



The autonomous customer 2021: cloudy with a chance of AI

Dr Nicola J. Millard
Principal Innovation Partner at BT
nicola.millard@bt.com
@DocNicola



BT's research and innovation

Top 10

Largest investors in R&D
in the UK over past ten years*

3rd

Highest no. of patents filed
with the European Patent
Office of UK-based
companies

£2.5_{Bn}

In the fixed line telecoms
sector over past ten years

30+

Direct university research
relationships

1000+

Graduates and Apprentices
recruited by BT in 2019

103

Number of inventions
filed in 2019/20

5000

Patents in our portfolio

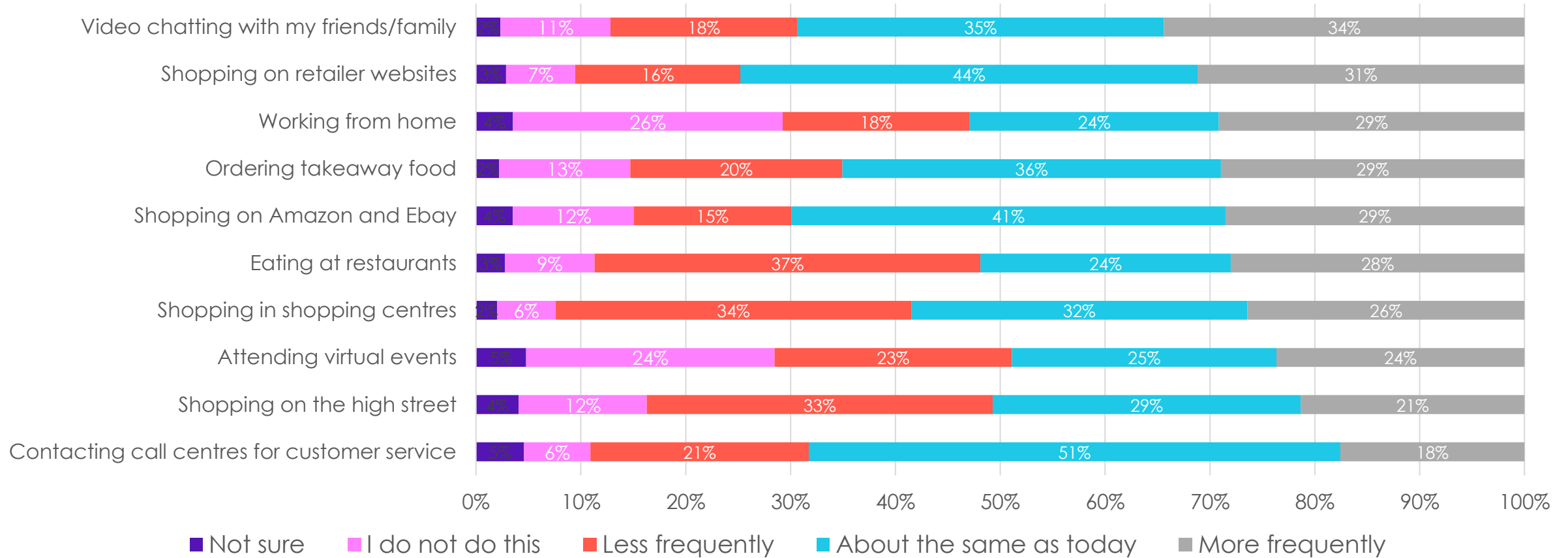
Understanding the evolving consumer and contact centre agent experience



Independent online research conducted by Davies Hickman Partners with 5,016 consumers, a nationally representative sample in each country, completed in Nov/Dec 20. 300 contact centre agents and team leaders across India, UK and USA

Behaviours that will change after Coronavirus

Compared to today, when the Covid-19 pandemic has finished, how frequently do you think you will do the following?



