The autonomous customer 2020:
trends to transform your digital customer experience

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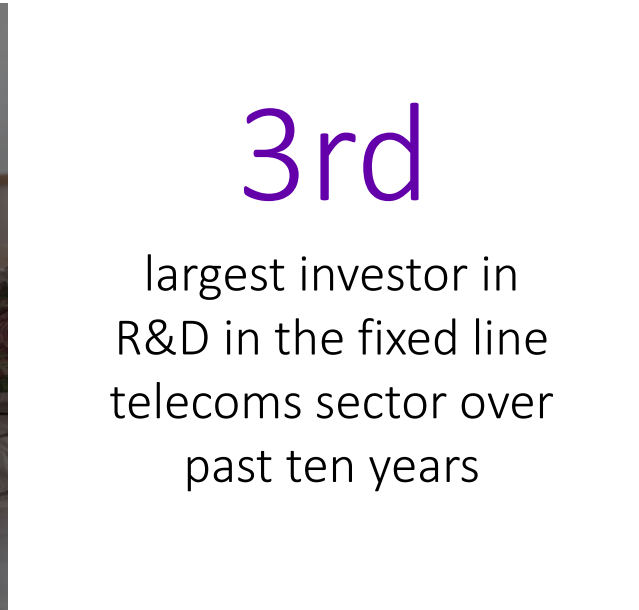nicola.millard@bt.com

@DocNicola
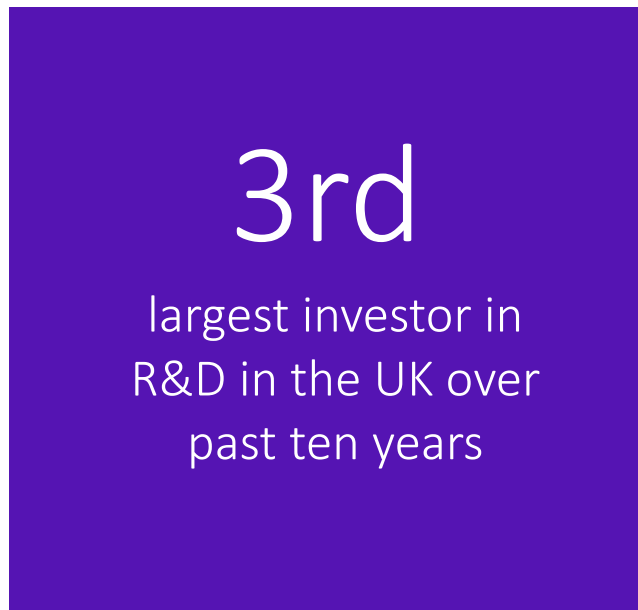
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BT's research and innovation
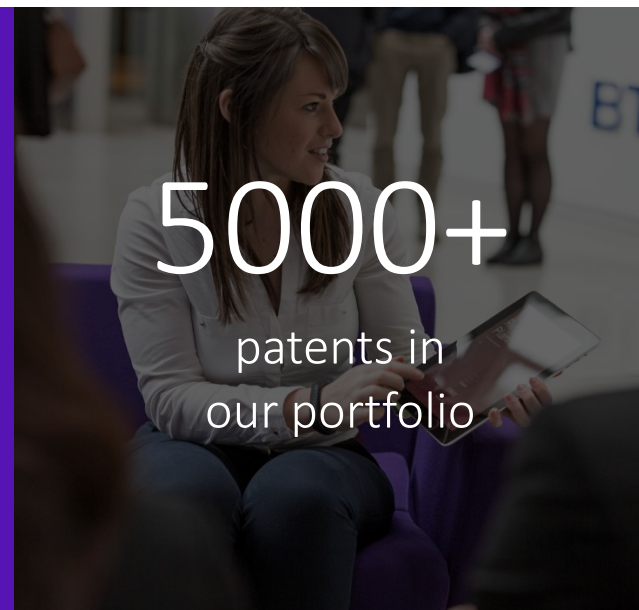
2.8b
spent on R&D over the last five years

