

POST LOCKDOWN - MARKET STUDY REPORT

What will your contact centre be like post lockdown?



In partnership with
:talkdesk®

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A note from Talkdesk

It's safe to say that 2020 has been a bigger challenge than any of us could have ever expected.

At Talkdesk, we are committed to supporting the contact centre industry at all times. That's why we reached out to understand how customer experience (CX) leaders have responded to better serve customers throughout the pandemic. We also asked what lessons CX leaders have learnt from their lockdown experiences, and what contact centres are likely to look like in 2021.

The global impact of COVID -19 has forever changed our experiences - as citizens, employees and customers. Social distancing has had a direct and indirect effect on multiple facets of our lives.



SUSAN YSONA
Vice President Marketing, EMEA
Talkdesk

As the immediate threat of the virus moves behind us, we will be different.

People will behave differently. New business models will emerge. Consumer and employee expectations will morph. This will, in turn, impact the way we design, build and operate the customer and employee experiences that people need today and what they will want next.

The way you are responding, and the way Talkdesk can help, is not only enabling us to persevere through these challenges, it is also igniting how we innovate together for the long term.

The survey has provided a unique opportunity to come together as an industry to reflect on what has been happening around us and prepare for the future ahead.



Introduction

The last few years has seen unprecedented change within the contact centre industry. From the launch of exciting technologies such as chatbots and artificial intelligence, to an increased focus on employee engagement and well being, operators have been rapidly embracing new ideas and positively looking to the future.

However little could have prepared the industry for the events of 2020 and, in particular, the switch to full-time homeworking.

102 contact centre professionals took part in the survey from a broad range of industry sectors and different sizes of centre. Some held vastly different views to others on what the future may bring. However, together their combined views represent a powerful and unique insight into the challenges

operators faced in 2020, and are likely to face in 2021.

The survey covered three broad areas:

- **What emergency response plans contact centres had in place pre Covid-19**
- **What happened during the lockdown period**
- **What people think the industry will look like in 2021**

The “What Will Your Contact Centre Be Like Post Lockdown?” survey was a collaborative project conducted by the South West Contact Centre Forum (SWCCF) and Call North West (CNW) in conjunction with ContactBabel and Talkdesk.

The survey was conducted online and promoted via advertisements, direct emails and in partnership with SWCCF and CNW members. To encourage participation, individuals that completed the survey were entered into a free prize draw to win retail vouchers.

The survey involved approximately 25 questions and took an average of 7 minutes to complete. 91% of all questionnaires started were completed. Individual responses were treated entirely confidentially, and aggregated for analysis purposes.

“The combined views of the contact centre professionals who took part in the survey represent a powerful and unique insight into the challenges operators faced in 2020, and are likely to face in 2021.”

I. Survey results

10 Key Highlights

This section provides a summary of survey highlights. Full survey results are provided from page 8 onwards.

1. Organisations were generally well prepared...

80% of organisations said that they had a formal Business Continuity Plan prior to the crisis, with 90% of these considering Shutting Down Office Buildings/Operations, and 92% Communicating with Employees, as part of those plans.

2. ...and took swift action to maintain BAU through lockdown.

To cope with the Covid-19 crisis, 79% of respondents invested in Employee Communications (including Microsoft Teams and Zoom), with 34% investing in Contact Handling technology, 30% in Cloud solutions, and 25% in digital/online solutions.