Overall themes:

expectations of easy customer service are still high

65%

I buy more from companies which have **excellent customer service**

71%

Consumers buy more from companies that **make it easier** to do business with them
(**75%** in 2019)

67%

I find dealing with organisations around customer service issues **tiring and exhausting**

46%

Convenience is more important than price

40%

Say they are **more likely** to buy products and services **online** in the future
(**33%** will go shopping less)

53%

Say they **could not** purchase a product or service online, make changes, choose a delivery slot, or pay for an order

79%

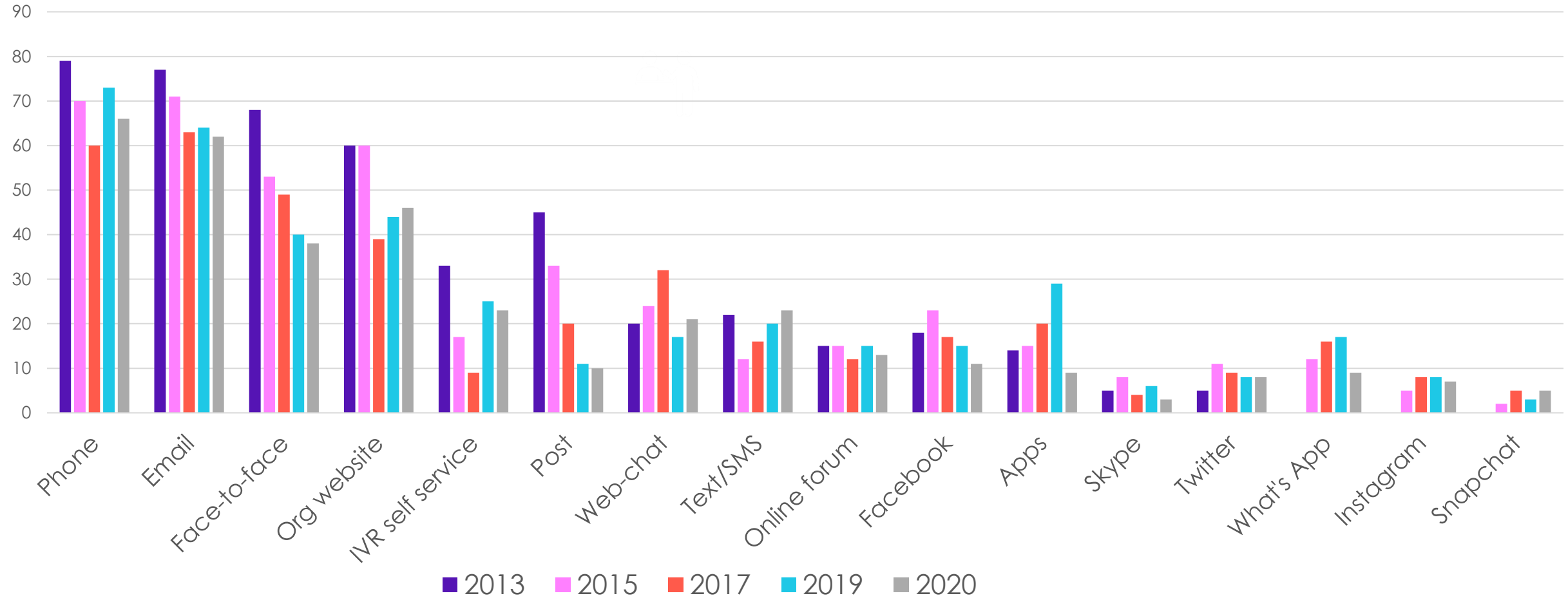
Consumers want organisations to offer **different channels** to meet their needs

73%

Customer service should be **available 24/7**
(**73%** in 2019)

Omni-channel shifts

Which of these methods of contacting organisations do you use currently? (UK)



Omni-channel still rules

Consumers pick different channels based on their goal intention states

Which of these three ways of interacting with the organisations would you select?

Explore, research, get advice e.g. online, webchat, face to face / in-store

Make it fast and easy e.g. an App, online self-service technology

Give me immediate access to a well-trained employee e.g. someone to talk to on the phone

	Explore, research, get advice e.g. online, webchat, face to face / in-store	Make it fast and easy e.g. an App, online self-service technology	Give me immediate access to a well-trained employee e.g. someone to talk to on the phone
Visionary	47%	26%	21%
Utilitarian	22%	55%	19%
Customer in crisis	25%	24%	46%

Digital customer support is phone-centric

Human after-sales service needed by 8 in 10 customers

Research shows that the number of customers calling contact centres has increased over the past 2 years. Why do you think this is?

