



The US Customer Experience Decision-Makers' Guide 2026

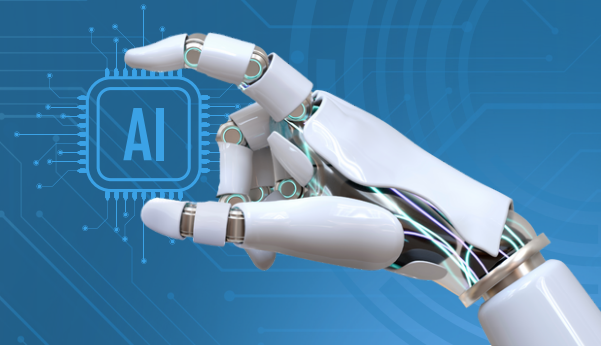
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- » 50% Faster Agent Onboarding with AI Coaching



The 2026 US Customer Experience Decision-Makers' Guide

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INTRODUCTION AND METHODOLOGY

The "*US Customer Experience Decision-Makers' Guide (2026 – 8th edition)*" is a major annual report studying the CX strategy, performance, operations and technology aspects of US organizations.

Taking a random sample of the industry, a detailed structured questionnaire was answered by senior CX and customer contact professionals in 190 organizations between October and December 2025. Analysis of the results was carried out in December 2025.

Additionally, a survey of 1,000 US consumers was carried out in December 2025 in order to understand their attitudes to elements of businesses' CX programs and what they understand a positive customer experience to be.

ContactBabel is grateful for the support received from the sponsors of the report. Complete editorial independence has been maintained at all stages, and readers can be confident about the objectivity of the report's findings.

Third-party White Papers, case studies and thought leadership pieces may also be referenced to assist readers who may wish to look more in-depth at specific areas or to gain another viewpoint.

A Supplier Directory is available at the end of this report.

HOW IMPORTANT IS CUSTOMER EXPERIENCE TO ORGANIZATIONS?

HOW DO ORGANIZATIONS COMPETE?

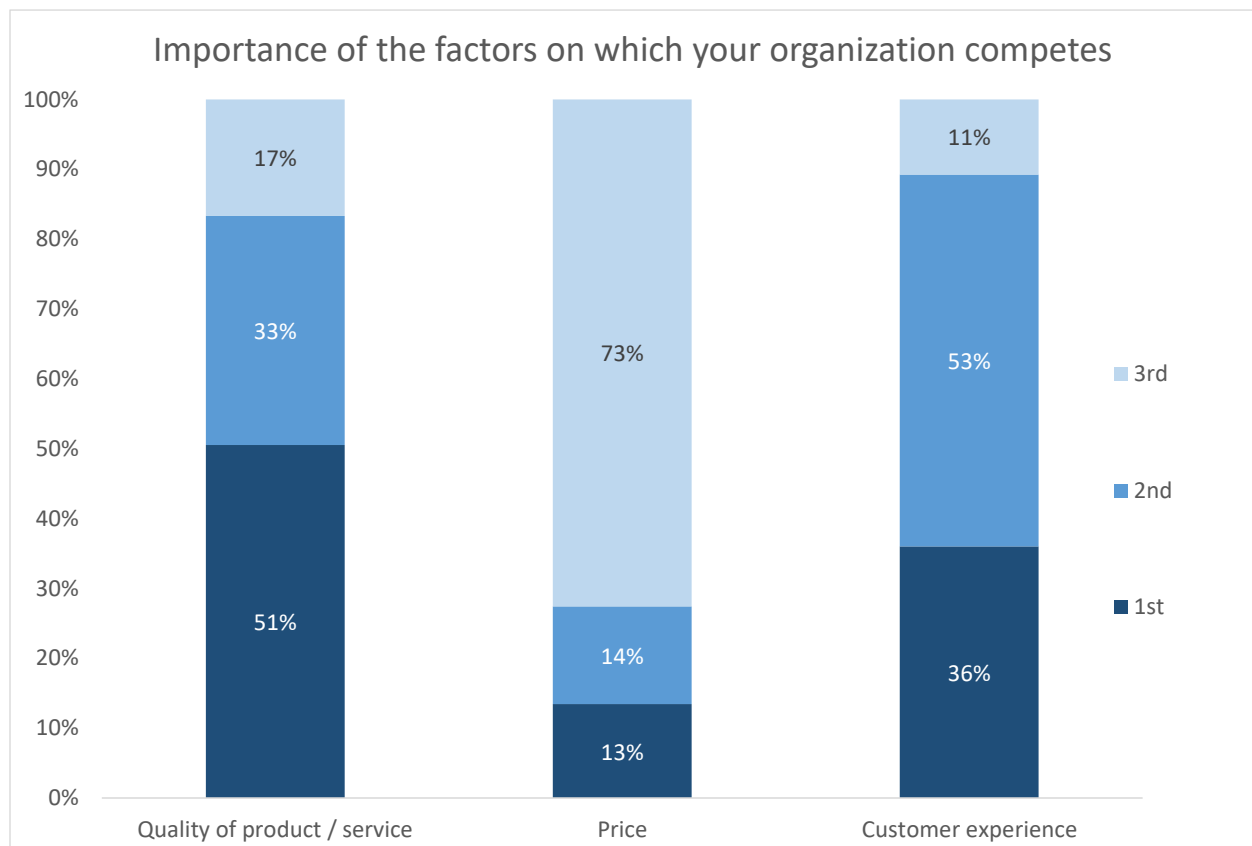
To maximize profits, in the past businesses focused on the variables over which there could be a large measure of control, such as managing the internal cost of production and service provision, employee salaries, price setting and sales resource allocation.

More recently, the increasing use of technology in every part of an organization has created an unprecedented amount of data for analysis. At the same time, large-scale advertising and widespread use of the Internet has made customers more aware of alternative products and services, meaning greater price competition and the need for companies to differentiate in ways that don't damage their bottom-line.

This meant that organizations competed to win business is either through a low cost product or service, or through selling goods of a higher quality (whether real or perceived) which allows greater flexibility in pricing.

More recently, as the customer is increasingly held at arm's length to the business (through the use of home shopping, contact centers or websites), the overall customer experience has become a battleground upon which to win customer favor.

Figure 1: Importance of the factors on which your organization competes



Survey respondents were asked how their organization competed, ranking three factors in order of importance: quality, price and customer experience.

As competition on price tends to mean lower profit margins for all of the companies in that sector, it is unsurprising that only 13% of survey respondents place this factor in first place.

It is notable to find that businesses are not in general considering price reduction to be a major strategy, perhaps as many producers of goods are also impacted by inflation passed on from their suppliers, and even services companies are experiencing wage inflation which limits their ability to cut prices.

51% of organizations stated that their primary competitive factor was quality, which has grown in significance since the survey was first conducted in 2018: quality and customer experience were similarly scored then, with around 40% of organizations choosing either as their primary competitive factor.

Since then, the proportion of organizations wishing to compete primarily on customer experience dropped to only 30% last year, although this was still an increase on the pandemic years where only around 25% of organizations wished to compete on CX.

This year, CX is back up to 36%, which is heartening for those in the sector, but it is still the case that almost two-thirds of organizations are **not** focusing on CX as their primary competitive factor.

This gives an opportunity for others to double-down on their CX strategy and lock in loyal customers for years to come, benefiting by the contrast between themselves and those organizations who have lost or underestimate their CX concentration.

CX BUDGET, ROI & INVESTMENT

CX INVESTMENT: PEOPLE, PROCESS, TECHNOLOGY

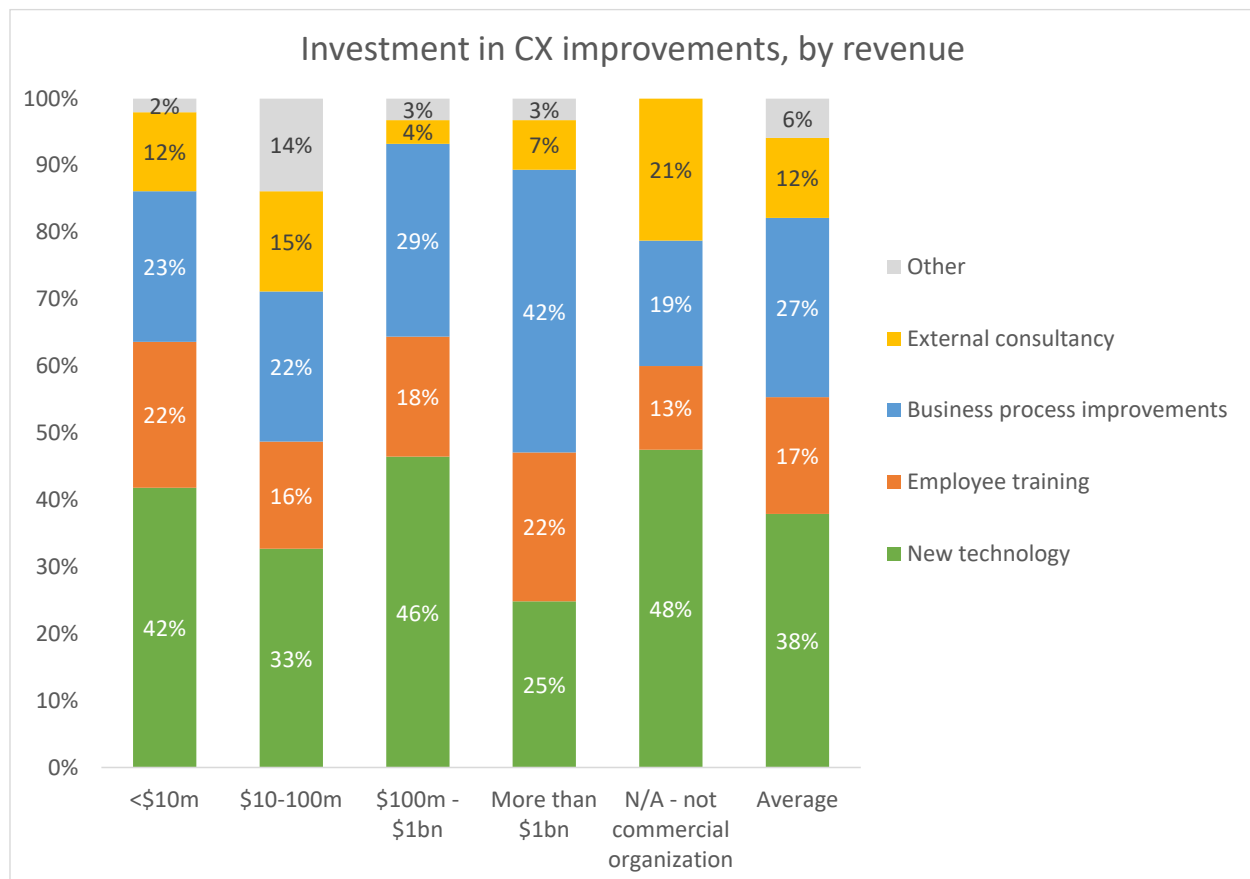
Respondents were asked to describe the allocation of their investments in customer experience improvements, considering new technology, training of employees, business process improvements and fees paid to external consultants.

'Other' spending includes:

- Benchmarking
- Customer research
- Data management
- Network cybersecurity
- Product enhancement
- Setting up outsourcing.

Investments in technology are usually higher than that of investment in business process improvements, particularly in smaller organizations, and non-commercial. Very large organizations report greater investment in business process improvements.

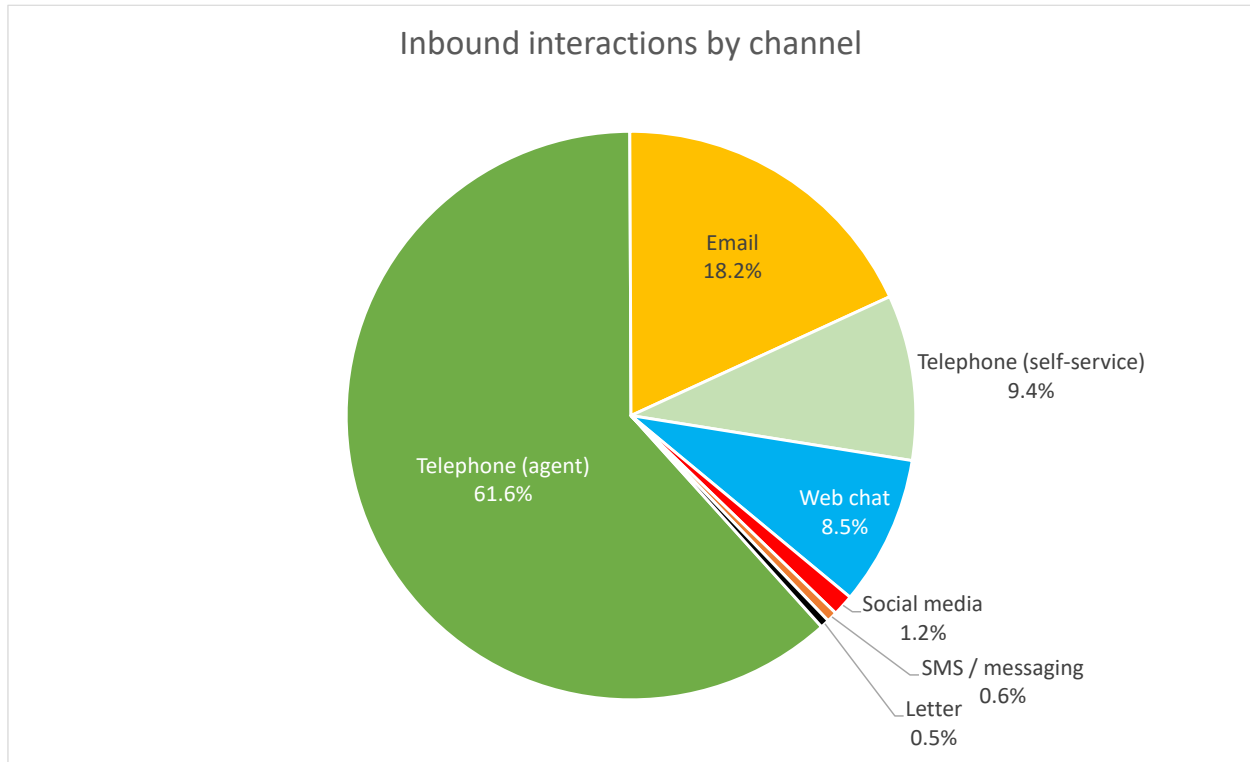
Figure 2: Investment in CX improvements, by revenue



CX INVESTMENT: CHANNEL FOCUS

Before looking which channels are receiving the most CX investment, it is important to put omnichannel into perspective.

Figure 3: Inbound interactions by channel



The proportion of live inbound interactions by telephone has remained fairly steady for a number of years. Telephony self-service interactions is back around its long-term historical figure of 10%.

After dropping to under 14% in 2022, email accounts for over 18% of respondents' interactions this year.

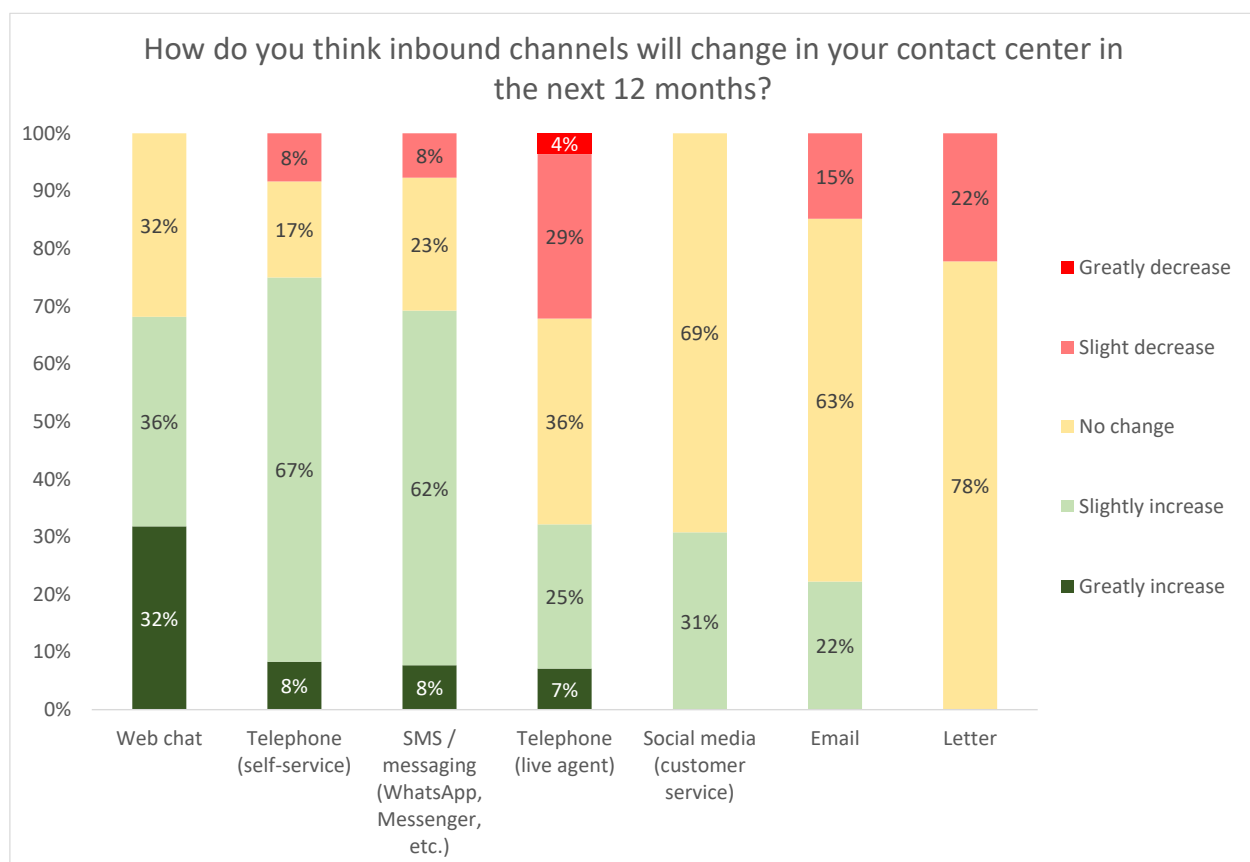
Web chat has shown steady growth, up from 4.7% in 2019 to 8.5% this year.

Social media rose to its highest figure of 3.7% in 2021, but this year's respondents only handle 1.2% of their interactions through this channel.

As not all of the same respondents take part in this survey every year, a jump or drop in the usage of a minor multimedia channel could be an industry-wide phenomenon or a case of a handful of early-adopters skewing the results, which is certainly possible where only a few use a channel, and where mean averages are used.

As such, a question is asked to respondents about how each inbound channel will change (if used by the respondent), so being able to judge if any alterations in the use of channels is due to real changes at a contact center-level, or is more of a statistical blip caused by a different set of respondents providing data each year.

Figure 4: How do you think inbound channels will change in your contact center in the next 12 months? (if used)



A similar proportion of respondents believed the live telephony channel volumes would drop (33%) or rise (32%), unlike many previous years where growth was expected.

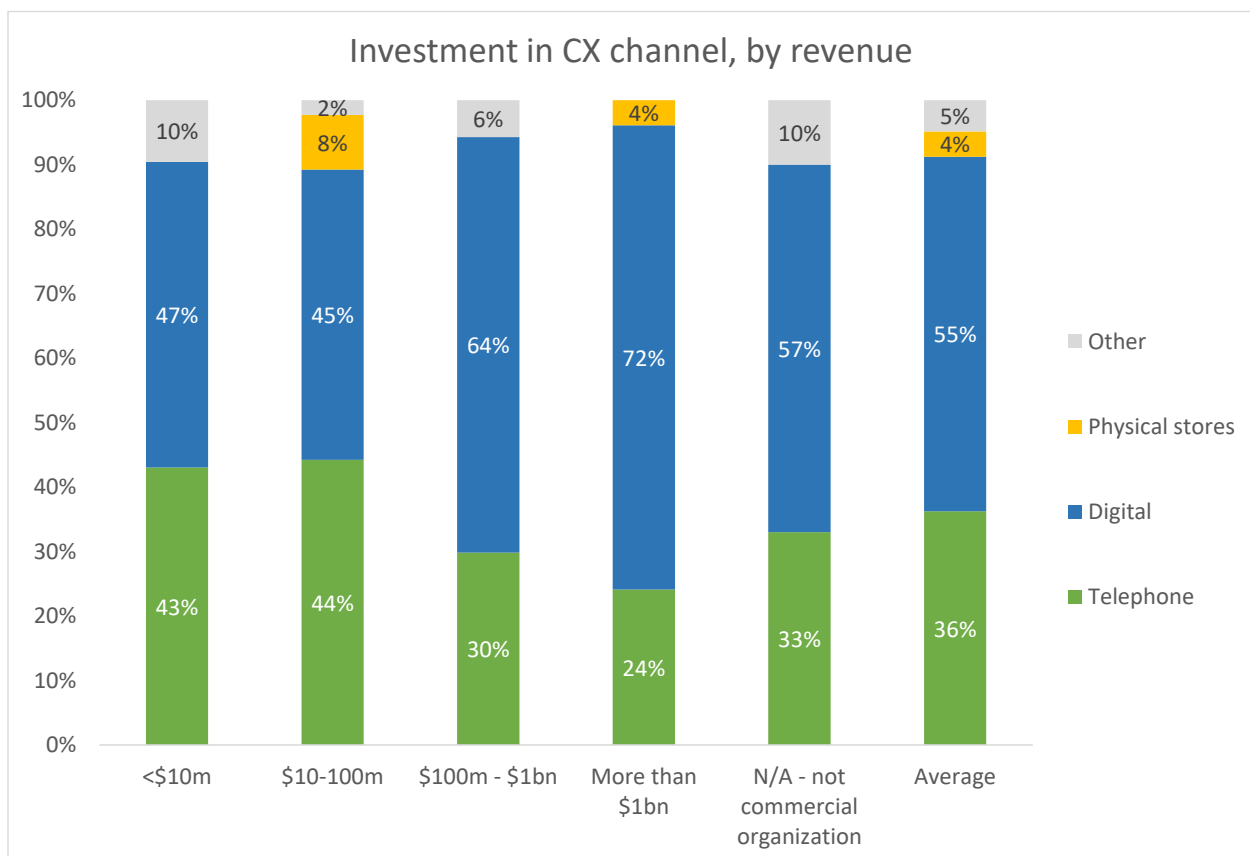
Strong growth is once again expected in web chat interactions, with SMS / messaging and social media also predicted growth. However, after many years of expected growth, respondents expect email volumes to stay fairly flat.

Telephony self-service is expected to grow once again this year, with its twin benefits of customer convenience and low cost still very much relevant. New approaches, such as AI-enabled interactive voice assistants, could encourage further use of self-service.

The previous chart's real message is that channels aren't being replaced, but rather augmented, and businesses have to accept that they need to develop an omnichannel approach, as that's what their customers are expecting. This means that the pressure to unify the view of the customer across channels is a challenge that isn't going to go away.

Turning to how customer experience investment is spent by channel, it is easy to see that for the majority of vertical markets, digital channels such as email, web chat, website and social media receive far more attention and investment than the traditional telephony channel, despite the former accounting for under 30% of inbound interactions (excluding web self-service), compared to over 70% coming through telephony (whether live or self-service). The focus on digital expenditure is higher in organizations with higher revenues.

Figure 5: Investment in CX channel, by revenue



Reported 'other' expenditure includes:

- Agent processes
- EDI / e-commerce
- Face-to-face interactions
- Staff training.

CORPORATE SUPPORT FOR THE CX PROGRAM

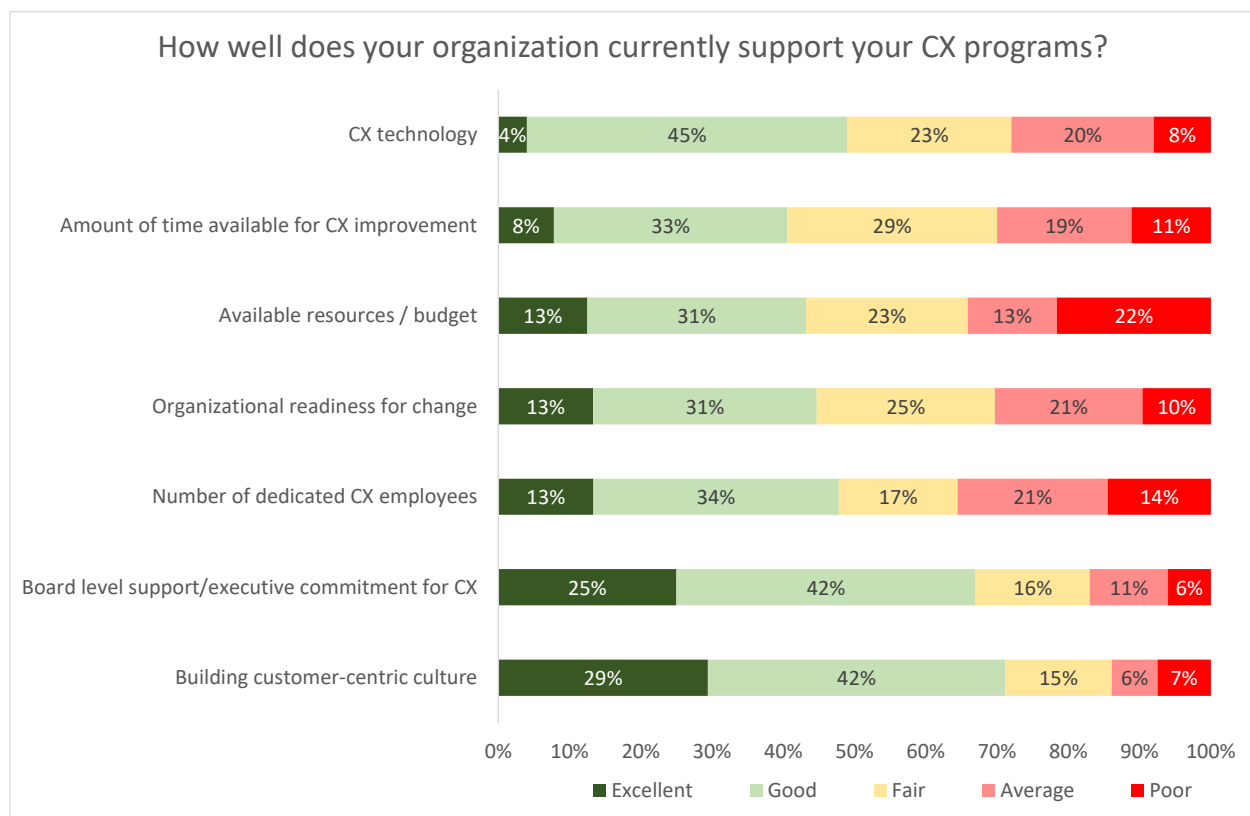
Respondents were asked how well their organization currently supported their customer experience programs.

In the main, the results were not entirely positive, with only half of organizations being positive about their CX technology, 35% being unimpressed with the number of dedicated CX employees, 35% being negative about the budget available for CX improvements and 30% feeling the same about the amount of time available for CX.

On the positive side, 67% commended their executives' commitment and 71% appreciated that their organizations were trying to build a customer-centric culture. It appears as if it is more the execution of CX improvement rather than the acceptance of the concept's importance which needs to be improved.

Having said that, the widespread finding that there were not always enough time and resource for CX improvement shows that having a customer-centric culture does not easily or necessarily translate into actual action to improve CX.

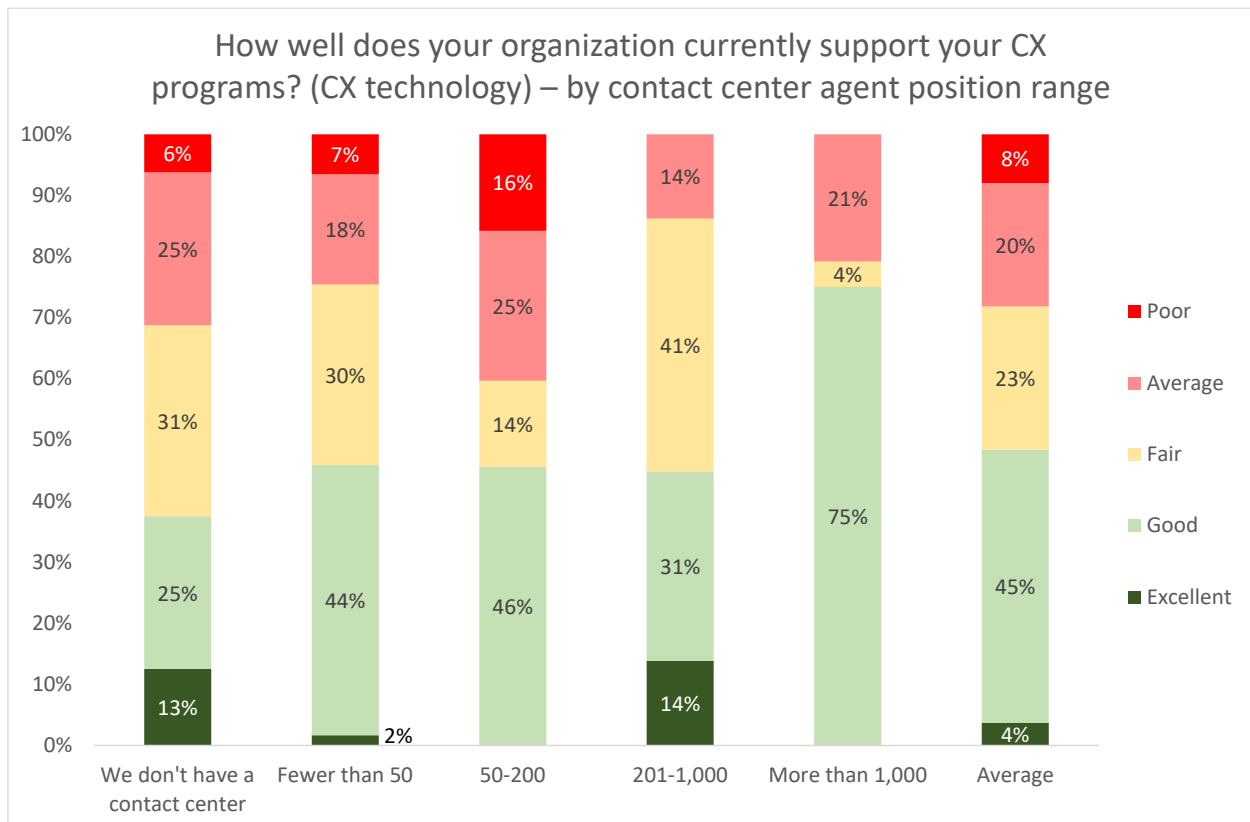
Figure 6: How well does your organization currently support your CX programs?



When considering the capability of customer experience technology by the size of the contact center, there are very significant proportions of contact center-owning respondents who ranked their CX technology as being poor or average, particularly those with smaller (or no) contact center operations.

While there was a positive correlation between contact center size and the satisfaction with their CX technology, there is still room for improvement.

Figure 7: How well does your organization currently support your CX programs? (CX technology) – by contact center agent position range



The next section of this report looks in depth at the use of some of the technologies supporting customer experience – in particular within the contact center – and the plans that organizations have for investing in these in the near future.

TECHNOLOGY

CURRENT AND FUTURE USE OF CUSTOMER CONTACT TECHNOLOGY

Touchtone IVR, IP telephony, call recording, AI, workforce management and management information systems are amongst the most likely to be upgraded or replaced in the next year.

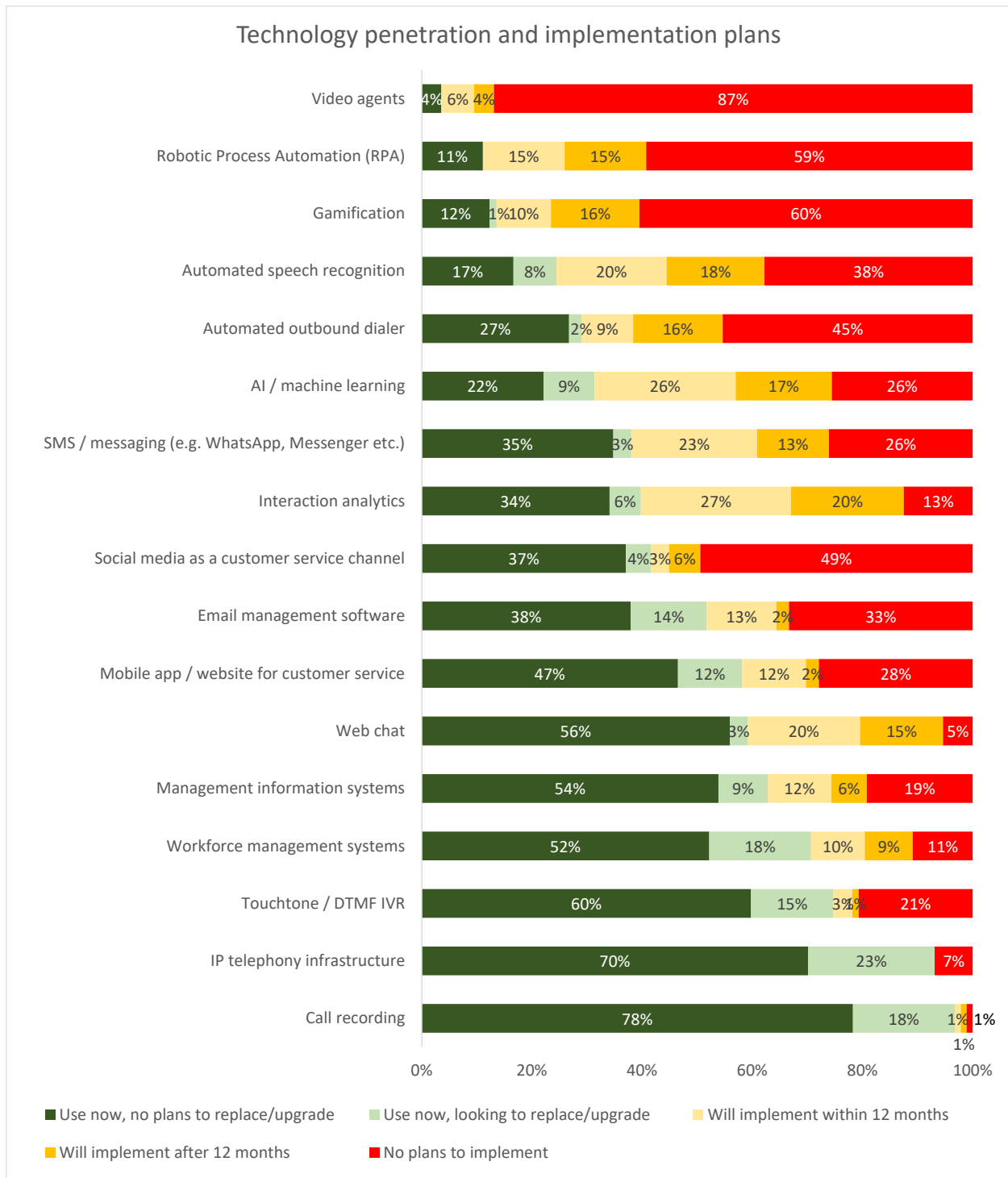
Many legacy call recording solutions are moving to the cloud, removing the need for on-site storage and maintenance, security management and improving operational flexibility, and the opportunity to upgrade recording systems while implementing analytics is also being taken by many contact centers.

