS, and CES (customer satisfaction, net promoter score, and customer effort score) - as part of customer service training programs.

By doing so, you can create a more **holistic view of agent performance across your contact centre**.

"

Agents love receiving the recognition and more tailored coaching and this has translated into **higher levels of engagement, improved service delivery and a 25% improvement in attrition rates.**

Greg German
Customer Service Centre Manager
Swanson Health Products

Medallia

LEVERAGING TECHNOLOGY TO FILL THE GAPS

Whether that's as simple as highlighting customer shoutouts to individual agents in company-wide emails, creating a team leaderboard to rank agent-level customer ratings, planning team-building activities, or offering small bonuses to top performers, these gestures can help improve productivity, profit margins, and both employee and customer retention.

The reality is, **customers care about customer service**.

At the end of the day, customers will be stickier and more loyal if they have an emotional, human connection with a brand. They want to feel seen, heard, and valued by your business - not just for the money they're spending with you, but for who they are as a customer.
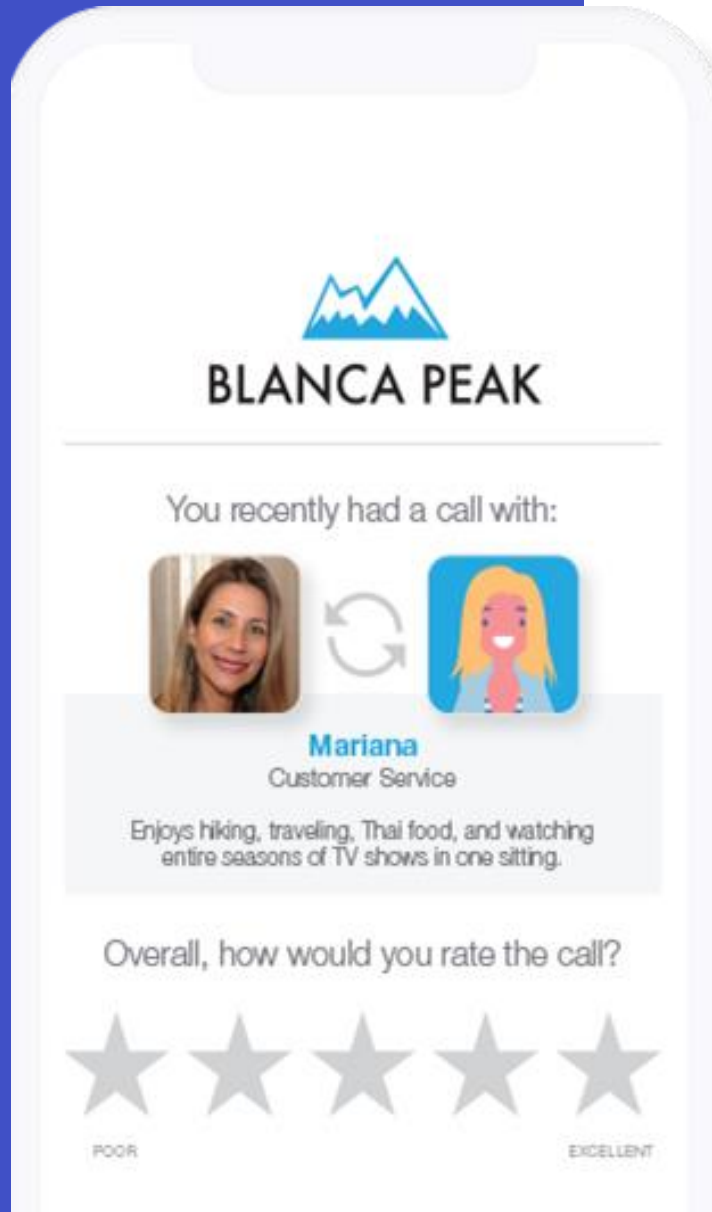
And frontline teams play a major role in that connection.

