

# 全球联络中心发展趋势与聚焦观察

## Global Contact Center Industry Trends and Focus Insights



改善运营、激励员工、提升客户忠诚度

**Improve** Contact Center Operations  
**Empower** Contact Center Employees  
**Enhance** Customer Loyalty

1. Who is ICMI ? 机构介绍
2. Past, Present & Future Trends 过去，现在&未来趋势
3. Customers Keep Changing 客户处于不断变化当中
4. Build Call Center Value on All 3 Levels 呼叫中心价值构建
5. Right People, Right Metrics, Right Everything! 正确的人员、  
正确的标准、正确的一切!

*Who's getting it right? What are they doing?*

# ICMI 是谁? Who is ICMI?



The International Customer Management Institute (ICMI) is the leading global provider of comprehensive resources for customer management professionals – from frontline agents to executives – who wish to improve customer experiences and increase efficiencies at every level of the contact center.

国际客户管理学院 (ICMI) 是为客户管理专业人士，从一线坐席到高层管理人员，凡是渴望改善客户体验、提高运营效率的人士，提供综合资源的全球领先专业机构。

# 1. Past, Present & Future Trends



呼叫中心的过去、现在和未来

**n** Use the Past as a predictor of the Future

通过呼叫中心的过去和历史，可以预见呼叫中心的未来

**n** Tell Compelling Stories 过去的故事

**p** History & Evolution 历史与演变

**p** Product Line & Services Offerings 产品与服务的提供

**p** Competitive Environment 竞争环境

**p** “Reason for Being” 存在的意义

n What about this economy?

经济状况怎样？

n The importance of Customer contact services in **good or bad**  
economic environments

在好的或坏的经济环境下，客户联络中心的意义

n Remember we're part of a HUGE & growing industry world  
wide

切记我们身处一个巨大而蓬勃发展的行业

# 联络中心产业规模

## The scale of Contact Center Industry



- 18 million agents, worldwide
- 1.5 million managers
- U.S. \$485 billion invested annually

\* ICMI estimates, worldwide market

- n 500万以上坐席，占1.38亿工作人群的3.6%
- n 公司每年大约花费1800亿美元来运营呼叫中心
- n 外包和自营的中心加起来，估计有700万坐席或更多

# 联络中心产业规模

## The scale of Contact Center Industry



n Four out of every 100 employed Canadians work in contact centers (Estimated at 500,000 employees)

每100位加拿大就业人口中就有4位就职于呼叫中心(大约500,000名)

n In 2008, Canada was second only to India in attracting new centers

2008年，加拿大是仅次于印度的第二最能吸引新的呼叫中心的国家

n The industry accounts for 4% of Canada's GDP

这个产业占加拿大GDP的4%

联络中心已经成为加拿大企业营销与服务策略竞争优势的关键所在。

Contact Centers are key to the competitiveness of Canadian business' sales and service strategies



# 世界其他地区联络中心产业情况

## Around the world



n One of the major challenges facing India & the Philippines is retaining staff for overnight shifts

面对印度和菲律宾的一个重要挑战就是如何挽留通宵夜班的员工

n Latin America has the fastest compound annual growth rate in Agent positions in the world at 16.8%

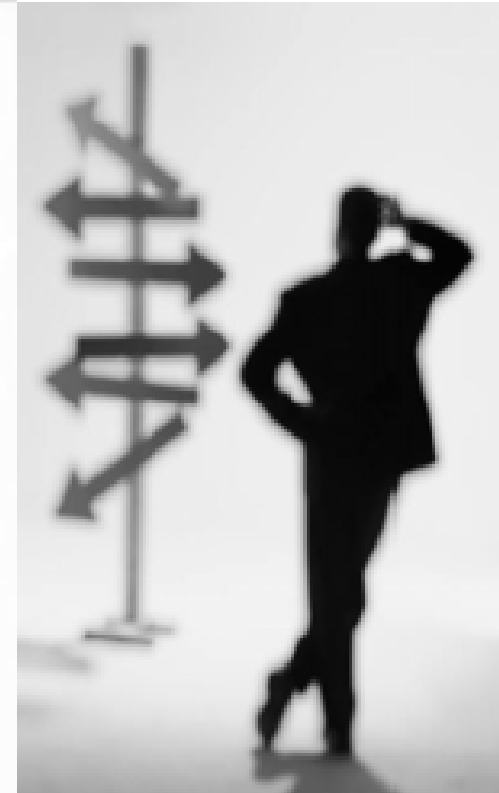
拉丁美洲有着全球年度增长最快的坐席职位，这个数字是16.8%

n In Mexico alone, agents working for outsourcers will grow from 33,500 in 2006 to 80,000 by 2010

在墨西哥，为外包中心工作坐席将从2006年的33,500增长到2010年80,000。

n Where is the profession headed?