Fastest ways to resolve your issue

50%

Best way to solve complex issues

45%

You get the best answer by phone

42%

It's easier than using self-service channels

39%

People like the personal interaction

25%

Customers trust people more than other channels

18%

Chat is still where it's at:

asynchronous still dominates, but the user experience is still challenging

61%

Used e-mail to contact an org. last year – 2nd most popular channel (64%, 2019)

21%

Have used WhatsApp to contact organisations (24%, 2019)

63%

You should be able to switch from chat to a voice or video call seamlessly

61%

I get a quicker / more instant response with chat than when I e-mail or call the contact centre (57%, 2019)

46%

Happy to make secure payments by webchat (37%, 2019)

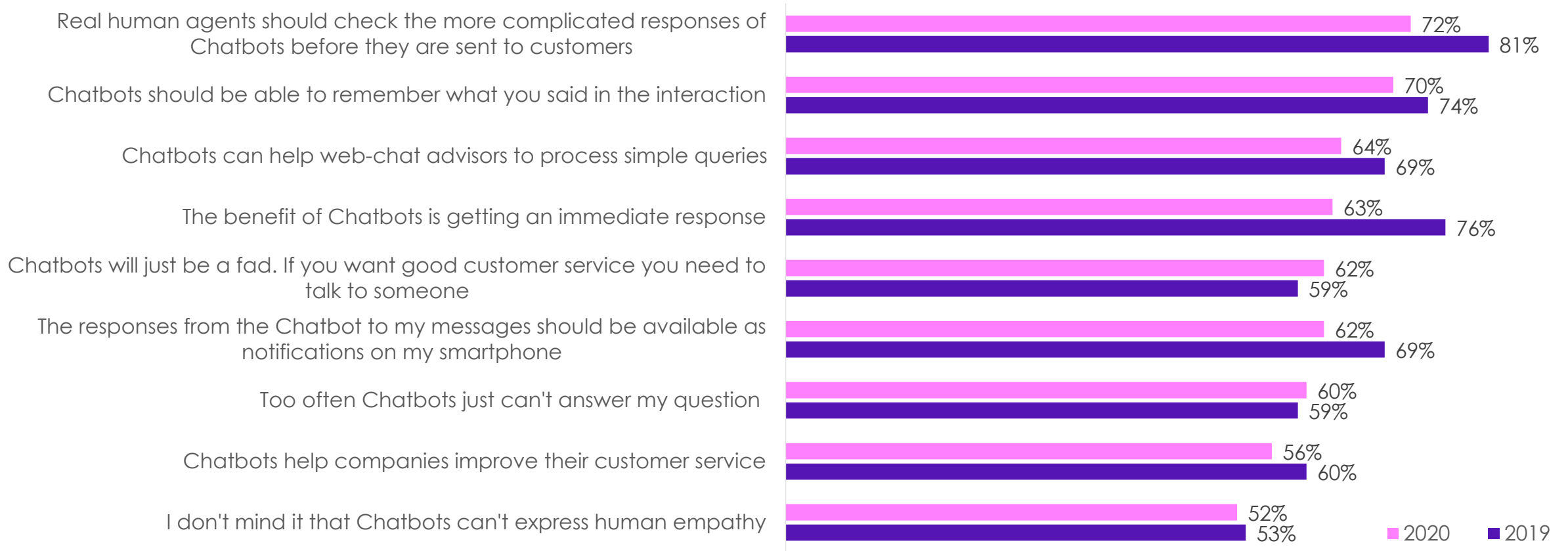
59%

Like web chat because you have a record of the conversation (55%, 2019)

Experience of chatbots worsens

Are chatbots becoming IVR for digital?