3rd
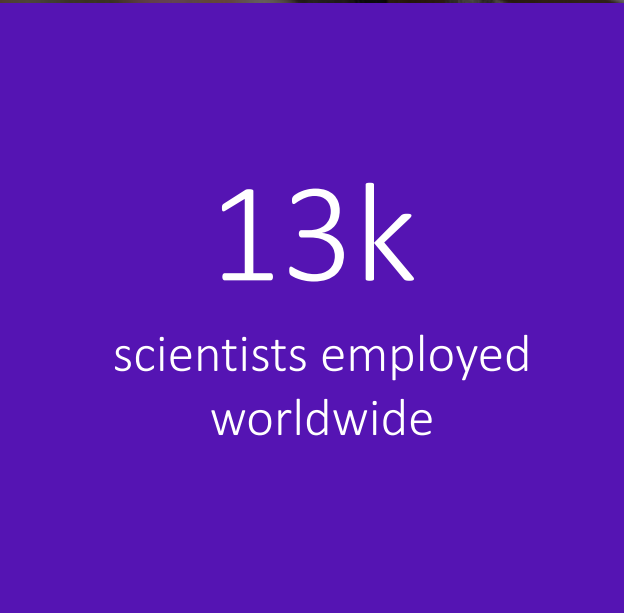largest investor in R&D in the fixed line telecoms sector over past ten years

3rd
largest investor in R&D in the UK over past ten years

5000+
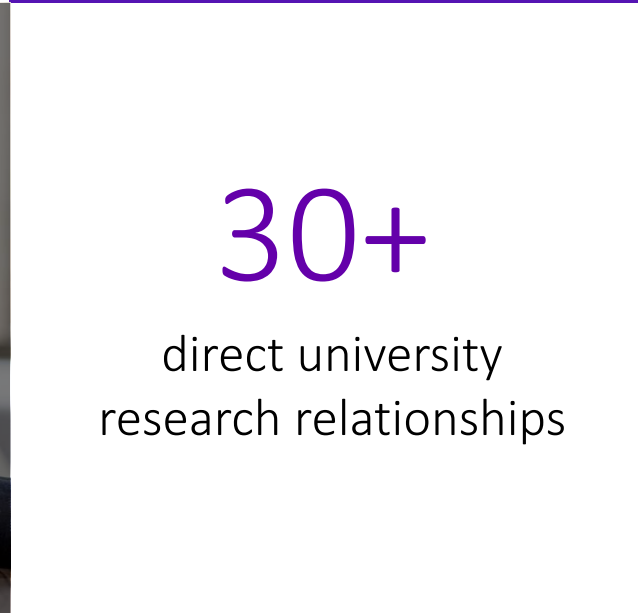patents in our portfolio

13k
scientists employed worldwide

£643m
invested in R&D in 2016 / 17

30+
direct university research relationships

4th
highest number of patents filed with the European Patent Office by a UK-based company

2020: 10 years of the autonomous customer

2010
UK
USA
1,000 consumers

2011

2012
Australia
China
Hong Kong
India
Singapore
2,500 consumers

2013
UK
USA
1,000 consumers

2014

2015
Belgium   Singapore
China   Spain
Germany   UAE
India   UK
Indonesia   USA
5,000 consumers

2016

2017
Australia   Singapore
China   South Africa
Germany   Spain
India   UK
Netherlands USA
5,000 consumers

2019
Australia   Netherlands
Brazil   Singapore
China   South Africa
France   Spain
Germany   UK
India   USA
6,000 consumers