3. Homeworking is the big story during lockdown...

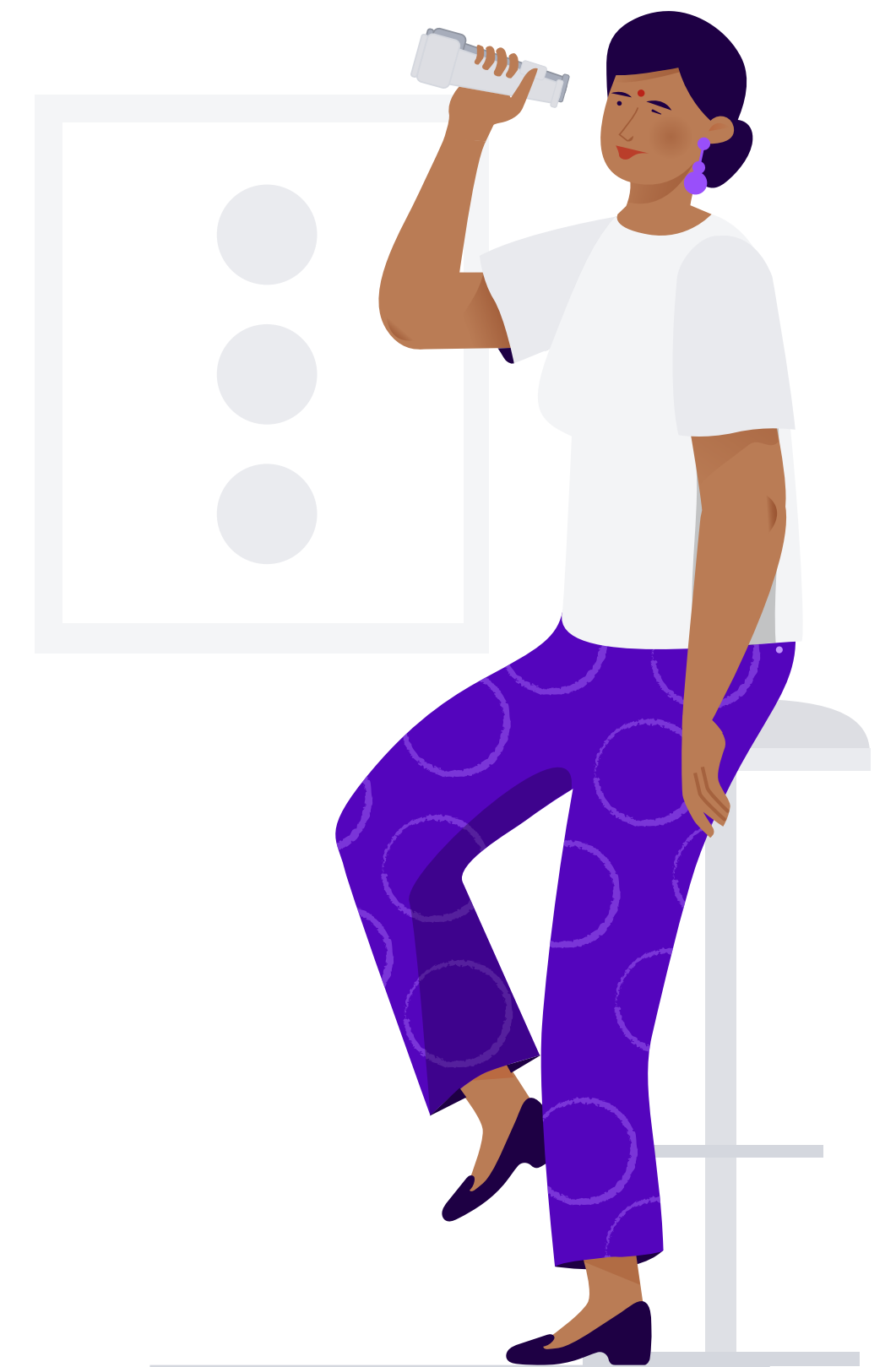
According to our survey, 77% of contact centres had 50% or more of their employees working from home during the current Covid-19 crisis.

4. ...and homeworking is here to stay

By 2021, 35% of contact centre leaders think that their centres will mainly be homeworking, with only 27% stating that they think that under a quarter of their contact centre employees will be working-from-home. 58% stated that they thought homeworking would be partly optional and partly compulsory.

5. Anxiety/Mental Health is emerging as a major contact centre issue

Anxiety/Mental Health Issues has been the biggest People concern for organisations operating work-from-home centres during the current crisis, with 66% of people stating that it has been a significant or very significant issue. 30% saw Anxiety/Mental Health Issues as being more of a challenge next year.



By 2021, 35% of contact centre leaders think that their centres will mainly be homeworking.