这个职业将去向何方？



- 1. Customers:**  informed  expectations  
客户层面
- 2. Employees:**  levels of skill & engagement   
员工层面
- 3. Products & Services:** More & emerging *faster*  
产品与服务层面
- 4. Call Centers:** Structures  Strategy  
呼叫中心本身

# 技术趋势 Technology Trends

The world is speeding up, and everything in society is moving toward the virtual, the personal and the connected. Here's a look at some trends whose time has come. - from *ICMI Call Center Report 2008*

世界正在加速,生活中的每件事都在趋于虚拟化连接. 这是关于什么样的时代将来临的趋势。 - 《ICMI 呼叫中心报告2008》

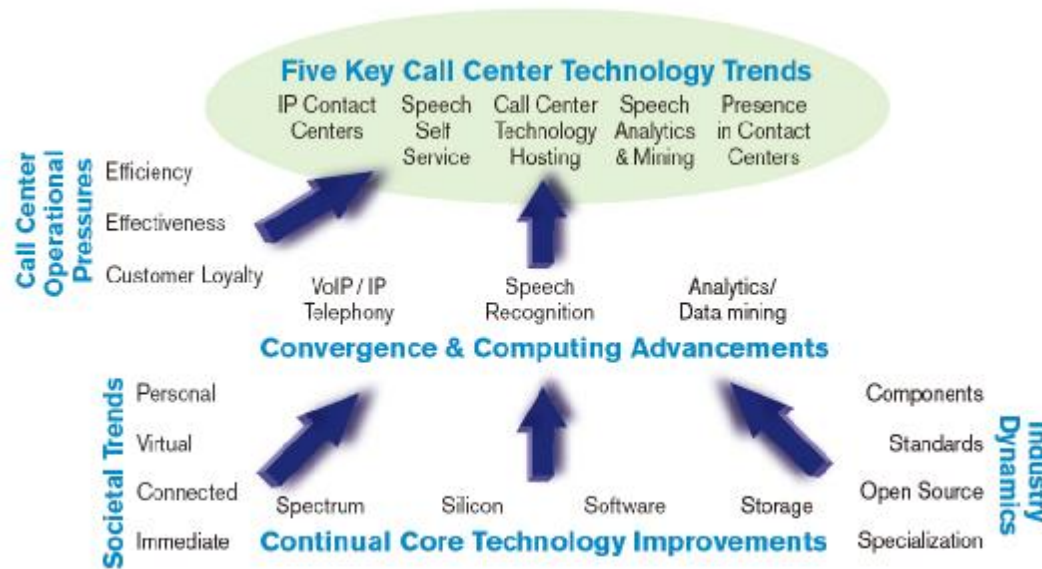


Figure 1: Factors driving new technology into the call center.

- Functionality
- Availability
- Response-ivity (Responsiveness)
- Usability / Clarity of Use
- Interoperability
- Scalability
- Security
- Manageability
- Supportability
- Reliability
- Extensibility
- Maintainability

Figure 2: New technologies must navigate all the elements that comprise quality.



## 2. Customer Expectations...

**Keep Changing**

客户期望在不断的变化

# 基准研究告知我们

## Benchmarking Research Tells Us



n “48% of consumers say customer service has the greatest impact on their loyalty to a company.” --

Genesys Global Consumer Survey

“48% 的消费者认为客户服务很大程度上影响着对公司的忠诚度。”

n “The inability to reach the right person with the right information drives **more than half** of customer

service dissatisfaction --Yankee Group, Call Center Manager's Forum

“无法给正确的人传达正确的信息将会带来超过一半的客户不满意度。”

n “Long waiting times still have the **greatest impact** on customer satisfaction” -- Merchant's Contact

Center Benchmarking Report

“长时间等待还是最能影响客户满意度的指标。”

# 典型的客户期望

## Typical Customer Expectations



n Demand increased access

要求增加接入手段

n Less willing to wait

更少等待时间

n More immediate response – NOW!

更多即时回复- 马上!

n Demand more information

要求更多信息

n Want speedy, effective recovery

希望快速有效的恢复

n Make more complaints and quicker

投诉处理更快

# 趋势观察 Trends observed by ICMI



Contact centers are beginning to focus more on maintaining and enhancing customer loyalty by managing the customer experience. Why?

呼叫中心开始花更多精力在客户忠诚度维护和加强上。为什么呢？

Ø Customer loyalty has become more important than ever – lose one customer to a bad service experience and a company stands to lose many more potential customers once the word gets out. 客户忠诚度比任何时候都变得重要 – 一次坏的服务体验带来的客户流失通过口碑相传将会带来更多的客户流失

Ø Recent studies show that about **57 percent** of customers leave a merchant after just one bad service experience. 近期研究显示大约57%的客户仅仅因为一次不好的服务体验而离开商家。

Ø It costs **7 times** more to secure a new customer than to retain an existing one. 开发一个新客户成本是维护一个老客户成本的7倍。