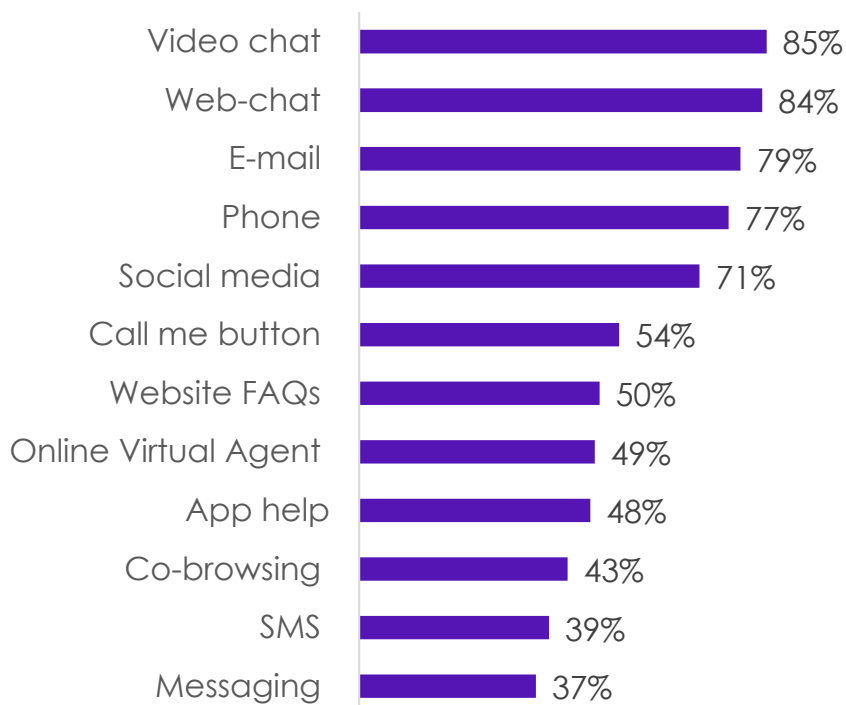
To what extent do you agree with the following statements about Chatbots?



Video killed the radio star?

Massive growth in usage during the pandemic, and enthusiasm for future usage in niche areas

Thinking of the most recent occasion when self-service proved difficult which of the following means of contacting organisations would you most like to use?



Would use video chat to...

75%

Speak to your **Doctor or other health professional** (73%, 2019)

77%

Be shown how to **install** a product or service (77%, 2019)

77%

Fix home technology by getting advice (76%, 2019)

71%

Discuss where to leave a **delivery** (68%, 2019)

71%

Discuss **financial services** product (65%, 2019)

70%

Make a **complaint** (67%, 2019)

Security strengthens customer relationships

Consumers want organisations to get the balance right between security and ease

55%

I would buy more over the phone if payments were secure (48% 2019)

58%

I would prefer to give my payment card details by voice recognition/ keypad to reduce chances of fraud (60%, 2019)

74%

I worry about security when giving organisations my card details over the phone (77%, 2019)

56%

It takes too long for organisations to identify me when I call (60%, 2019)

62%

I'm often asked to repeat my account details on the same call which is irritating (67%, 2019)

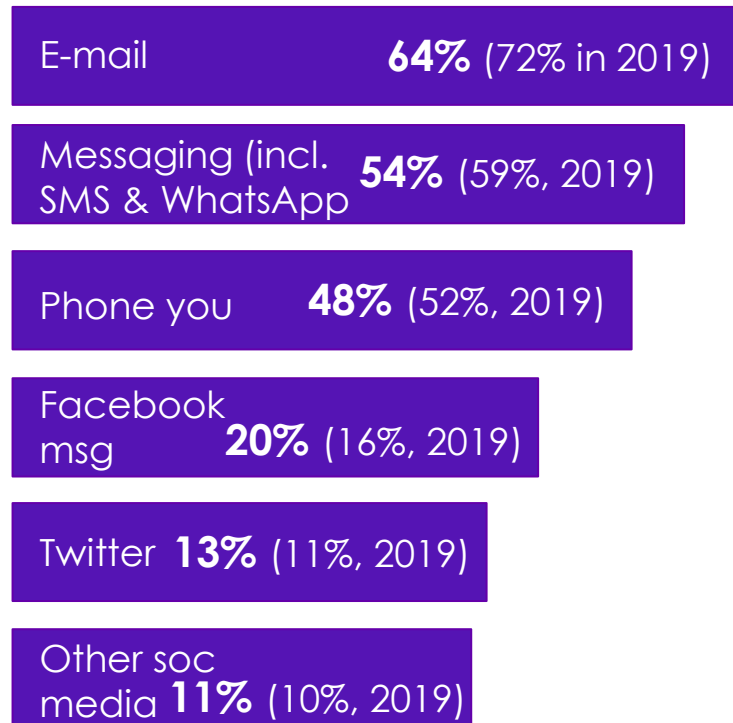
58%

I like the idea of organisations using technology like AI to identify me by my voice and save time on the call

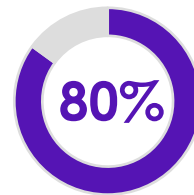
Proactive Futures: but there is a fall in openness for outbound contact

Is this poor design or something else?