In terms of expected new implementations, AI and interaction analytics dominate once again, with messaging, speech recognition and web chat also receiving serious interest.

In the longer-term, AI, RPA, speech recognition, gamification and analytics were seen by respondents as likely investments.

This may show that businesses are serious about these solutions, or alternatively it may be viewed as something that businesses would like to do, but find it difficult to get around to as they have more pressing tasks in the meantime. Budgetary issues may also play a large part in this.

Figure 8: Technology penetration and implementation plans



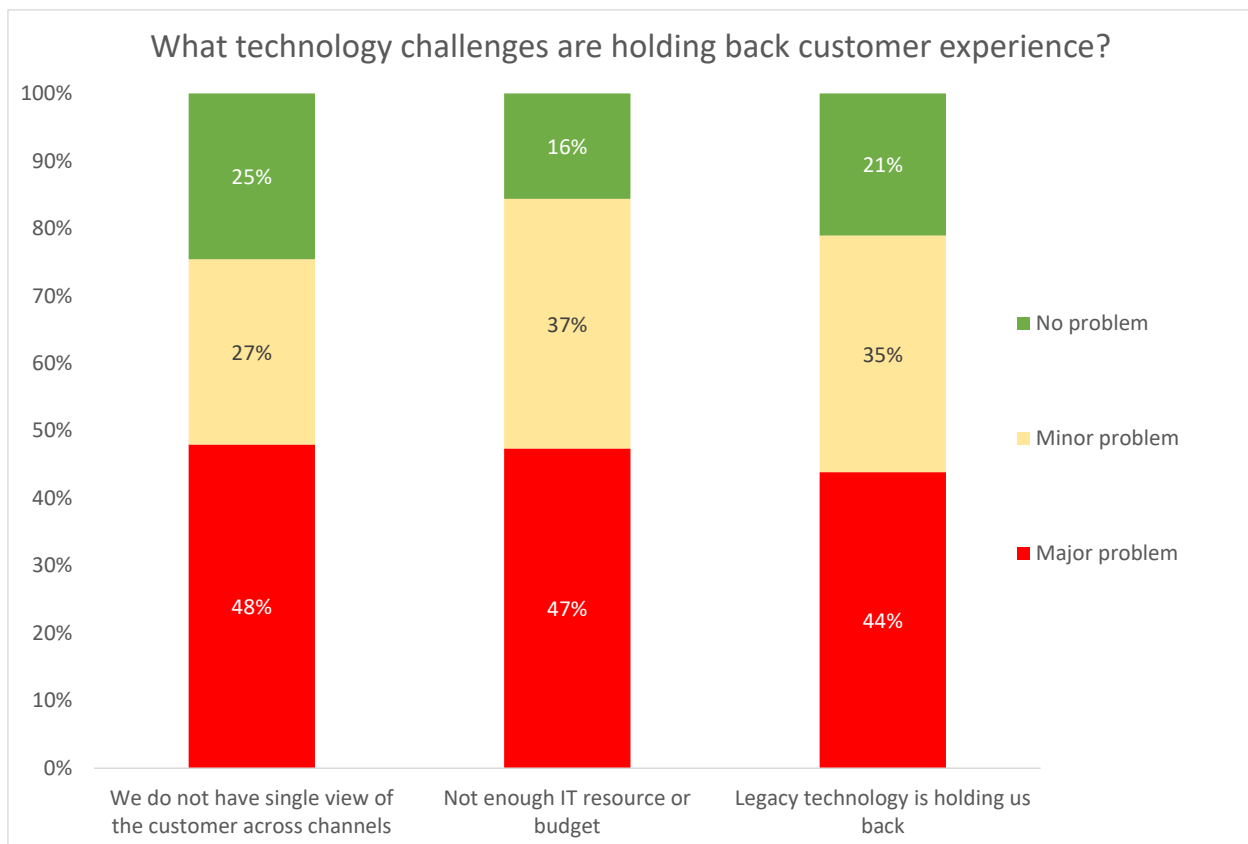
EFFECT OF TECHNOLOGY ON THE CUSTOMER EXPERIENCE

ARE TECHNOLOGY ISSUES HOLDING BACK CUSTOMER EXPERIENCE?

Respondents were asked about the extent to which technology challenges were affecting their ability to improve their customers' experience.

Legacy technology is reported to be a major problem by 44% of survey respondents. This is more likely to be the case in larger contact centers: 68% of the largest contact centers report this to be a major problem for them, compared to 16% of small sub-50 seat operations. While there has been a very significant move to cloud – supported recently by the need for remote working – it is clear that there is still a long way to go before businesses can fully develop their CX-supporting technology.

Figure 9: What technology challenges are holding back customer experience?



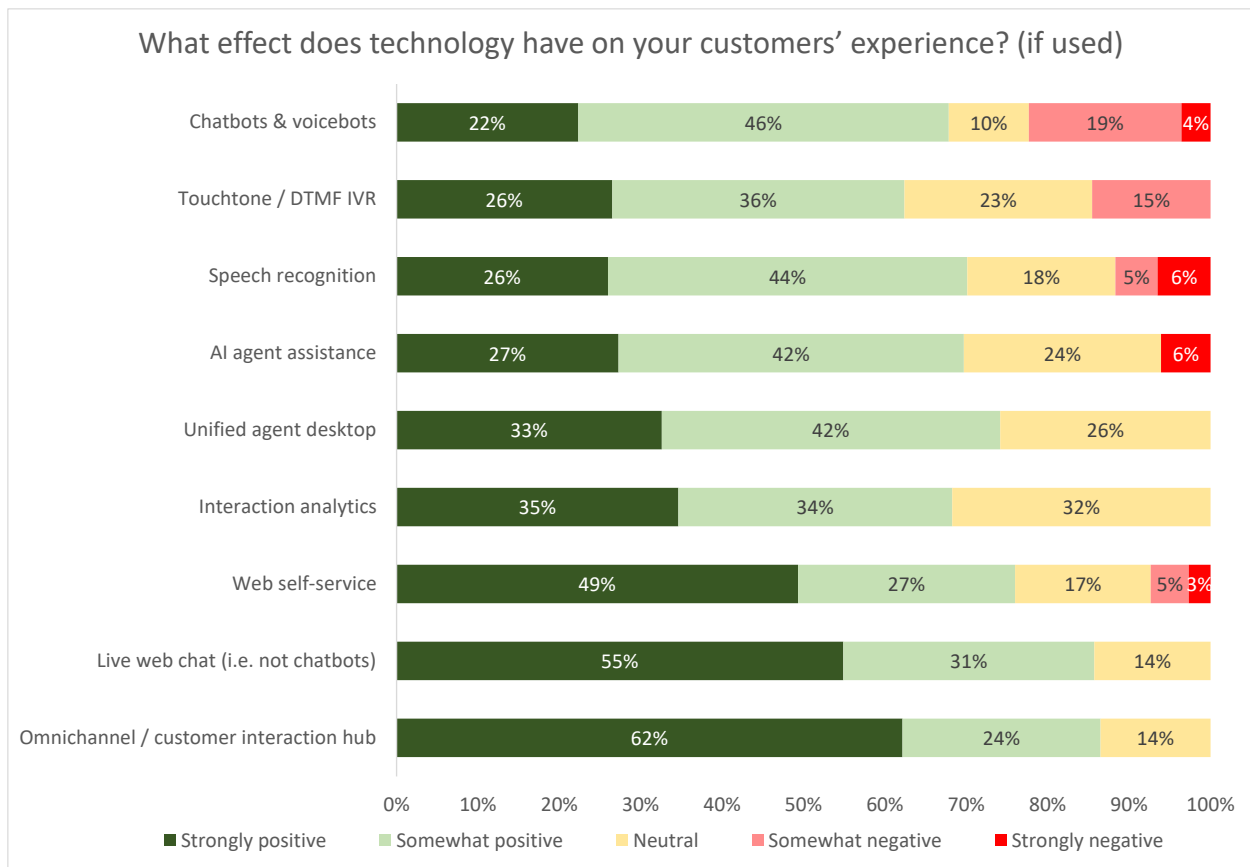
A lack of IT budget for CX-supporting technology was a major problem for 47% of respondents, and not being able to view the customer across channels (48%) means that the full benefit of omnichannel contact cannot be achieved, and that unnecessary time and effort are being spent by the customer, with sub-optimal results for all concerned.

DOES CX TECHNOLOGY AFFECT CUSTOMER EXPERIENCE?

The following chart looks at the effect that organizations believe specific technologies have on their customers' experience (data are only from the survey respondents actually using these applications).

Generally, they are seen as providing a positive experience for customers, and although touchtone IVR and speech recognition have had a somewhat more polarizing view in the past, these applications receive a strong net positive response again this year.

Figure 10: What effect does technology have on your customers' experience? (if used)



Users of an **omnichannel customer interaction hub** are very positive (62% of respondents) about the effect on customer experience. Omnichannel describes the goal of customers being able to contact (and be contacted) through any channel – switching between them during the interaction as appropriate, while taking any relevant data and history along with them – with a single, unified view of the customer's journey being available to the agent.

For true omnichannel, the platform, infrastructure, applications and resources need to be available to identify, route and switch interactions between agents and channels seamlessly, while keeping all relevant data gathered in the course of the interaction: larger operations are more likely to have had the investment made to deliver this sort of experience.

One of the main irritants for a customer is having to contact the business on numerous occasions, often through different channels, about the same issue. Omnichannel can make this experience less painful and more effective, by providing a single view of the customer's journey – not just that particular interaction, but the entire experience – so that agents do not have to repeat questions and can treat the customer's request more effectively.

Web chat offers organizations a chance to cut costs through running more than one chat session at a time with customers, using the time that a customer spends reading and replying to an agent's response to deal with other customers concurrently, with 2 or 3 chats being seen as sustainable.

Web chat can be used as a 'point of crisis' channel to convert an online shopping basket into a sale by providing timely service, or if a visitor is paused on a web page too long, perhaps as they can't find what they are looking for. In such cases, there are two main benefits to the business to provide text chat: revenue maximization, and the avoidance of unnecessary calls.

Web chat can also act as a safety net for the customer if an online self-service attempt fails. An analogy can be made with voice self-service, where a failed session is often ended with the customer 'zeroing-out' (pressing zero to get in touch with an agent).

Failed web self-service sessions may end with a phone call being made, but web chat can avoid some of these, which is a cost saving for the business and better for CX. Survey respondents using live web chat usually see it being extremely positive for customer experience.

Live web chat is seen as providing a strongly positive CX effect by 55% of survey respondents.

Chatbots/ voicebots don't get quite the same level of positive response of live web chat, 68% of businesses using them say that they have a positive effect on CX.

Unified desktop: most of today's contact centers use complicated, multiple applications, often only loosely linked, which require skilled and experienced agents to navigate and manage interactions with customers successfully at the same time. Even after the call is completed successfully, each system may need specific inputs from the agent in order to start the required back-office processes or to keep each database consistent with the others.

The result is that even though a contact center may be staffed with experienced, hard-working and skilled staff, its overall performance is suboptimal, leading to lower profits, customer satisfaction and unnecessary costs, as well as downstream service issues.

The variable capability of agents is also a contributory inhibitor to quality improvements, profit maximization and an optimized customer experience. One possible solution is to look at an overall unified desktop environment that includes dynamic scripting, as well as understanding agent training needs through an integrated solution including call recording and analytical functionality, delivering up-to-date performance metrics and in-call information supporting cross-selling and upselling offers.

Although the unified desktop can be seen as an internally focused technology, the vast majority of respondents believe that its ability to provide in-call support to agents and reduce downstream errors has a very beneficial effect upon customer experience.

Web self-service is also seen as being of positive benefit to the customer experience, and as the cost per automated support session is estimated to be between 40 and 100 times cheaper than a live call to an agent, it has significant benefits to the business too.

Many customers will try self-service, but if this experience does not give them what they want immediately and accurately, they will either call the business or go elsewhere.

Where the customer is tied into an existing business, this will result in a higher cost of service and decreased customer satisfaction but where the visitor is only a potential customer, a failure in web self-service may mean the loss of a sale. Providing effective web self-service options – with a clear path to escalation to a live agent, along with any contextual customer specific information – is in the best interests of the business.

Interaction analytics can be used in many different ways to address various business issues. This is an advantage – it is hugely flexible – but it can also make its message to the market more complicated. However, depending upon how interaction analytics is used, it can assist in:

- agent improvement and quality assurance
- business process optimization
- avoidance of litigation and fines
- customer satisfaction and experience improvements
- increases in revenue and profitability
- improvements in contact center operational performance, and cost reduction.

Like most contact center applications, analytics can be used to cut costs, but its promise goes far beyond this. No other contact center technology provides the business with this level of potential insight that goes far beyond the boundaries of the contact center and can offer genuine and quantifiable ways in which business processes can be improved.

Amongst the survey respondents which use interaction analytics, there is a general feeling that it impacts somewhat positively upon the customer experience, although perhaps not quite to the same extent as customer-facing technology such as live web chat. As a large amount of interaction analytics is done historically, the immediate benefits to the customer may not be as apparent.

Despite the wider and more powerful functionality that **automated speech recognition** gives to an IVR system, some inhibitors are present.

It is generally acknowledged that speech recognition can be considerably more expensive to implement than DTMF IVR, and is also likely to require significant, highly-paid in-house resource to fine-tune and operate it going forward. Some solution providers note that the majority of businesses' interest in moving from DTMF to speech recognition comes when the existing telephony self-service legacy system is approaching end-of-life.

The success or otherwise of speech-based IVRs is very affected by how callers are encouraged to use the service. It has been the case that some speech implementations have actually made life more difficult for the customer, who may not have the confidence that the system will understand their natural language request and provide very short, one-word answers; if nothing is given in the way of prompts or examples, callers may give too little or too much information as they are unsure of the sophistication or capabilities of the system, and this may be a reason for high self-service abandonment rates.

Survey respondents are increasingly positive about the effect that speech recognition has had on the customer experience, and we would expect this to increase as AI-driven voicebots become mainstream.

AI agent assistance is deployed in a number of ways that reduces the manual work required for handling customer interactions while boosting the value of each conversation.

It helps agents navigate more difficult conversations and reduce their average handle time with tools that surface relevant information like reminders, coaching, or knowledge base articles. It also helps agents to follow company compliance regulations, handle customer objections, and identify upsell opportunities by automatically surfacing and tracking key tasks. Lastly, it reduces manual work like note-taking and uploading call transcriptions to the CRM system while increasing the accuracy of call summaries in less time.

The feeling amongst respondents is that **touchtone IVR** is a little less beneficial to the customer experience than most of the other technology applications surveyed, despite its widespread prevalence.

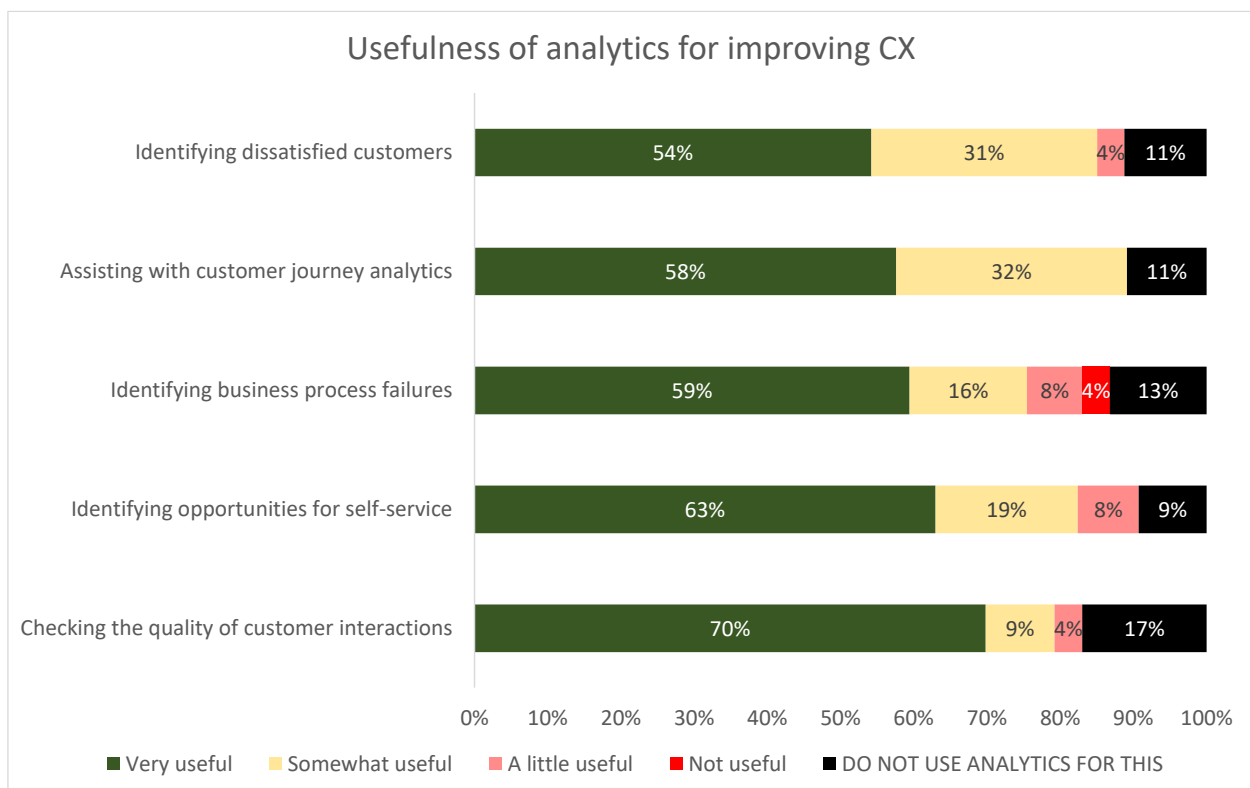
IVR was typically implemented as a cost-saving measure, rather than something to improve the customer experience, and although visual IVR promises to benefit both business and the smartphone-owning customer, its uptake is currently low.

THE ROLE OF ANALYTICS IN CUSTOMER EXPERIENCE

Customer interaction analytics offers huge opportunity to gain business insight, improve operational efficiency and develop agent performance. In fact, the list of potential applications for this technology is so high that businesses could be forgiven for being confused about how to target and quantify the potential business gains.

Organizations using analytics were asked how useful the solution was for improving various aspects of the customer experience, either directly, or through improving internal processes which then had a impact upon the overall customer experience.

Figure 11: Usefulness of analytics for improving CX



The overall conclusions were surprisingly consistent: in all analytics use cases, over half of respondents that used analytics for the stated purpose said that it was 'very useful' with the majority of the rest saying that it was 'somewhat useful'.

These figures are somewhat more positive than has been the case in the past.



How isp.net Transformed Customer Experience and Increased Performance Visibility by 900% with MiaRec Auto QA and Conversation Intelligence

isp.net, a Las Vegas-based Internet Service Provider, built its reputation on exceptional, community-focused support. However, with only one QA manager reviewing just 5–10% of calls, the team lacked the visibility needed for consistent coaching and customer insight. This led to reactive evaluations, inconsistent feedback, and missed opportunities to improve the customer experience.

All of this changed when isp.net adopted MiaRec's AI-powered Conversation Intelligence.

A Clearer Window into Every Customer Interaction

With [MiaRec Auto QA](#), isp.net now automatically evaluates 100% of relevant calls, driving a 900% increase in performance visibility. Instead of relying on limited call reviews, the team now has complete insight into agent behaviors, trends, and opportunities for development.

Agents review their own calls using AI-powered personalized feedback, while supervisors gain consistent, data-driven coaching insights. MiaRec Auto QA helps isp.net eliminate 24 hours of manual QA work per week, saving over 52 days per year.



Automated Coaching That Elevates Satisfaction and NPS

To strengthen agent development, isp.net leverages MiaRec's Areas of Improvement, which automatically analyzes each customer interaction and highlights individual strengths and skill gaps. Agents receive personalized recommendations after every call, empowering them to self-correct and continuously improve.

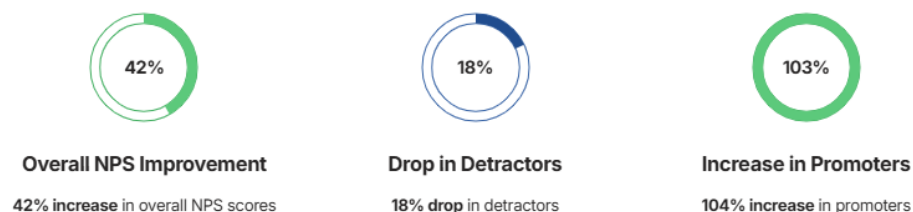
By combining these insights with AI-powered Sentiment Analysis, isp.net's Support Manager delivers weekly, targeted coaching that directly addresses each agent's needs. This dual-layered feedback loop fuels collaboration, improves performance, and drives measurable customer-experience gains.

The impact has been substantial:

CSAT Results



NPS Results



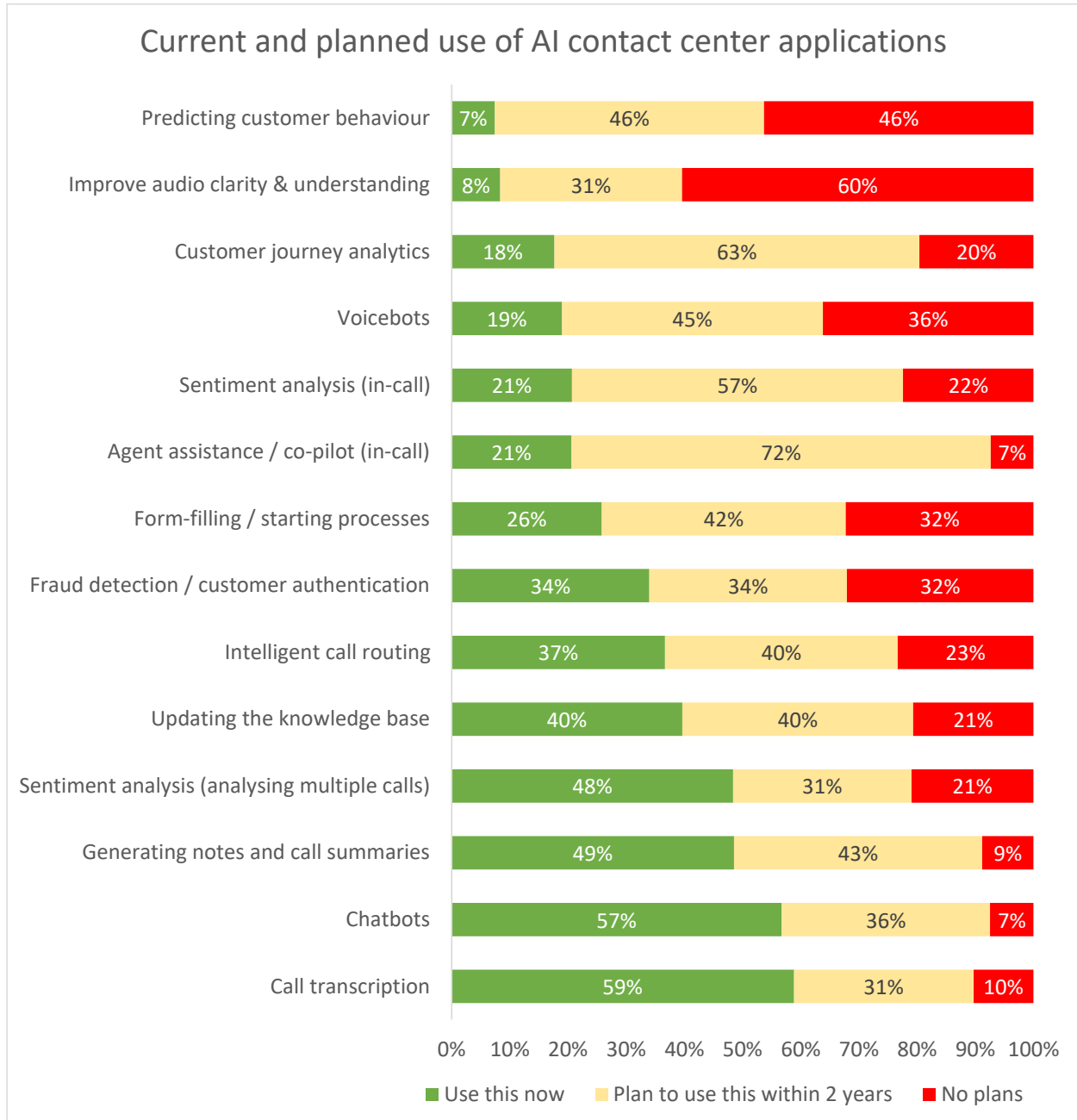
Proactive Customer Support for Improved Customer Experience

Using Sentiment Analysis and CX Insights, isp.net quickly identifies at-risk interactions and routes them to retention managers for immediate follow-up, reducing churn and preventing escalation. Powered by MiaRec, isp.net has replaced manual QA and limited visibility with an automated, insight-driven support model that enables faster coaching, stronger customer relationships, and consistent delivery of world-class service.

THE ROLE OF AI IN CUSTOMER EXPERIENCE

Survey respondents were asked which AI applications they are currently using with their contact centers, and what their plans were for future implementations.

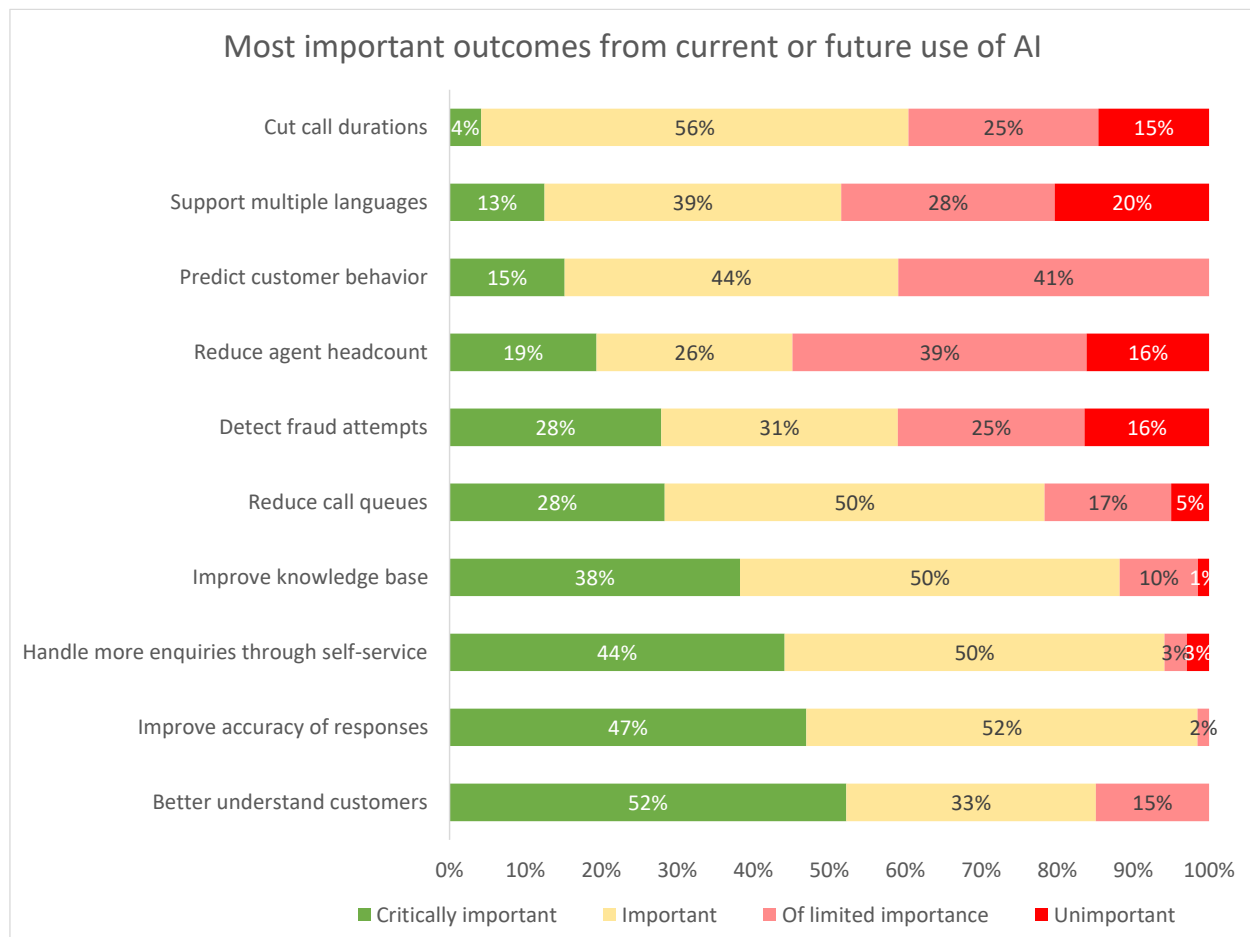
Figure 12: Current and planned use of AI contact center applications



Chatbots and call transcription were the most frequently used AI applications. AI agent assistance, while in place in only 21% of businesses surveyed, had the greatest proportion of survey respondents planning to implement it within two years. In-call sentiment analysis and using AI for customer journey analytics were also expected to grow very strongly.

Survey respondents were asked about the benefits they wanted to see from AI.

Figure 13: Most important outcomes from current or future use of AI



Interestingly, while 19% said that reducing agent headcount was of critical importance to them, 55% said that it was of either limited, or no importance.

AI is looked upon to be vital as a means to increase the sophistication, accuracy and effectiveness of self-service, and especially as a way to improve the understanding of customers. The improved provision of information – quicker and more accurate – across all channels is also a key driver of AI implementation.

Improving telephony operational performance through reduced call lengths and queue times (with the former supporting the latter) is seen as comparatively less important, despite the powerful positive effect this can have on customer experience.

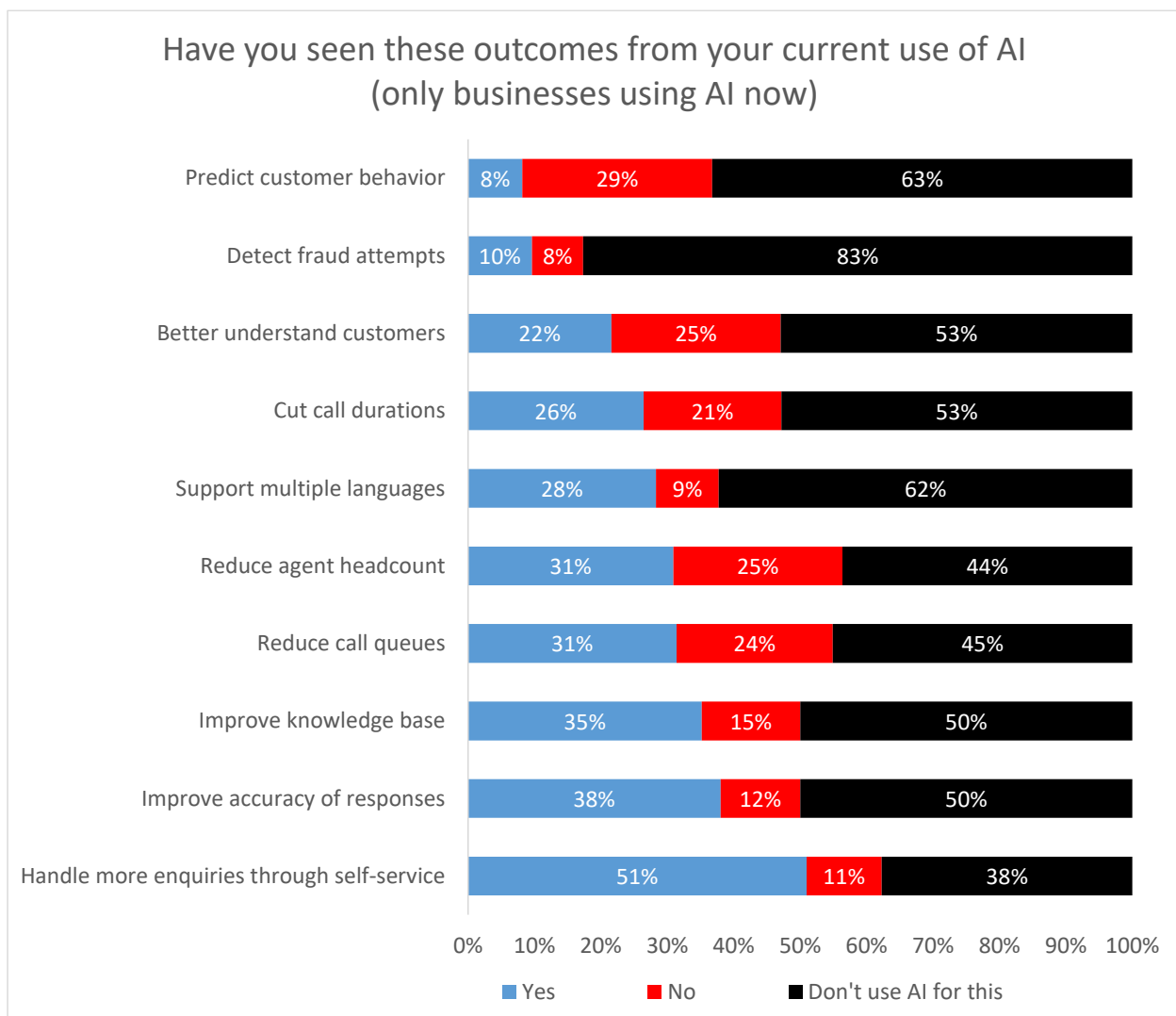
Survey respondents who were currently using AI were asked about the outcomes and results that they had seen as a result. As the use of AI in the contact center is in its relative infancy, readers should be aware that the relatively small sample size needs to be treated with caution.