LOVE and Gratitude

I hired ICMI Consulting

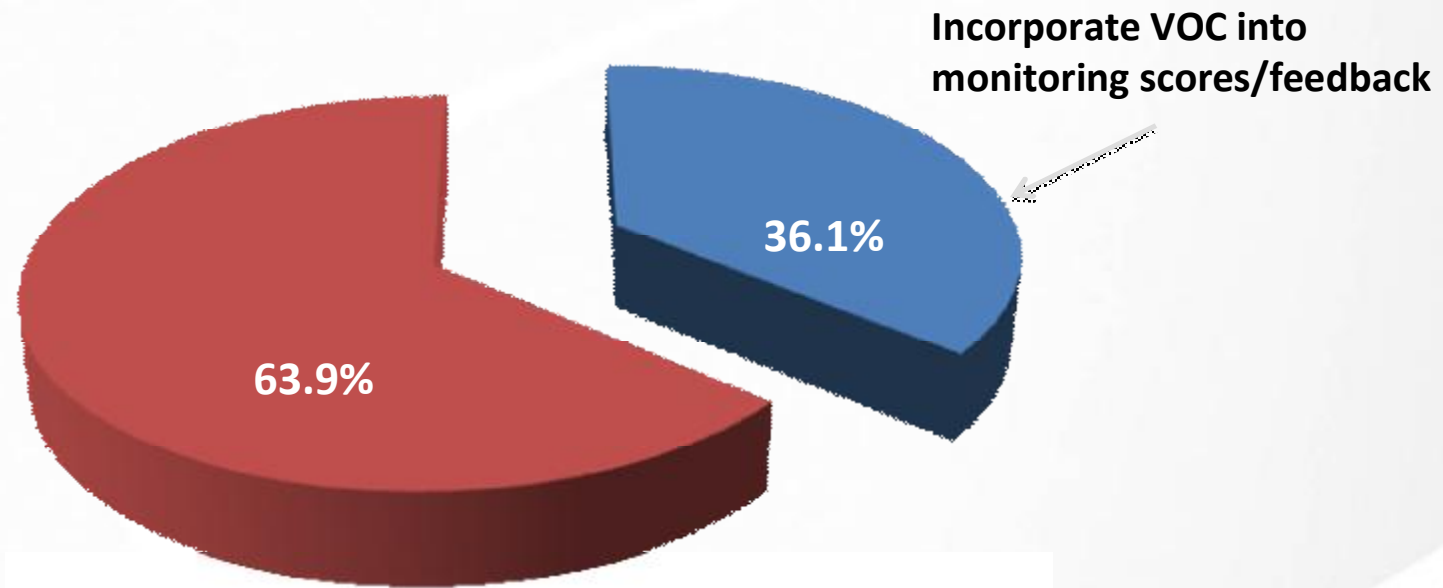
icmi.com | 800.672.6177



# 趋势观察 Trends observed by ICMI



Ø Based upon the 2008 ICMI Contact Center Operations Report, only 36.1% of financial sector contact centers in the U.S. incorporate direct customer feedback into the monitoring scores. 基于ICMI2008呼叫中心运营报告，在美国金融服务行业呼叫中心，只有36.1%把客户反馈纳入绩效监测系统。



Do not incorporate VOC into monitoring scores/feedback

Incorporate VOC into monitoring scores/feedback

## Customer Experience Focus:

Ø Adopt processes and technologies that enable Customer Experience Management.

- ü Virtualization
- ü IP-based communications
- ü Remote workforce
- ü CRM Integration
- ü Multichannel coordination
- ü Self service and hosted alternatives

## 客户体验集中:

Ø 采用进程和技术启动客户体验管理.

- ü 虚拟化
- ü 基于IP的通信
- ü 遥控劳动力
- ü CRM整合
- ü 多渠道协调
- ü 自助服务

***“Commit to listening to your Customers!”***  
***“承诺倾听您的客户!”***

## Customer Experience Focus:

### Ø Capture and act on the “Voice of the Customer”

- ü Administer a concise and timely transactional survey capturing the voice of the customer – tie the results to individual agents
- ü Use internal quality monitoring methods to measure compliance only
- ü Effectively incorporate customer ratings and verbatim comments into agent monitoring scores and feedback
- ü Involve agents in the management of the process

## 客户体验聚焦:

### Ø 抓住“客户之声”

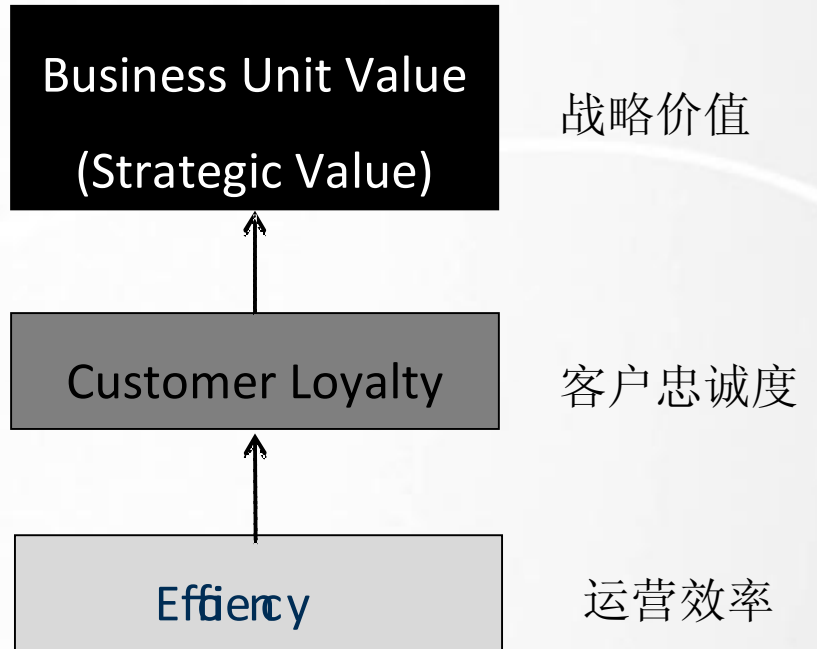
- ü 做个简洁而适时的“客户之声”调查——将结果紧密联系到单个坐席
- ü 使用内部质量监控体系来评估
- ü 有效地将客户评级归入坐席监测分数和反馈
- ü 把坐席归入管理进程