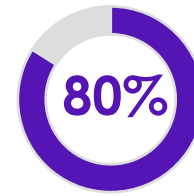
If orgs. become aware of issues or problems (e.g. delays, faults) how should they tell you?



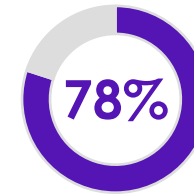
I would like a notification when...



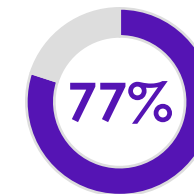
There are signs of fraud on my account



Reminders about appointments & deliveries



There is a problem with my product/service



My policy/contract is due for renewal

72%

I like it when organisations notice I have been having difficulty with a website /completing an order and contact me directly to try and help (2019, 74%)

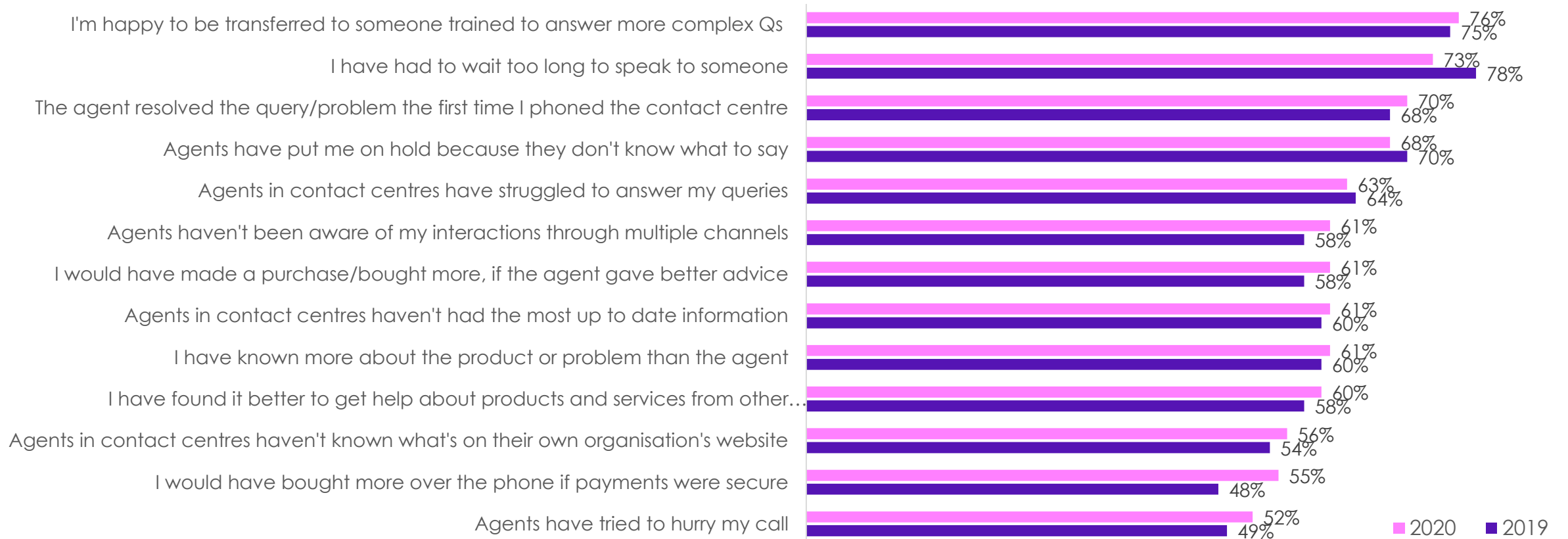
62%

The more information I give to organisations the better the level of customer service I expect to receive (2019, 67%)

Contact centre success

Comparing 2019 to 2020, consumers rate contact centres as performing better across most key metrics

Which if any of the following have you experienced when calling an organisation over the past 12 months...



Agents have a difficult job to do

Contact centre agents face a range of challenges

69%

Agents say customers are more likely to ask **questions which are difficult** to answer (during pandemic)

29%

Agents say they need a discussion with a colleague or team leader to resolve **1 in 5 of their customer calls**, e-mails or messages

Saying they often take calls, emails or messages from people who are...