6. Other major challenges during lockdown

51% of respondents from organisations that were mainly operating on a work-from-home basis during lockdown identified Homeworker Training as a significant or very significant issue. In addition, 30% of all respondents saw it as potentially being a bigger issue next year.

44% of respondents from organisations that were mainly operating on a work-from-home basis during lockdown said that Managing Contact Volumes had been a significant or very significant issue. 21% of all respondents saw it as potentially a bigger issue next year.

7. Centres will be better prepared if there was a second crisis

Recognising the major impact of recent events on the future of the industry,

83% of contact centre leaders said that they will be revising their Business Continuity Strategy/Plan to address the possibility of subsequent waves of Coronavirus. 89% said they would be Better Prepared, 73% said that they would be better Able to Deploy Our Work-From-Home Model Faster, 62% said that they needed to understand how to do homeworking better, while 54% said that they would be better Able to Make Changes to Technology Infrastructure.

8. Technology will have a massive role to play...

56% of leaders stated that they would use technology to manage customer contacts more effectively in 2021. 40% indicated they would be investing in Remote Management and Monitoring Solutions, with 39% expecting to invest in AI Solutions in 2021.

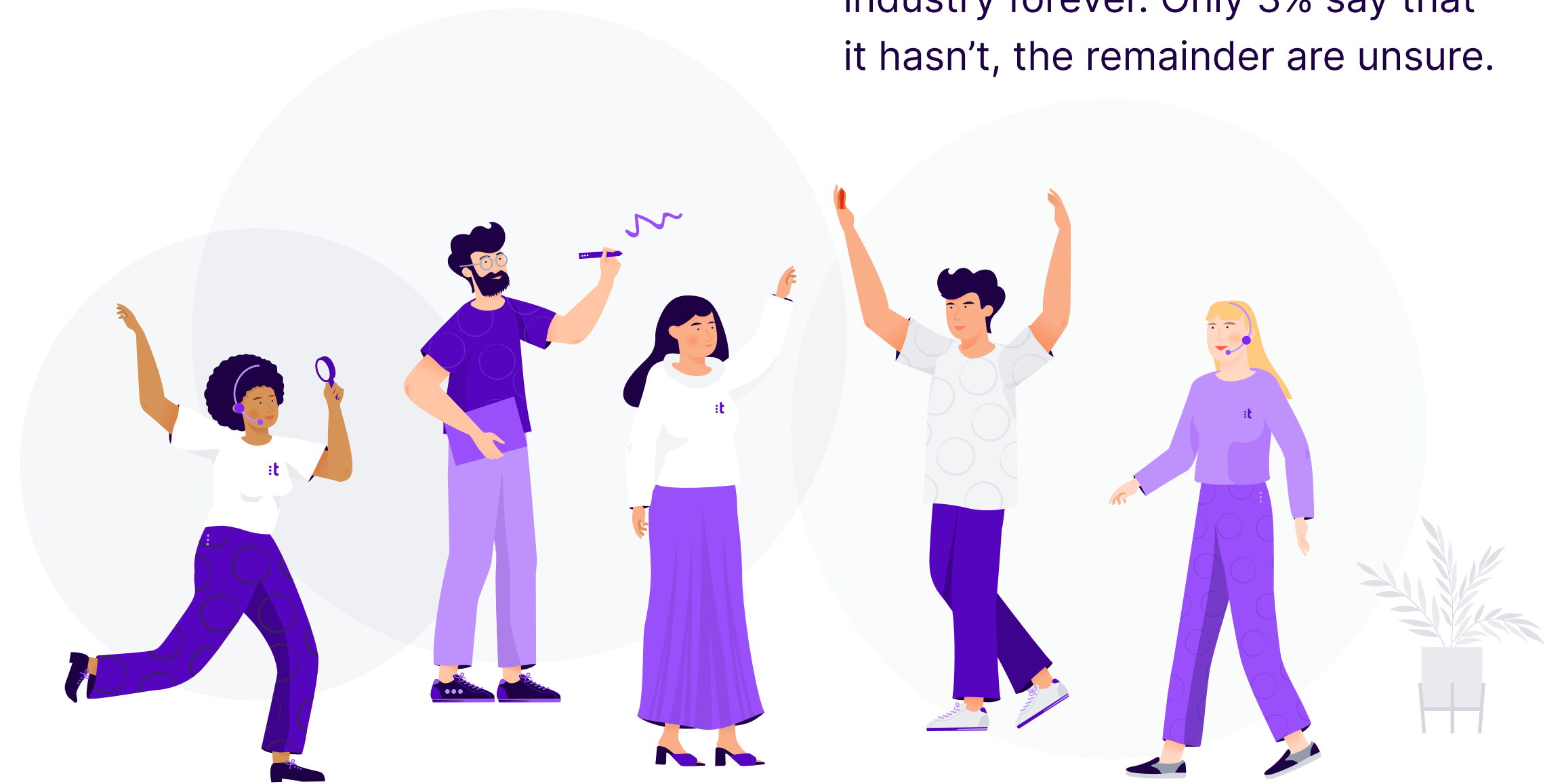
9. ...with team communications technology absolutely key