Brands like lululemon are leaning into the value of fostering this relationship by collecting humanized customer feedback using **Stella Connect by Medallia.**

Humanized customer feedback focuses on giving your customers the opportunity to learn more about the agent they spoke to and leave feedback directly for that individual, which helps build a more personalized relationship between that customer and your brand. With Stella Connect, lululemon can empower their frontline team with real-time, agent-level feedback and develop training programs specific to each individual or team, allowing them to create opportunities for their team to be effective.

That effectiveness increases both agent and customer engagement.

This year and beyond, understanding how your customer experience informs your employee experience, and vice versa, is going to be more important for contact centre teams than ever before.

BLANCA PEAK

You recently had a call with:

Mariana
Customer Service

Enjoys hiking, traveling, Thai food, and watching entire seasons of TV shows in one sitting.

Overall, how would you rate the call?

★ ★ ★ ★ ★

POOR   EXCELLENT

Medallia

Operations

As contact centres look to improve efficiency within their contact centres, it will be important to develop automated workflows that move customers to more cost-efficiency and lean channels. While telephony and email have continued to rank high during the pandemic, organizations are investing to improve across channels.
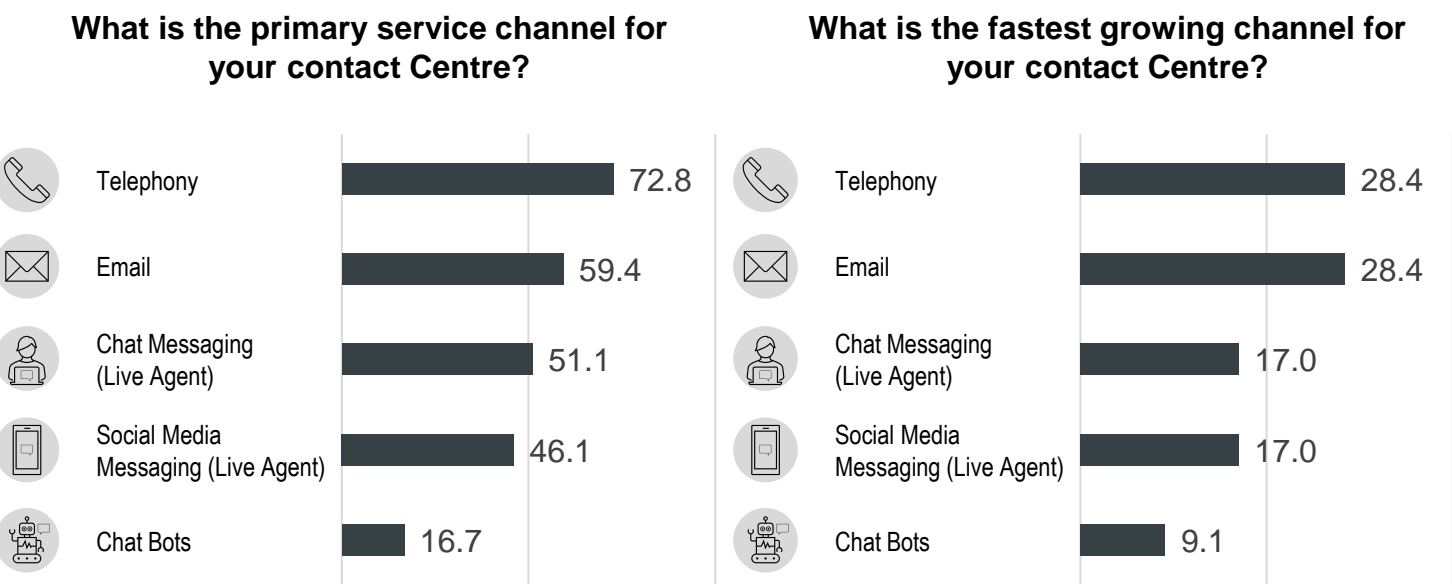
The survey asked:

• **What is the primary service channel for your contact centre?**

• **What is the fastest growing channel for your contact centre?**

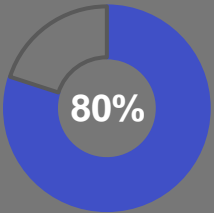• **How manual are your agents' processes?**

Operations

Telephony and email continue to be the core and fastest growing communication channels followed by Live Agents. Chat Bots and AI tools continue to lag on program adoption.
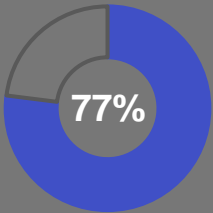
What is the primary service channel for your contact Centre?

Channel	Value
Telephony	72.8
Email	59.4
Chat Messaging (Live Agent)	51.1
Social Media Messaging (Live Agent)	46.1
Chat Bots	16.7

What is the fastest growing channel for your contact Centre?

Channel	Value
Telephony	28.4
Email	28.4
Chat Messaging (Live Agent)	17.0
Social Media Messaging (Live Agent)	17.0
Chat Bots	9.1

Top Performance Metrics

Net Promoter Score
80%

First Call Resolution
77%
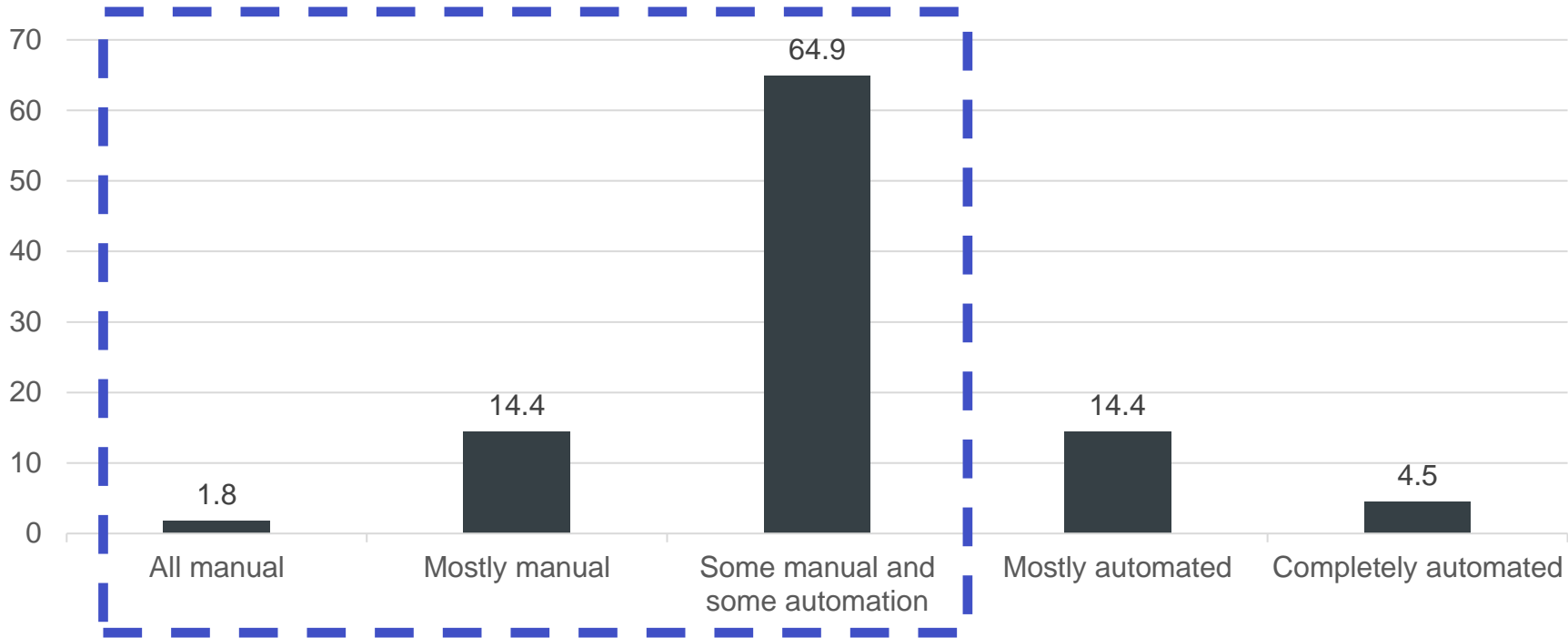
Agent productivity + Collaboration