- 43% **Impatient**
- 39% **Very stressed**
- 31% **Rude**
- 30% **Serial complainers**
- 30% **Not listening**

Agents agree...

We are a valuable part of the brand experience **87%**

We are part of the service the customer is paying for **87%**

We build loyal customers **83%**

83%

of customers say the last time they phoned a contact centre, they were doing one of the following at the same time...

46%

On the internet

17%

Cleaning

31%

On social media

26%

Eating food

37%

Watching TV

11%

Driving

19%

Cooking

11%

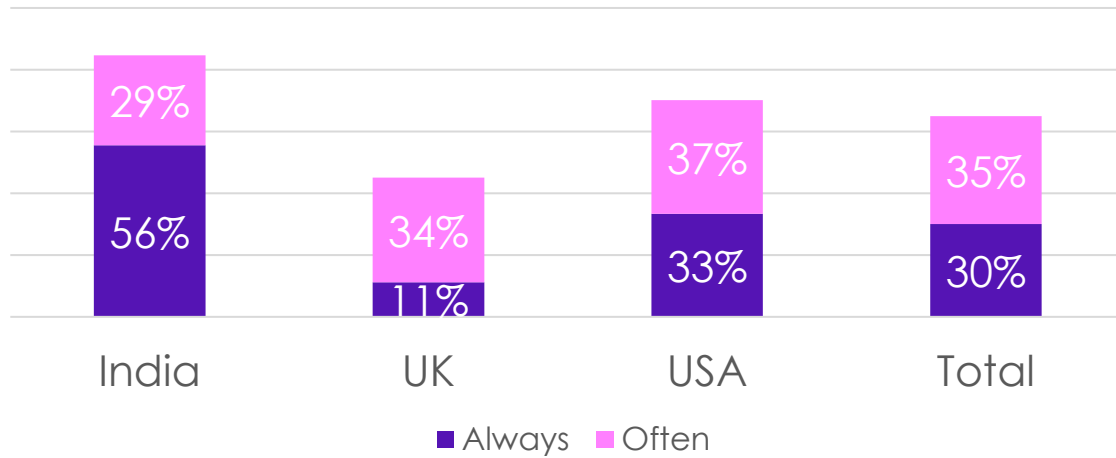
Travelling

25%

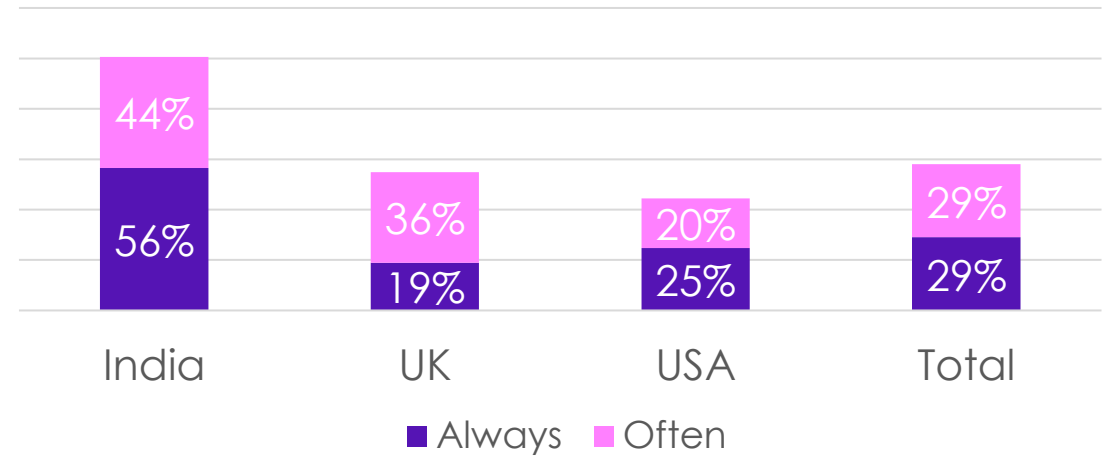
Working

Contact centres have some high cost attrition rates

Our colleague satisfaction is high



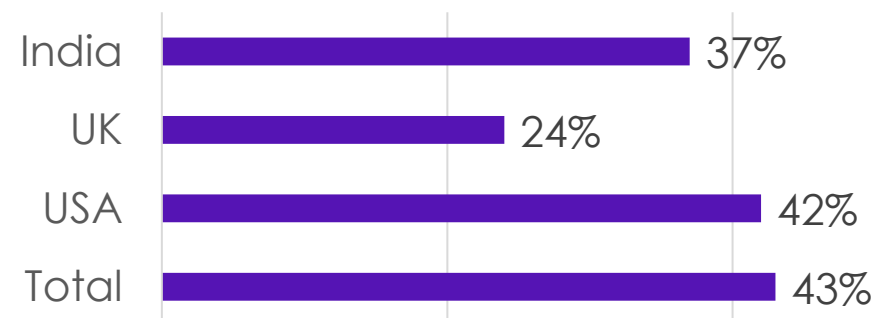
Our staff turnover is high



My colleagues have been more anxious since the Covid-19 pandemic



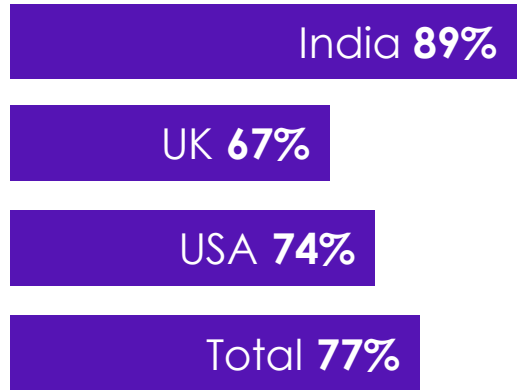
My colleagues have been more understanding since the Covid-19 pandemic