Not only did 79% of contact centres invest in Employee Communications (including Microsoft Teams and Zoom) during lockdown, but 40% said that they were planning further investment in Communications with Remote Managers/Agents in 2021.

10. Things may never be the same again

When asked What Will Your Working Environment Mainly Look Like in 2021? 57% of contact centre leaders chose the image of a Socially Distanced Centre, 35% a Work-from-Home centre, and only 7% a Normal Contact Centre.

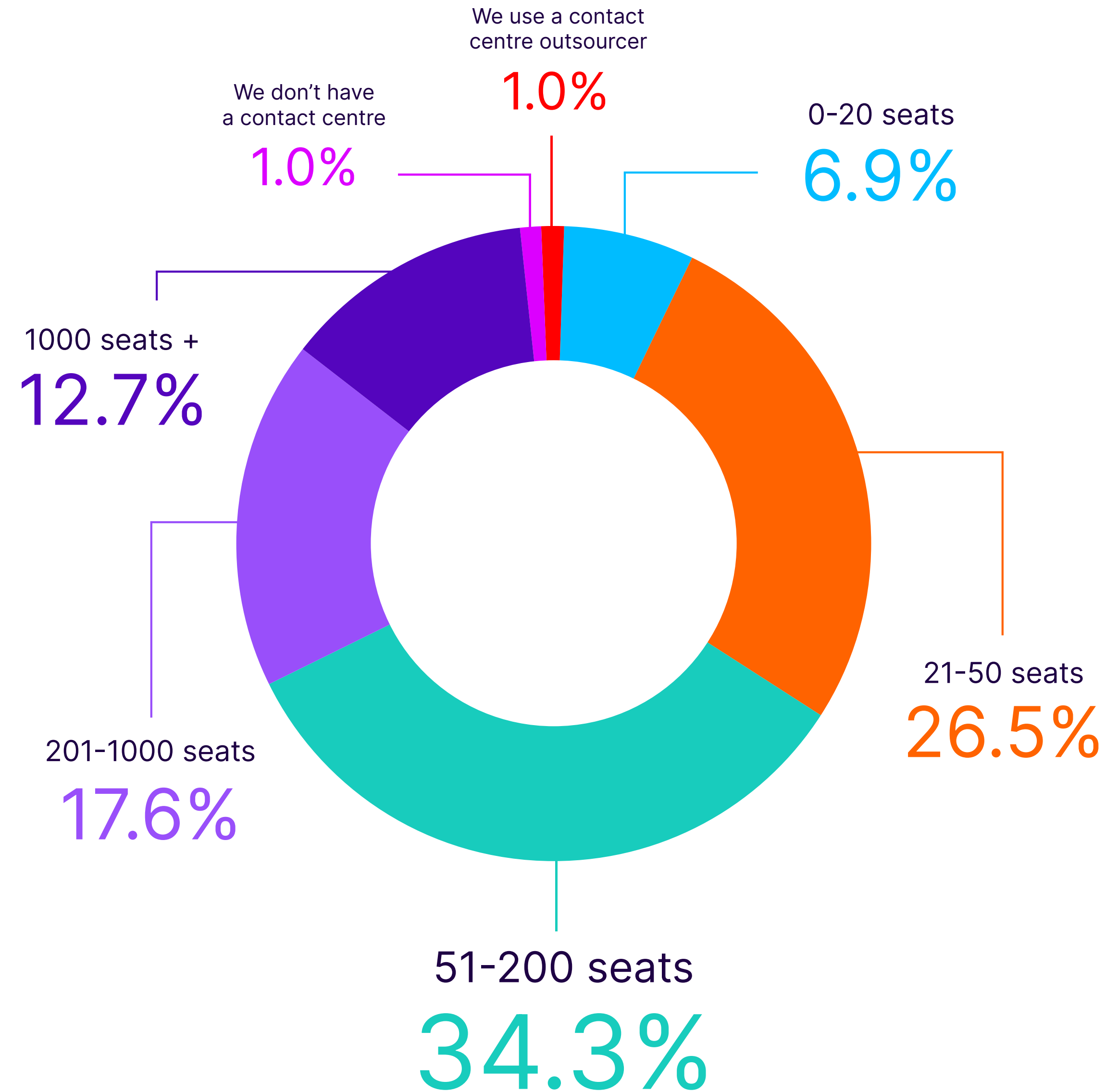
89% of leaders say that the Covid-19 crisis has changed the contact centre industry forever. Only 3% say that it hasn't, the remainder are unsure.