## 3. Building Call Center Value...

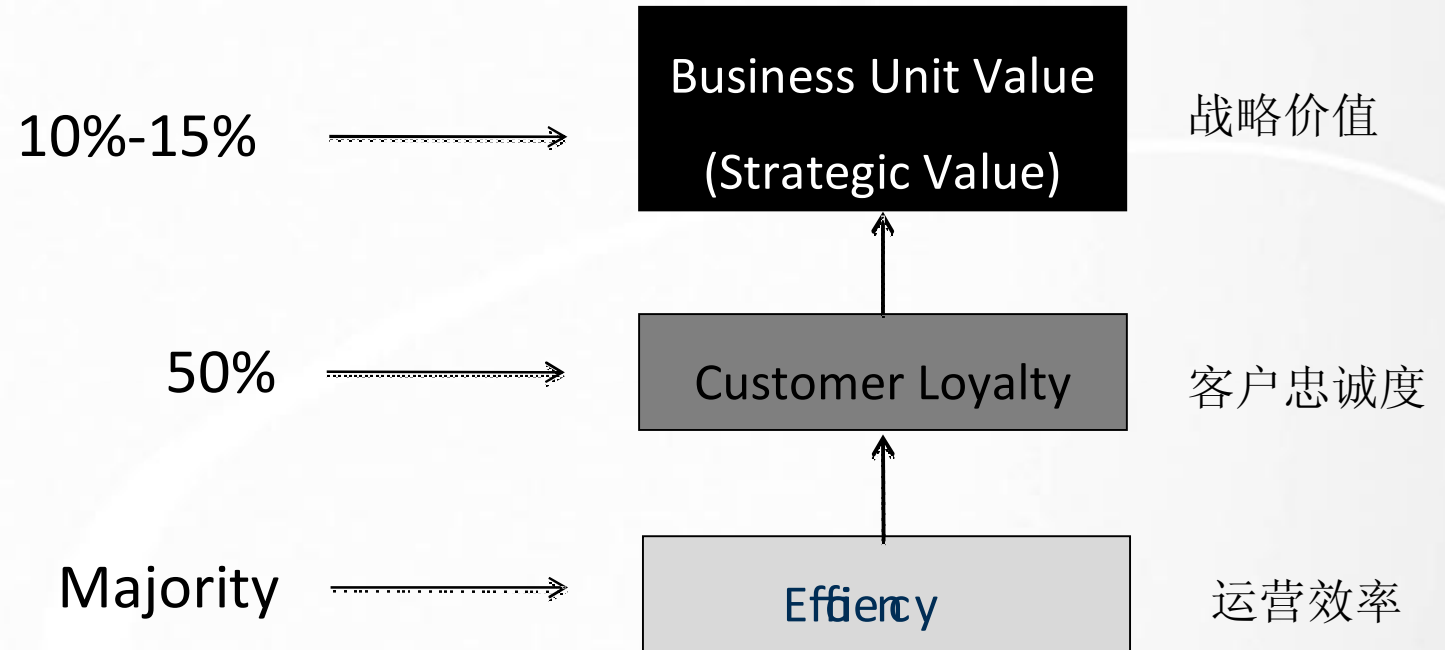
### On All 3 Levels

在三个层面上，构建呼叫中心价值

# 价值构建 Value building



# 价值构建 Value building

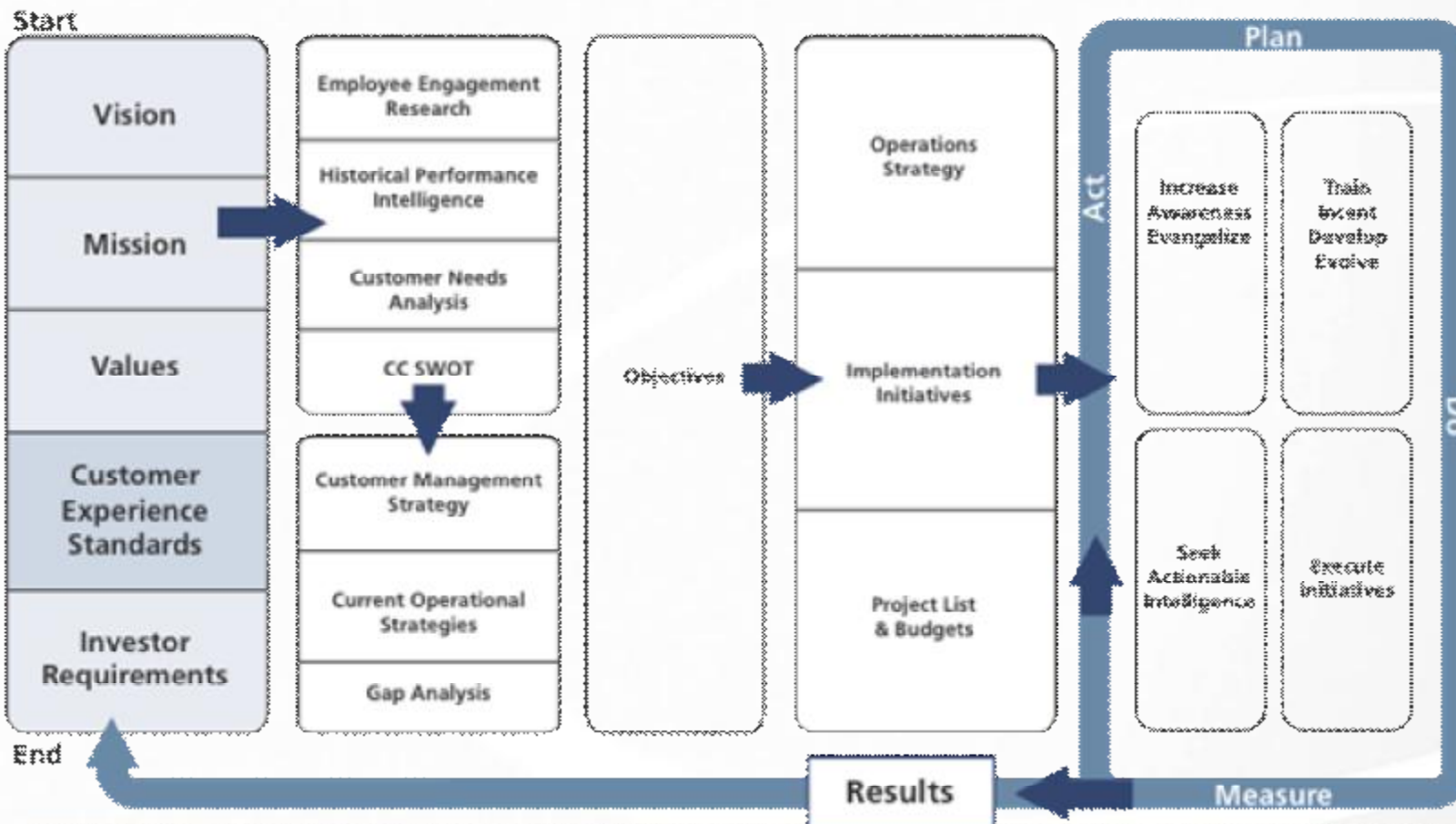


# ICMI 客户管理标准及认证评估

## ICMI CMO & Certification

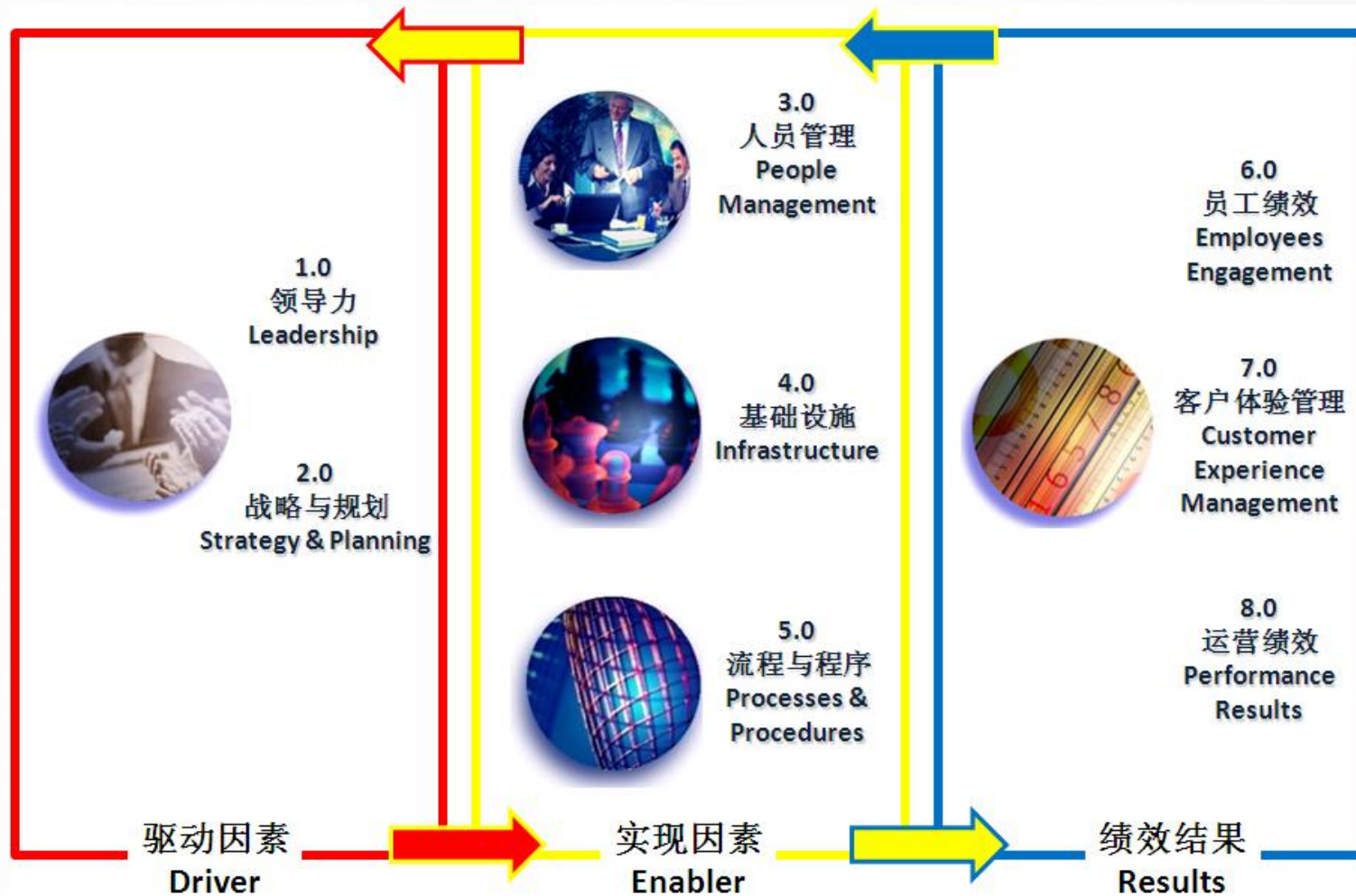


### Customer Experience Planning & Execution



# ICMI 客户管理标准及价值贡献评估

## ICMI CMO & Certification





# ICMI 客户管理标准及价值贡献评估

## ICMI CMO & Certification



# 客户服务中心价值贡献的三个层次

Level 3: Business Unit Intelligence

Level 2: Customer Loyalty

Level 1: Operational Performance

呼叫中心价值贡献三个层次

资料来源: ICMI 国际客户管理学院——全球呼叫中心战略研究

综合全球以及国内呼叫中心产业的发展演变历程, 呼叫中心对企业的价值贡献可以归结为以下三个层次:

- Ø 通过科学、规范化的管理, 提高运营效率和服务质量, 积极参与企业生产运营, 在充分满足客户需求的基础上, 降低企业和呼叫中心的相对运营成本, 并提升客户满意度。
- Ø 通过数据分析与挖掘, 识别和区分不同客户群体的不同需求, 主动进行差异化和个性化的客户互动关系维系, 提升客户的服务体验和价值体验, 帮助改进客户忠诚度和贡献度。
- Ø 通过客户信息的分析、汇总, 通过与客户的交流互动, 为其它部门架起与客户沟通的桥梁, 并为他们提供相关的决策信息, 促机企业在各个环节上持续不断地改进与提升, 帮助企业提升整体的运营效率、改进产品和服务质量。同时, 在战略层面上, 更可以帮助企业管理层根据客户及市场需求, 优化决策, 提升企业在目标客户群体中的竞争力。