Technology shortfall

Contact centre teams rate their technology in need of improvement, although Indian agents are most satisfied

How would you rate the quality of the technology at your contact centre? (0 is worst, 100 is best)



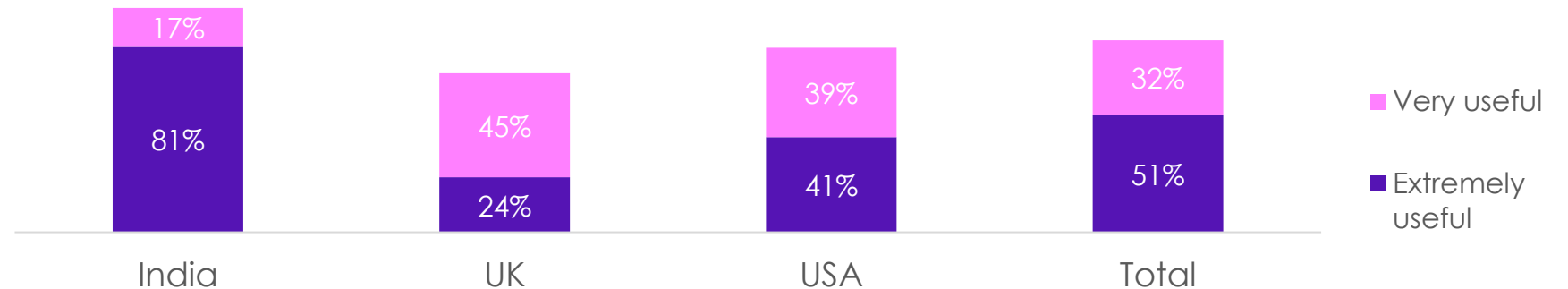
85%

use a **knowledge base** or **database** of common answers to **customer questions**

Saying often or sometimes

	India	UK	USA	Total
You have to use multiple screens to resolve customer issues	60%	59%	58%	59%
You have to complete operations manually (typing in information etc.)	48%	65%	56%	56%
Your system runs slow	45%	73%	46%	55%
It takes too long to log on	45%	57%	44%	49%
Your system falls over	48%	52%	32%	44%
It takes too long to find customer details	47%	46%	33%	42%
You get cut off from your customer	47%	40%	33%	40%
A customer's payment card is declined	49%	34%	26%	37%

How useful is your knowledge base in resolving customer queries?