- Empower agents to rapidly resolve customer issues using the powerful **Dynamics 365 + Microsoft Teams collaborative platform**

- Access queue members, supervisors, and subject matter experts who have resolved similar cases

- Link chats to records to preserve context

- Derive knowledge and other insights from chats
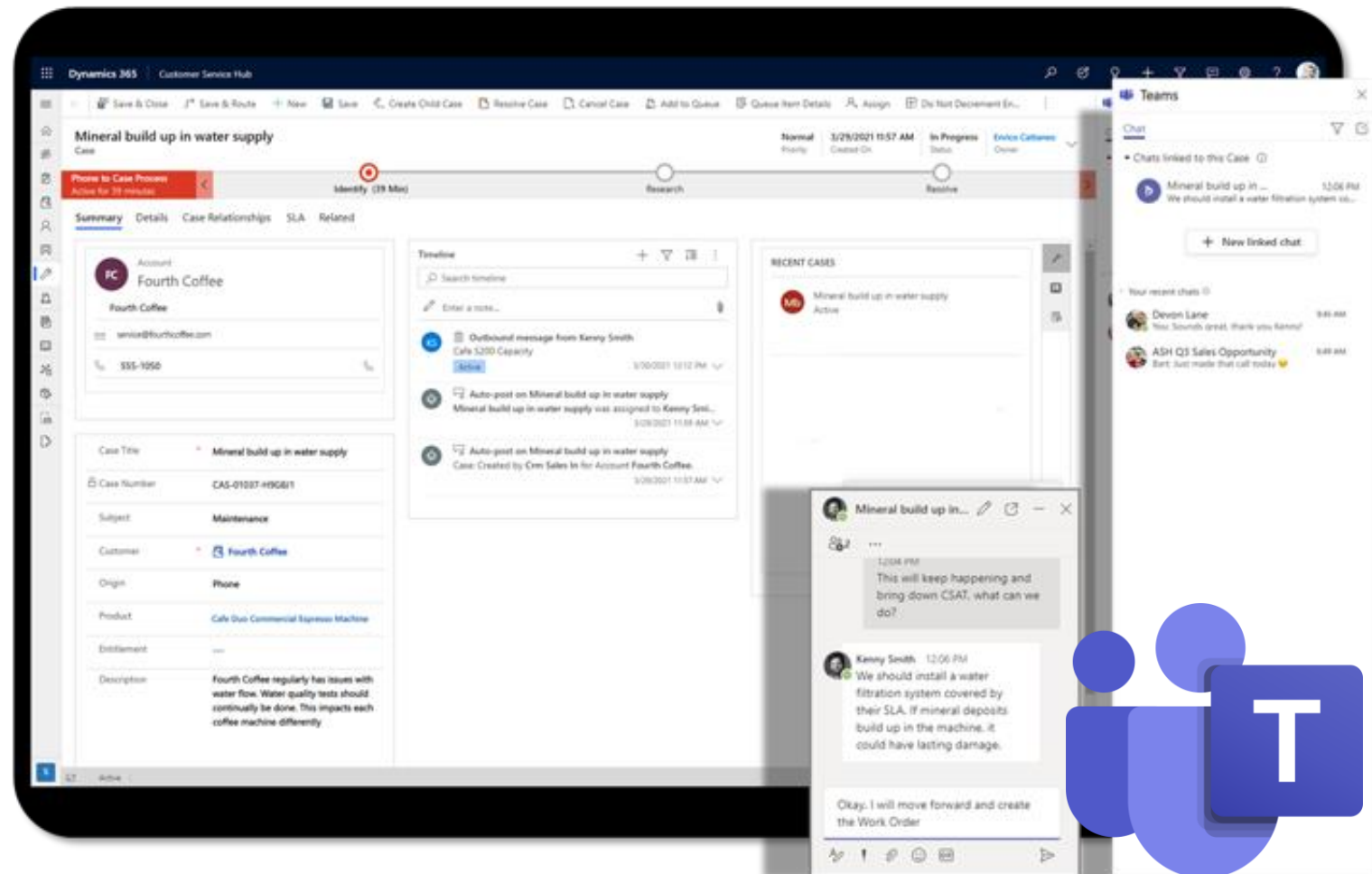
Operations