# 客户服务中心价值贡献分类

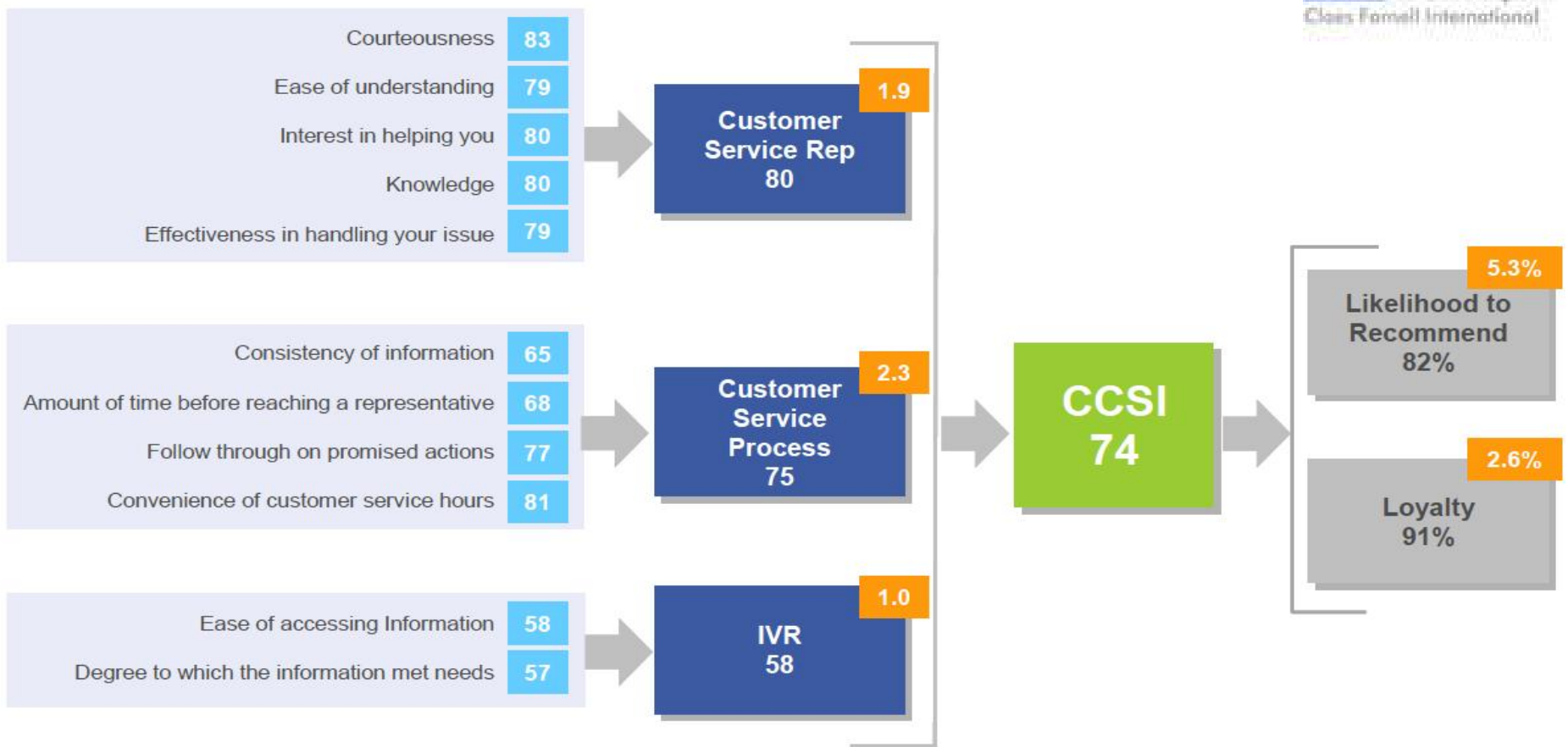


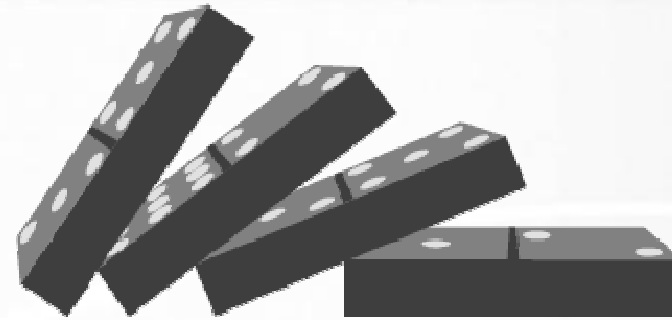
- CCSI所运用的是娴熟而独具前瞻性的方法论——通过定量分析的方法将客户满意度和忠诚度同客户中心价值贡献紧密联系起来。
- ICMI国际客户管理学院和CCSI的研发者CFI集团在北美有着广泛的业务联系，对于联络中心客户满意度进行了广泛调研——使用2009联络中心满意度指标（CCSI）协助企业主导市场环境。
- 在运用到您所在企业时，独特的因果方法论将显示哪些评价为“满意”的客户的当下感受，以及满意度如何带来理想结果。同时，这一先进的方法论还将使用客户体验的特定因素评估满意度，这种客户体验将会影响整体满意度和未来成功与否。

# 关于CCSI方法论



## Private Industry Model 2009





## 4. Right

# Everything...

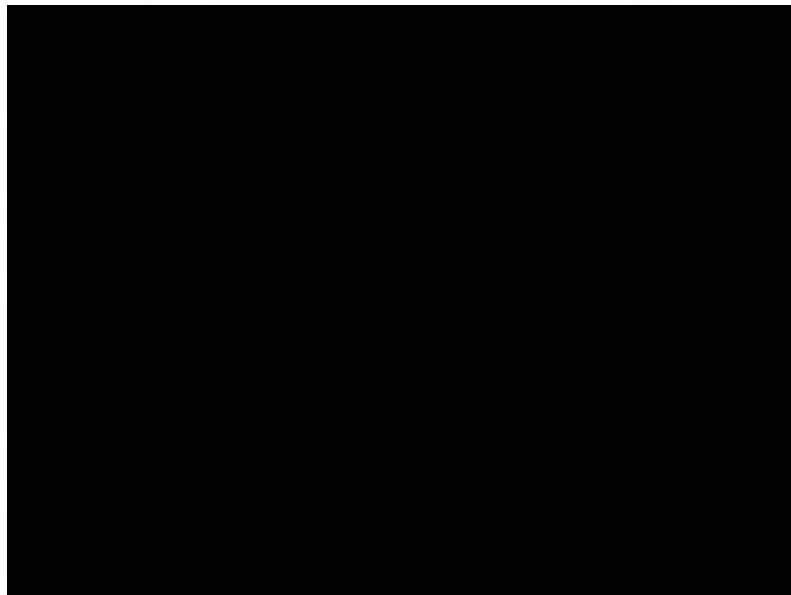
## People, Metrics & More

正确的人员、正确的指标 & 正确的一切！

# It All Starts Here Call Center Management Is...



...the art of having the right number of skilled people and supporting resources in place at the right time to handle an accurately forecasted workload, at service level and with quality. ...一种通过合适的人和资源在正确的时间处理成功预测的工作量，并且保证服务水平和质量的艺术。



Input: Average talk time in seconds = 180  
Average after call work (wrap up) in seconds = 30  
Calls per half hour = 250  
Service level objective in seconds = 20

<u>Output:</u>	Agents	ASA	SL	Occ	TKLD
	30	208.7	23.5%	97%	54.0
	31	74.7	45.2%	94%	35.4
	32	37.6	61.3%	91%	30.2
	33	21.3	73.0%	88%	28.0
	<b>34</b>	<b>12.7</b>	<b>81.5%</b>	<b>86%</b>	<b>26.8</b>
	35	7.8	87.5%	83%	26.1
	36	4.9	91.7%	81%	25.7
	37	3.1	94.6%	79%	25.4
	38	1.9	96.5%	77%	25.3
	39	1.2	97.8%	75%	25.2
	40	0.7	98.6%	73%	25.1