There was a widespread positive response from those using AI to improve self-service – which as a previous chart showed was mainly from chatbots – and an improvement in knowledge base quality and response accuracy was also noted.

There was much less use of AI to detect fraud attempts, to predict customer behavior or to cut call durations, and these applications were by no means unanimously agreed to be successful at the moment.

Improving operational metrics such as call duration and queue length also had mixed results.

Figure 14: Have you seen these outcomes from your current use of AI (only businesses using AI now)



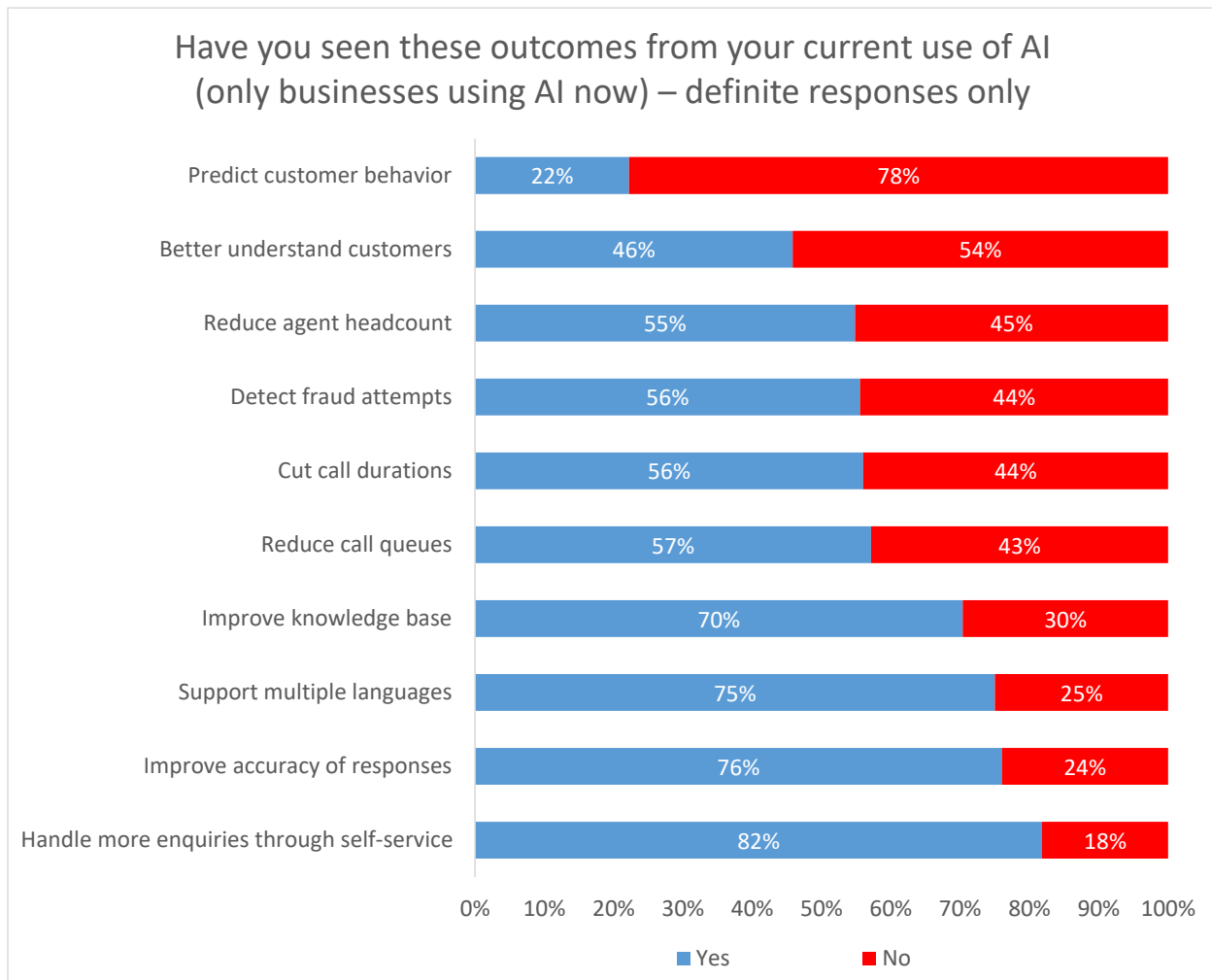
The chart below shows the same information as the previous diagram, with the survey response “Don’t use AI for this” removed to clarify what actual users of AI are experiencing.

There was widespread satisfaction with the use of AI to improve accuracy, support a multilingual environment and to handle more self-service enquiries.

There were significant proportions of AI users who had not seen improvements many use cases: predicting customer behavior, better understanding customers, reducing agent headcount, detecting fraud attempts or cutting call durations or queues.

This suggests that AI – both the technology itself and businesses’ use of it – still has a considerable way to go before it can be said to be entirely fulfilling its purpose.

Figure 15: Have you seen these outcomes from your current use of AI (only businesses using AI now) – definite responses only



There is more research about the use of AI for specific contact center business and operational use cases at www.contactbabel.com/research.

Blending AI & Human Expertise To Transform Contact Centers

The rapid rise of AI in contact centers has shifted from fear of job replacement to a recognition of AI's power in augmenting and empowering human agents. With 90% of global CX leaders believing AI is key to unlocking employee potential, now is the time to embrace AI-driven solutions that enhance both efficiency and customer satisfaction.

Managing High Call Volumes & Complexity

As customer interactions grow in volume and complexity, AI-powered solutions enable contact centers to streamline workflows, reduce agent burnout, and improve service quality. Real-time guidance and post-interaction analysis help frontline teams handle difficult conversations with confidence, ensuring compliance and reducing escalations.

AI-Powered Scorecards & Performance Coaching

AI-driven scorecards provide consistent, data-backed performance evaluations for agents, replacing traditional random sampling with 100% interaction analysis. These insights enhance agent coaching, drive quality improvements, and foster a culture of continuous learning, boosting both employee engagement and customer satisfaction.

Strengthening Compliance & Customer Trust

Regulated industries must navigate strict compliance requirements. AI solutions identify compliance risks in real-time, ensuring agents use appropriate language and adhere to necessary protocols. This proactive approach helps prevent costly violations and reinforces customer trust in sensitive interactions.

AI as a Workforce Enabler, Not a Replacement

AI optimizes, rather than replaces, human expertise. By handling repetitive tasks, AI allows contact center agents to focus on complex, high-value interactions. The result? Improved efficiency, enhanced customer relationships, and a more engaged workforce. With AI as a strategic ally, contact centers can deliver seamless, human-centric customer experiences while driving operational excellence.

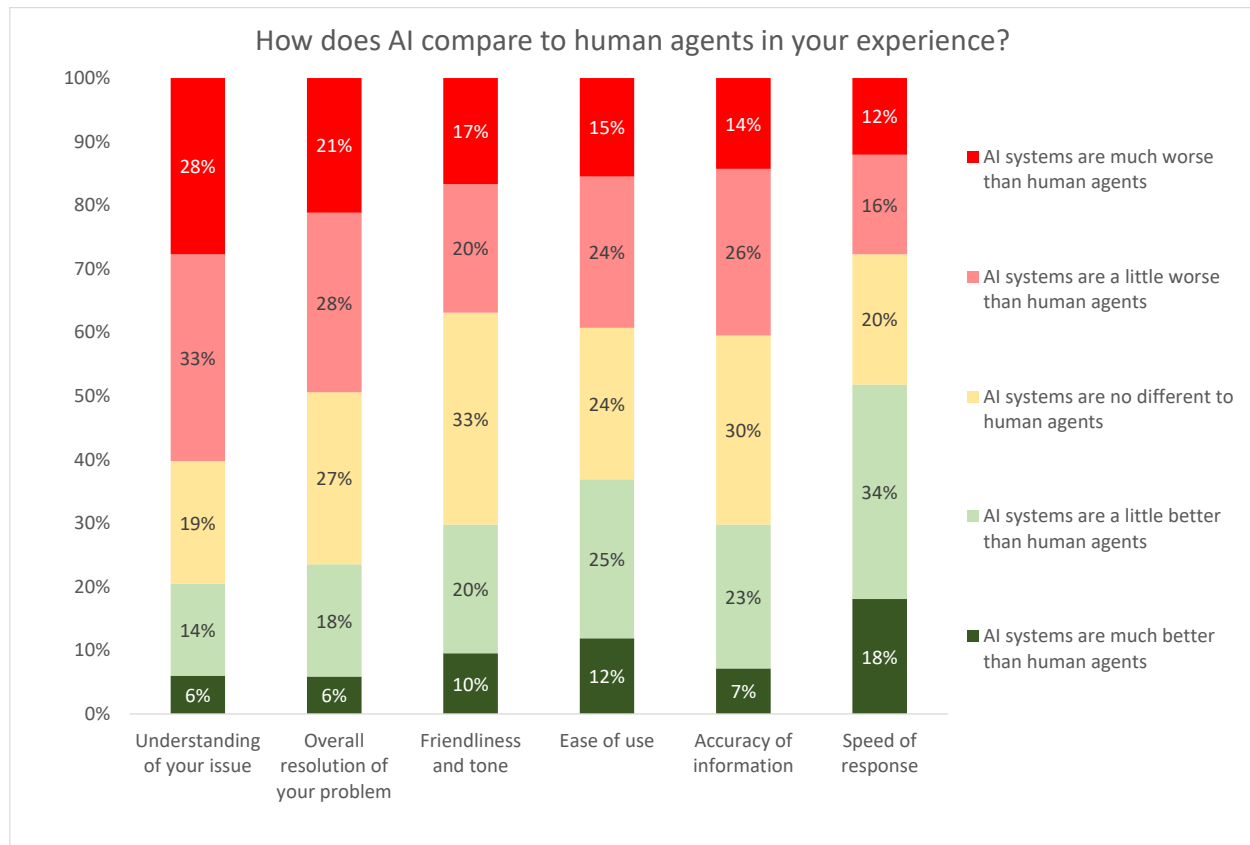
Discover how CallMiner's AI-driven conversation intelligence platform empowers contact centers to optimize customer interactions, enhance agent performance, and drive operational success.

CUSTOMER OPINIONS AND EXPERIENCE WITH AI IN CX

The customer panel was asked about their experience of using AI for customer service, in particular how it compared to the service experience provided by live agents.

Survey respondents who stated that they had never knowingly experienced AI customer service have been removed, leaving 84% who believe that they have done so.

Figure 16: How does AI compare to human agents in your experience?



The customer panel reported that the speed of service from AI was generally quicker than live agents, which is to be expected.

However, the rest of the experiences were less positive, with 61% of customers stating that AI's understanding of the issue was poorer, 49% that the overall resolution was worse and 37% that the friendliness and tone was inferior.

Perhaps most concerning is that 40% of customers found that the accuracy of the information provided by AI was not as good as that given from live agents: if AI is to grow and be accepted, the quality of responses has to improve considerably. If not, customers will refuse to engage fully with the system. This is an issue that is industry-wide: if there are sufficient poor customer experiences with AI, then customers will become generally 'inoculated' against trying to use them, regardless of how effective an individual organization's AI system is.

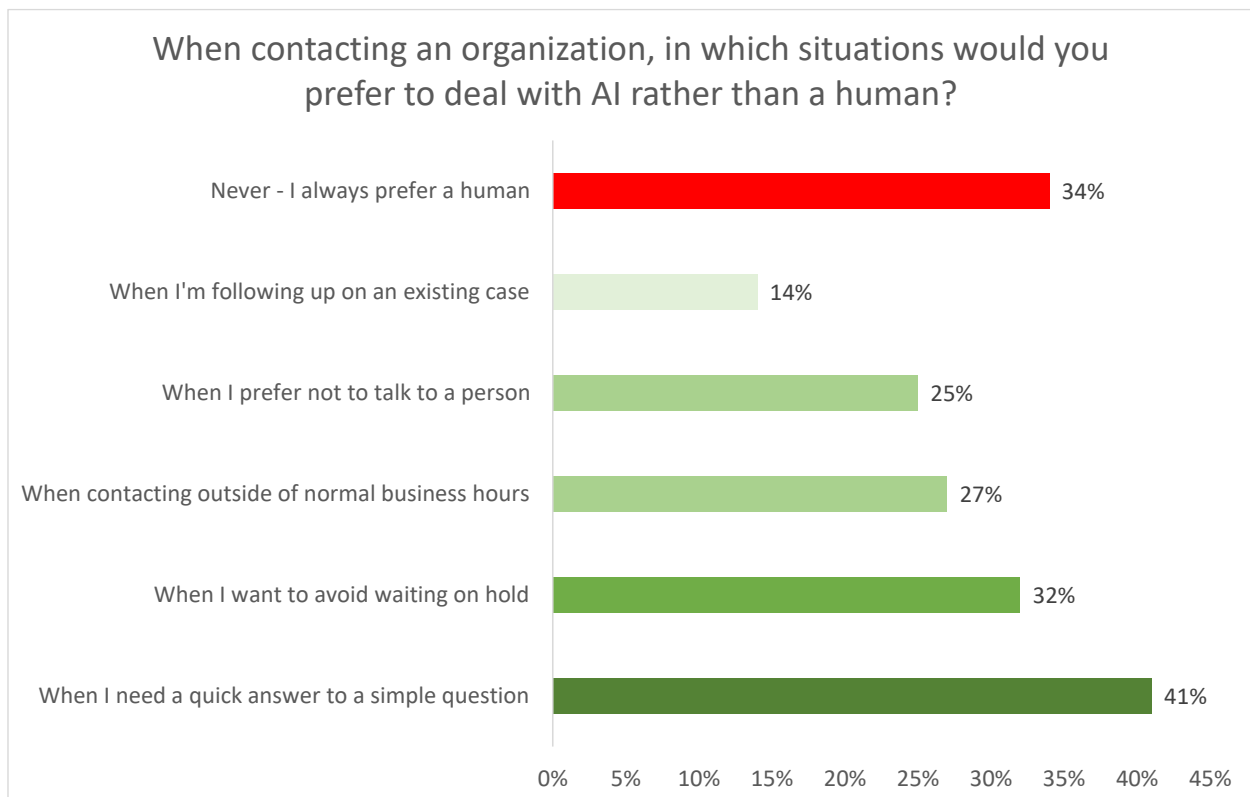
WHEN WOULD YOU LIKE TO USE AI FOR CUSTOMER SERVICE?

Our 1,000-strong customer panel were asked under what circumstances they would prefer to use AI to answer their queries rather than talking to a live agent.

The exact question asked was “When contacting an organization, in which, if any, of the following situations would you prefer to deal with AI rather than a human?”.

It is important to note that we cannot assume that if the answer is negative (i.e. the survey respondent does not prefer AI in a specific case), that they then **by definition** prefer a human – it may be that they have no strong feelings either way, which is why the final option of “Never – I always prefer a human” has been included.

Figure 17: When contacting an organization, in which situations would you prefer to deal with AI rather than a human?



66% of survey respondents state that there are circumstances in which they would prefer to use AI rather than speak with a live agent.

By far the most popular situation is where the customer wants a quick answer to a simple question. This is what most AI is currently used for – usually chatbots, regardless of whether they are truly AI-enabled or not – and aligns closely with one of the main reasons that business state they are implementing AI: to improve self-service uptake.

This customer interest in a speedy response is shown in the second most popular response, where customers want to avoid waiting in a call queue. As short queue times – along with first-contact resolution – are the main drivers of positive customer experience, this again is to be expected.

Customers are showing organizations that they are willing to use AI-enabled self-service if it provides them with what they need: a quick and successful outcome.

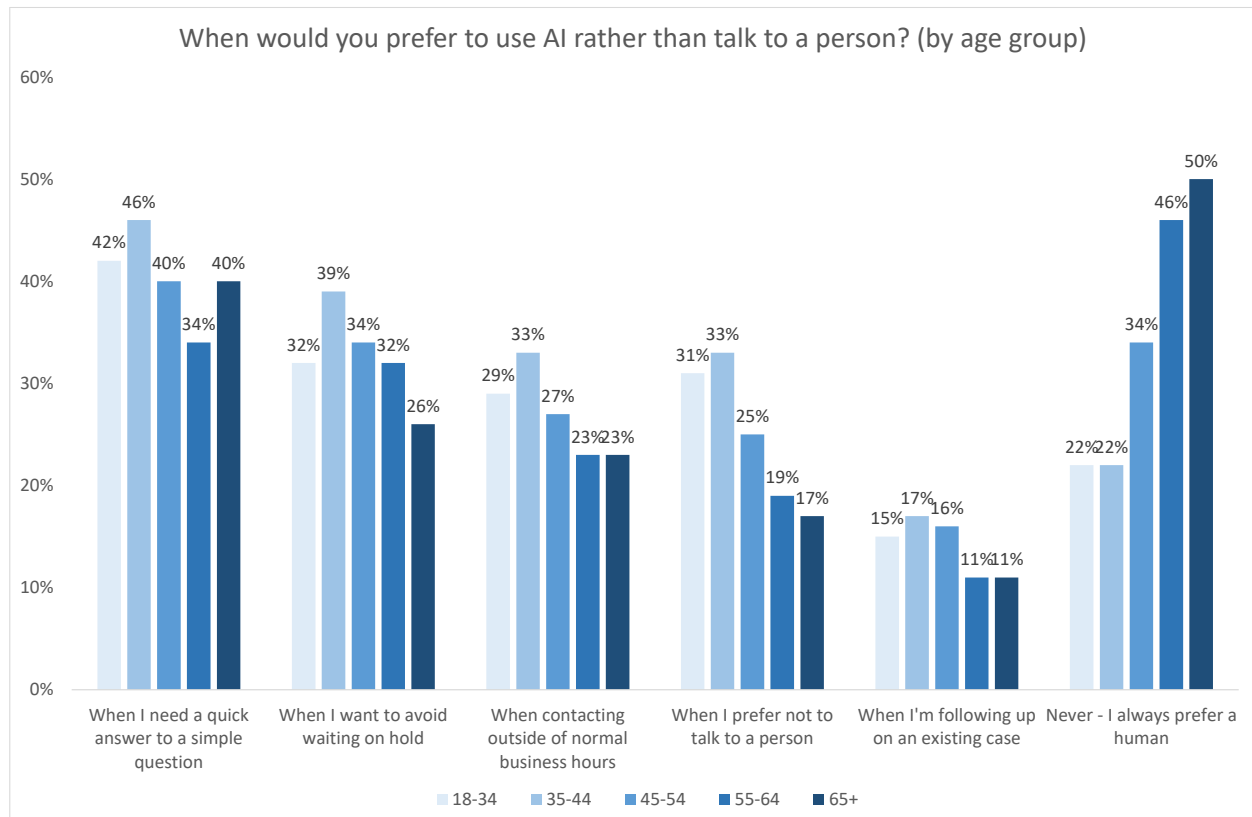
Other situations where AI is preferable to an agent are less popular, but still have their proponents: the ability to contact an organization at a time that suits the customer is very popular with some groups, and sometimes – depending on customer circumstances or personality – AI may actually be preferable to speaking with another person, even if queue times are short.

There was little customer belief that AI would be better for following up on an ongoing issue than speaking with a live agent, which seems to indicate that as far as customers are concerned, AI is still of most use for handling simple queries.

Looking in more depth at this question, we have segmented answers by age group.

The situations below are displayed with the most popular on the left, with the final column on the right showing the proportion of respondents who would never prefer to use AI.

Figure 18: When would you prefer to use AI rather than talk to a person? (by age group)



As detailed above, AI seems well placed to answer simple questions – the main current use of self-service – with younger groups slightly more likely than older ones to choose AI over live agents. While the 65+ group are much less keen on AI in general, self-service is by far the most likely situation in which this customer group will choose AI over a live agent.

Young people are generally more acceptant of AI, but older people have had much more experience of being stuck in contact center telephony queues, so more are willing to choose AI over live contact than might be thought.

Avoiding spending time in a queue is also a fairly popular choice, although only 32% of all respondents chose to use AI over a human for this purpose.

Using AI to contact a business outside office hours has a strong correlation by age, which is supported by evidence elsewhere that long opening hours is an important factor for many younger customers, who are also much more likely to have situations where they actively do not want to talk to a live agent, even if one were available.

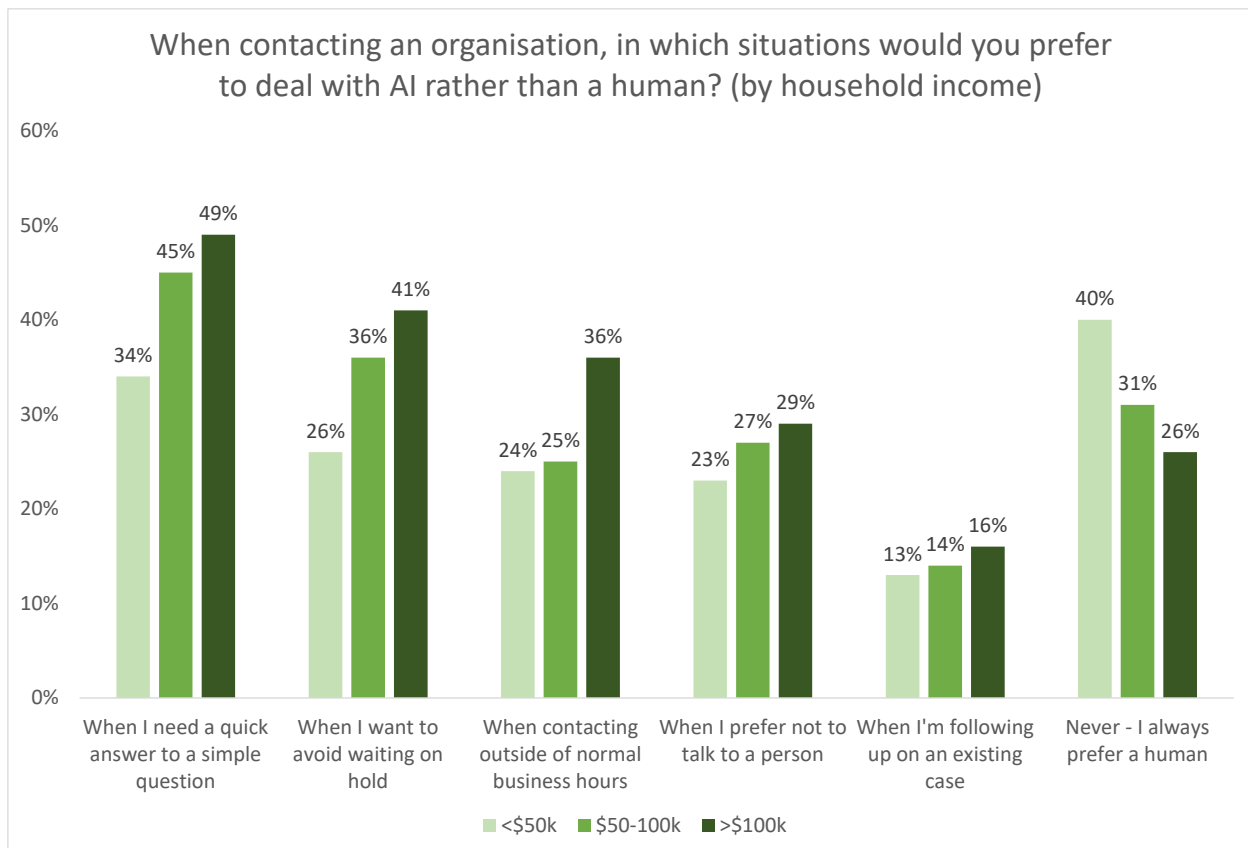
AI is rarely preferred when the customer has to follow up an existing case.

Around half of the 55+ age group state that they would always prefer to speak with a live agent rather than AI, which emphasizes the scale of the task that organizations have to move customers to automation and away from a preference for the live channel.

Looking at the same data segmented by household income groups, more affluent survey respondents are more likely to choose AI in general, particularly when needing to contact an organization outside normal business hours.

Those on lower incomes are somewhat more likely than any other group to always prefer to speak with a person rather than use AI, although it should be noted that the majority of this group (60%) have at least one situation in which they would use AI in preference to speaking with a live agent.

Figure 19: When contacting an organisation, in which situations would you prefer to deal with AI rather than a human? (by household income)



CONCERNS ABOUT THE USE OF AI IN CUSTOMER SERVICE

The survey panel of 1,000 US customers were asked to what extent, if any, they were concerned about six potential issues with using AI for customer service.

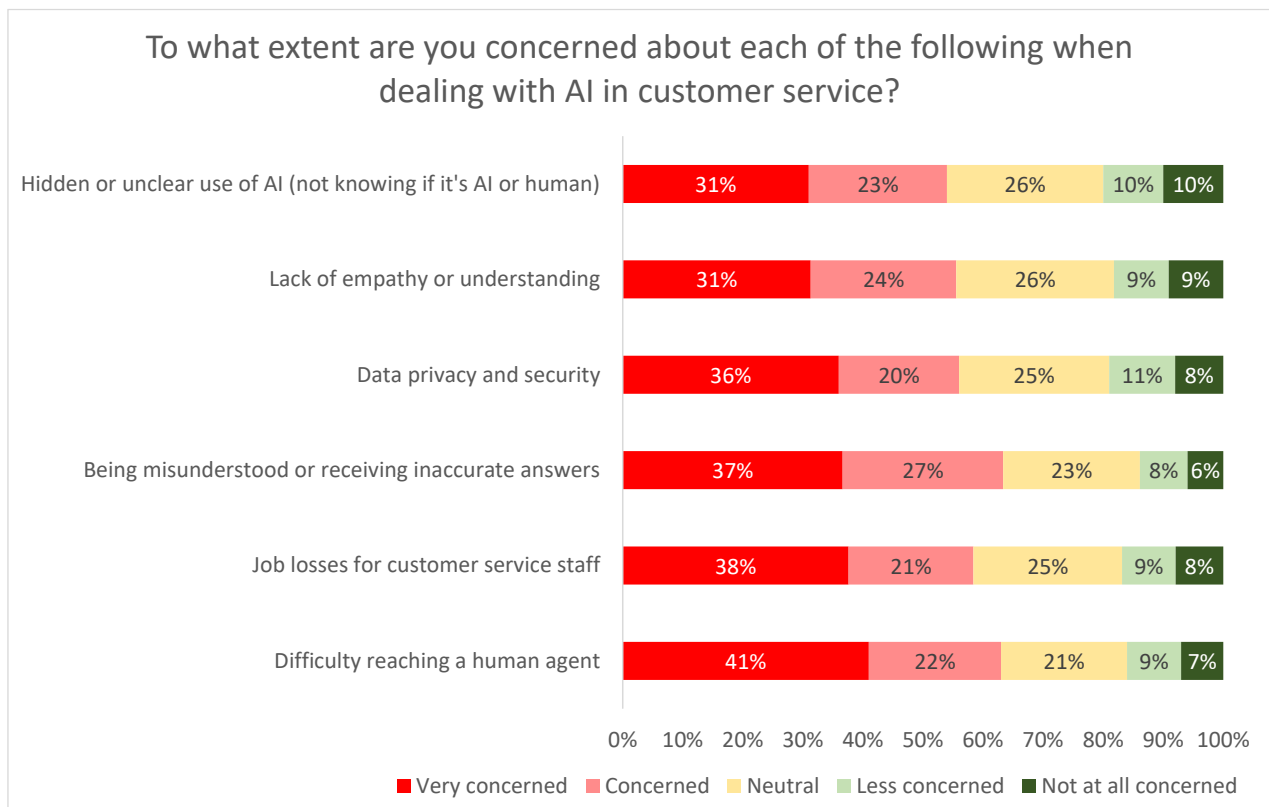
63% stated that they were concerned to some extent about AI increasing the difficulty of speaking with a live agent if required. This is an accusation that is often levelled – with some justification – at self-service functionality, whether voice or web-based. Customers bring their own real-life experiences, with many already concerned that AI will deny them live service.

Another major concern is that the AI will provide inaccurate answers or fail to understand them at all. Again, this attitude is likely to be based on customers' own experiences with self-service, particularly around speech recognition's frequent failure to understand context or anything other than the keywords it is looking out for.

More than half of customers surveyed were concerned about job losses for customer service staff and that AI would provide lower levels of empathy and understanding than live agents.

While data security and the hidden use of AI were seen as less concerning, it should still be noted that over half of the customers surveyed saw these as potentially concerning. It is clear that organizations face a struggle to get a quick and widespread acceptance of AI in the customer service arena.

Figure 20: To what extent are you concerned about each of the following when dealing with AI in customer service?

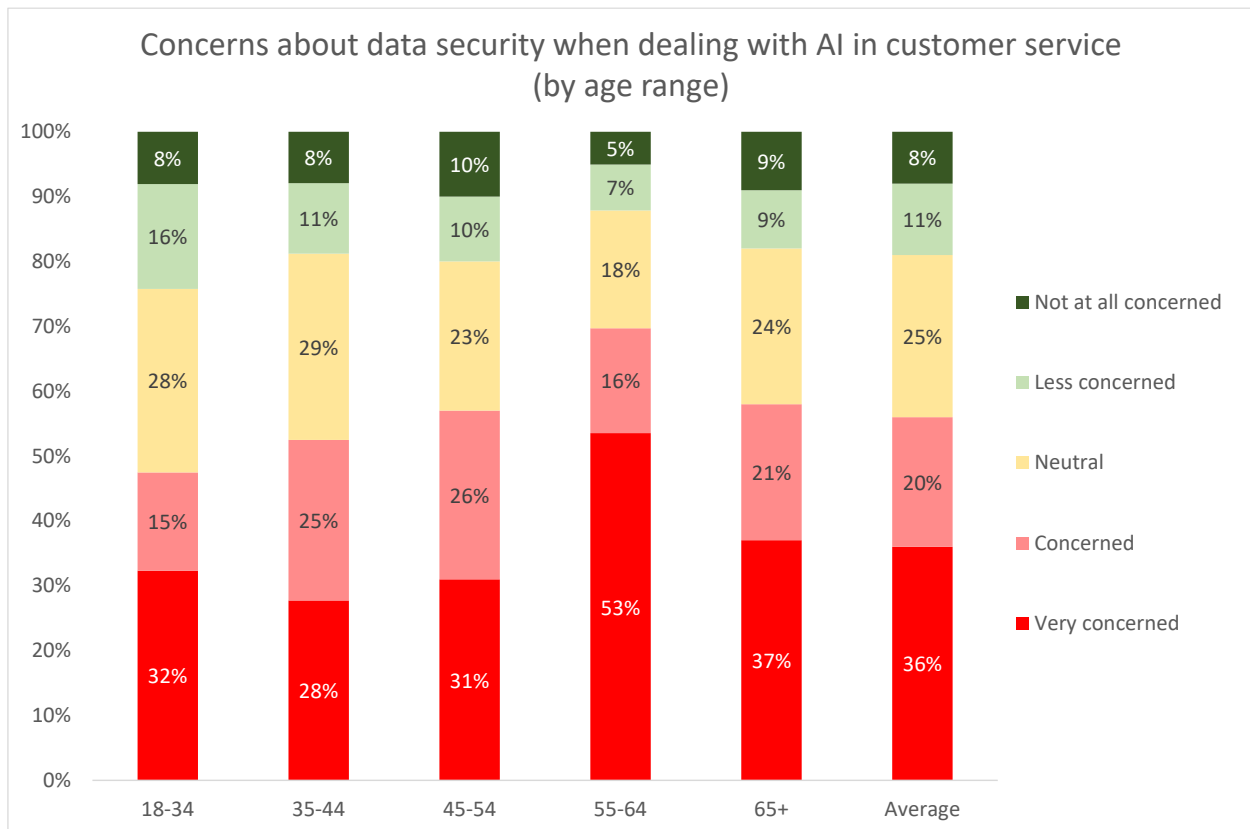


Looking in more detail at these concerns, by age groups, it is clear that in general, concerns are greater in older cohorts.

Data security is of major concern to the 55-64 year-old age group, perhaps as they are aware of past data breaches and are generally more technically aware of AI than older age groups.

Younger customers seem less concerned, despite in theory being more educated about the dangers of data and confidentiality breaches, with many spending more time online than older generations.