Opportunities exist to continue to invest in automation to reduce the need for manual or repetitive tasks by agents.

How manual are your agents' processes?

| Category	Value
All manual	1.8
Mostly manual	14.4
Some manual and some automation	64.9
Mostly automated	14.4
Completely automated	4.5

Technology

As contact centres look out to 2025, consistent investment will be placed across all channels with the goal of reducing manual processes and improving automation. As contact centre leads look to make shifts, price will play a large role and their internal trusted advisor continues to be their IT business partners.

- **Is your telephony system on-premise our cloud-based?**

- **Over the next 2-3 years what technology will you be investing in?**

- **When making a technology change what are the most important consideration factors?**

Technology

Is your telephony system on-premise our cloud-based?

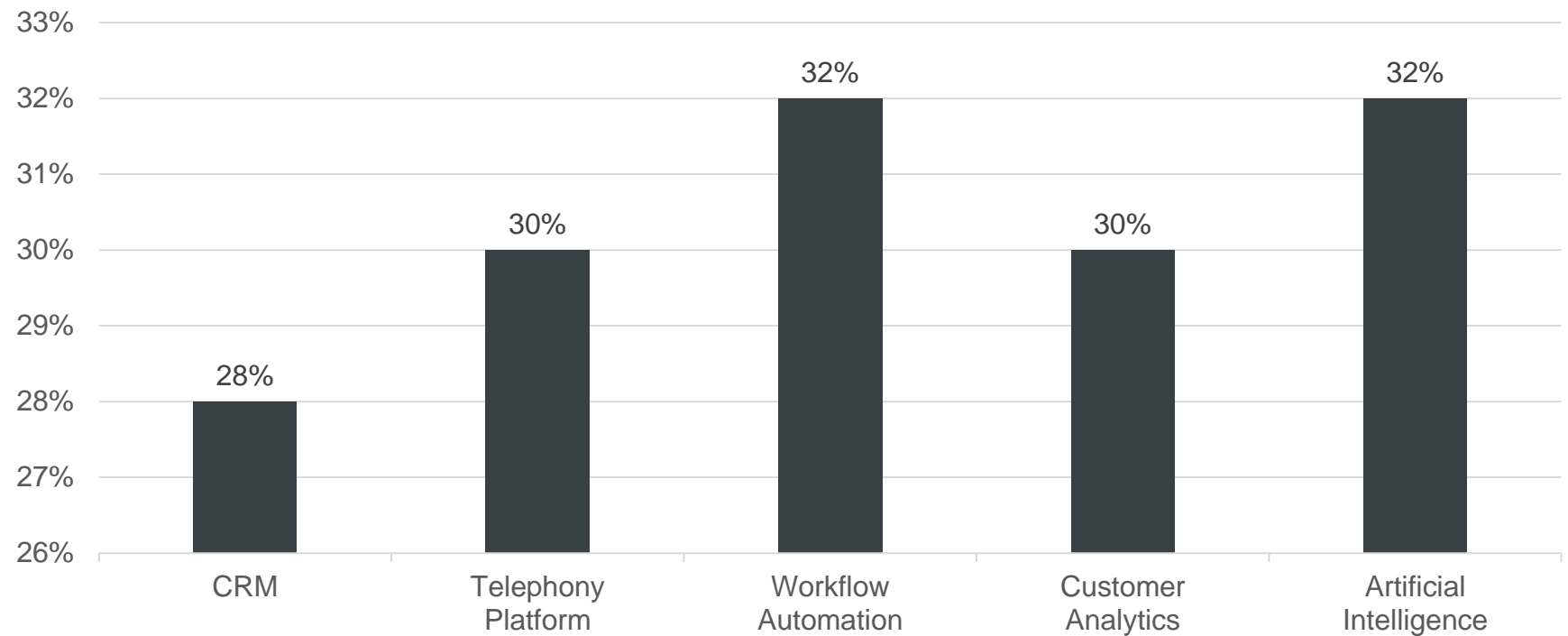| On-Premise	Cloud	I don't know
61.5	34.6	3.9