davies hickman

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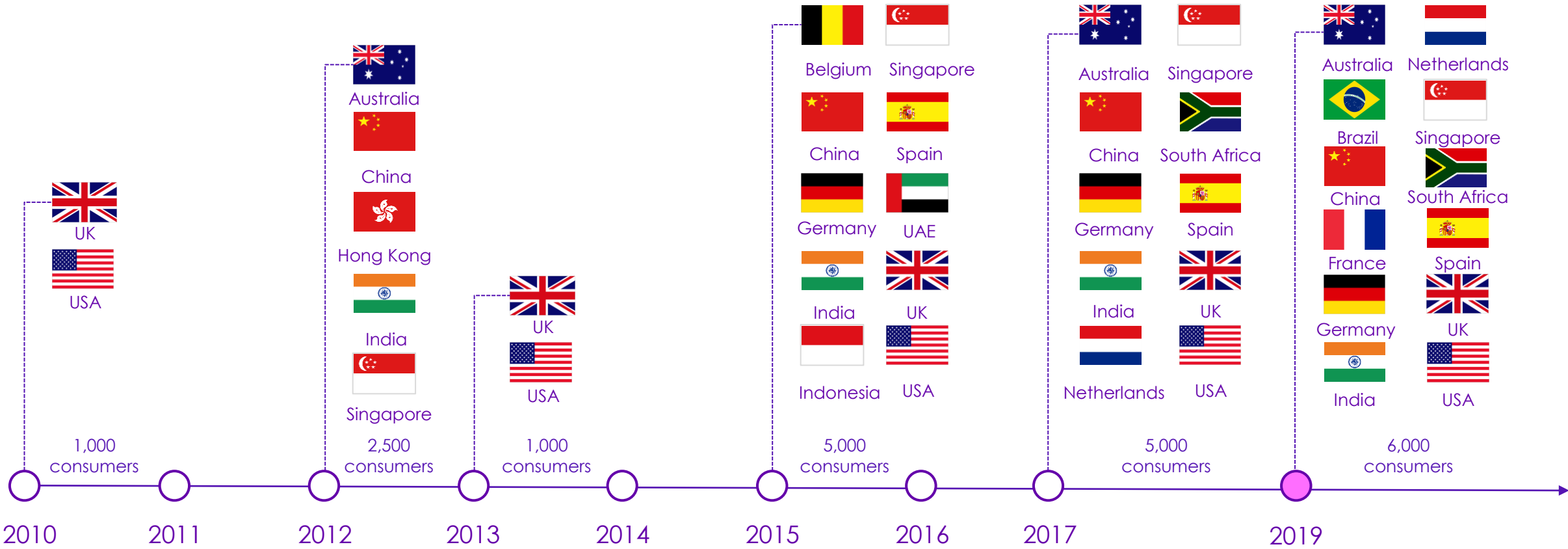
Overall theme: Easy experiences still matter

3 in 4 (4 in 5)
Consumers buy more from companies that make it easier to do business with them

73%
Self-service is good because it puts me in control (2017, 73%)

83% (76%)
Organisations should measure their performance across the whole customer journey, not just one interaction