Figure 21: Concerns about data security when dealing with AI in customer service (by age range)



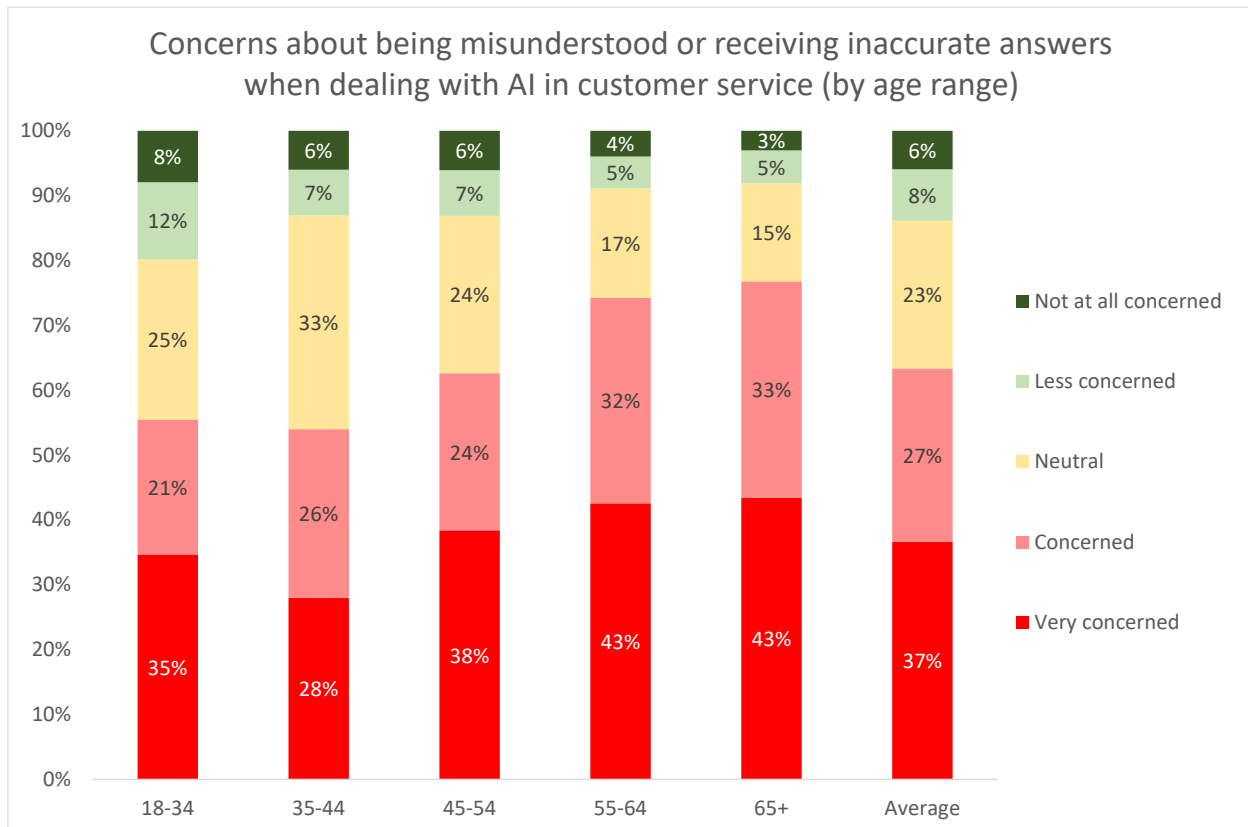
64% of the customer survey panel were concerned to some extent that AI will misunderstand them or provide inaccurate information.

This was particularly strong in the older cohorts, but this is one of the most widespread fears across all age groups.

Stories of AI hallucinations are widespread, and while generative AI tools – and the ways in which this functionality is being implemented – are improving rapidly, this is clearly a barrier to the uptake and trust that the customer base as a whole is displaying.

Implementations should focus on getting simple answers right all of the time, rather than trying to solve every query through AI – in this case, 99% right will not be enough: it is the 1% wrong that customers will remember, and may well assume that other organizations' AI will suffer as a result of customer cynicism and poor experiences elsewhere.

Figure 22: Concerns about being misunderstood or receiving inaccurate answers when dealing with AI in customer service (by age range)



At 80%, concerns that AI will block customers reaching a human agent where they need to is of major concern to the oldest age cohort.

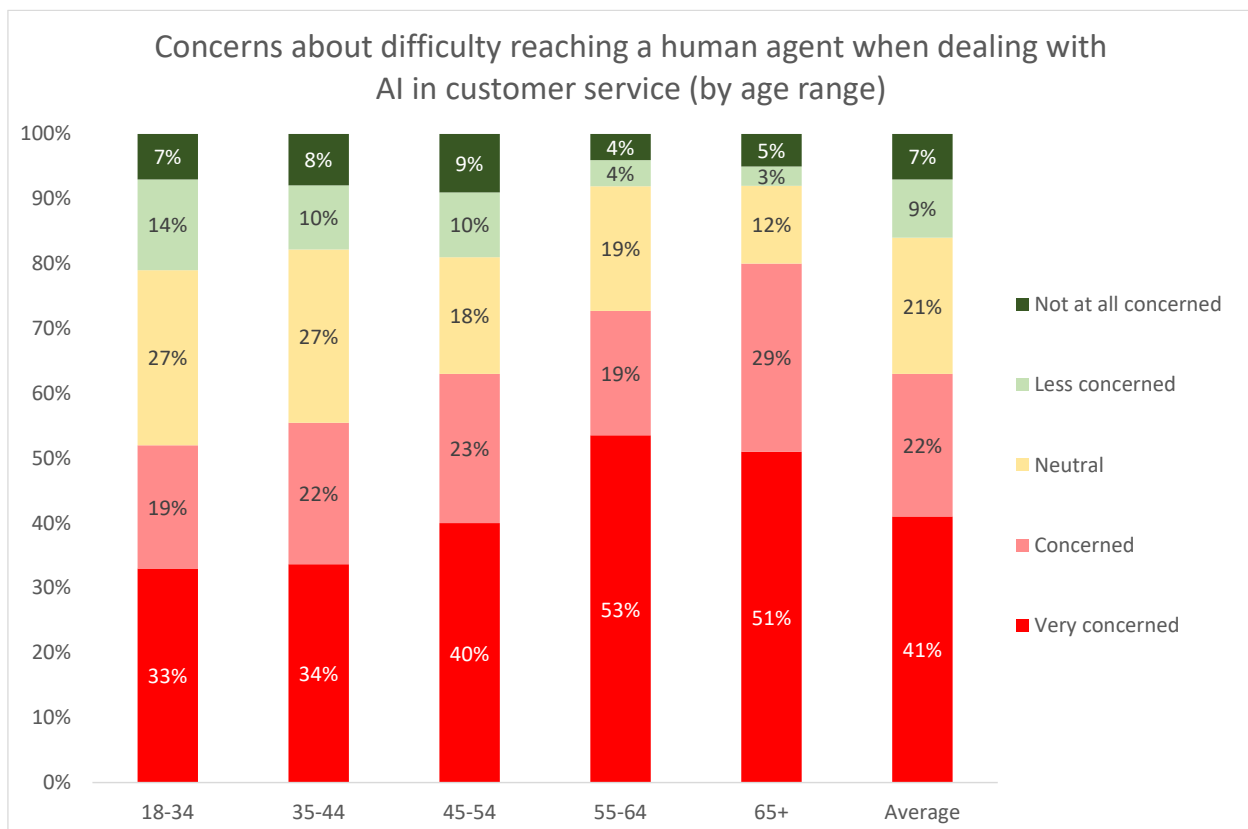
Experienced customers have seen on multiple occasions that self-service tools – in particular DTMF IVR – seem to have been implemented in order to keep customers away from live agents.

Whether this outcome was what organizations actually wanted to happen is irrelevant: many customers see self-service as denying them the right to speak with someone.

Any self-service implementation – AI-enabled or not – needs to have a clear and easy option to contact a live agent. Forcing someone to stay on a self-service channel is a self-defeating strategy: in the case of IVR, customers will zero-out or choose irrelevant IVR options just to speak with someone, or abandon the company altogether. For web self-service, organizations that hide the phone number deep in the website are just causing themselves as many problems as their customers.

When implementing any new customer-facing solution, organizations need to provide extra levels of reassurance to build customer confidence: people are usually willing to try something new, but need to know that they have options if it doesn't work out or if for whatever reason they know that they need to speak with a person.

Figure 23: Concerns about difficulty reaching a human agent when dealing with AI in customer service (by age range)



It would be surprising if customers thought that AI would provide the same levels of empathy and understanding that a human agent provides.

In fact, concerns around this are lower than for some of the other potential issues studied here.

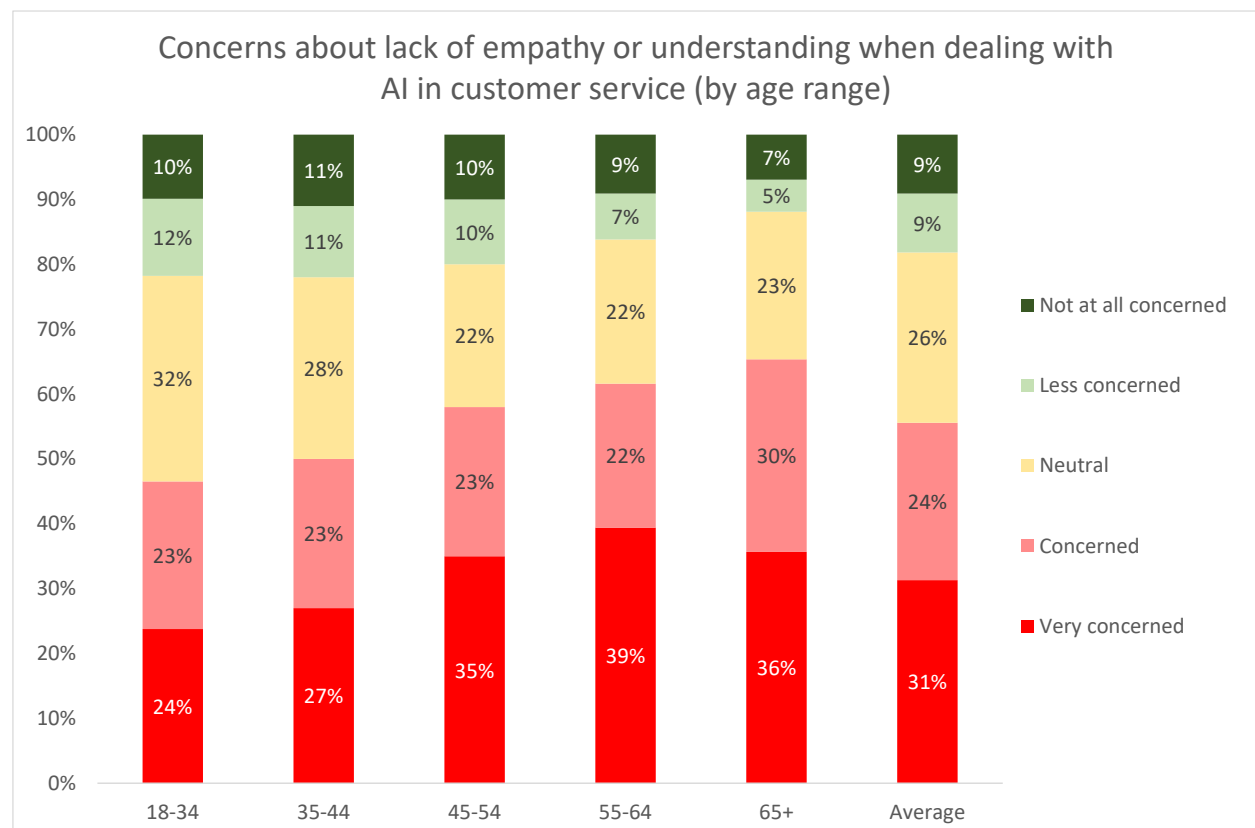
It may well be that customers do not expect particularly high levels of empathy from AI, and might even be put off if they were handled by a bot which was aping human behavior too closely.

Having said that, customers are clearly concerned that AI will not be able to understand them, and this will be a challenge for organizations to overcome. Many self-service implementations, particularly speech recognition and rules-based chatbots, have worked on a keyword basis, rather than encouraging natural language.

The level of sophistication, context understanding and functionality now available means that the use of natural language makes AI more effective, but customers do not yet know this. One chatbot looks much like another: how do customers recognize whether they should use a couple of simple keywords, or if they should spend the time and effort to explain their exact situation?

This is an industry-wide challenge that will not be resolved overnight.

Figure 24: Concerns about lack of empathy or understanding when dealing with AI in customer service (by age range)



Some solution providers are proud of the lifelike nature of their AI, but it seems that hiding the use of AI may actually be of concern to many customers.

There is no absolute consensus on whether AI use in customer service should be disclosed, but research and expert opinion increasingly lean toward transparency.

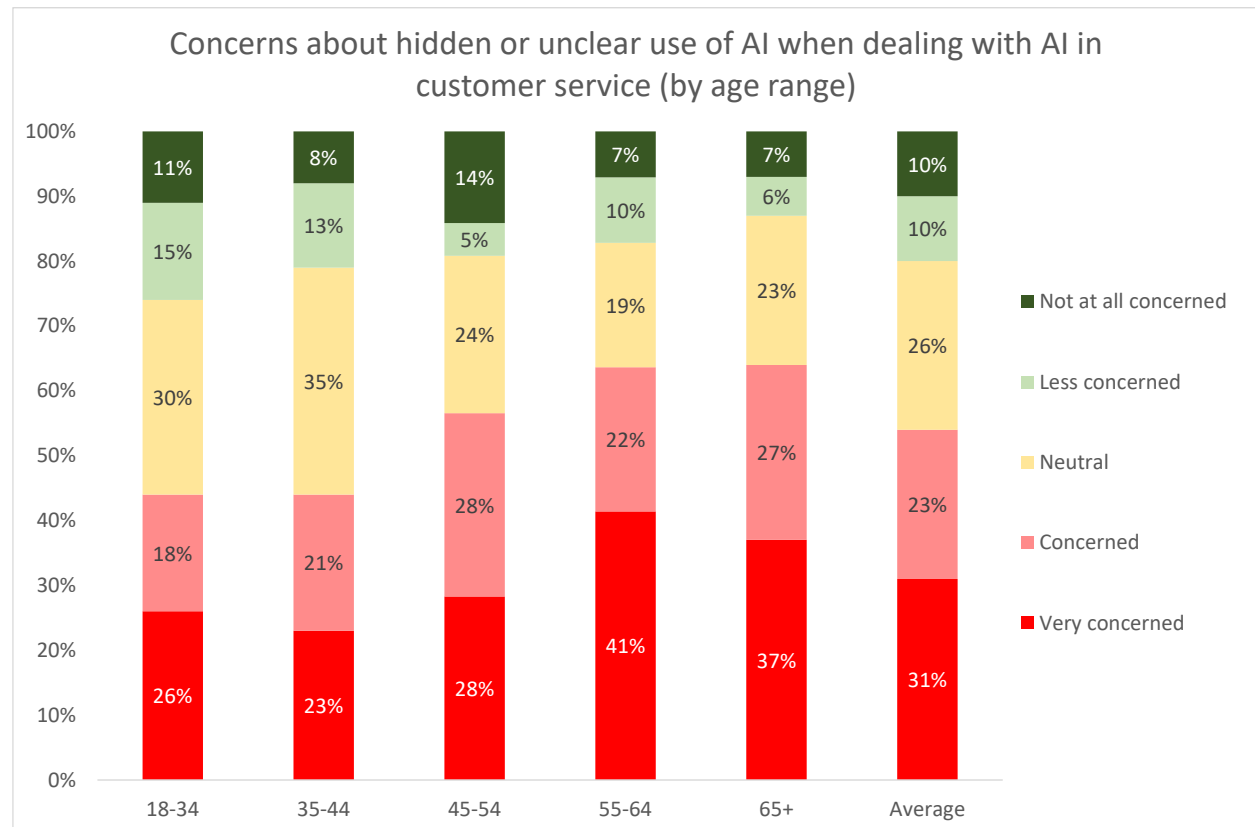
Studies show that openly identifying an AI assistant generally supports trust and strengthens reputational integrity, as transparency is perceived as ethical and reliable.

However, some experiments indicate that non-disclosure of AI presence can boost short-term metrics such as purchase conversion, but these gains may be wiped away by the long-term risks of customers feeling deceived once they discover the interaction was automated.

Most evidence suggests that AI disclosure does not significantly harm satisfaction in typical service scenarios, and that the design quality of the AI experience matters more than whether the user knows it is a bot.

Regulatory and ethical pressures are also pushing organizations toward clearer signaling, particularly where sensitive data or consequential decisions are involved. The prevailing view is that transparent disclosure is becoming the safer and more sustainable path.

Figure 25: Concerns about hidden or unclear use of AI when dealing with AI in customer service (by age range)



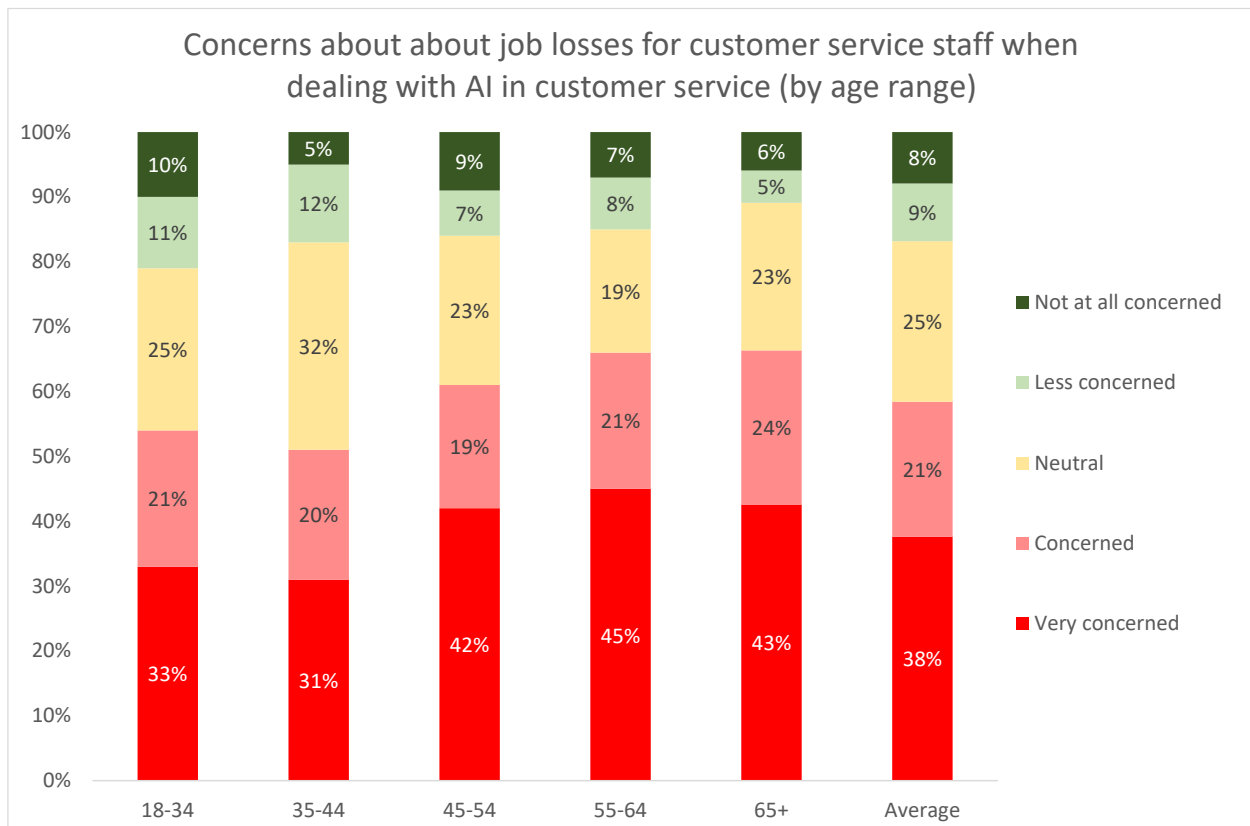
59% of survey respondents were concerned about the potential impact of customer service job losses due to the impact of AI.

For an industry where conventional wisdom – as reported in the press – is that contact centers are 21st century sweatshops which are unpopular with customers, the high levels of concern shown across the board are surprising.

Perhaps the truth is that most customers are experienced enough to know that to get their issue resolved most effectively, talking with live agents is most likely to get them the best outcome and that wholesale layoffs are unlikely to be followed by a superior customer experience.

There are of course also legitimate concerns about how high levels of unemployment will impact the country as a whole, although we believe it is more likely that any decrease in agent headcount will be gradual and be driven by a lower replacement of staff who have left, rather than large-scale redundancies (although it is almost certain that there will be some high-profile instances of this).

Figure 26: Concerns about about job losses for customer service staff when dealing with AI in customer service (by age range)



WHAT DOES CX MEAN TO A CUSTOMER?

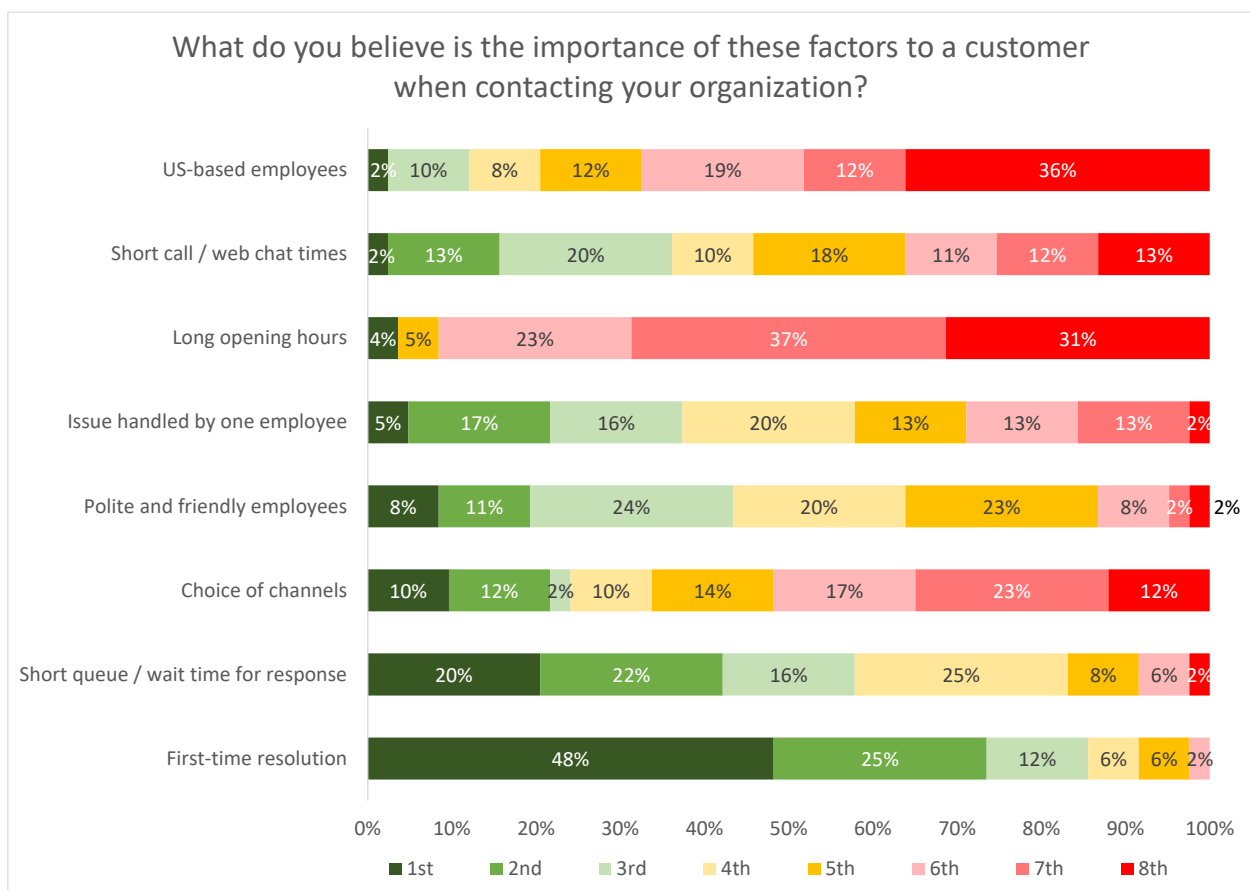
It is difficult for an organization to be confident about which of the many elements that go towards a great customer experience are actually the most important, and consequently should receive the greatest investment and resource.

This section looks at the importance of key factors which occur within the customer experience when a customer contacts an organization, from the perspective of the business and also from the customer.

THE VIEW FROM THE BUSINESS

Organizations were asked to rank eight factors that impact upon customer experience.

Figure 27: What do you believe is the importance of these factors to a customer when contacting your organization?



As with many past ContactBabel surveys, first-time resolution was clearly seen as being the most important factor impacting upon customer experience, with 48% of business respondents ranking it in first place, and a further 37% placing it within the top three.

A short queue time or wait time for a response was also seen as being important, being ranked in the top 3 by 58% of respondents, with polite and friendly employees being ranked in the top 3 by 43% of organizations surveyed.

Having the issue handled by a single employee was placed in the top 3 by 38% of respondents, with a choice of channels making the top 3 for only 24% of respondents.

Long opening hours (4%) and US-based agents (12%) were seen by very few organizations as impacting significantly on customer experience.

The following section considers these elements of the customer experience from the perspective of customers themselves, and there are some significant differences of opinion between organizations and customers on what impacts the most on customer experience.

Focus on What Matters

DELIVER EXCEPTIONAL CUSTOMER EXPERIENCE (CX) BY UNDERSTANDING THE CUSTOMER'S PERSPECTIVE

Their Perception is Your Reality

Most organizations presume what customers need, want, and expect, only to realize at some point "We don't know what we don't know!" ...yet, customers are actually very specific about why they engage with your organization, at every step along the customer journey.

The Customer Will Tell You What Works, and What Doesn't

An omnichannel contact center, that offers the choice of voice, chat, email, social media, and video channels, provides the best approach for gathering the intelligence you need to deliver the customer experience your customers expect. **The Upside?** The richness of the data you gather grows every day.

Just Listen

But, this data is only useful if analyzed the right way - objectively. Insight comes from looking at every touchpoint along the customer journey. By aggregating and assessing all interactions, your organization can develop a more complete view of what your customers think.

Leverage Actionable Insights Extracted Using AI

By analyzing customer verbatims, and their context, along with intonation and inferences, insights can be extracted that will clearly tell you how best to engage with your customers, helping you **exceed their expectations**.

[Click Here](#) to Learn how to use AI to
Deliver the CX YOUR customers expect

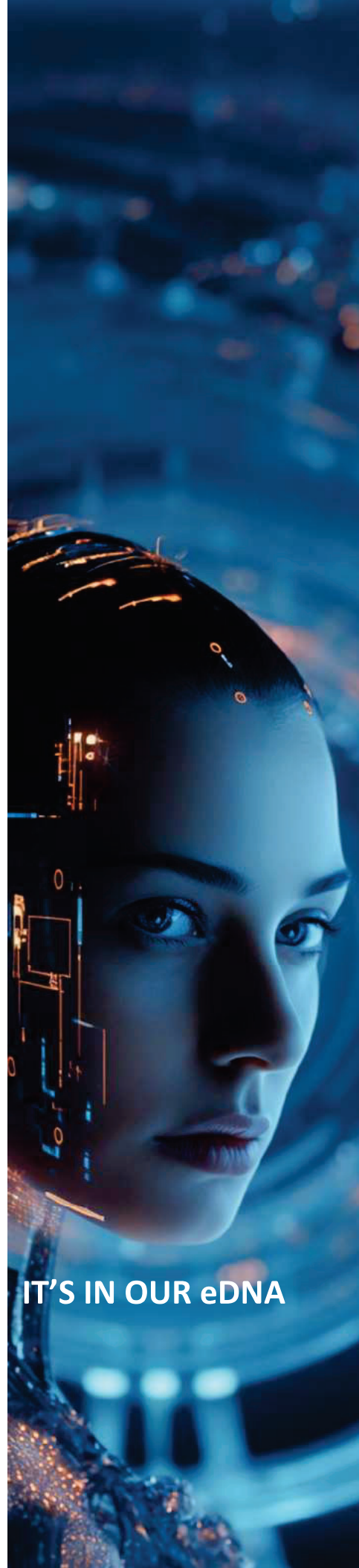
SOLUTIONS THAT DELIVER EXCEPTIONAL CUSTOMER EXPERIENCES

THAT'S WHAT WE DO IT'S IN OUR eDNA



EnghouseAI

For More Information visit: enghouseinteractive.com

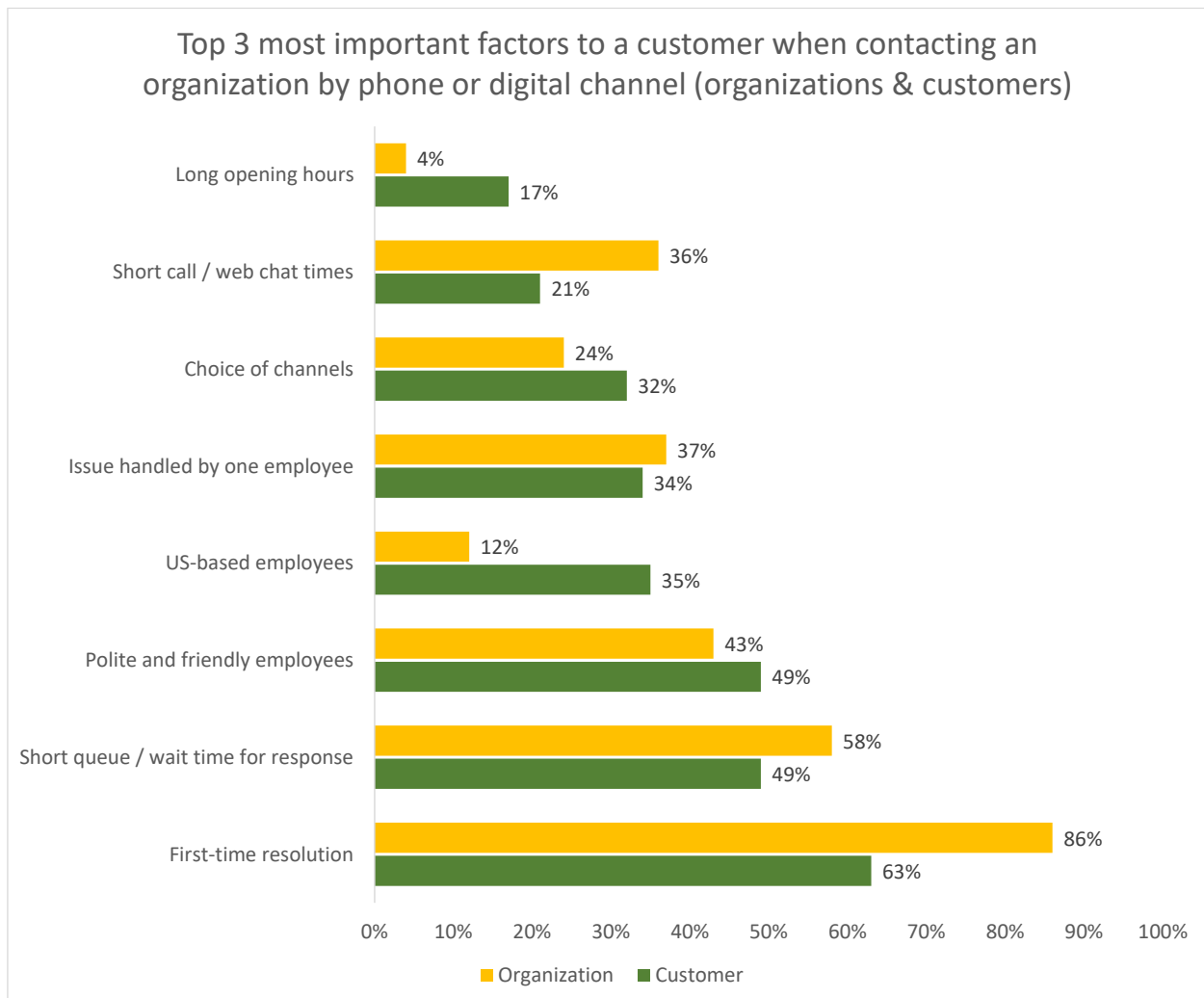


THE VIEW FROM THE CUSTOMER

ContactBabel commissioned the research firm [Big Village](#) to carry out a survey of 1,000 US consumers, which gives a 95% confidence level and maximum margin of error of +/- 3%. That means that for example, a response of “yes” from 50% of the sample means that if the survey were to be conducted repeatedly amongst US adults then 95% of the time the result would be between 47% and 53%.

Survey respondents were provided with a list of eight factors that affect CX and asked to rank them in order. The chart below shows the proportion of survey respondents (both from organizations and customers) placing them in their top three.