■ On-Premise ■ Cloud ■ I don't know
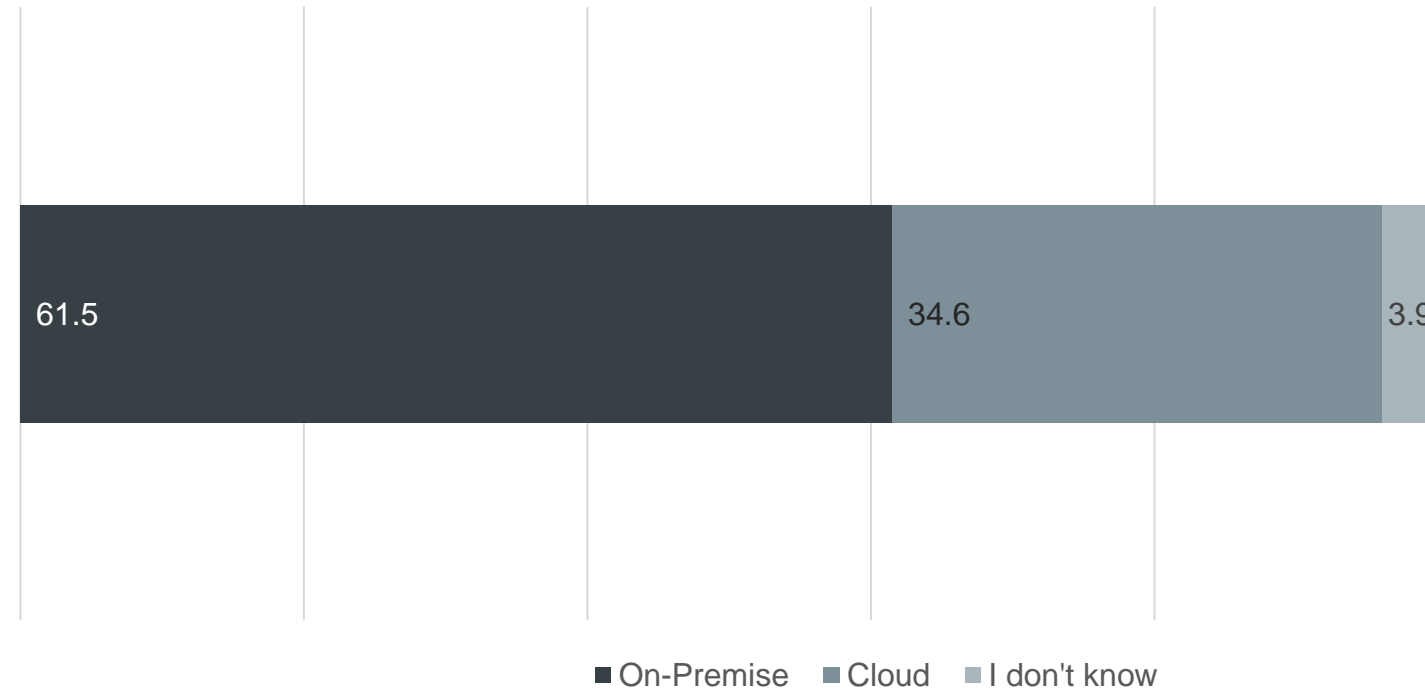
Telephony continues to be primarily on-premise versus cloud-based.