**Base Staff  
Calculations  
and Queue  
Dynamics**

**Source: ICMI  
QueueView**



# 关键业绩指标

## Key Performance Objectives



n Strategic value (contribution to  
战略价值(商业组织贡献、渠道)  
business units, channels)

客户满意度/忠诚度

n Customer satisfaction/loyalty

员工满意度

n Employee satisfaction

通话质量

n Contact quality

首次解决率

n First call resolution

服务水平/响应时间

n Service level/response time

排班遵守率

n Adherence to schedule

业务量预测准确率

n Actual to forecasted work load



# 环境要素-可应用的技术

## Enabling Technologies



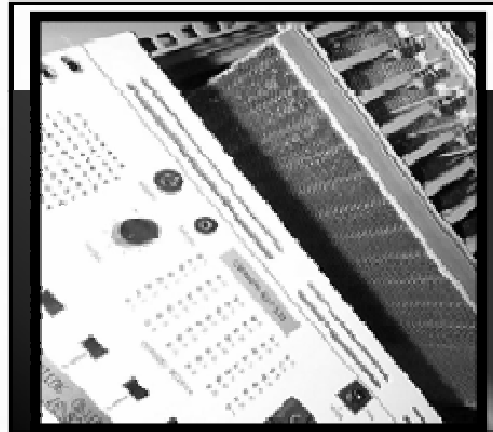
**CRM**

**Outsourcing**

**"All in One"**

**Hosted  
Solutions**

**Post Call CS Surveys**



**TECHNOLOGY  
EXCELLENCE**

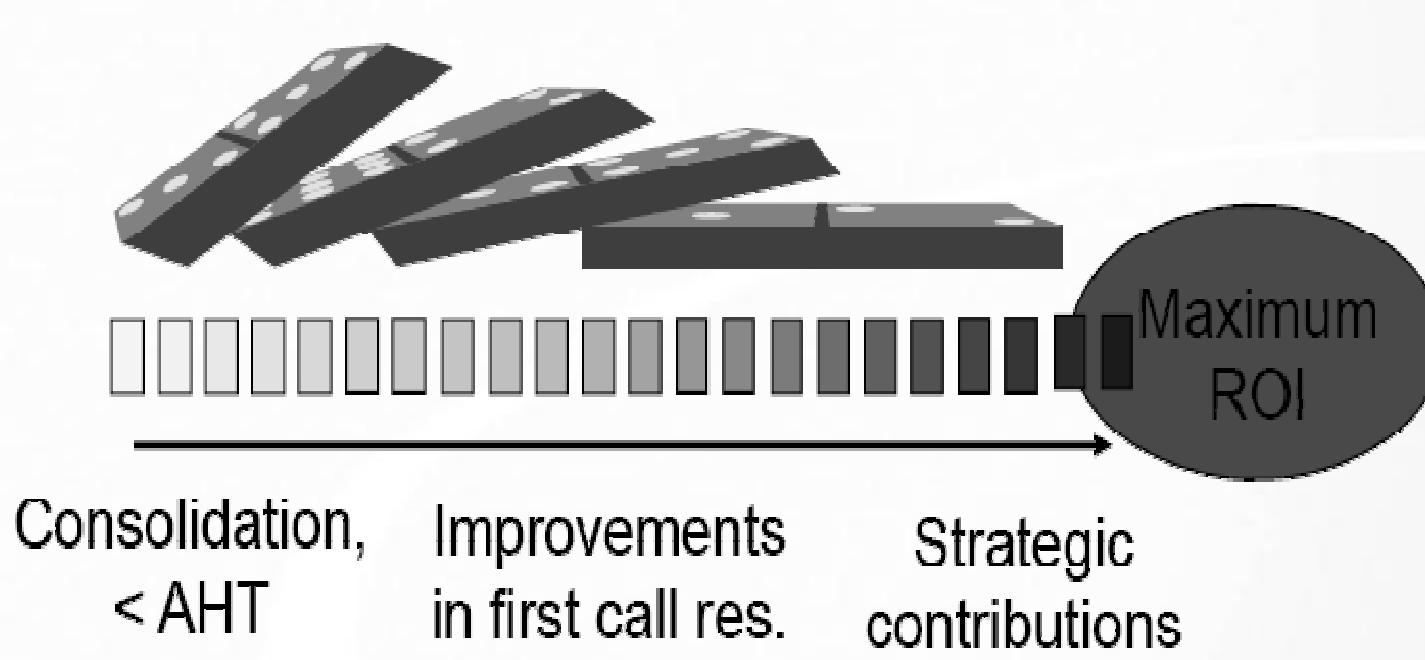
**VOIP**

**eChannel  
Integration**

**Multimedia  
Queuing**

**Web Architecture**

# 正确的人，标准，及一切！ Right People, Metrics, Everything!





**The Times...**

**Are Changing...**

**Prepare for what's ahead!**

# THANK YOU!

To find out more about ICM ,  
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