Figure 28: Top 3 most important factors to a customer when contacting an organization by phone or digital channel (organizations & customers)

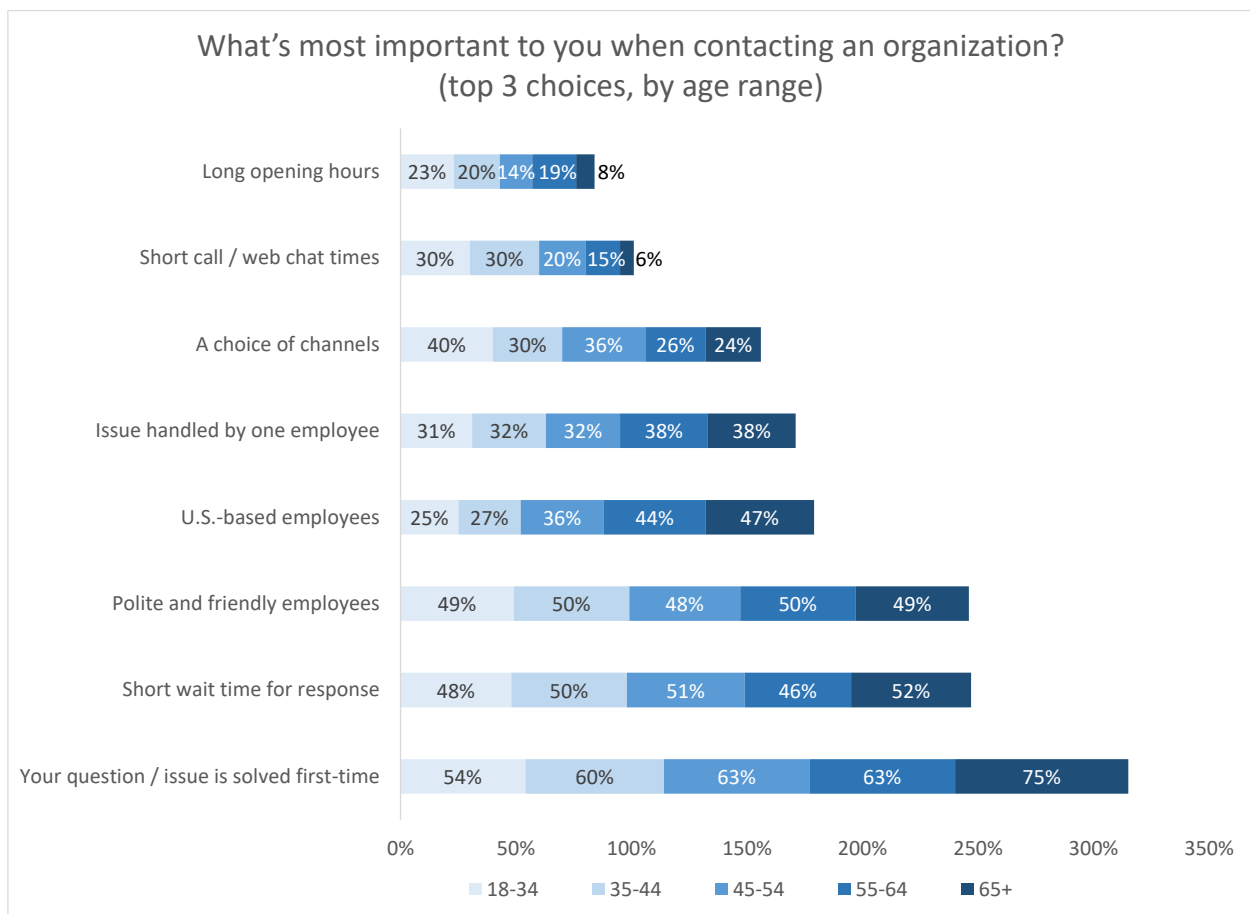


This consumer research has some interesting findings when comparing consumer attitudes to businesses' beliefs:

- both businesses and consumers agree that first-contact resolution, short wait times and polite & friendly agents are the most important factors impacting upon customer experience when contacting a business
- long opening hours are judged more important by customers than businesses, especially for younger customers
- having US-based employees is seen as far more important to customers than businesses believe, particularly for the older generation.

The chart below shows the importance of various customer experience factors as an aggregated bar chart, segmented by age so as to show the factors that were of most importance to customers in each age range.

Figure 29: What are the top 3 most important factors to you when contacting an organization by phone or digital channel? (by age range)



Aggregating the results allows an understanding of which factors were placed in the top three overall, while also providing insight on age-related opinion.

For example, 54% of the youngest age group (18 to 34 years old) stated that having a question answered first time was one of their top three most important factors, whereas 75% of the oldest age group (over 65 years old) placed this in their top three.

When considering these findings from the perspective of the various age ranges, younger respondents place a greater emphasis on their time than older people, being more likely to rate short call / chat times and long opening hours as being more valuable.

Younger people also value having polite and friendly agents just as much as any other age group, being as important to them as a short queue time or first-contact resolution. This may be because the youngest age group have the least experience of dealing with businesses and contact centers, perhaps lacking some of the confidence that comes with years of speaking with businesses, and to have a friendly and approachable agent is valued very highly.

Younger age groups are also much more likely to value a choice of channels and long opening hours, the latter of which can be achieved through effective self-service options which younger customers are generally willing to try out.

One of the most noticeable differences between ages groups is the requirement for US-based employees, which is very important for older customers, but much less so for younger people.

Older customers are also very focused on first-contact resolution – they do not wish to have to call back – and also want their issue handled by a single employee.

Again, it must be emphasized that unless a business deals almost entirely with older or younger customers, that **all** of these factors are valued highly by a substantial part of their customer base, and need to be addressed.

WHAT DO CUSTOMERS ACTUALLY GET WHEN CONTACTING AN ORGANIZATION?

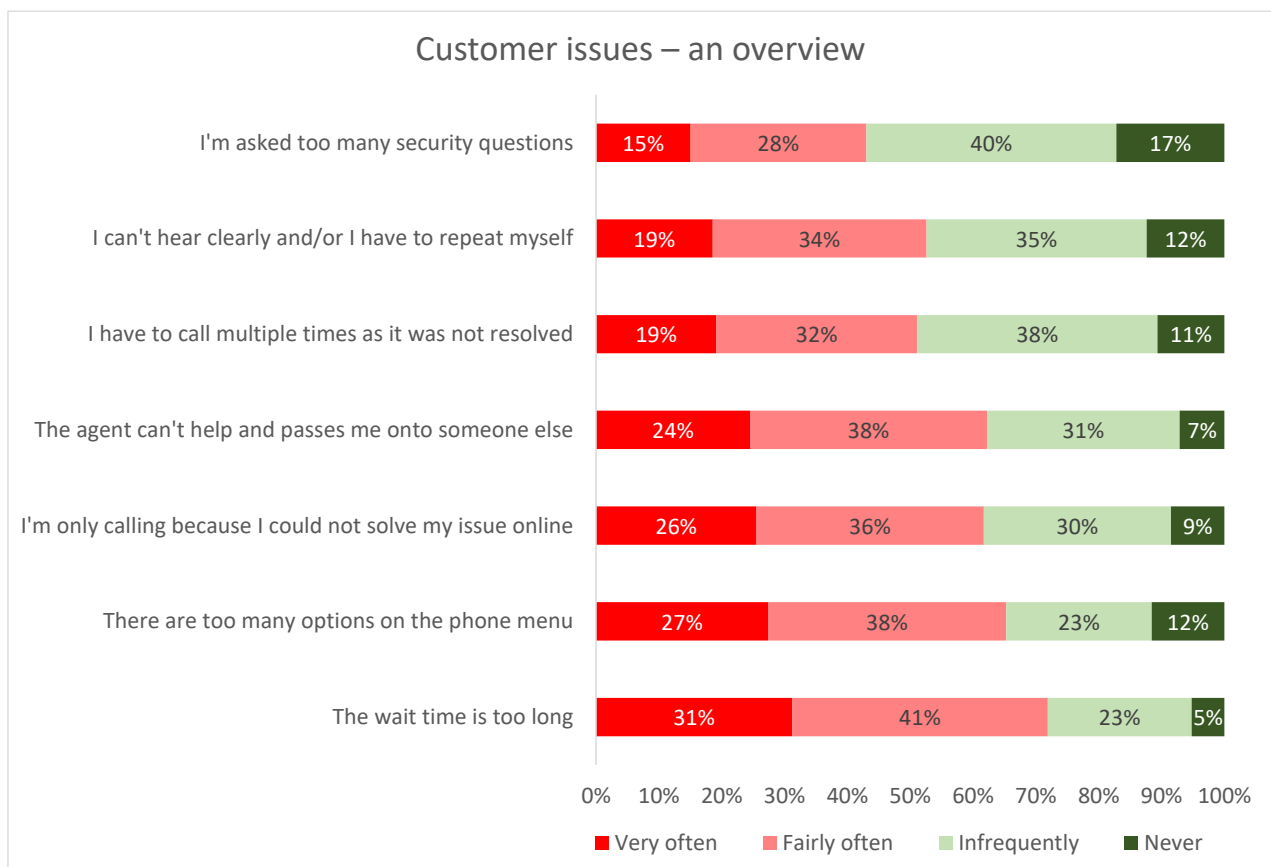
The previous section of the report looked at what customers want when they're contacting an organization, but what exactly do they feel that they receive?

The general customer view is that they hit roadblocks fairly often. It is not a surprise to see that 72% of survey respondents felt that the queue time was too long very often or fairly often. The following section will show this has become considerably worse in recent years.

More than a quarter of respondents often feel that IVR menus are too complicated, and over 60% state that they very or fairly often get passed around the contact center, and also that they are only calling because they've tried and failed to get their issue resolved online.

More than half of survey respondents state that they have to call back multiple times and 43% say that they often have to answer too many security questions. The need to repeat themselves often or not being able to hear clearly or understand the agent is also a frequent experience for over half of customers.

Figure 30: Customer issues – an overview



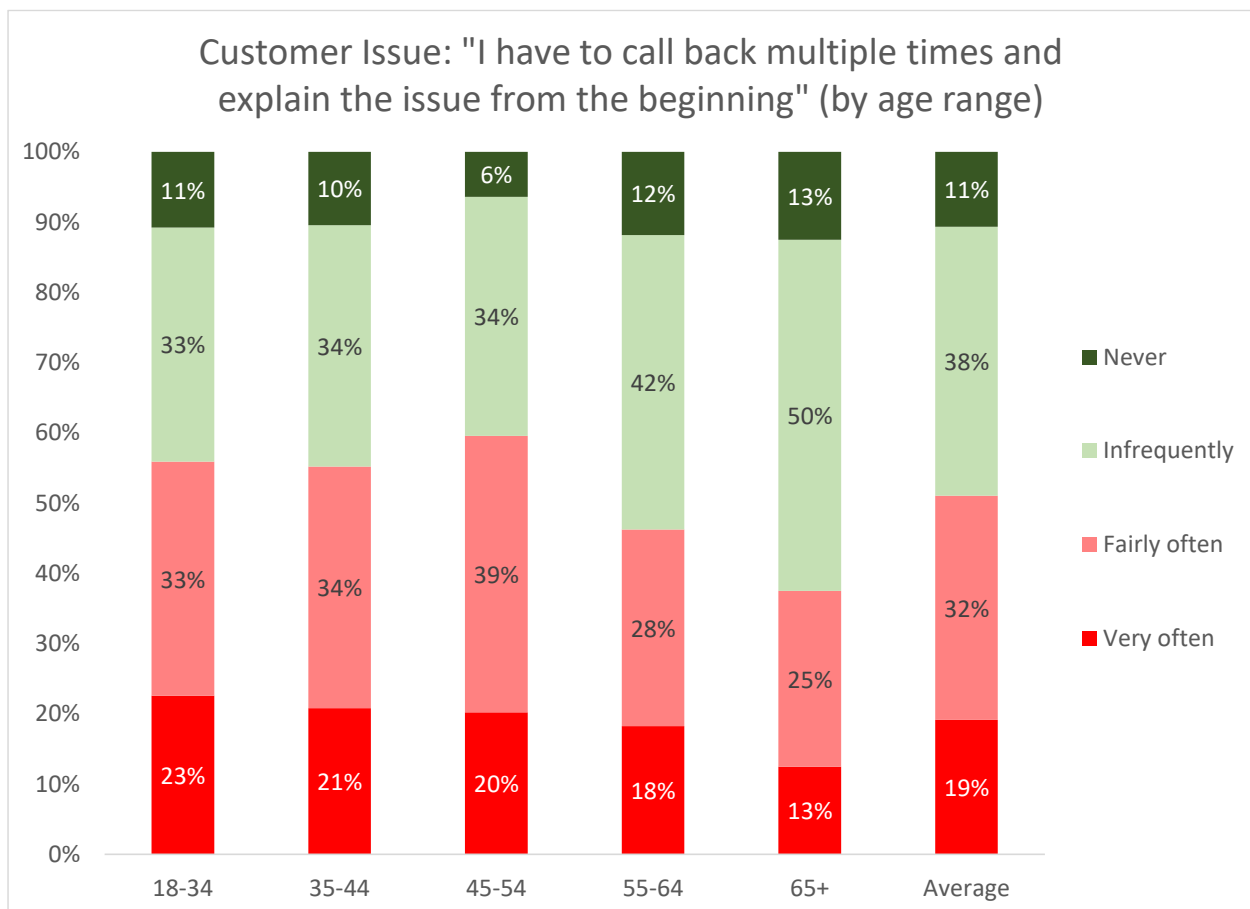
The following sections look in more detail at customers' actual experience and opinions of the two main drivers of CX – first-contact resolution and long wait / queue times.

FIRST-CONTACT RESOLUTION & THE CUSTOMER EXPERIENCE

Our customer survey showed that first-contact resolution was vital to the customer experience, particularly amongst older customers.

Looking at how often customers felt that they experienced having to call back multiple times, younger customers were slightly more likely to feel that they had to do this, although around half of respondents from most age groups stated that they had to do this very often or fairly often.

Figure 31: Customer Issue: "I have to call back multiple times and explain the issue from the beginning" (by age range)



As first-contact resolution (FCR) is such a key to customer experience, organizations should be focusing their attention on identifying and resolving the issues that cause repeat calls, as it impacts not only on cost but also strongly on customer satisfaction.

As easier interactions go to self-service (especially online), the contact center is left with more difficult and varied tasks – through email as well as phone – which can also be very complicated to categorize effectively using the current tools available to most.

While first-contact resolution is vital, it should be acknowledged that FCR rates are not simple to understand and have to be viewed in context: for example, an improving business may well see its FCR rate actually decline after it implements process improvements.

This seems counter-intuitive, but if the business had been handling live calls that were more suited to self-service or avoidable through better marketing communications, getting rid of these 'easy' calls entirely will make the FCR rate decline. If many calls are about the same issue, and are answered quickly and accurately, it improves FCR rates, but of course piles up cost and impacts negatively upon other performance metrics, such as queue length and call abandonment rate.

Businesses should consider the reasons for these unnecessary calls, rather than just focusing upon a single metric, as high first-contact resolution rates may actually be masking underlying problems:

- The contact center is handling simple and repetitive calls that could be moved to self-service, or which could be addressed on a website or through better communication
- Callers are dropping out of self-service to speak with agents because the self-service application is failing in its task and should be re-engineered
- Unclear marketing communications are causing customers to call
- Calls are being received that are actually driven by mistakes from elsewhere in the enterprise.

When businesses begin stopping unnecessary calls at the source, those left are usually of a more complex nature. This will lower first-call resolution rates initially, allowing a clearer picture of what is really happening in the contact center to emerge, which can then be addressed more fully.

As the contact center adapts and invests in better ways of handling customer requests, first call resolution rate increases and parity resumes. The exodus of 'easy' work to self-service channels may not always be quite balanced by immediate balancing improvements in knowledge sharing and other agent support processes that would mean stable FCR.

The first-contact resolution rate is an important metric to study, being concerned both with the customers' experience as well as avoiding unnecessary calls. However, it is very difficult to measure effectively, with no single best practice method of getting definitive statistics that are directly comparable to the rest of the industry. This difficulty is shown by the fact that ten years ago, perhaps half of contact centers responding to our research did not collect FCR performance at all (the current non-responding figure is only around 15%, which is an ongoing improvement).

The good news is that first-contact resolution is a metric that is far more suitable for use internally, rather than comparing it against external benchmarks. This means that as long as a company measures the same factors **consistently** over time (and across every department and outsourcer used), any FCR results remain valid.

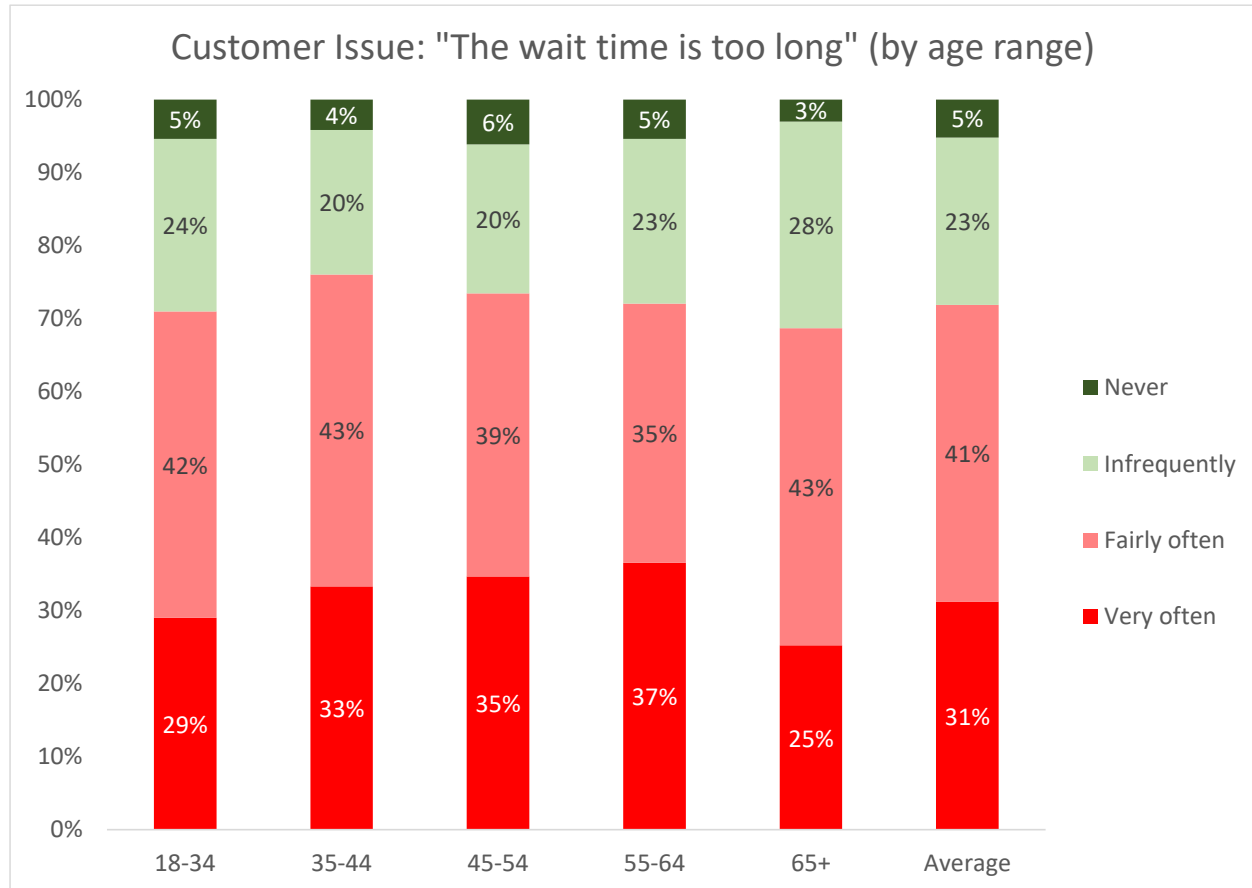
For more information about FCR and how to measure and improve it, please download [The Inner Circle Guide to First-Contact Resolution](#).

QUEUE / WAIT TIMES

There is no great surprise that the most widely reported customer issue is that the wait time / speed to answer is too long.

There is little difference between age groups.

Figure 32: Customer Issue: "The wait time is too long" (by age range)



As the following charts show, customers are not imagining that the average speed to answer is excessive: the industry statistics bear this out.

Speed to answer plays a vital part in improving the customer experience, and also feeds into other performance measures such as call abandonment rate: obviously, the longer the queue, the more people will abandon the call.

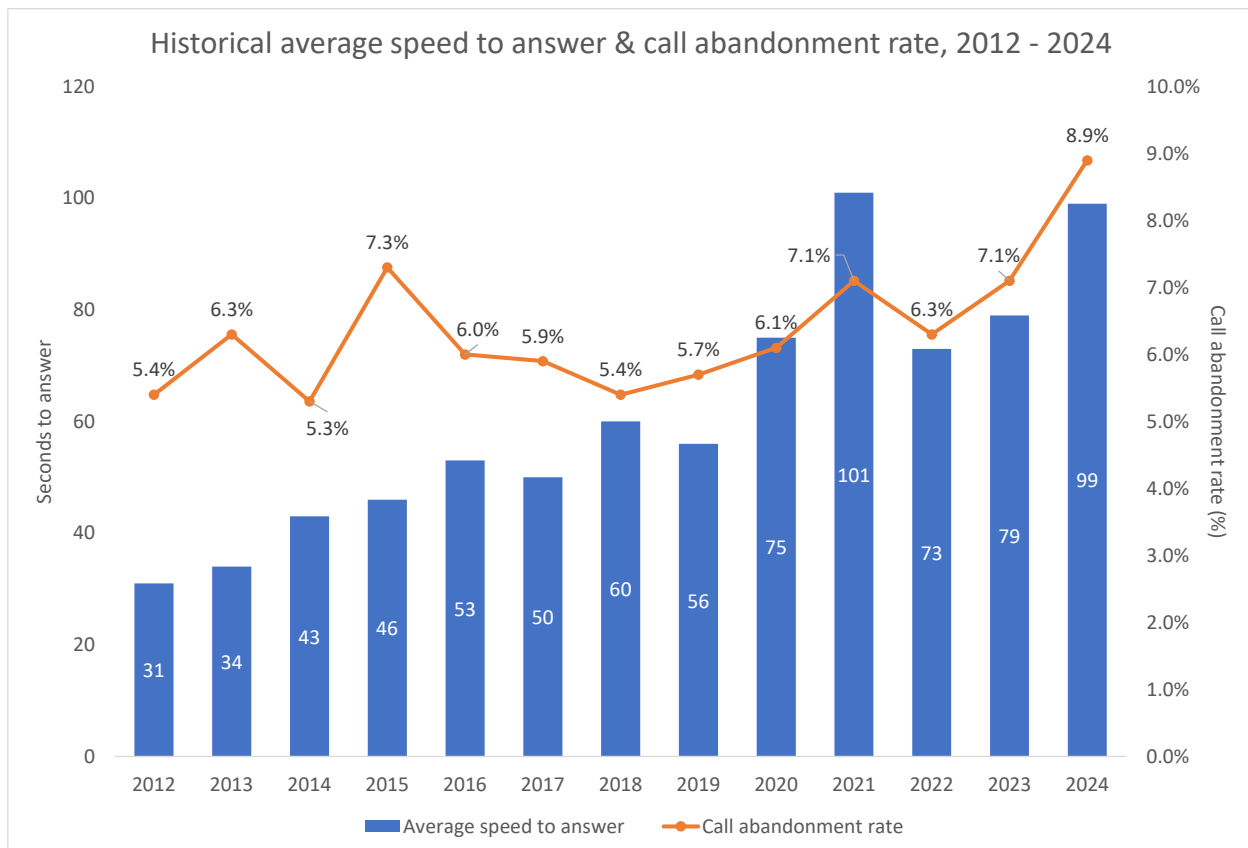
The following chart shows historical figures for average speed to answer and call abandonment rate.

From 2012 onwards there has been a gradual increase in average speed to answer, with a considerable uptick in 2020 and 2021 caused by pandemic-related working practices and an increase in demand experienced by some businesses. While this dropped slightly in 2022, the rise has continued in the past two years.

Call abandonment rate did not show any particular upward trend until the same time period, with 2024's abandonment rate being the highest yet recorded.

It is also worth noting that customers' **perceptions** of how long they have been queueing are far higher than reality: past ContactBabel research asked customers to estimate their typical wait time, which was reported to be 23 times longer than the actual industry average.

Figure 33: Historical average speed to answer & call abandonment rate, end-2012 – end-2024



OMNICHANNEL AND THE CUSTOMER EXPERIENCE

OMNICHANNEL: THE CONSUMER'S CHOICE

There are two main factors that influence contact centers within any vertical market: the commercial activity within that sector, and customers' requirements and preferences for contacting organizations.

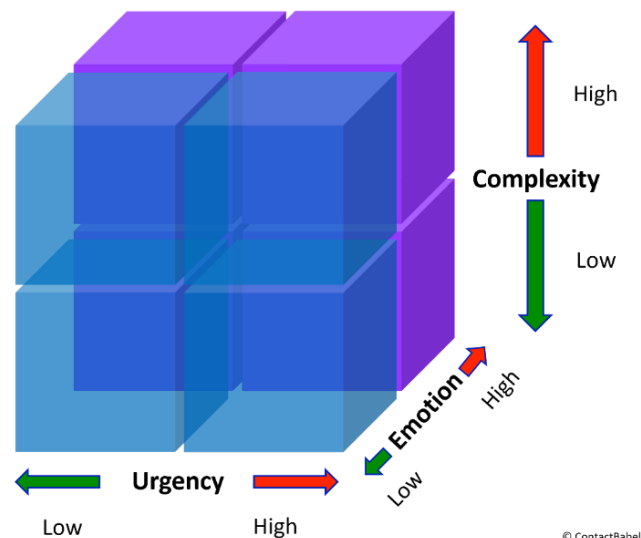
It is not only the nature of the specific business vertical market that needs to be considered. The urgency, complexity and emotional importance of the interaction is perhaps at least as important as the nature of the business that is being called: for a customer calling a bank, a simple balance request and an urgent call about the progress of a mortgage application are very different types of call, and should be treated as such.

The Customer Interaction Cube (below) is a structure developed to categorize the different types of customer interactions that businesses have to handle, considering the urgency, complexity and emotional input of the interaction from the customer's perspective.

Businesses could use this to analyze their volumes of each type of interaction, cross-referencing it with other variables such as the time of day these types of interaction are received, and the customer demographic preferences seen elsewhere in this report in order to support the relevant channels through the promotion of alternatives to live calls, and the correct levels of resourcing.

Doing this will not only improve the customer experience, but also reduce the cost of service through anticipating the likely resourcing required and even proactively engaging with the customer on lower cost channels first.

The Customer Interaction Cube



Using this 2x2x2 cube as a structure, there are eight types of interaction, a combination of either low or high urgency, complexity and emotional input. Each of these eight interaction types may best be suited to specific channels, and both business and customer can benefit from matching channel with interaction type.

The examples shown below of various scenarios and the channels most suitable for these are suggestions, and will differ between customer types, businesses and vertical markets, but may offer a tentative framework for readers to build their own scenarios. It should be noted that the results of the customer survey that follow this section suggest that different age groups and socioeconomic segments have their own views on how they prefer to contact a business in each of these cases. Primary and secondary channels are suggested, but will differ between organizations and customer types.

Figure 34: The Customer Interaction Cube and suggested associated channels

Emotional importance	Urgency	Complexity	Examples of interaction	Primary channel	Secondary channel
Low	Low	Low	Meter reading; casual product research	Self-service	Web chat
Low	Low	High	Instructions on how to program a TV remote; find out about proposed planning / house building	Email	Phone
Low	High	Low	Top up mobile credit; check payment has been made	Self-service	Phone
Low	High	High	Details of how to make an insurance claim; understand mobile roaming charges before imminent trip abroad	Web chat / self-service	Phone
High	Low	Low	Book train tickets for important engagement	Self-service	Phone
High	Low	High	Complaint about incorrect billing	Phone	Email
High	High	Low	Simple question about imminent desired purchase (e.g. delivery, personalization, return policy)	Web chat	Phone / social
High	High	High	Household emergency advice; 911	Phone	Web chat

There are many other variables that could be considered as well::

- Demographics
- Ownership of smartphone / broadband impacts upon channel availability
- Time of day (i.e. is this an out-of-hours enquiry? Is the customer at home, at work, or travelling?)
- Whether the request is specific to an account, or a generic issue (i.e. is it necessary to pass through security first?).

While the 2x2x2 cube can help businesses to estimate the current and potential volumes and resourcing required to serve the customer base, it is important to remember that similar types of customer interaction may require very different handling depending on circumstances. For example, a query about product delivery may be a small part of a wide-ranging research process carried out by a particularly thorough prospective customer, or may be asked by a customer who has just realized they've forgotten about an important birthday and needs immediate, accurate information.

McKinsey talks about the 'moment of truth' in customer interactions¹, often occurring when the customer has an unexpected problem or has a high emotional stake, when long-term loyalty and customer advocacy can be won or lost depending on the outcome and the way in which it is handled. Businesses should be aware that these relatively rare occurrences offer great opportunities. Recognizing and handling these moments of truth appropriately – moments which are defined as such by the customer, not the business – will have a far greater long-term impact on customer satisfaction and loyalty than the dozens of competently-handled, forgettable interactions that may have happened previously.

Sentiment analysis can indicate a measure of stress in the customer's voice, flagging this up to the agent within the call, but agents should be in any case capable of recognizing this without technology. In any case, if the customer has already tried two or three other channels without success, even the most competent and empathetic agent will find it difficult to turn the moment of truth around positively.

However, the 'peak-end' rule, a psychological finding where we recall a memory based upon how we felt at a peak (or trough) moment as well as how we felt at the end of the situation biases the memory of the overall experience, and gives live agents a chance to rescue even particularly poor customer experiences.

For more information on this and other customer engagement methods, please download "[The Inner Circle Guide to Customer Engagement & Personalization](#)".

Equally important is the freedom for agents to act in way appropriate to the situation – for example, if a 'high-emotion' interaction happens on social media, which can't be handled on that channel, the agent should be given the license to place an outbound call to that customer in real-time, rather than advise them to call the contact center. While this will impact upon the social media channel's service levels while the agent is away from it, the moment of truth offers the opportunity to lock-in that customer's loyalty.

¹ <http://www.mckinsey.com/business-functions/organisation/our-insights/the-moment-of-truth-in-customer-service>

For contact center operations traditionally run on a structured command-and-control basis, this may sound chaotic, but businesses have to decide if the occasional relaxation of their own procedures is an acceptable trade-off for providing the customer with something that they truly value. Agents need to be given *carte blanche* to deliver in 'moments of truth', and the training and support to recognize when this is happening.

This is not to say that 'moments of truth' necessarily have to be handled by a live agent. The only reason that many customers abandon self-service at the point of crisis in order to ring the contact center is because self-service cannot deliver what they need. If companies focused on providing more sophisticated and reliable self-service applications, these channels could also deliver as much customer benefit at these moments of truth.

For example, if a passenger misses their plane, they are then likely to engage in a long and complicated discussion with a live agent (either at the airport or in a contact center), involving alternatives, connections and payments. If, on missing the last call for the plane, the customer were immediately provided with an SMS or email detailing the various options available to them, which they could then select and rebook at once, this would be more convenient for the customer and significantly reduce the cost of service to the business. Perhaps more importantly, the customer would feel that the airline is looking out for them, creating long-term loyalty out of the negative experience of missing a plane.

The survey of 1,000 US consumers carried out for this report looks at what customers' channels of preference are in cases of high emotion, urgency and complexity through presenting survey respondents with three hypothetical scenarios:

High emotion: notifying a company that an incorrect item has been sent to them. Being sent an incorrect item is often frustrating, as not only has the desired product not arrived, but the customer is then left with the problem and effort of returning the item.

High urgency: checking the arrival time of a flight that the customer is meeting. This is likely to be an urgent interaction as it is very time-sensitive. Complexity is very low - as the required information is simply a time - and in the majority of cases, should have a fairly low emotional impact.

High complexity: receiving guidance on completing a mortgage application or tax form. This is likely to be a complex and long interaction, but is unlikely to have high levels of urgency or emotional response.

HIGH EMOTION INTERACTIONS

Consumers taking the survey were asked to imagine that a product they had ordered from a company had arrived but was incorrect. In this circumstance, they were asked which would be their preferred method for contacting the company to notify them that this was the case.

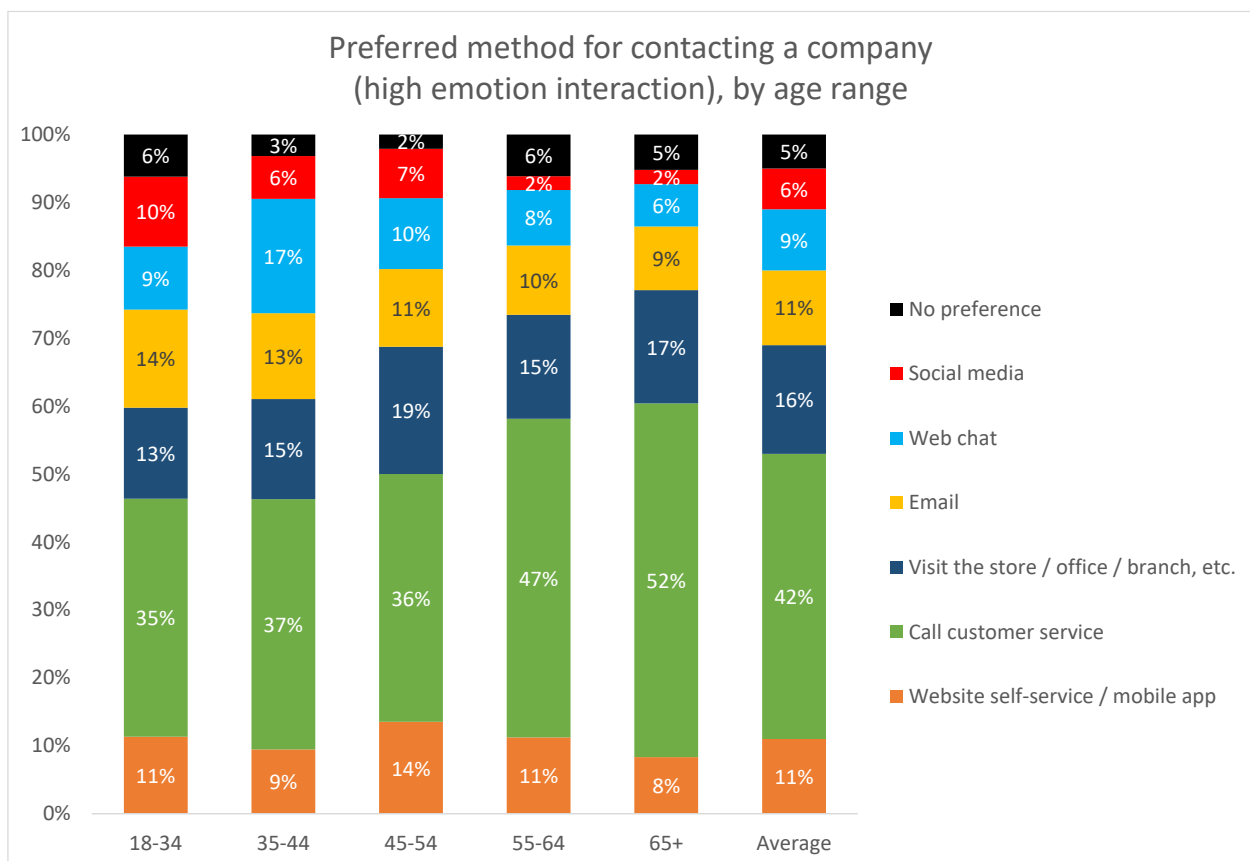
The most popular option is to phone the organization, with 42% of respondents choosing this method. A physical visit to the store was the next most popular, with email and web self-service each being chosen by 11% of survey respondents.