47%
Started on an app and changed to another channel

41% say in the last year they have stopped partly or completely using 2 brands or more because of poor customer experience or service
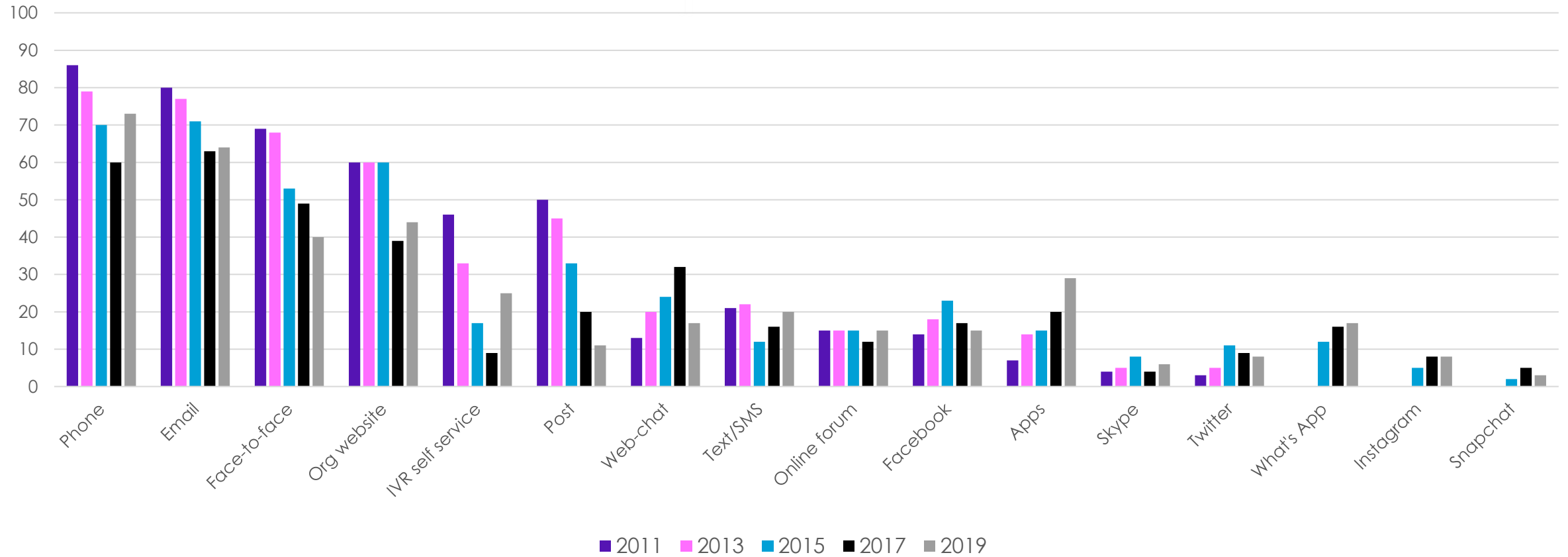
2 in 3
Consumers say there is often not enough help available on organisations' websites or Apps

21%
Rate the digital experience of large multinational organisations as excellent

Source: Davies/Hickman (2019), The Digital Customer, BT/Cisco

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Omni-channel intensifies

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

Legend: 2011 2013 2015 2017 2019

Source: Davies/Hickman (2020), The Autonomous Customer, BT/Cisco

#1. Phone priority: the phone is dead, long live the phone!

The calls I make to organisations are more complex as I'm doing the simple things via their website or App

2015 61%

2017 62%

2019 59%

Age	Phoned a call centre in the last 2 weeks
16-24	21%
25-34	32%
35-44	29%
45-54	27%
55-64	27%
65+	27%

68% Agents put me on hold as they don't know what to say (70% 2017, 72%, 2015)

59% Agents haven't had the most up to date information (64% 2017, 61%, 2015)

53% Agents haven't known what's on their own website (59% 2017, 52%, 2015)

61% I have known more about the product or service than the agent in the call centre (62% 2017, 58%, 2015)

#2. Messaging mania: Global consumers want asynchronous interaction but long term success is not guaranteed

68% Used e-mail to contact an org. last year – 2nd most popular channel (49%, 2015)

48% I prefer to use web-chat than the phone to contact an organisation when I'm on their website