Creating the ideal WFH environment

Contact centre agents want better technology and privacy to work at home successfully

20%

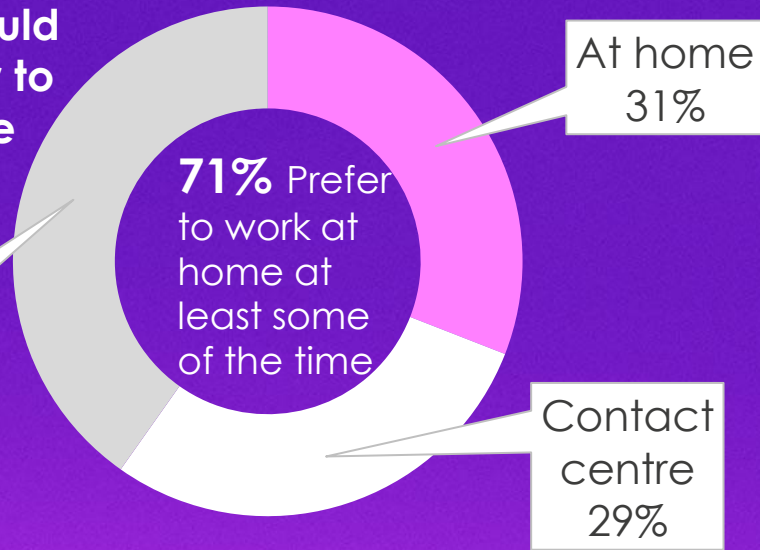
Agents say they **do or can** work at home

38%

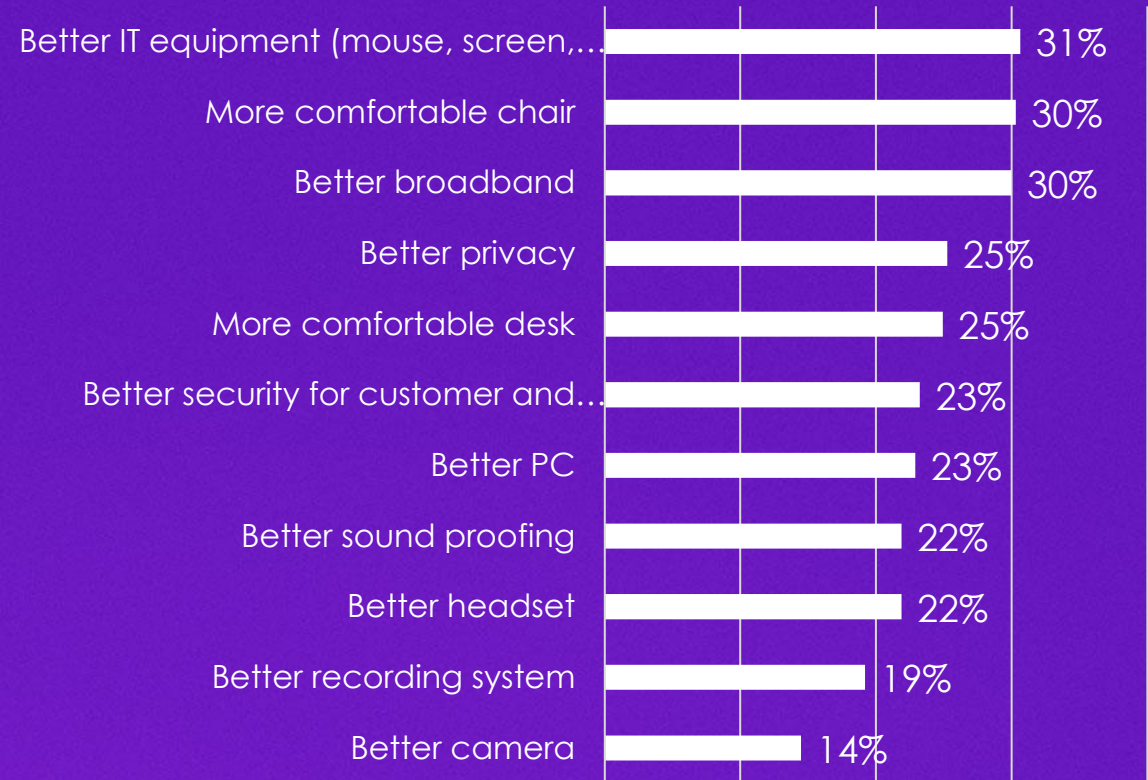
My organisation will **definitely encourage** agents to work at home **in the future** (33% probably)

Where would you prefer to work in the future?

A mix of both
40%



What would make you more efficient when working at home?





Thank you

Dr Nicola J. Millard

Principal Innovation

Partner at BT

nicola.millard@bt.com

[@DocNicola](#)