There was a strong pattern based on the age of the survey respondent and their preferred channel: the older demographics were the most likely to pick up the phone.

Web chat was a popular option with the 35-44 age group, and email is most popular with the younger cohorts.

10% of the sub-34 year-old age group would choose social media, which is a significant finding for businesses serving these customers.

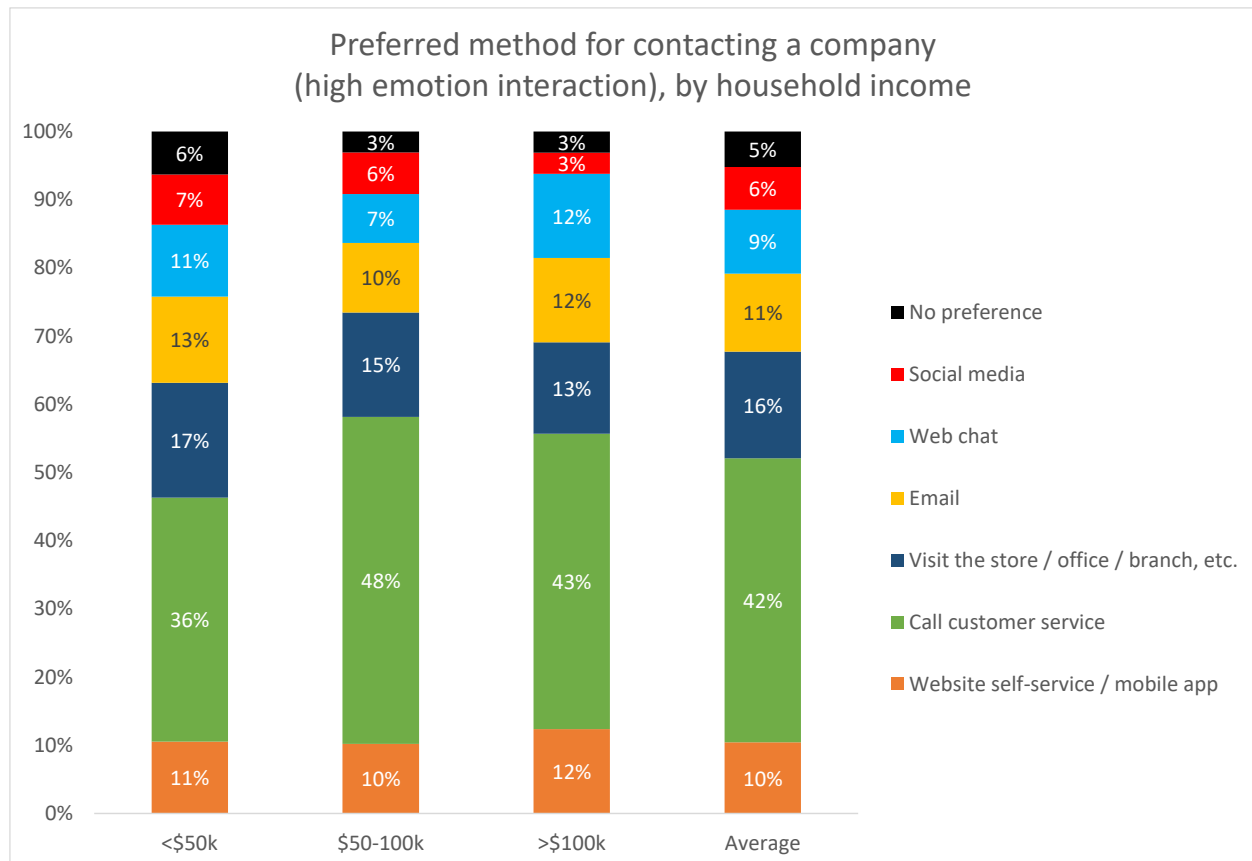
Figure 35: Preferred method for contacting a company (high emotion interaction), by age range



When considering the preferred method for contacting a company with a high emotion interaction, phone was by far the most popular choice for all income groups.

Lower income respondents were a little more likely to choose social media or a physical visit to the store, and less likely to use telephony, but the differences overall are not great.

Figure 36: Preferred method for contacting a company (high emotion interaction), by household income



As this research has been running annually for eight years, it has enough history to look at how channel preferences are changing.

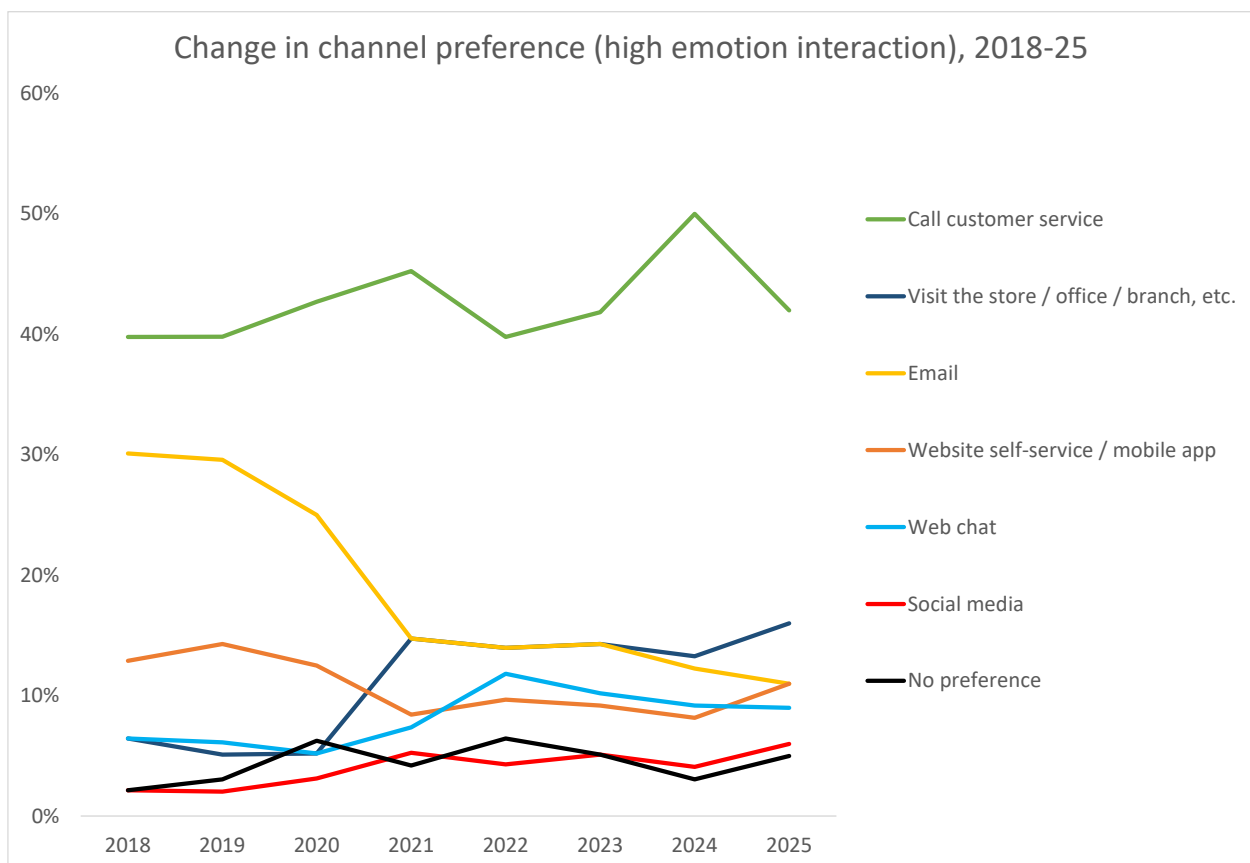
The pandemic has clearly made a significant (and perhaps lasting change) to how customers prefer to interact with businesses.

The chart below shows the change in how customers prefer to handle high emotion interactions.

Although there has been a drop in the proportion of customers choosing the email channel, there has not been the same level of increase in telephony, although there has been a rise in the preference for face-to-face interactions.

It should be noted that research for the customer survey is usually carried out in early Q2 of each year, and that 2020's figures consequently do not show the full impact of the first pandemic lockdown. Statistics from 2021 onward are taken from customers who have experienced the decline in service levels that was undeniably present in many companies due to the pandemic.

Figure 37: Change in channel preference (high emotion interaction), 2018-25



HIGH URGENCY INTERACTIONS

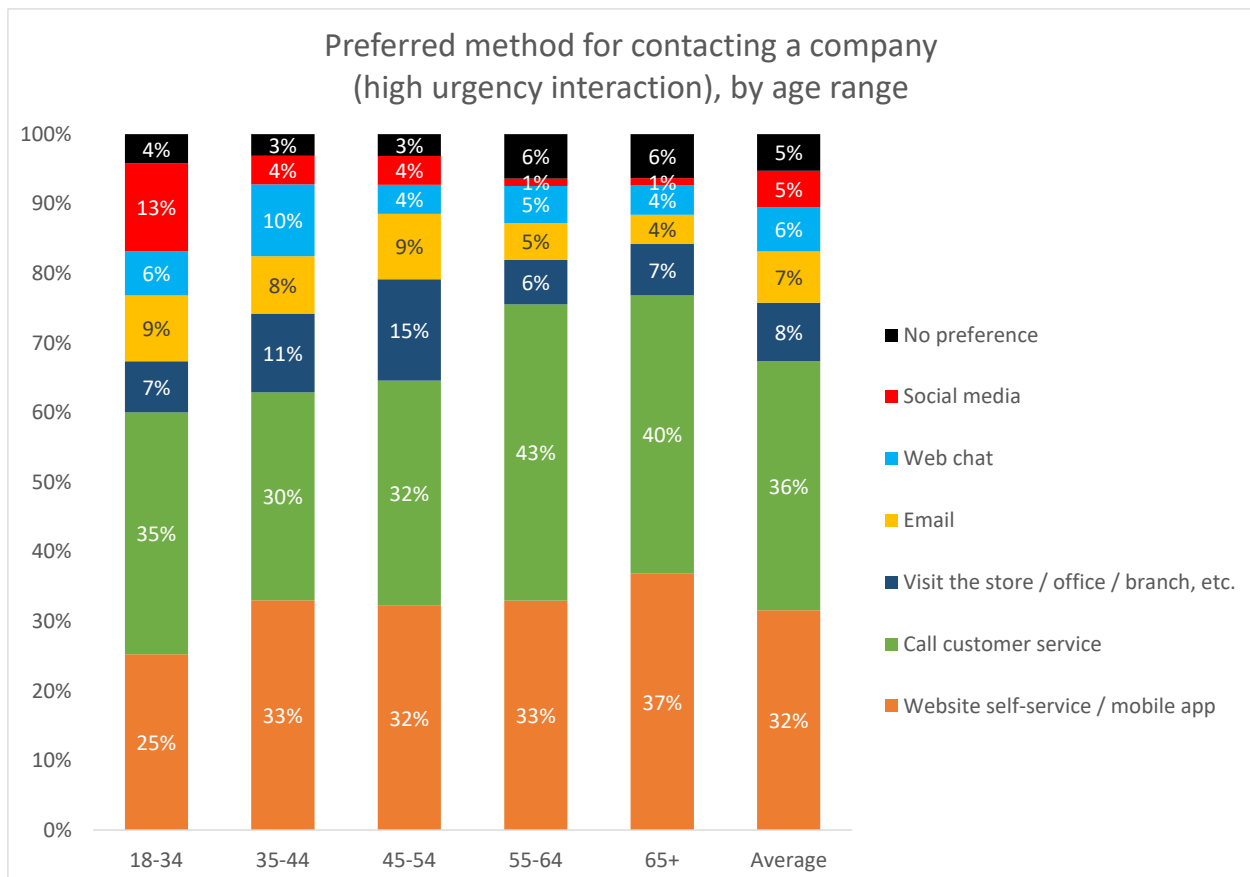
Survey respondents were asked which would be their preferred channel of choice in an urgent situation, for example where they were meeting somebody from a plane and needed to confirm the time at which to be at the airport.

The most popular channel was again telephony, with older age groups more likely to choose this as their no.1 option.

This is quite a change on pre-pandemic findings, which put web self-service as clearly the most popular channel of choice, and may be a reflection of customers' greater requirement for the reassurance and confidence that the phone channel provides.

Email, social media and web chat were more likely to be preferred by younger demographics, but not exclusively by any means.

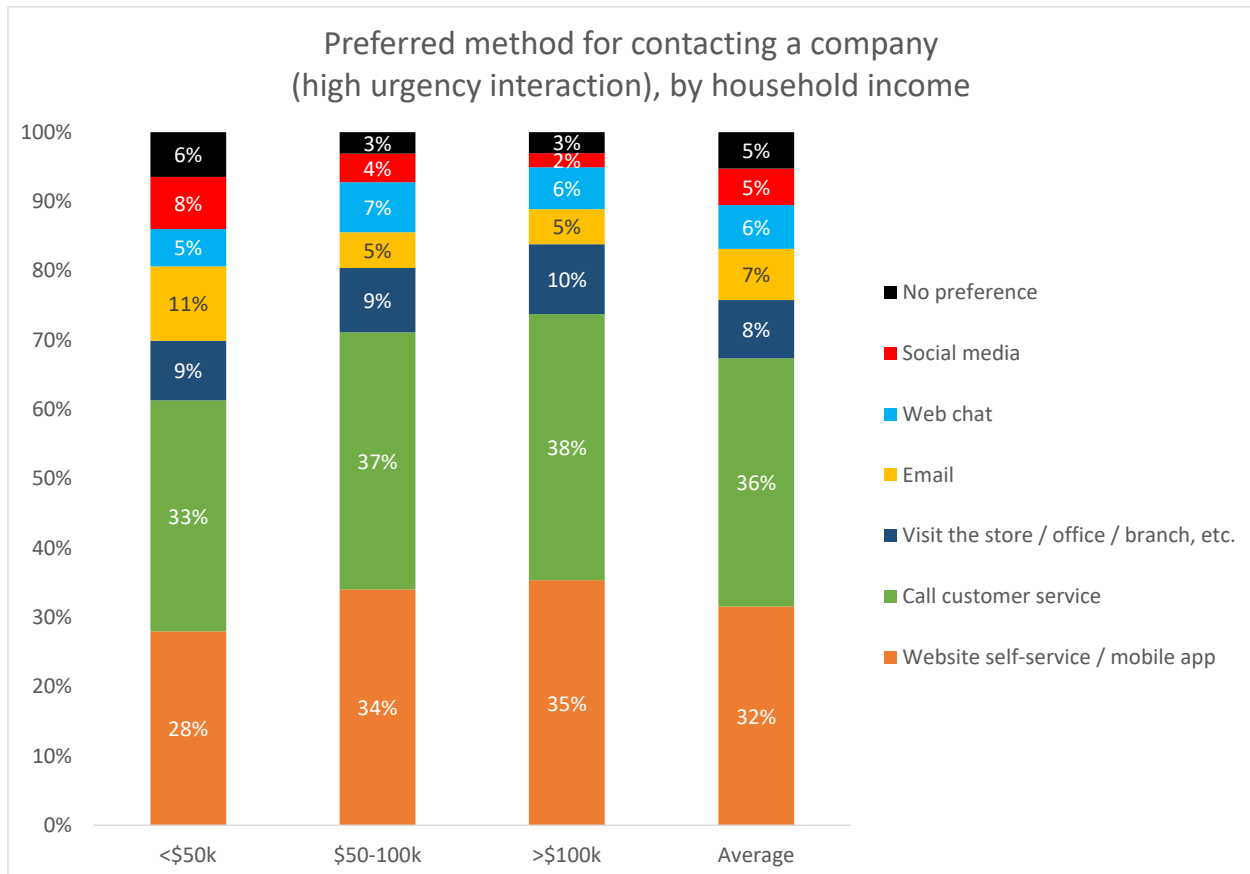
Figure 38: Preferred method for contacting a company (high urgency interaction), by age range



When considering household income, telephony is strong across the board, with web self-service a close second in all groups.

The households with the lowest incomes are most likely to choose social media or email.

Figure 39: Preferred method for contacting a company (high urgency interaction), by household income

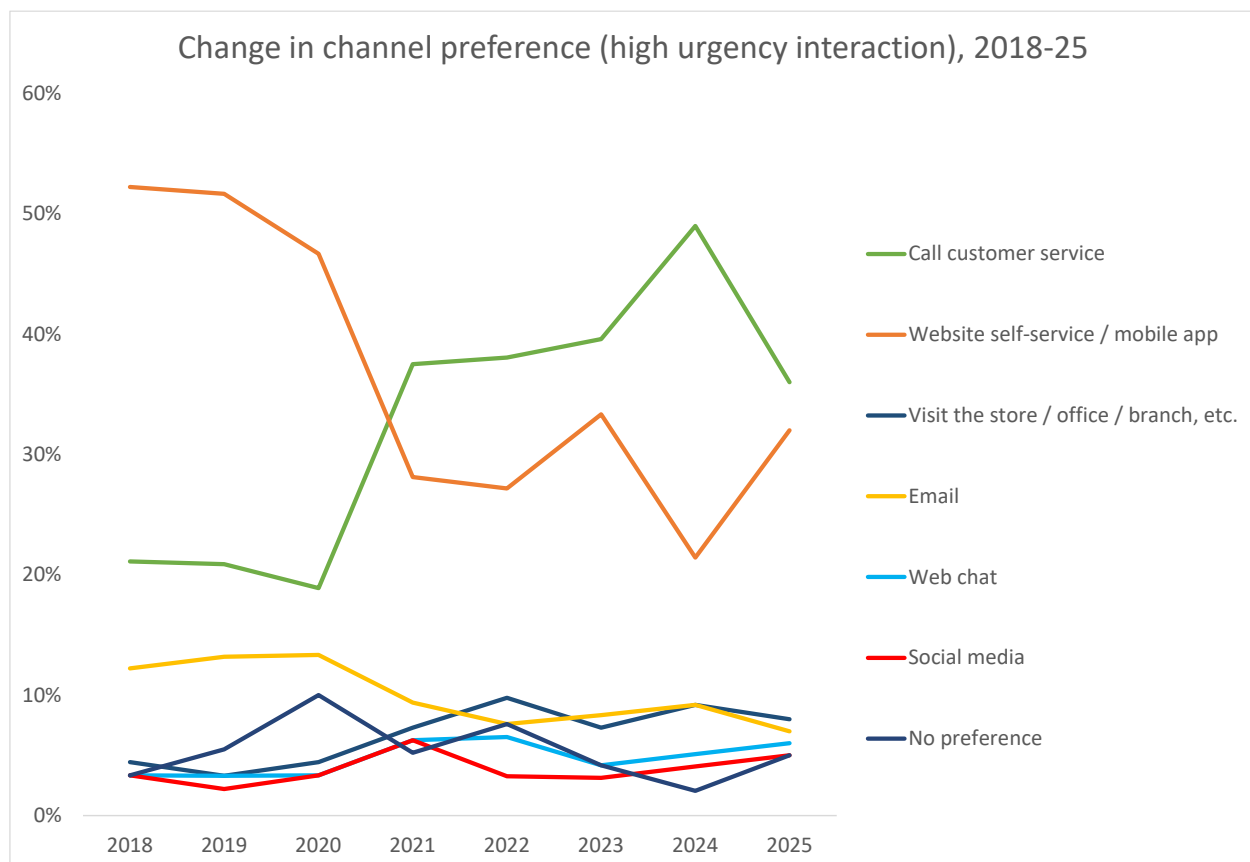


The effects of the pandemic can be seen clearly: live telephony replaced web self-service as the preferred channel for urgent interactions, despite the massive investments put in place by many businesses to achieve the opposite effect.

It is not possible to state with complete confidence why this should be, but it may be that many customers have experienced very poor levels of customer experience from some companies that struggled in the pandemic and afterwards, and that they have reverted to the channel that they associate with confidence, flexibility and resolution: telephony.

However, it is interesting to note the huge lead that telephony had over web self-service in last year's survey has been cut considerably this year: it may be that self-service is improving and customers are regaining confidence in the channel. Alternatively, it may be that telephony queue lengths are putting customers off calling.

Figure 40: Change in channel preference (high urgency interaction), 2018-25



HIGH COMPLEXITY INTERACTIONS

For highly complex interactions, such as getting expert guidance with a tax form or mortgage application, the most popular contact choice pre-pandemic had been making a physical visit to an office or branch, particularly in the older demographics.

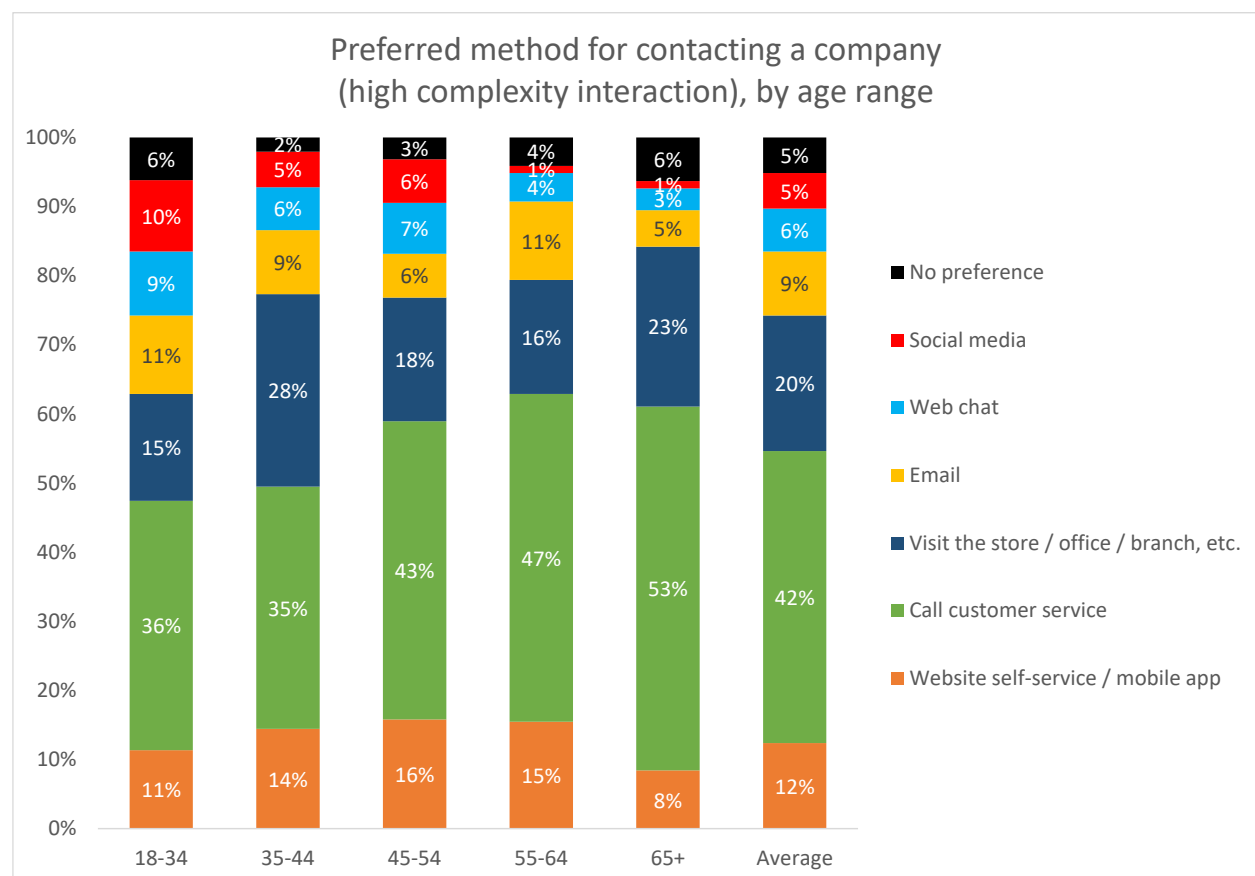
However, this option is now less popular, probably due to the customers getting out of the habit of making unnecessary visits during the pandemic, particularly as the experience is likely to be different than what they are used to.

As a result of this, telephony rose from 28% in 2018 to 47% in 2024, although it has fallen back a little this year.

Social media and web chat are also seen – perhaps surprisingly – as appropriate primary channels for complex interactions by a significant minority of young customers.

Email is not much more popular than other digital channels, possibly due to the probable requirement for back-and-forth communications.

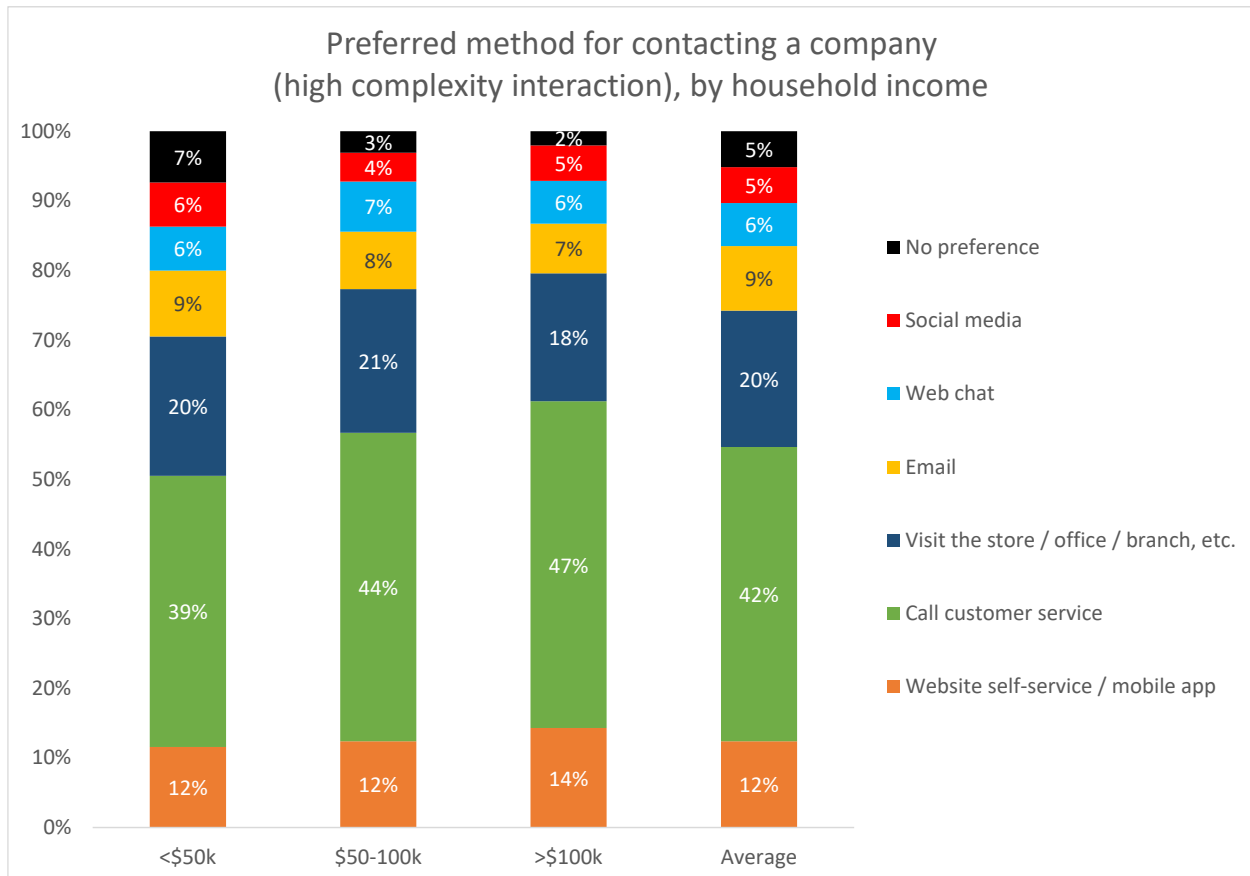
Figure 41: Preferred method for contacting a company (high complexity interaction), by age range



Telephony is by far the most popular choice for all demographics who have a complex query, particularly with higher income households.

There is little real difference between groups apart from this.

Figure 42: Preferred method for contacting a company (high complexity interaction), by household income

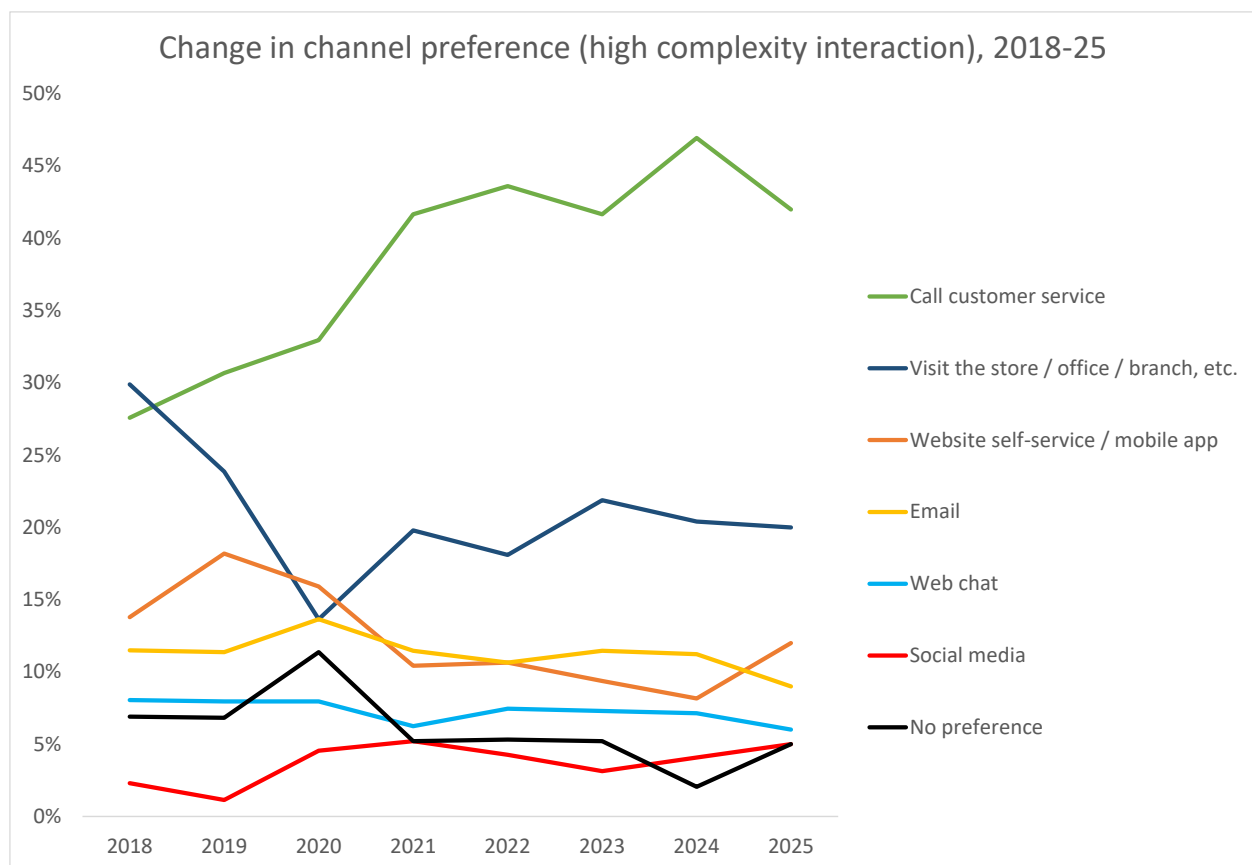


As with urgent requests, the preference for telephony jumped hugely during the pandemic and grown even higher, probably for the same reasons.

Web self-service has seen a drop in preference, with customers preferring to be reassured by an actual person: this is borne out by the relatively low drop in face-to-face communication which is recovering to some extent from the obvious drop in the pandemic.

It seems as though customers – possibly through their own unsatisfactory experiences – have formed an opinion that they simply want to be talked through their complex issue in real-time, although preferably without the trouble of actual visiting a business premises.