24% Have used WhatsApp to contact organisations

57% I get a quicker / more instant response with chat than when I e-mail or call the contact centre
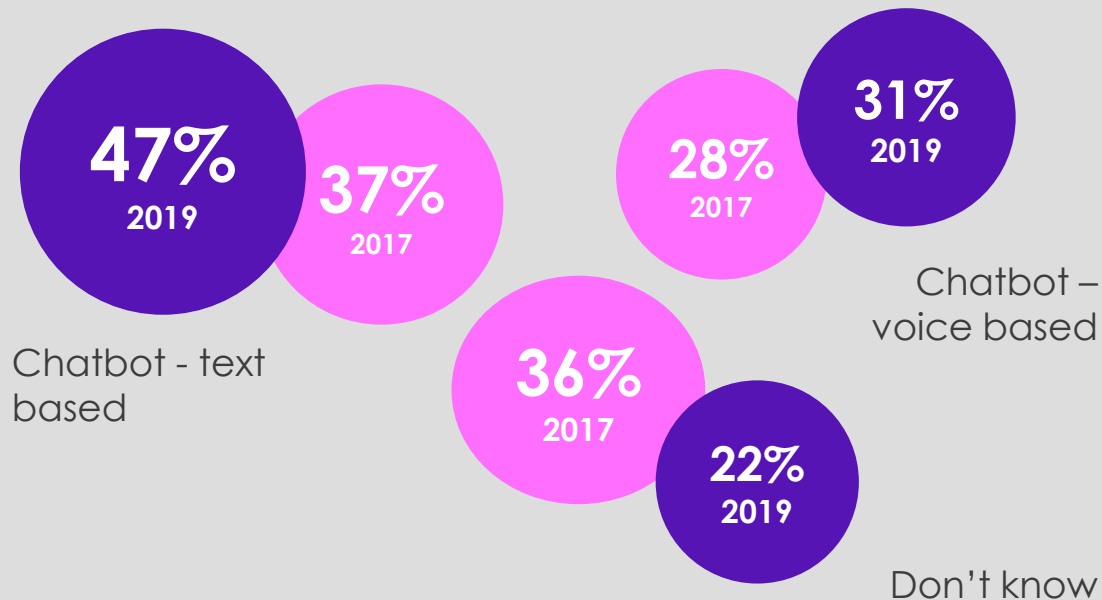
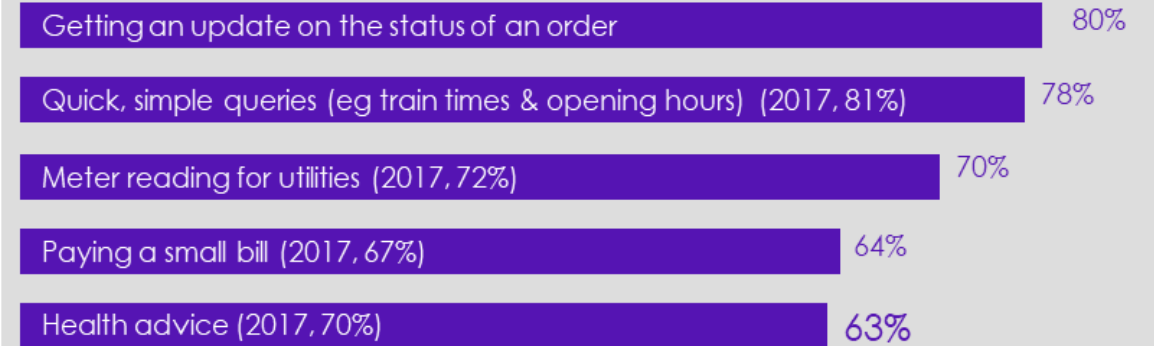**58%** Being able to look at the screen makes web chat more useful (49%, 2015)

55% Like web chat because you have a record of the conversation (48%, 2015)

Source: Davies/Hickman (2019), The Digital Customer, BT/Cisco

Copyright: British Telecommunications PLC, 2020

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Chatbots: hype meets reality

A 'Chatbot' is a computer program which conducts a conversation via voice (e.g. Siri) or text methods(e.g. messenger) using artificial intelligence. Which do you think would be most effective?

47% 2019

37% 2017

Chatbot - text based

36% 2017

22% 2019

Don't know

28% 2017

31% 2019

Chatbot – voice based

How interested would you be in the following chatbot applications?

Application	%
Getting an update on the status of an order	80%
Quick, simple queries (eg train times & opening hours) (2017, 81%)	78%
Meter reading for utilities (2017, 72%)	70%
Paying a small bill (2017, 67%)	64%
Health advice (2017, 70%)	63%

3 in 4
The benefit of chatbots would be getting an immediate response (2017, 2 in 3)

81%
Human agents should check the more complicated responses of chatbots (2017, 74%)

58%
Chatbots will help companies improve their customer service (2017, 73%)

76%
would like it if they could call an organisation using their smart speaker

Are chatbots 'IVR for digital'?

Challenges…

- Works for simple queries – effectively steering the customer through the "known knowns", i.e. GIGO.

- More difficult for complaints / complexity - if we get angry, we tend to tell long, rambling stories which are hard to parse.

- Sarcasm tends to throw algorithms: e.g. "Thanks, @TrainCo for my free sauna this morning"; "It was so good to see that your maintenance department hadn't spoiled things by making unnecessary repairs"; "I would have cheerfully strangled them".