Technology

Contact centres are generally aligned to continue investing in technology over the next few years, with no clear category leader.

Over the next 2-3 years what technology will you be investing in?

Technology

When making a technology change what are the most important consideration factors?
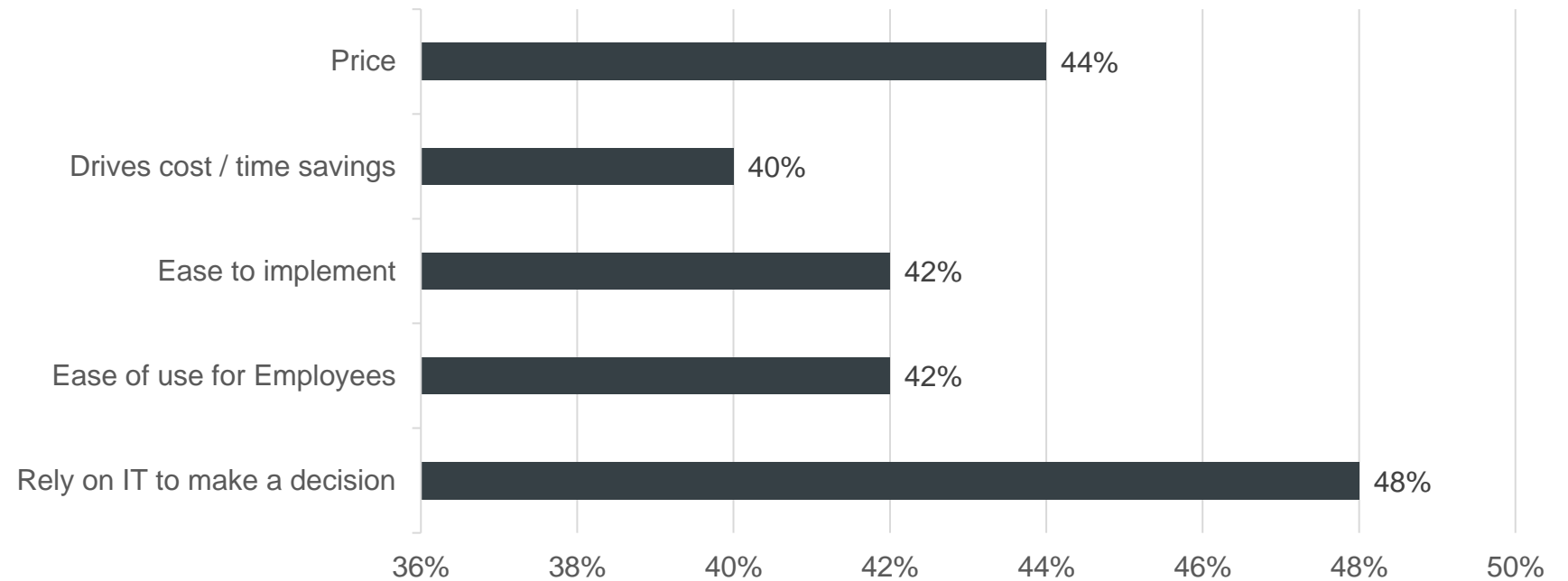
IT Teams continue to be a critical deciding factor when considering what technology to deploy and when.

Factor	Percentage
Price	44%
Drives cost / time savings	40%
Ease to implement	42%
Ease of use for Employees	42%
Rely on IT to make a decision	48%

Thank You & Next Steps

BENCHMARKING

This report was prepared by the CX Analytics Team at the customer Service Professionals Network Inc. ("CSPN")

For more information on the report or to discuss how the survey data can be used to benchmark your organization, please contact:

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