Figure 43: Change in channel preference (high complexity interaction), 2018-25



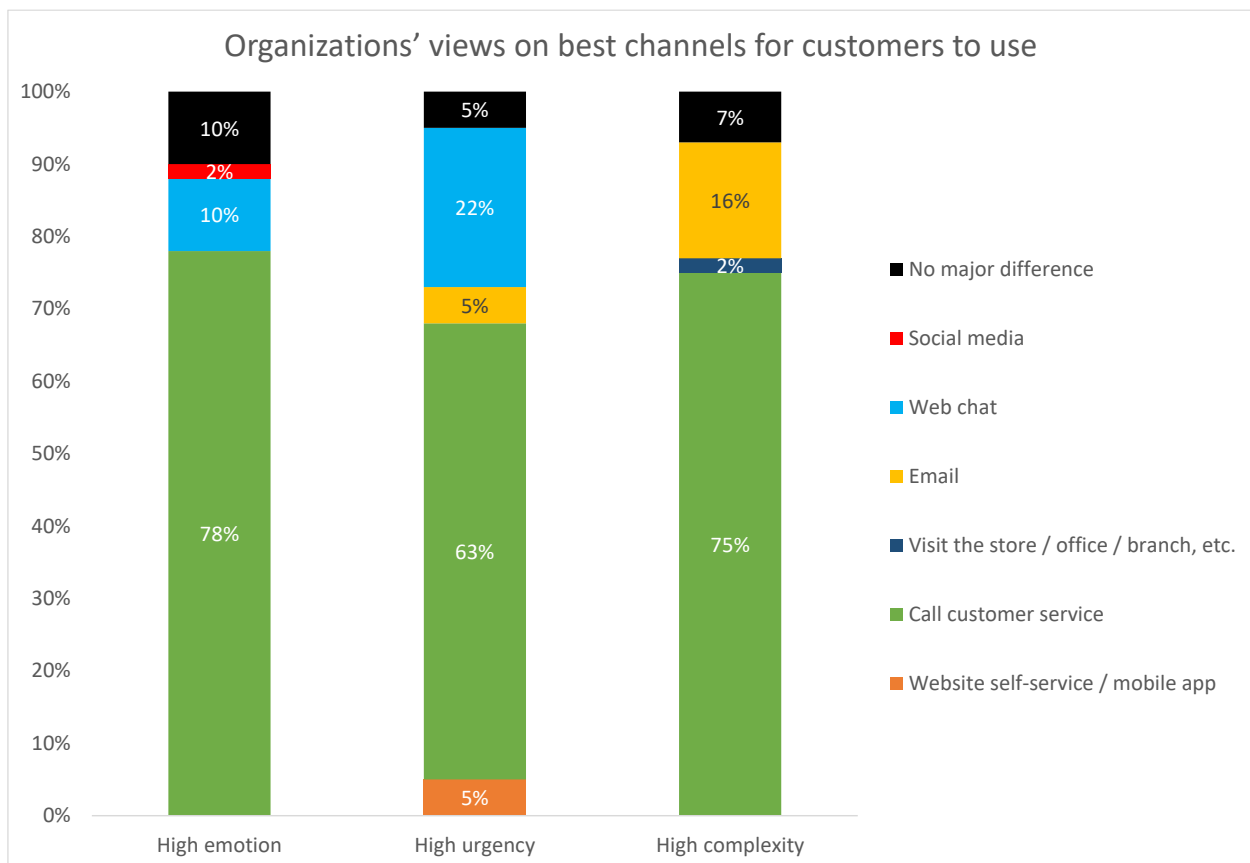
THE VIEW FROM THE BUSINESS

Organizations were asked their views on what they thought the best channel for customers to use would be for each of the three scenarios (high emotion, high urgency and high complexity).

Telephony is seen as very much the front runner, with the large majority of survey respondents stating that customers would be better off picking up the phone for any type of interaction.

Email was seen by some as appropriate for complex interactions (which most customers disagree with), and web chat for urgent issues was also seen as a possibility by 22% of organizations.

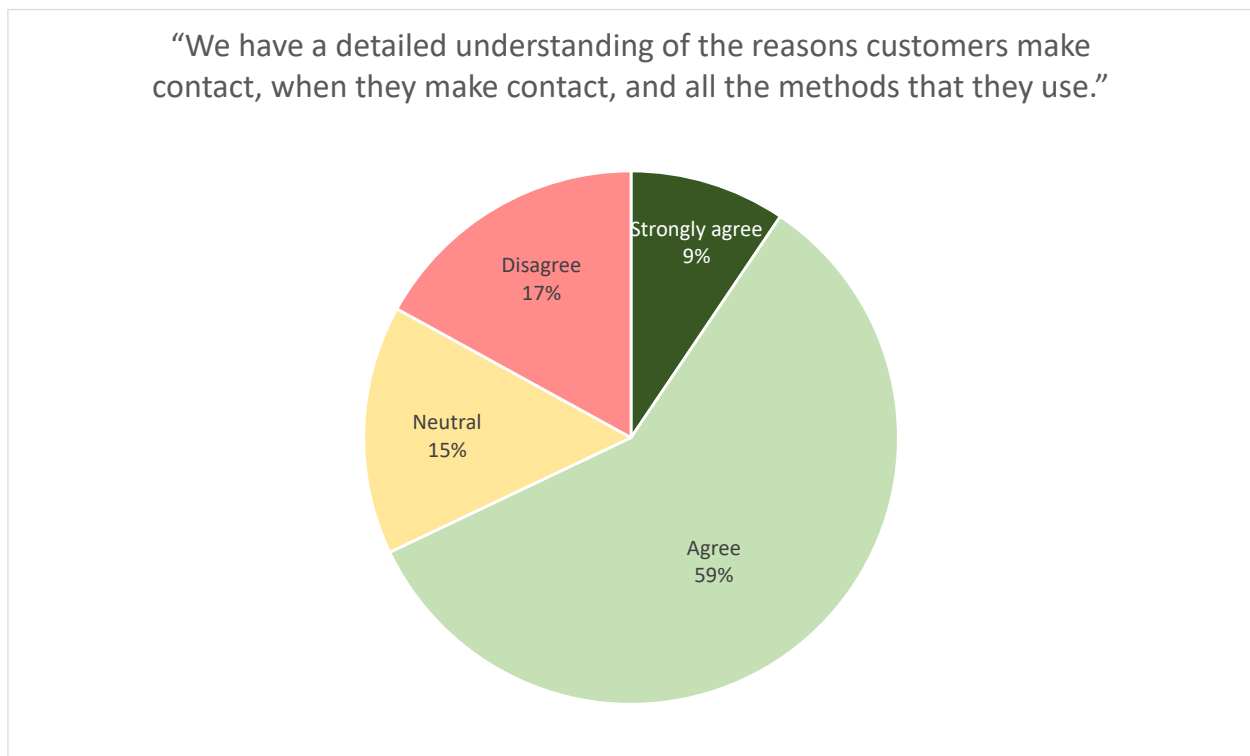
Figure 44: Organizations' views on best channels for customers to use



Survey respondents are generally confident that they understand the reasons customers make contact with businesses, and also that they know why they are choosing to use the method that they do.

While it is positive that businesses believe they understand customer motivations, the fact that they are investing far more in digital channels than telephony – despite the customers' clear requirement for the latter and the declining performance of this channel – suggests that there is a certain amount of wishful thinking going on.

Figure 45: “We have a detailed understanding of the reasons customers make contact, when they make contact, and all the methods that they use.”



CX BENCHMARKING

To improve customer experience, it is necessary to be able to measure it. There is no single best method or benchmark to use for doing so that applies equally to every company or type of customer base, but many organizations will use a mixture of data sources and methods to approach the issue from various angles.

CUSTOMER SURVEYS

Customer surveys are an integral part of most businesses. Many organizations now have “Voice of the Customer” programs, often based around large-scale analysis of call recordings, but the more traditional, direct methods of understanding customer experience and requirements are still very much present. Methods of directly surveying customers include:

IVR: at the end of the call, customers are passed to an automated IVR system, which typically asks a mixture of open and closed questions which can be answered with a combination of touchtone and speech. Immediacy means that the caller will be able to give an accurate assessment of the call and the agent and the business may be alerted in near-real-time to any major problems through pre-programmed automated SMS or email alerts.

The speed and ease with which an agent-invited IVR survey can be implemented gives it a distinct advantage over a survey conducted via outbound calls. The resources and staff time required to make outbound calls often mean that they are conducted erratically and rarely during peak times which undermines the quality and usefulness of the data collated. As agent-invited IVR surveys are automated, they require little staff input and can monitor customer satisfaction whenever the contact center is open.

Outbound automated surveys are becoming more prevalent. After the call has been concluded, the caller's number may be put into an outbound dialer's queue, which calls them and offers an IVR survey. The speed with which this call-back is made is crucial to the take-up rate of the survey, with up to 70% acceptance rate if the call-back is in minutes, but perhaps only 10% if the call is made over 48 hours later.

Written: some businesses ensure that a system-generated email is sent to the customer soon after an interaction takes place, often requesting detailed feedback through open-ended questions. Typically, more customers who have had a poor experience will bother to complete the questionnaire, skewing the figures, and although some good and detailed learning points can emerge, it's perhaps only appropriate if the customer has engaged very deeply with the business on a number of recent occasions (e.g. completing a mortgage application) or with a demographic that has more time available to them, especially older people.

However, email does allow immediacy and offers a customer a chance to express themselves more fully, rather than simply with numerical scores. This method also has the advantage that it can be fully automated.

Detailed person-to-person interviews have an important role to play, particularly where the feedback generated can be compared side-to-side with feedback by other methods. Having quantitative and qualitative data provides valuable feedback that can't be achieved by adopting a single surveying method.

Web forms are becoming increasingly widely used as an increasing number of customers visit a website initially to see if they can find the information or resolve the issue themselves. Online survey invitations that pop up within a couple of seconds of entering a website are widely used, although many customers find them intrusive as they have not yet found the information that they require. Using a little more intelligence around when to offer the survey to the customer provides far higher take-up rates and more accurate, informed feedback.

Outbound: the contact details of a proportion of incoming callers can be passed to a dedicated outbound team, who will call the customer back, often within 24 hours, to ascertain the customer's level of satisfaction with the original call. Sometimes customers will find this intrusive, while others will welcome the chance to provide feedback. Additionally, certain companies employ outside agencies to survey customers regularly, which may be useful in benchmarking exercises, since they will apply a more formalized and structured approach to data gathering and presentation. The automated option as mentioned in the IVR section above should also be considered as an option.

SMS: Text messaging has the advantage of immediacy of sending and also of reporting on the results. It is a cheap way of carrying out surveys, and can be linked to a specific agent, allowing the contact center to use this information for agent performance as well as satisfaction with the business. However, SMS does not support particularly detailed questioning, and businesses will have to collect mobile numbers if they do not already have them. However, take-up rates are better than many other forms of feedback (at around 25-35% on average), and younger and more time-poor customers are more likely to respond, providing a wider universe of responses across demographics. This form of survey can allow the contact center to identify very unhappy customers and schedule an outbound call to deal with the problem.

Different customers will prefer to be surveyed in different ways and a survey platform should have the flexibility to support IVR, web, text and written surveys and collate the results in a unified reporting system. Not only will this mean that businesses are increasing the number of customers accessed, but a different quality of feedback and level of insight will be received from each approach.

Regardless of whether or not surveys identify specific agents, a key to customer feedback success is whether the survey implemented is considered by agents as just yet another form of monitoring, or a genuine attempt to help them provide better service in the long run. Agents tend to respond well to successful customer satisfaction improvement initiatives as they usually make their job easier and more rewarding.

Keep the survey process simple, focus on agent engagement and act quickly to provide positive feedback to the team. It's more important to get the survey adopted as a positive part of the company's customer service strategy than it is to design the academically perfect survey that has a negative impact on the morale of the team.

It is vitally important before beginning to survey customers, that a business:

- Clearly determines the purpose and aims of the survey
- Considers adopting a variety of question types. Scored questions enable a business to produce statistically significant and representative data. Free comments allow the gain of real insight into customers' perception of service
- Selects an experienced company to set up and host the survey. Businesses will benefit from their expertise and knowledge and avoid potentially costly errors and missed insight
- Ensures that the survey can be carried out throughout the day, including peak times, to gain a true picture of the customer experience
- Makes sure that the results of the survey can be collated and analyzed in a wide variety of ways. It is pointless to amass information if it cannot be evaluated and the results disseminated usefully
- Has procedures in place to act upon the information that it finds. The survey may have uncovered some broken processes in the service which need attention. It will also inevitably throw up disgruntled customers whose concerns need addressing. The survey platform should provide some mechanism for alerting and following-up to ensure that dissatisfied customers are quickly escalated to the appropriate staff
- Adopts a unified approach across the business to assessing and monitoring customer satisfaction. If a business rewards agents based on traditional call performance metrics, it may not support the behaviors needed to improve customer experience. If agents are rewarded based on customer satisfaction ratings, it will increase agent engagement and retention as well as improving the service it offers to customers.

More information about this is available from "[The Inner Circle Guide to the Voice of the Customer](#)".

EMPLOYEE FEEDBACK

Voice of the Employee (VoE) programs are part of the workforce engagement management suite, discovering how agent feel about their work and the organization, with the end goal to understand and improve outcomes for employees and the business.

Some of the purposes of VoE include:

- improving employee performance and retention
- identify areas of underperformance in the organization
- understanding and addressing the causes of agent boredom and burnout
- improving agent motivation and aligning them with business strategy and culture
- as happy employees directly affect performance and customer experience, making the workplace and culture more pleasant will benefit everybody.

VoE programs survey employees through tailored questions in order to gather insight about current levels of engagement by role, team, department, etc. Not only do front-line employees appreciate being listened to, but to be able to see any changes and improvements made as a result of their comments is very motivating.

Team and individual development plans can then be published, progress tracked and results shared. VoE survey findings can provide insight to other parts of the WFO suite (e.g. coaching/eLearning, and also gamification and performance), and also be connected to other metrics including absence, attrition and customer-focused scores.

VoE helps organizations understand what their best-performing employees are thinking and engage with them to keep them loyal. It is important for any VoE program to be set up so as to be able to release actionable insight: not just answers to questions such as 'How engaged with the business are you?', but also **why** this is, how it can be improved and what effect on the business will this have.

VoE in the contact center should discover whether agents have all the tools they need to deliver successful CX and whether they are encouraged and empowered to own the customer's issue or feel as though they are managed and judged solely by internal metrics.

Many contact center employees are finding that the calls they are now handling are becoming increasingly complex, as many of the simplest interactions are being resolved through self-service. Where support systems and training have not been upgraded accordingly, this can lead to stress and demotivation as not been able to help customers effectively is a very negative experience. This issue is only likely to get larger over time, particularly as customer expectations are always rising.

Successful VoE is a long-term, ongoing project rather than simply being a snapshot of a moment in time, and it is important to create buy-in at the top of the organization by sharing the goals and insights with senior management and linking any results to improvements in business performance.

COMPLAINT ANALYSIS

Complaints are a potentially rich environment for businesses to understand where they are going wrong, and which issues are in danger of turning a customer into an ex-customer. For many businesses, each complaint is dealt with on a case-by-case basis, with little in the way of categorization or structure being put in place formally, and little chance of communicating findings in an actionable way to the relevant department.

Speech analytics gives businesses a chance to quantify the reasons that customers complain, identifying the most important factors, assessing trends and spikes, and providing hard recommendations based on every call taken.

Analytics allows businesses to track words and phrases related to complaints (such as 'supervisor', 'manager', 'complain', 'unhappy' etc.), allowing escalation to a supervisor, or screen-pop to the agent to provide them with a revised script or suggestions of how to handle the call. Emotion detection and sentiment analysis may also be used to identify unhappy or wavering customers within the call, updating supervisors who can then intervene or advise the agent accordingly.

John Seddon uses the term “failure demand” to describe calls that are created by the inability of the business’s systems to do something right for the customer:

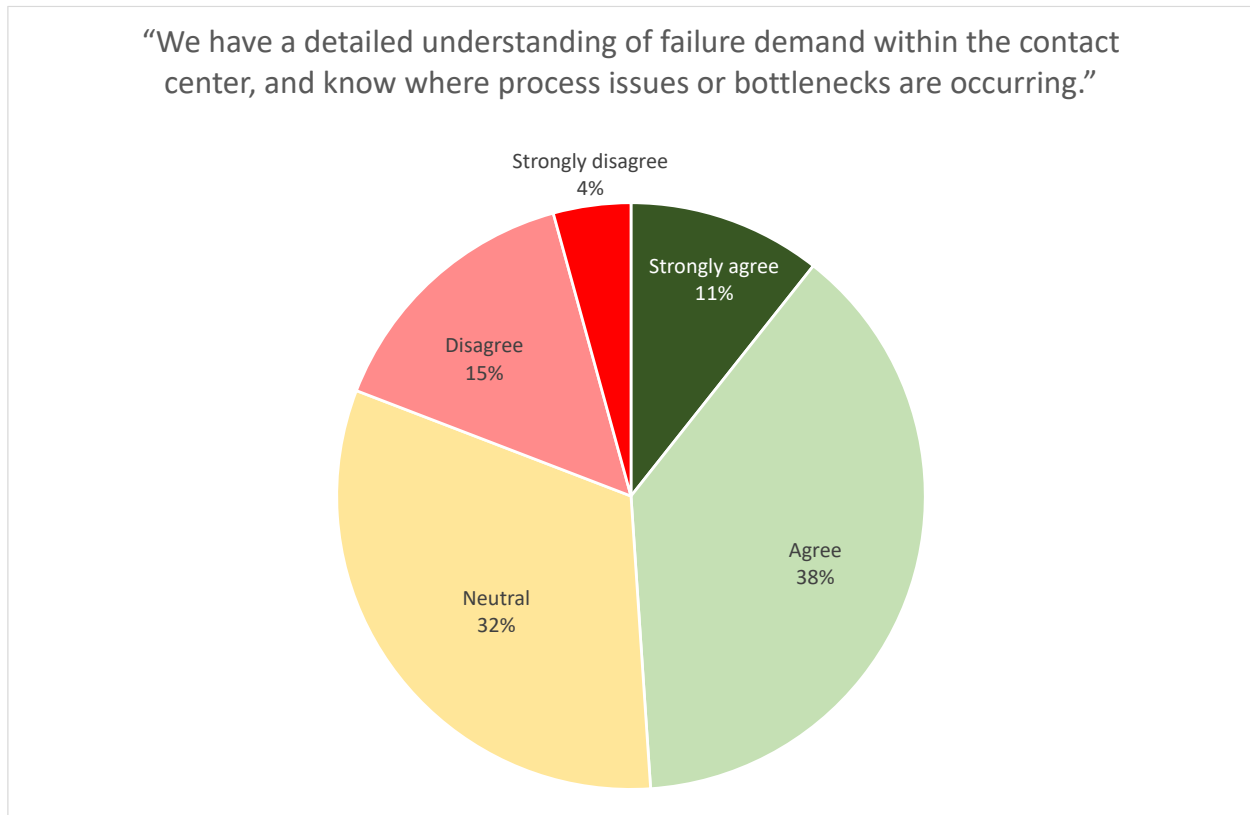
“A failure to do something - turn up, call back, send something...causes the customer to make a further demand on the system. A failure to do something right - not solve a problem, send out forms that customers have difficulty with and so on - similarly create demand and creates extra work. Failure demand is under the organization’s control, and it is a major form of sub-optimization.”²

Seddon cites the instance of the bank where failure demand created almost half of the calls which they had to deal with. Another classic example of failure demand is where emails go unanswered, leading to calls being made (first-stage failure demand). Later, the email will be answered, unnecessarily, as the customer already has their answer or has gone elsewhere (second-stage failure demand). This redundant work will then impact on other (still live) messages in the email queue, creating a vicious circle of failure demand.

² *Freedom from Command and Control: A better way to make the work, work*, John Seddon

The chart below shows that while almost half of survey respondents agree to some extent that they understand where failure demand is occurring, it is by no means universal.

Figure 46: “We have a detailed understanding of failure demand within the contact center, and know where process issues or bottlenecks are occurring.”



Redesigning and restructuring the way in which work flows around the organization, putting the contact center at the heart of it, rather than treating it as a separate silo, will go much of the way to reducing unnecessary contacts. The customer ends up getting a better service from the whole company, not just the contact center.

One way in which this can be achieved is to unify and automate the agent desktop through AI agent assistance, bringing in the relevant data automatically, depending on who the caller is and what they want. At the end of the call, the correct data is written to the relevant places, and the correct processes kicked off automatically, meaning that the right departments will be provided with the right information, thus reducing the risk of failure demand, unnecessary calls and irate customers.

This also takes the pressure off the agents to remember which systems to update and how to navigate through them within the call (which causes long delays, negatively impacting customer satisfaction), or in the wrap-up, which risks agent forgetting to do things, and also decreases agent availability, increasing the queue length, and decreasing customer satisfaction.

In cases where multiple processes have to happen in order for the customer's requirement to be met, automated outbound messaging to the customer, whether by email, SMS or IVR is likely to reduce the number of follow-up contacts that the customer feels that they have to make.

Information on failure demand can be gleaned from analysis of the contact center, which holds huge amounts of knowledge about customers' views of the products, services, competitors and company. Feedback loops can be established to push information and insights upwards to those who can make a difference in product development, process improvements and customer strategies.

AI-enabled interaction analytics offers businesses the chance to mine huge amounts of data and find patterns and reasons in a timely fashion, and it is vital then to act upon this knowledge, proving to both customers and agents that the business takes them seriously.

On average, 12% of survey respondents' calls were complaints, and of those calls, 78% were not about the contact center itself (or its staff), but rather 'failure demand', caused by a breakdown of process elsewhere in the organization.

However, the contact center has to deal with the fall-out, and further failures within the complaints procedure can see customers calling into the contact center again and again, becoming more irate each time, despite the real problem lying outside the contact center.

There may also be a blurring of responsibility between the contact center and the rest of the business so that lines of demarcation over where the fault lies can be difficult to find.

For example, a telecoms provider that has taken an order for a new line has to rely on the rest of the organization to provision and deliver this correctly.

If the agent takes down an email address incorrectly, the customer will not receive any information about their order, which may have a query on it. When the irate customer rings in to complain, the problem may appear to be with the back-office processes where the order has halted, but the fault actually lay with the original agent. Whether this is tracked or reported on correctly is not a certainty, so analysis between contact center / back-office complaints should be treated with caution.

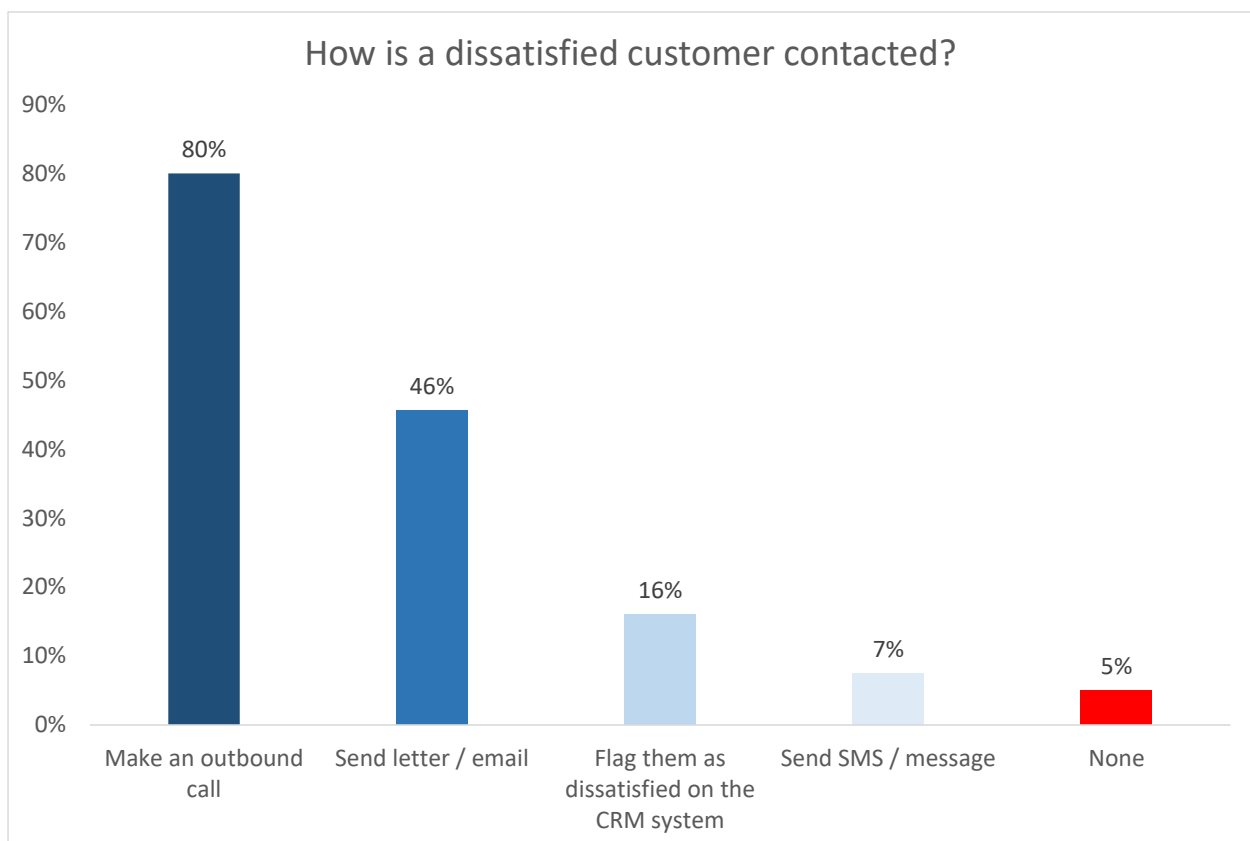
There is also a real risk especially within large contact centers that a single agent does not have the capability or responsibility to deal with the customer's issue, which may reach across various internal departments (e.g. finance, billing, provisioning and technical support), none of which will (or can) take on full responsibility for sorting out the problem.

The following chart shows how survey respondents handle customers that are identified as being dissatisfied.

It is heartening to see that very few organizations choose to do nothing in these cases, with a majority making an outbound call, especially B2B companies for whom the loss of a single customer can impact significantly on revenues.

Sending a letter or email is also quite a popular choice, and some account-based organizations – usually B2B – will flag complaints to account directors or other senior staff to follow up and resolve the situation.

Figure 47: How is a dissatisfied customer contacted?



INTERACTION ANALYTICS

There has been a great increase in customer satisfaction surveys in recent years, with the widespread uptake of the Net Promoter®³ score (NPS) being a good example of companies' desire to learn what their customers actually think about them.

However, research has shown that a 'satisfied' customer isn't necessarily a profitable or loyal one, and the results of customer surveys, particularly the written or telephone-based variety (the latter of which, despite its limitations and expense, is still seen as the best method), are carried out at a time when any feelings about the original interaction may have changed or dissipated, are prone to inaccuracy, delay and lack of detail.

With all of the methods of customer surveys, the questions are fixed in advance, and if the right questions aren't asked, the level of actionable insight is low. In many cases, a business might know that x% of its customers are satisfied, and y% dissatisfied, but it still has no real idea why this is, or even how it will impact upon their profitability.

As an addition to customer satisfaction surveys, interaction analytics allows a business to gather customers' views within the interaction itself – guaranteeing immediacy and accuracy – and can be applied across 100% of calls, rather than focusing on the outlying 'very dissatisfied' or 'delighted' customers.

Through detailed analysis of what the call is about, the type of language or messages used in the call, how the customer was handled, and the eventual outcome, businesses will be able to learn how to improve their customer retention and satisfaction in real-life, bypassing the standard metric (e.g. "83% of customers are satisfied") and getting to the root causes of satisfaction or dissatisfaction and sharing the results with the rest of the operation.

Some solutions use historical analysis of call characteristics, agent behaviors and interaction outcomes to estimate customer satisfaction or Net Promoter® scores on every call, and can also predict the attrition of customers based on what they have said and what has happened within the call, allowing the business to act swiftly.

AI-enabled sentiment analysis can identify negative customer emotions and means that calls can be flagged for further review or action, reducing potential losses from customer churn and addressing dissatisfied customers who might require higher-cost interventions later. This can be done either to identify specific calls, or at a wider level to see which processes or products are causing the significant negative customer sentiment.

³ Net Promoter, Net Promoter System, Net Promoter Score, NPS and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., Fred Reichheld and Satmetrix Systems, Inc.

VOICE OF THE CUSTOMER ANALYTICS

Recently, there has been a great increase in the number of organizations implementing “Voice of the Customer” (VoC) programs, increasingly based around large-scale analysis of call recordings, as well as using formal surveys of customer experience to offer the customer a chance to feed-back, and the business to learn.

VoC programs strive to capture customer feedback across multiple channels of engagement (IVR, live agent, email, etc.), while enabling closed-loop strategies to support customer retention, employee development and omnichannel experience optimization. VoC programs typically trigger alerts with role-based delivery via the use of text and speech analytics, offer statistical modelling services to pinpoint root causes, and digitally track progress and results with case management.

The definition of what a VoC program includes runs the gamut across vendors from simply sending alerts based on key words derived from a survey, to more complete solutions that directly contribute to contact center optimization and overall CX improvement.

Examples of more complete VoC program features include:

Closed Loop

- **Automated Alerts:** as surveys are completed, real-time alerting capabilities will immediately identify and inform teams of customers in need, while assigning ownership for follow-up
- **Callback Manager:** an interactive system that enables callback teams to conduct detailed case reviews and disposition follow-up activities for eventual root-cause analysis
- **Case Management:** root-cause exploration tools enable back-end analysis of the customer’s initial concern, enabling operational support teams to uncover, track and mitigate systemic problems proactively.

Coaching

- **In-The-Moment Coaching Tools:** as surveys are completed, real-time alerting capabilities will identify when a frontline employee is in need of immediate coaching intervention
- **Performance Ranker:** the performance ranker helps managers develop weekly and monthly coaching plans by outlining strengths and weaknesses for each employee, while identifying opportunities for peer-based knowledge sharing
- **Behavior Playbooks:** playbooks with scorecards help managers coach specific behaviors by outlining how to best demonstrate each of them, showcasing best-practice examples and suggesting sample role-plays.

Reporting

- Real-time Insight – text analytics zeros in on key issues from multichannel survey feedback
- Role-based Reporting – define type and frequency of report delivery based on responsibility, title, geography and more
- Call Recording – drill-down detail includes IVR and live agent call recording for additional insight.

VoC programs are frequently ongoing engagements with results measured by internal CSAT scores, NPS benchmarks and efficiency improvements.

Alongside direct customer surveys, VoC analytics solutions can also gather insight from recorded digital and voice channels. Aggregation of customer surveys and analytical results can identify the root cause of any issues identified, and provide actionable insight for changing processes and/or agent handling techniques.

VoC should be seen as a continuous process, rather than a one-off project, and ongoing analysis allows the business to operate a closed-loop system, whereby identified issues can be actioned and continuously checked to make sure that the problem does not reoccur.

MYSTERY SHOPPING

Mystery shopping is often used by retailers in order to measure and confirm that the experience a customer has with an organization is one which the business actually intends them to have. Mystery shopping does not have to happen within a physical store, as it is also possible to carry out these activities with the contact center or online.

Businesses may wish to make sure that specific actions are being carried out consistently, such as greeting a customer or asking if they need help with packing their purchases, and can also be useful more subjectively to understand the general feeling that the customer has about communicating with the business.

Mystery shopping is generally better suited to B2C organizations, as B2B mystery shopping may require specialist information and can be an extremely complex sales process, involving ratification of a potential customer's identity and *bona fides*.

While mystery shopping has a part to play in understanding customer experience, the fact remains that the actual mystery shopper is not a real customer, and is acting based on specific instructions given to them by the company. Additionally, customer experience data will be taken from a relatively small sample size of mystery shoppers, rather than a larger proportion of the customer base which can be accessed through surveys or analytics.

THE USE OF CX BENCHMARKING METHODS

The chart below shows the use and effectiveness of the methods of gathering customer experience covered earlier in this chapter.

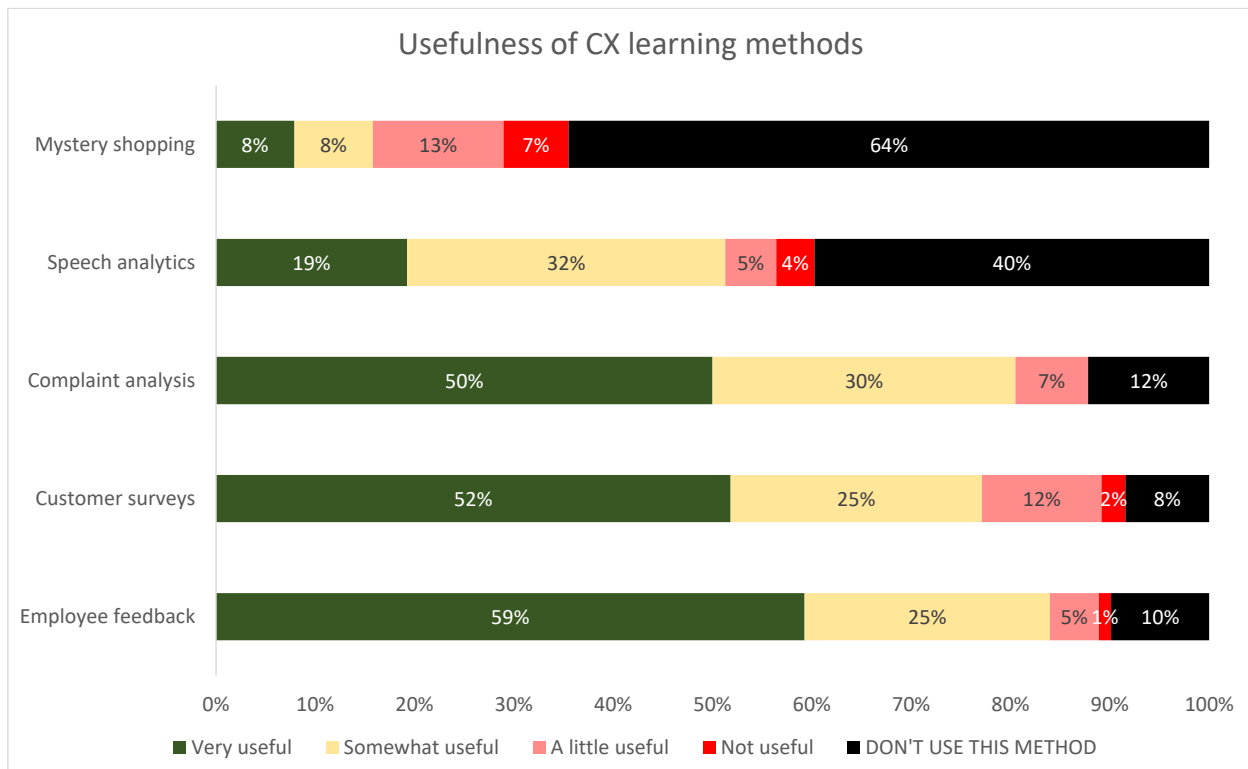
The large majority of respondents use customer surveys, employee feedback and complaint analysis in order to learn about customer experience, with 60% using speech analytics and 36% using mystery shopping.