- Limited ability to parse emotional context - YET!

- Intelligent routing is key to the customer experience.

The networked experts of the future?

| Sally	Paula	Natalie	Tony	Chris
the 'Swiss Army knife' advisor	the problem solver	the negotiator	the techie	the crowdsourced advisor

Trainers*   Explainers*   Sustainers*

* H. James Wilson, Paul R. Daugherty, and Nicola Morini-Bianzino (2017), The Jobs That Artificial Intelligence Will Create, MIT Sloan Review, 23rd March

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#3. Not all channels are growing: consumers are using video communication more and more, but should organisations adopt it?

I watch Youtubers who make recommendations about products & services

2015 **2017** **2019**

30% **45%** **42%**
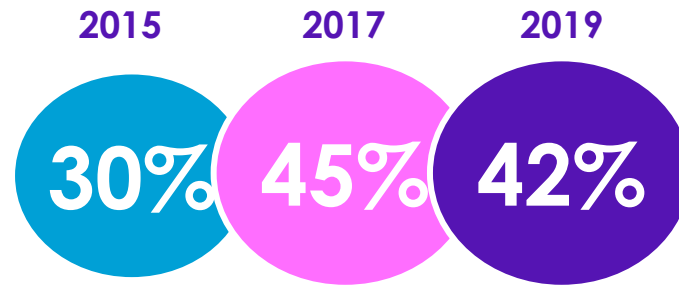
Have used video chat to contact an organisation in the last 6 months

2017 **2019**

3% **7%**
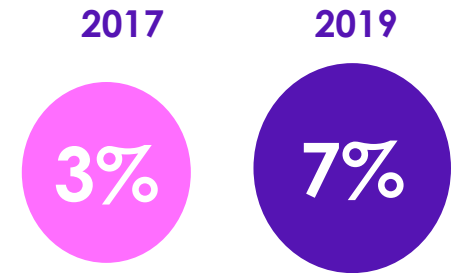
Top uses of video:

1. To talk to your doctor or health professional
2. To see a product or service demonstrated
3. To discuss a financial services product with an advisor
4. To discuss queries with a product or service
5. To share experiences with other customers

Of those who would definitely use video-chat to discuss queries about a product or service:

56% of these use Google Hangouts once a day or more

47% of these use Facetime once a day or more

27% of these use Facebook once a day or more

Source: Davies/Hickman (2019), The Digital Customer, BT/Cisco

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Innovation: video enhanced interactions.

Proposition

- Sightcall offers a simpler Customer Experience to deliver as "see what I see" experience to the customer.
- Very quickly allow the customer to share the smartphone camera to understand a home network/setup problem.
- Agent can take screen shots, annotate a video image, co-browse.

Results

- **Gives an innovative customer experience to home network and home setup issues.**
- **End user trials were completed in Consumer, EE, EE Stores, Openreach, Enterprise & Ventures.**
- **Launched last year – EE typically handle around 2000 calls a week using the Sightcall Service with a 60 – 80% reduction in the need to arrange an engineer appointment.**

#3. Not all channels are growing: social media is great for marketing but a slow growing channel for service

64% were extremely or very happy with the way their social media complaint to a company was handled (2017, 55%)