Employee feedback was seen as a very effective method of gathering customer experience data, with 66% of **respondents who use this method** stating that it was very useful. Customer surveys (57%) and complaint analysis (57%) were also seen as useful.

Only 32% of those who use speech analytics to understand customer experience data find it very useful, and 15% state it as being of little or no use, which is surprising considering the vast capabilities that modern analytics solutions have.

Mystery shopping fared quite poorly: only 25% of those using it stated that it was very useful, with 56% finding it of little or no use.

Figure 48: Usefulness of CX learning methods



Businesses were asked which of six quantifiable benchmarks that they use in order to measure customer experience and satisfaction.

- Net Promoter Score®, otherwise known as NPS, is an index ranging from -100 to 100 that measures how likely customers are to recommend a company's products or services to others. The question asked to customers is:
 - “On a scale of 0 to 10, how likely are you to recommend this company's product or service to a friend or a colleague?”
 - Based on their rating, customers can then be grouped into in 3 categories: detractors, passives and promoters. 'Detractors' score lower than or equal to 6, 'Passives' score 7 or 8 and 'Promoters' answered 9 or 10.
 - NPS is determined by subtracting the percentage of customers who are detractors from the percentage who are promoters. For example, if 50% were promoters and 10% detractors, the NPS would be +40. This allows businesses not only to focus upon increasing the proportion of people that actively like and evangelize about the company, but also to bear in mind those at the opposite end of the spectrum who are negative.
- Customer effort scores look to understand the ease or otherwise with which the customer has interacted with the company on a particular occasion. Often, there will be a five-point scale running from “very easy” to “very difficult”, which can be converted into a quantitative metric. Various methods of calculating customer effort scores and pitfalls to avoid can be found within this referenced article⁴
- Quality scores differ from company to company, but are based on interaction scorecards on which employees are scored over a number of calls or interactions each week or month, and include factors such as compliance, quality of greeting and call termination, cross-selling and upselling attempts, fluency of communication and other factors deemed important by the business
- Customer retention rates are generally based on the percentage of customers renewing contracts, and are typically used by businesses within contract-based industries, such as insurance and telecoms
- First-contact resolution rates can be complex to measure, and as no widely accepted external standard is present, this is of most use as an internal benchmarking metric. It is a major driver for both CX and contact center costs
- CSAT (customer satisfaction) scores do not have a fixed and widely-accepted scoring system, but are more wide-ranging. Businesses may decide that they want to track the proportion of customers who report being “very satisfied”, score them at 5 out of 5, etc.

⁴ <https://www.callcentrehelper.com/how-to-calculate-customer-effort-94671.htm>

The most widely used customer experience benchmark is the general customer satisfaction rating, which is used by 84% of respondents. First-contact resolution rate is used by 65%, NPS 71%, customer retention rate 60% and agent quality scores 68%. Customer effort score is much less widely used and is in place with only 34% of survey respondents.

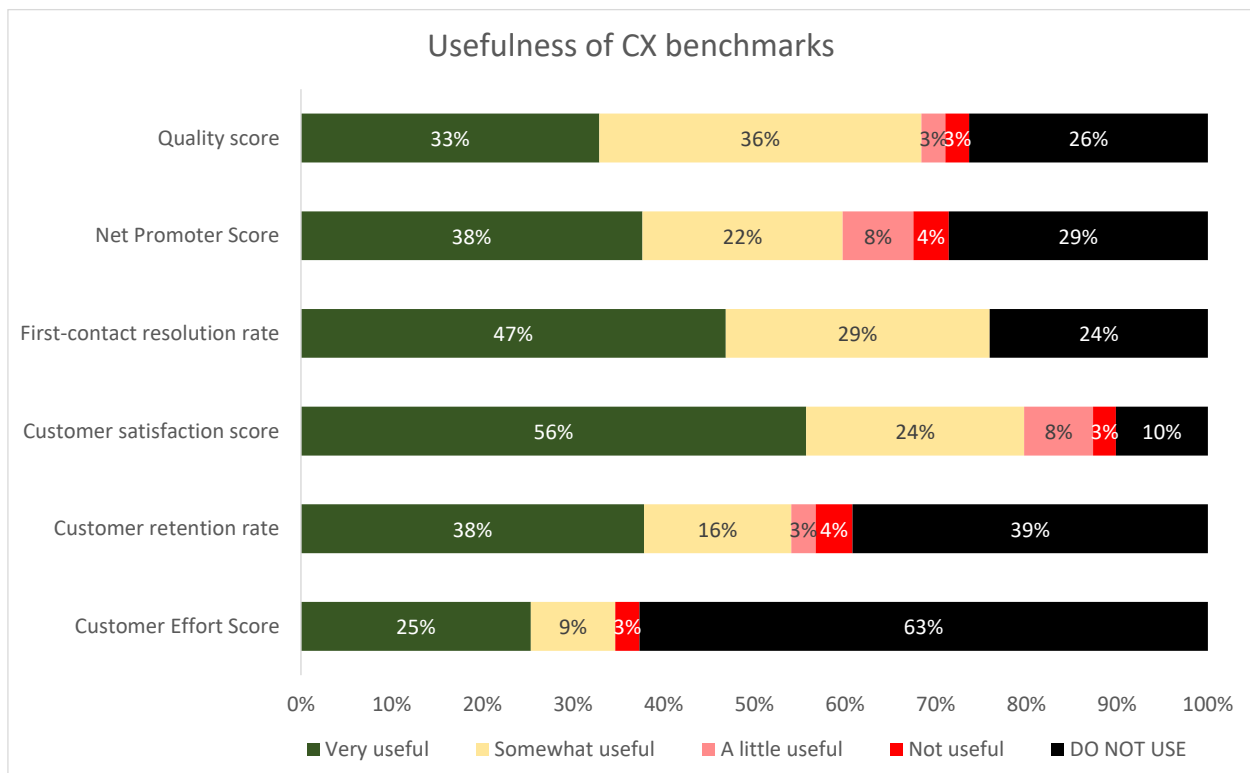
Respondents that used these customer experience benchmarks were asked to rate how useful they were.

The chart below is ordered by the proportion of responses which are stated to be “very useful” by those who use it. Customer effort is rated highest, and quality score the lowest.

68% of the respondents **that used it** stated that they believed that customer effort score was a very useful indicator of customer experience, being the highest-rated metric, although the least used.

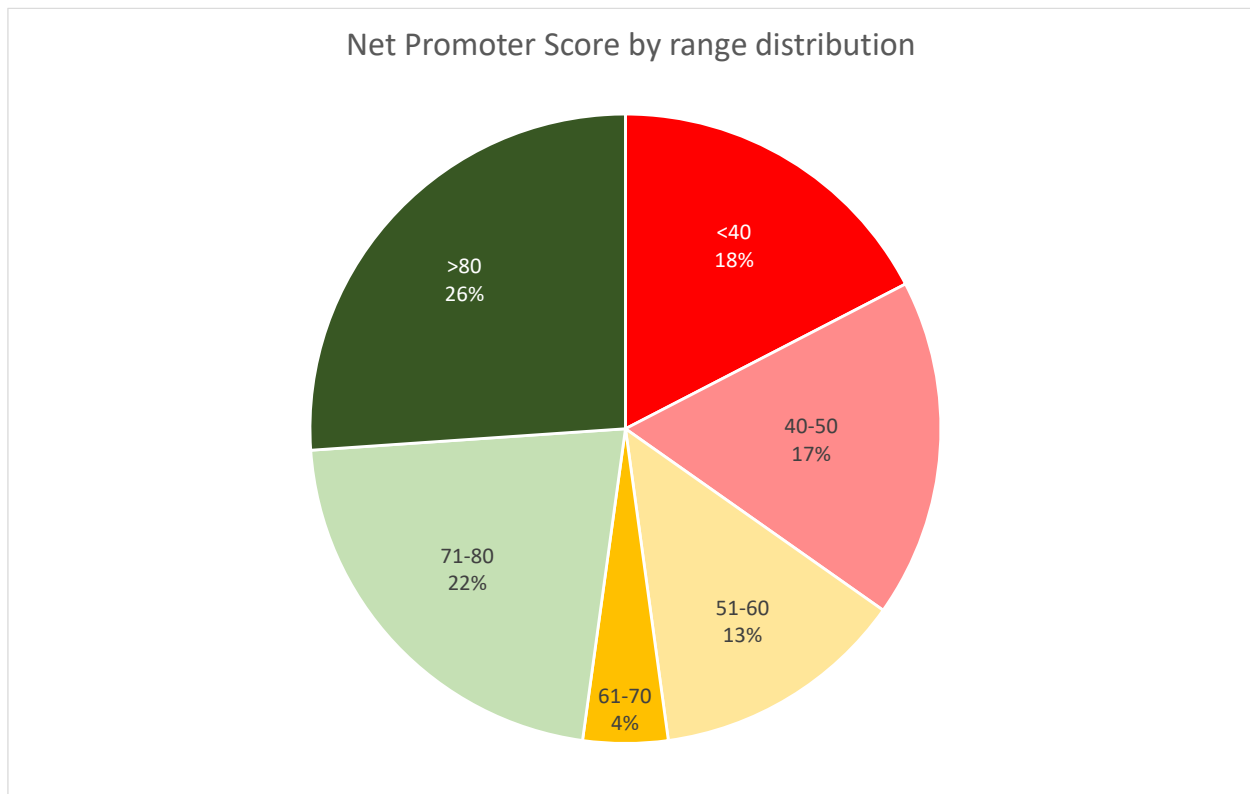
Most of the other customer experience benchmarks received very similar scores, with 50-60% respondents stating that they were ‘very useful’.

Figure 49: Usefulness of CX benchmarks



As customer experience benchmarks change from company to company – there is no generally accepted customer satisfaction rating or quality score that allows direct comparison between organizations – only NPS easily allows head-to-head comparison across companies, although there were not enough responses from each vertical market to be able to give a full picture.

Figure 50: Net Promoter Score by range distribution



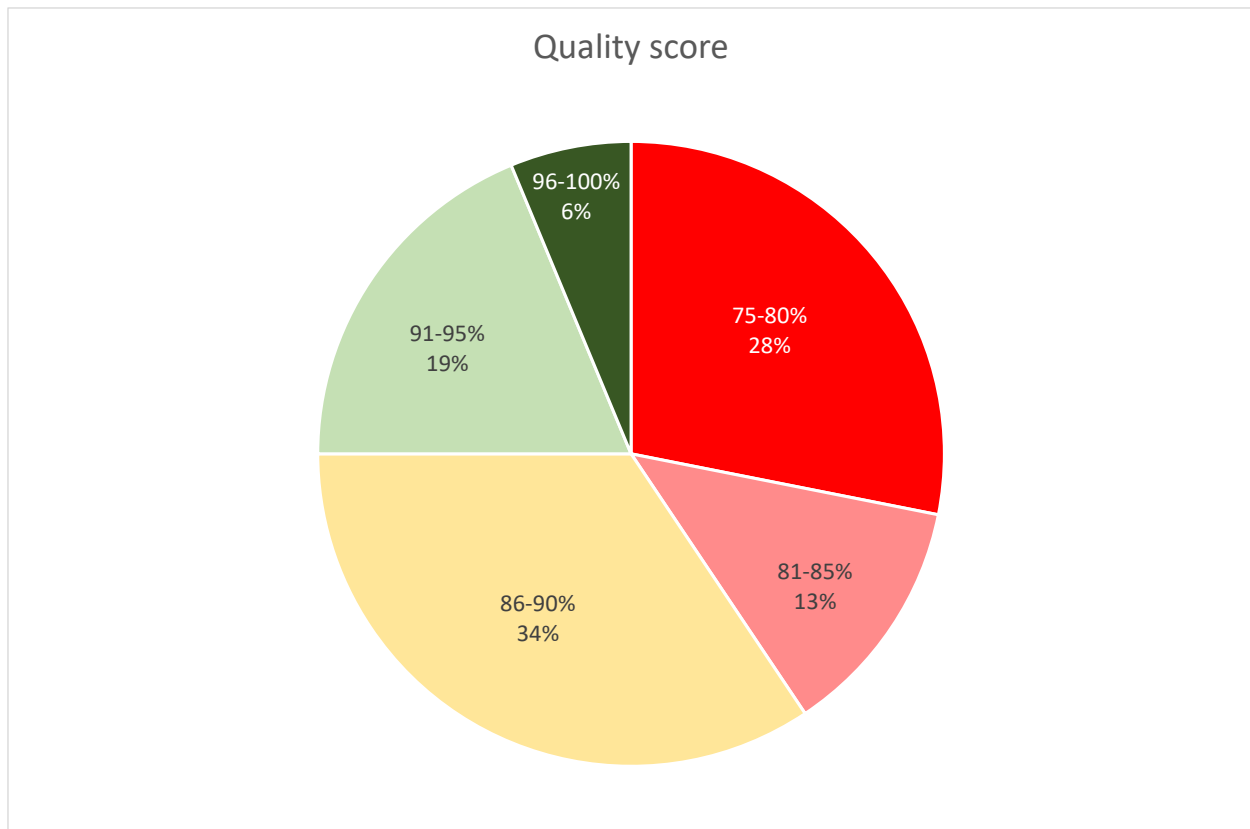
The chart above shows the distribution of NPS across ranges, with 18% of respondents under +40, and 26% at over +80.

Mean average: +63 (2024: +62), against a target NPS of +62. Median NPS is +70.

Looking at quality scores, the fact that there is no single industry-wide quality measurement score made head-to-head comparisons impossible. As such, we have normalized the data to act as a percentage of the maximum (100%).

25% of respondents report a quality score of over 90%, with 28% only achieving 80% or lower.

Figure 51: Quality score



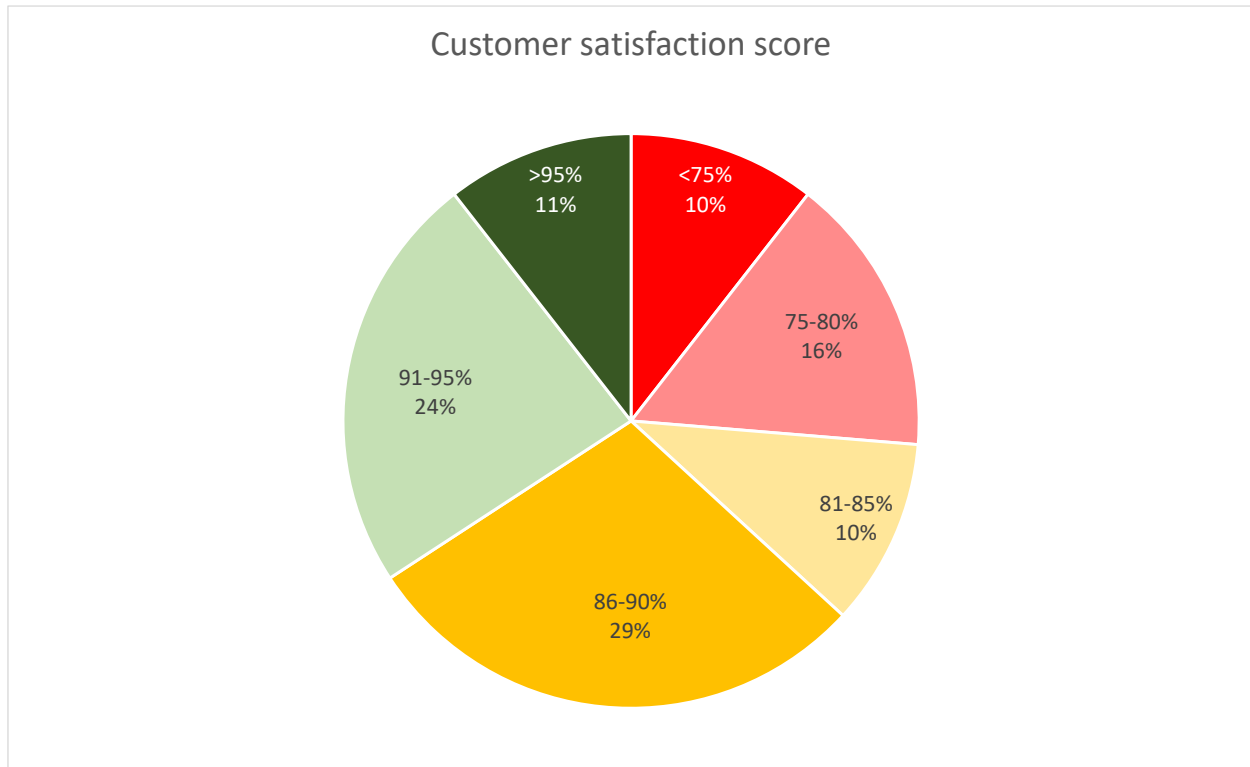
37% of survey respondents are currently missing their quality target, and 44% report beating their target quality score, a decline on last year's figures.

However, the mean average quality score was 99% of target.

In the same way as with quality scores, customer satisfaction scores are not necessarily directly comparable between organizations. However, where possible, the data was normalized as a percentage.

The majority of survey respondents achieve CSAT scores higher than 85%, although 10% report getting CSAT scores of under 75%.

Figure 52: Customer satisfaction score



13% of respondents were more than 10% below their target, with 51% above it to some extent, which is a considerable improvement on previous years.

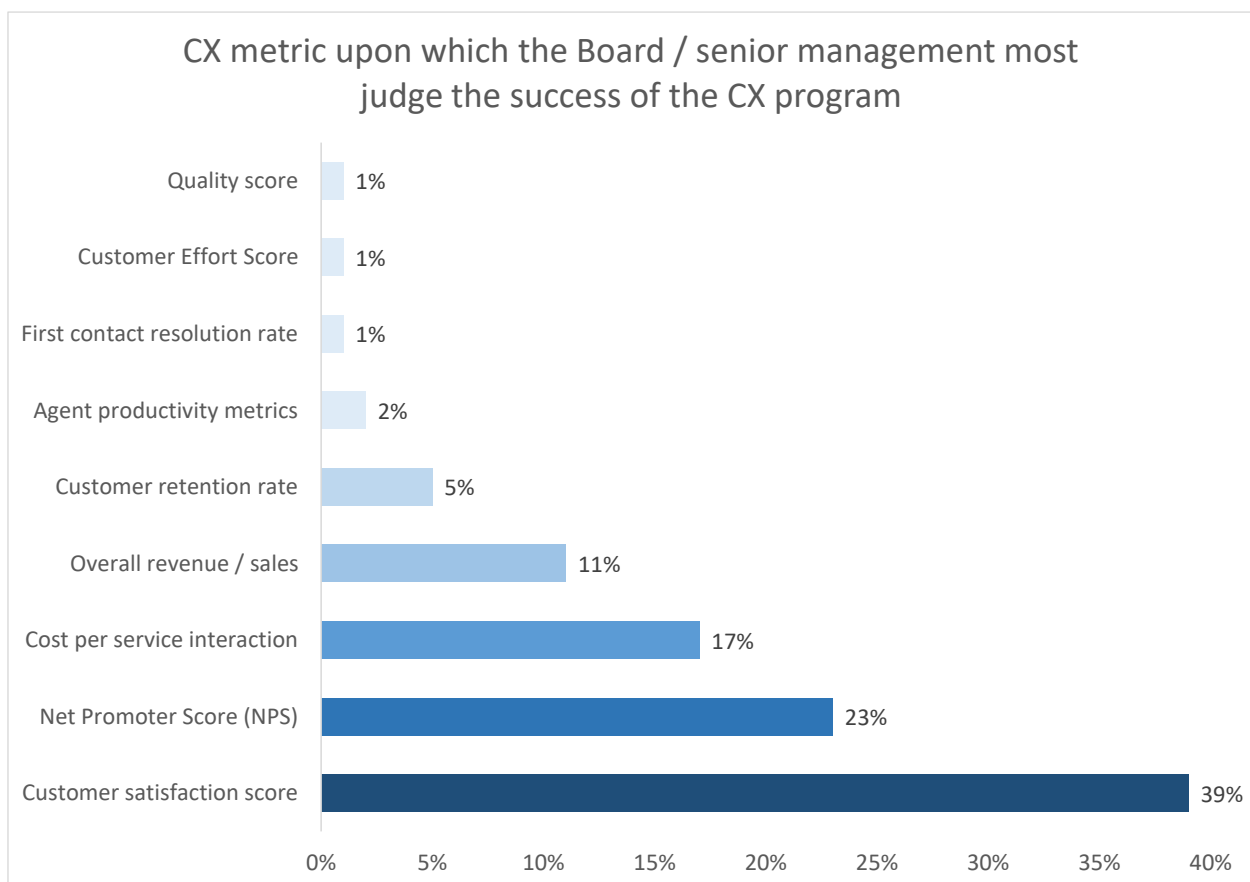
On average, survey respondents report being at 97% of their CSAT target.

Survey respondents were asked to pick a single customer experience metric upon which their board or senior management team most judged the success or otherwise of the customer experience program.

There was a wide mix of responses, with NPS and customer satisfaction score accounting for 62% of responses.

Of note is the fact that first-contact resolution rate was identified as being the key CX metric for senior management by only 1% of respondents, despite both the customer and business survey results earlier in this report showing clearly that first-contact resolution was the most important factor in influencing customer experience.

Figure 53: CX metric upon which the Board / senior management most judge the success of the CX program



Survey respondents were asked if their customer-facing employees were financially rewarded based on any customer experience factors. 53% stated that they did so.

35% of businesses reward agent based on individual CSAT scores, 24% so do based on quality scores, and 24% on the cross-sell / upsell rate. These – unlike NPS and FCR – are more likely to be in the control of specific agents, so this is more of a direct reward for performance.

This may be a reason why only 7% reward agents based on FCR, despite high first-contact resolution rate’s overwhelming importance to the overall customer experience program.

Figure 54: Are customer-facing employees financially rewarded based on any CX factors?



CX FUTURE STRATEGY

THE IMPORTANCE OF CX DEVELOPMENTS

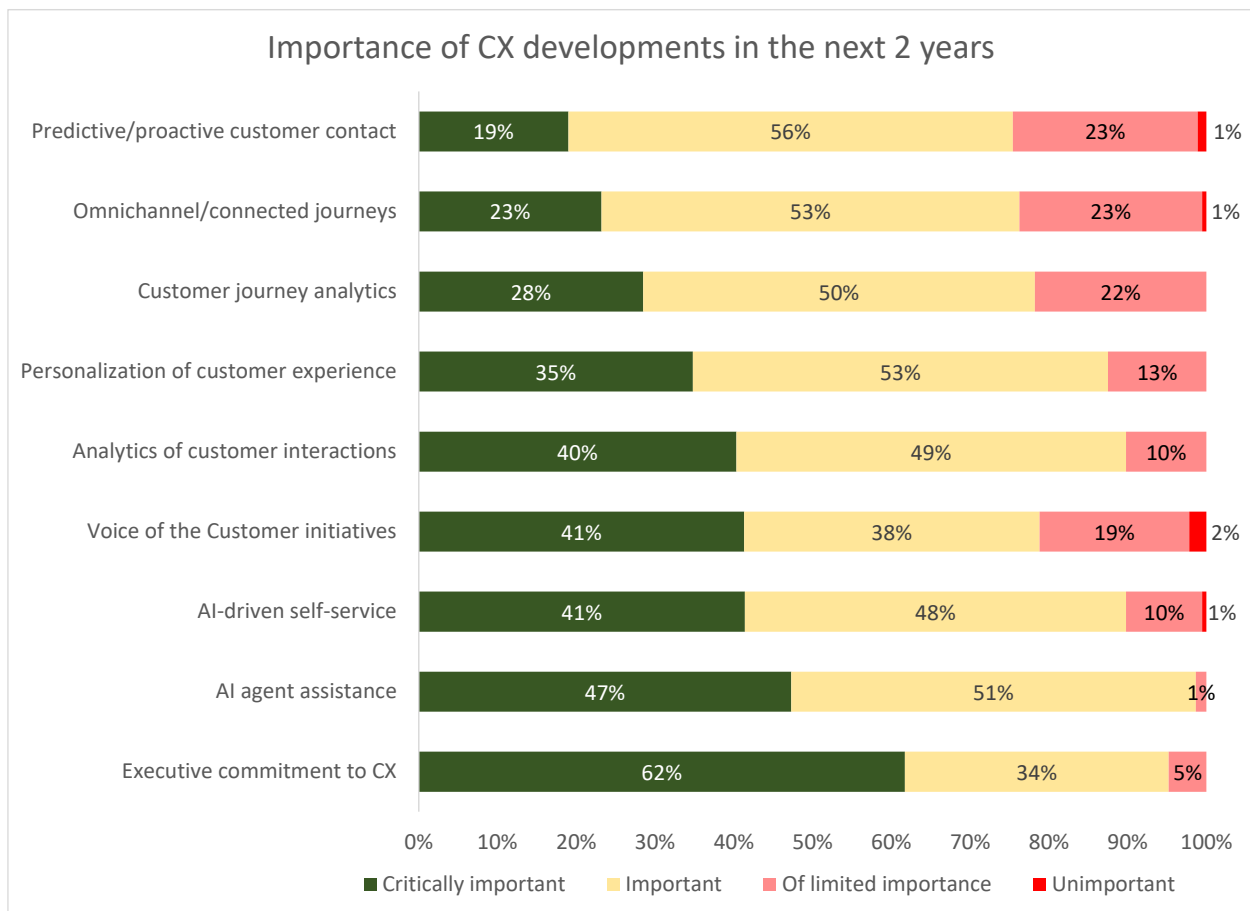
Survey respondents were asked their opinion on how important various customer experience developments would be to their organization in the next two years.

AI-driven self-service and agent assistance – while not yet figuring strongly as being ‘critically important’ are popular choices amongst technology solutions, with only 1% of businesses stating that AI agent assistance is of little importance to them.

The most striking finding is that the most important factor determining the future success of the customer experience program was not technology-related, but rather a requirement for the continuing and strengthening executive commitment to improving customer experience.

Without this ongoing support from the top levels of organizations, multi-departmental CX initiatives cannot hope to succeed.

Figure 55: Importance of CX developments in the next 2 years



CONCLUSION: CX STRATEGIES

The business and consumer surveys carried out in the course of the research for this report show that while improving the customer experience is high on the agenda for many organizations, most businesses are still a long way from where they want to be.

The key findings of this report can be summarized, and various strategies suggested for maximizing the customer experience while improving profitability and managing cost:

- Customer experience is widely seen by businesses as being an increasingly important competitive factor, with fewer respondents than ever wanting to compete primarily on price
- the main investment in customer experience improvement programs is focused on technology, followed by business process improvements and then employee training
- live telephony is still by far the largest communication channel used by customers, comprising over 60% of inbound interactions. Email is second with around 18%, although web chat has risen steadily as well
- however, despite the prevalence of telephony, the majority of customer experience investment is going into digital channels
- CX technology was said by many survey respondents to be under-supported in that it did not give a single view of customers across channels, and many businesses (especially smaller ones) reported that they were being held back by the restrictions of legacy technology and inadequate budgets
- technology is not the only roadblock to CX: a lack of time and resource for CX improvements were also seen as being important
- businesses believe that the most important customer experience factors to a customer are first-contact resolution, short wait times and having a polite and friendly agent answer the phone. Having issues handled by a single employee is also seen as important, and can be linked to first-contact resolution rates
- from a consumer perspective, first-contact resolution and short wait times are also seen as being key to a positive customer experience. However, consumers also place far more emphasis on having US-based employees to talk to than organizations believe
- depending on the nature of an interaction – whether emotional, urgent or complex – multiple channels will need to be offered to the consumer base, especially live telephony, email, web chat and web self-service

- most businesses strongly believe that customers would be better off ringing the contact center if they have anything to discuss that is urgent, complex or emotional
- there are significant differences in channel preference by age and socio-economic group, so businesses should look to see which their own customer base prefers and in which circumstances, so that support and investment can be planned accordingly
- there was a steep rise in customer preference for telephony for all types of interaction, starting during the pandemic, but still very much present today, especially for complex enquiries
- interaction analytics is becoming increasingly useful in collecting and acting upon CX data, and has become mainstream
- AI is mainly being used for chatbots, in order to improve self-service and reduce the numbers of calls being handled. However, in reality many of these are rules-based bots rather than being AI-enabled
- the use of AI for call transcription is growing rapidly, allowing low-risk post-call work (e.g. auto call disposition and note-taking) to take place, as well as forming the base for other use cases
- there is significant growth expected in the use of AI, especially for self-service, live agent assistance and sentiment analysis
- users of AI, while positive about its effects on self-service and multilingual support, are more ambivalent about the outcomes they have seen in other use cases
- most customers say AI is faster than human agents, but worse at understanding issues, resolving problems, providing accurate information and sounding friendly
- 40% report that AI gives less accurate information, creating a major barrier to trust and adoption
- 66% of American customers would prefer to use AI in some situations rather than talking with a live agent, especially for quick answers to simple questions or to avoid queueing
- Customers are least willing to use AI for ongoing issues or complex queries, where human agents are strongly preferred
- Younger customers are more accepting of AI, especially for convenience-driven use cases. Older customers generally prefer live agents and are highly skeptical
- 63% of customers are concerned that AI will make it harder to reach a human, reflecting long-standing frustrations with IVR and self-service systems
- 64% fear AI will misunderstand them or give inaccurate answers, fueled by past poor chatbot and speech recognition experiences

- Customers doubt AI's empathy and understanding, though expectations for empathy from bots are generally low
- A significant number worry about hidden AI use. Transparency is increasingly seen as essential for trust and long-term satisfaction
- 59% are concerned about AI-driven job losses, reflecting recognition that human agents are often crucial for effective problem resolution
- first-contact resolution rate is generally not a primary indicator of the success of the CX improvement program, despite both businesses and consumers indicating that it made the greatest difference to the actual customer experience
- only a small minority of companies reward customer-facing staff based on customer retention rates or first-contact resolution, the two of the most desirable outcomes of a successful CX program
- the executive team's commitment to the CX improvement program is seen as being more important than any business process or technology investment: without the former being in place, the latter simply won't happen.

The surveys show that the telephony channel must be strongly invested in and supported, not only in the present day, but also into the foreseeable future.

While digital channels and AI-based automation give the promise of a lower cost of service which is attractive to businesses, consumers state that they value telephony-based interactions, especially for queries that are out of the ordinary.

There is no expectation that live telephony will become unimportant at any time in the foreseeable future, as it provides reassurance and confidence. However, it will increasingly be focused on non-routine service enquiries, particularly of a complex, urgent and emotional nature. Fewer than half of the organizations surveyed said that reducing headcount was an important reason for them implementing AI.

Over time, the customer base will become more technologically sophisticated and comfortable with using automation, but businesses should be aware that this is a long and ongoing process and that dramatic changes in the short term are unlikely to have a positive effect on customer experience.

Organizations should consider rewarding agents for behaviors that support customer retention and improved first-contact resolution rates: something which is rarely done, despite the acknowledged importance of these metrics to the success of the customer experience program and the business itself.

The findings of this report should encourage businesses to find out more about their own customers' preferences, and give an insight into what they actually value within an interaction. In this way, CX investments can be focused upon the areas and solutions that are valued most highly by customers, thus increasing retention rates and individual customer profitability while keeping service costs under control.

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[MiaRec's platform](#) is delivered through four modular and scalable product packages: Auto QA, Customer Experience (CX) Intelligence, Revenue Intelligence, and Business Intelligence (Custom AI Insights). These packages can be deployed independently or together, depending on business needs.

[Auto QA](#) is designed for QA leaders and supervisors. Using Generative AI, it automatically evaluates every customer interaction against customizable scorecards, eliminating manual sampling and inconsistent scoring. Auto QA delivers objective performance insights and supports targeted, agent-specific coaching based on real behavior, not limited call reviews.

[Customer Experience \(CX\) Intelligence](#) provides CX and support teams with continuous insight into customer sentiment without relying on post-call surveys. The platform automatically infers CSAT, NPS, and Net Easy Score (NES) from each conversation, identifies churn risk, and surfaces process friction, customer intent, outcomes, and next actions across all channels.

[Revenue Intelligence](#) equips sales and revenue teams with deep visibility into buying signals, objections, lead quality, and lost deal drivers—derived from 100% of sales conversations. A key differentiator is automated objection handling coaching, where MiaRec flags objections, captures exact customer and agent language, scores responses, and delivers targeted coaching recommendations. Insights are aggregated to reveal systemic friction points impacting conversion and pipeline performance.

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 - South African Contact Centres
 - Voice of the Customer
- **The UK Contact Centre Decision-Makers' Guide**
- **The UK Customer Experience Decision-Makers' Guide**
- **Exceeding UK Customer Expectations**
- **UK Contact Centre Verticals:** Communications; Finance; Insurance; Outsourcing; Retail & Distribution; Travel; Utilities
- **AI in UK Contact Centre Verticals:** Finance; Insurance; Retail & Distribution; Utilities
- **The US Contact Centre Decision-Makers' Guide**
- **The US Customer Experience Decision-Makers' Guide**
- **Exceeding US Customer Expectations**
- **US Contact Centre Verticals:** Finance; Insurance; Outsourcing; Public Sector; Retail & Distribution
- **AI in US Contact Centre Verticals:** Finance; Insurance; Retail & Distribution
- **The AI Series:** how can AI can help contact centers' operational and commercial issues?
Research reports: First-Contact Resolution; Sales Growth; Workforce Engagement; Business Insights: Customer Insights; Agent Productivity; Digital Customer Contact; Contact Center Cost Reduction; Customer Satisfaction.