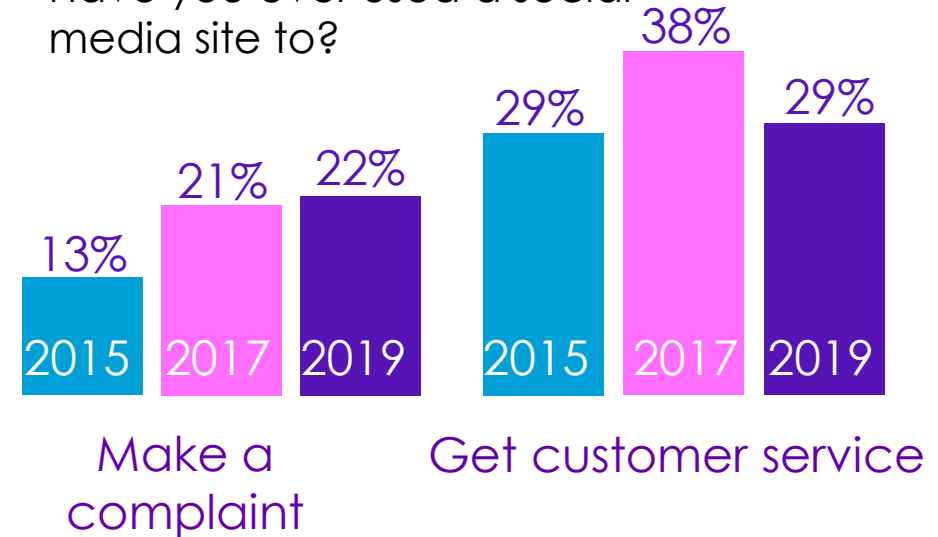**52%** I wouldn't use Facebook or Twitter for customer service with an organisation as it is not secure

85% would like it if I started a text based interaction with an agent on a social media platform but could then have a phone call with the same agent

If I have an urgent issue or emergency the best way to get customer service is to use Twitter or Facebook

26% 2015   **38%** 2017   **34%** 2019
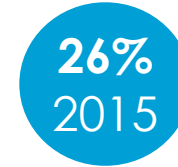
Have you ever used a social media site to?

Make a complaint
13% 2015   21% 2017   22% 2019

Get customer service
29% 2015   38% 2017   29% 2019

Have used a social media site to...	16-34	35-54	55+	Total
Get customer service	37%	30%	14%	29%

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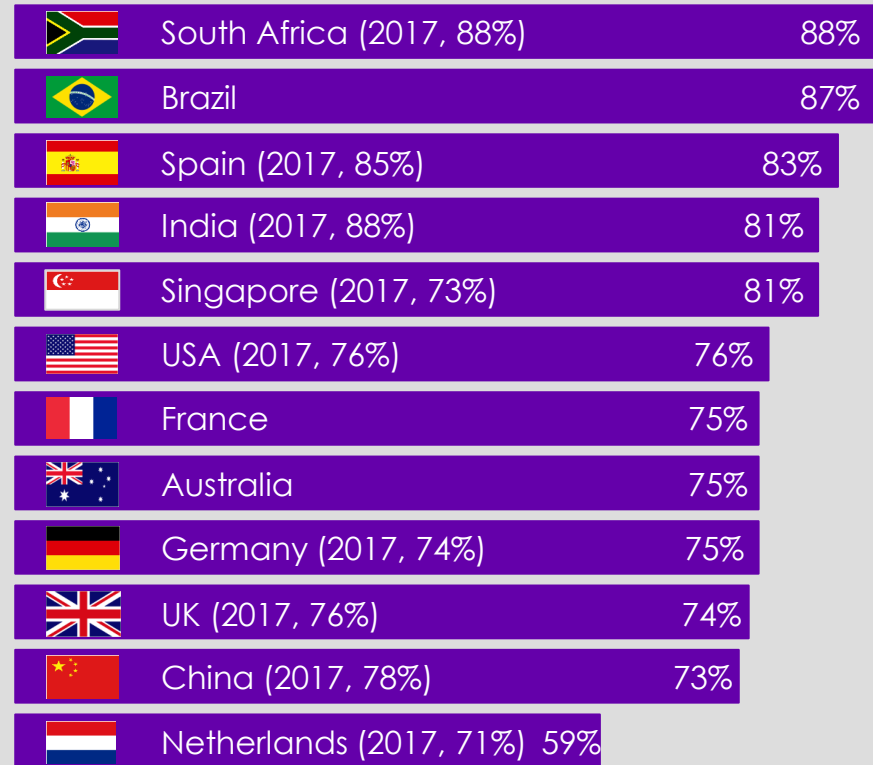# #4. Trusted Technology: Consumers want low effort personal data security, ID&V and payments for business success

2015 56% **2017** 63% **2019** 60%

It takes too long to identify me when I phone call centres

2015 72% **2017** 70% **2019** 81%

Would like voice biometrics for Identification & Verification (ID&V)

67% I am often asked to repeat my account details on the same call which is irritating (2015, 67%)

I worry about security when giving organisations my card details over the phone

Country	%
South Africa (2017, 88%)	88%
Brazil	87%
Spain (2017, 85%)	83%
India (2017, 88%)	81%
Singapore (2017, 73%)	81%
USA (2017, 76%)	76%
France	75%
Australia	75%
Germany (2017, 74%)	75%
UK (2017, 76%)	74%
China (2017, 78%)	73%
Netherlands (2017, 71%)	59%

50% I would have bought more over the phone if payments were secure

75% Want technology to secure card payments over the phone (2017, 74%)

60% I would prefer to give my payment card details by voice recognition or the keypad to reduce fraud (2017, 50%)

#5. Proactive Future: 8 in 10 global consumers expect organisations to use AI for personalisation and proactive notifications

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

Channel	%
E-mail	72%
SMS, WhatsApp	59%
Phone you	52%
Facebook message	16%
Twitter message	11%
Other social media	10%

74%
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 (2017, 78%)
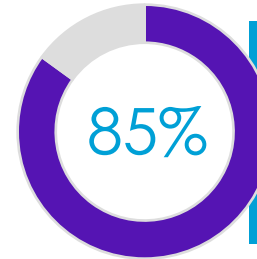
87%
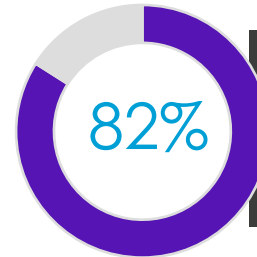want to be informed when there is a problem with their product or service

67%
The more information I give to organisations the better the level of customer service I expect to receive
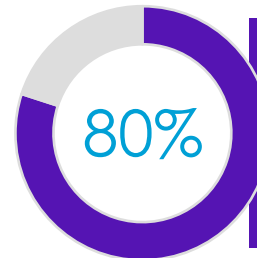
I would like a notification when…

85% My contract or tie in period is coming to an end (2017, 84%)

82% They have a better deal available (2017, 84%)

80% Update me when buying a new product or service (2017, 82%)

Source: Davies/Hickman (2019), The Digital Customer, BT/Cisco

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Innovation: proactive engagement

ContactEngine

- ContactEngine provides a customer engagement hub, enabling companies including BT to transform their contact journeys through omni-channel conversational capabilities.

- ContactEngine can reduce OpEx and improve CX by engaging customers in automatic AI-driven conversations that fulfil business objectives.

- BT Enterprise has been using the ContactEngine engagement hub to mange it's Broadband and PSTN installation journeys. With great results:

  - Contact Response rate increased from 10% to 80%
  - Order cancellations (customer driven) reduced by 35%
  - PTC reduced by 20% across the provision journey
  - 13 FTE currently handle 3500 orders a week
  - NPS increased by 34%

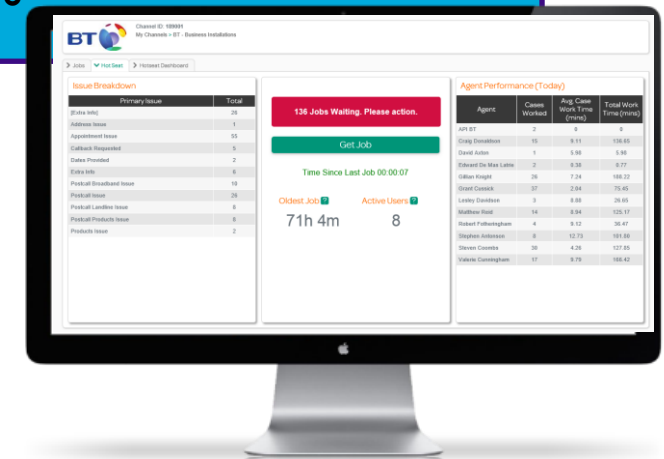Right Content × Right Channel × Right Time × Right Responses × Objective met & customer happy

Thank you

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