II. The survey results

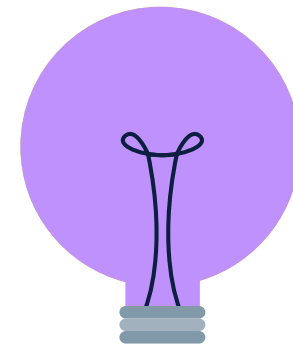
Q1: Contact centre size

Our survey participants come from a representative sample of small and large contact centres. 33% work in contact centres that have 50 or less seats, 34% from contact centres with 51-200 seats, and 30% with over 200 seats.



Q2: Industry sector

Survey participants come from a broad range of industries. 20% are from Financial Services firms, 14% from the Public Sector and 10% from Outsourcing firms.



Utilities
4.9%



Financial Services
19.6%



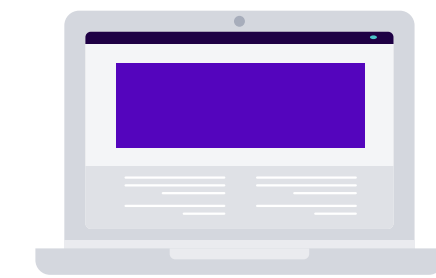
Retail
2.9%



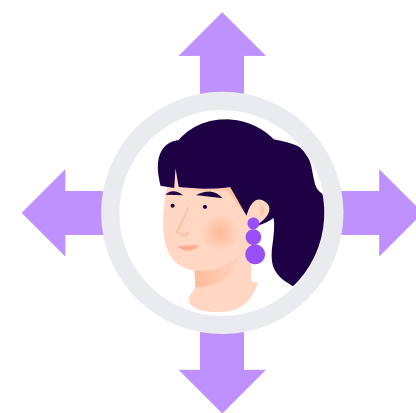
Healthcare
2.0%



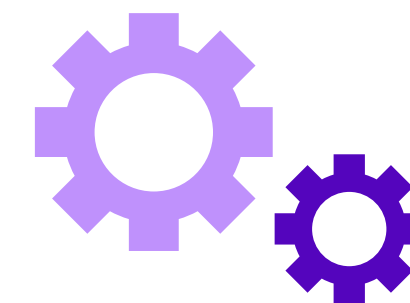
Public Sector
13.7%



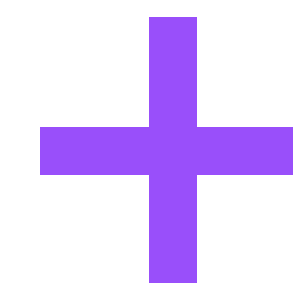
IT & Telecoms
5.9%



Outsourcing / BPO
9.8%



Manufacturing
3.9%

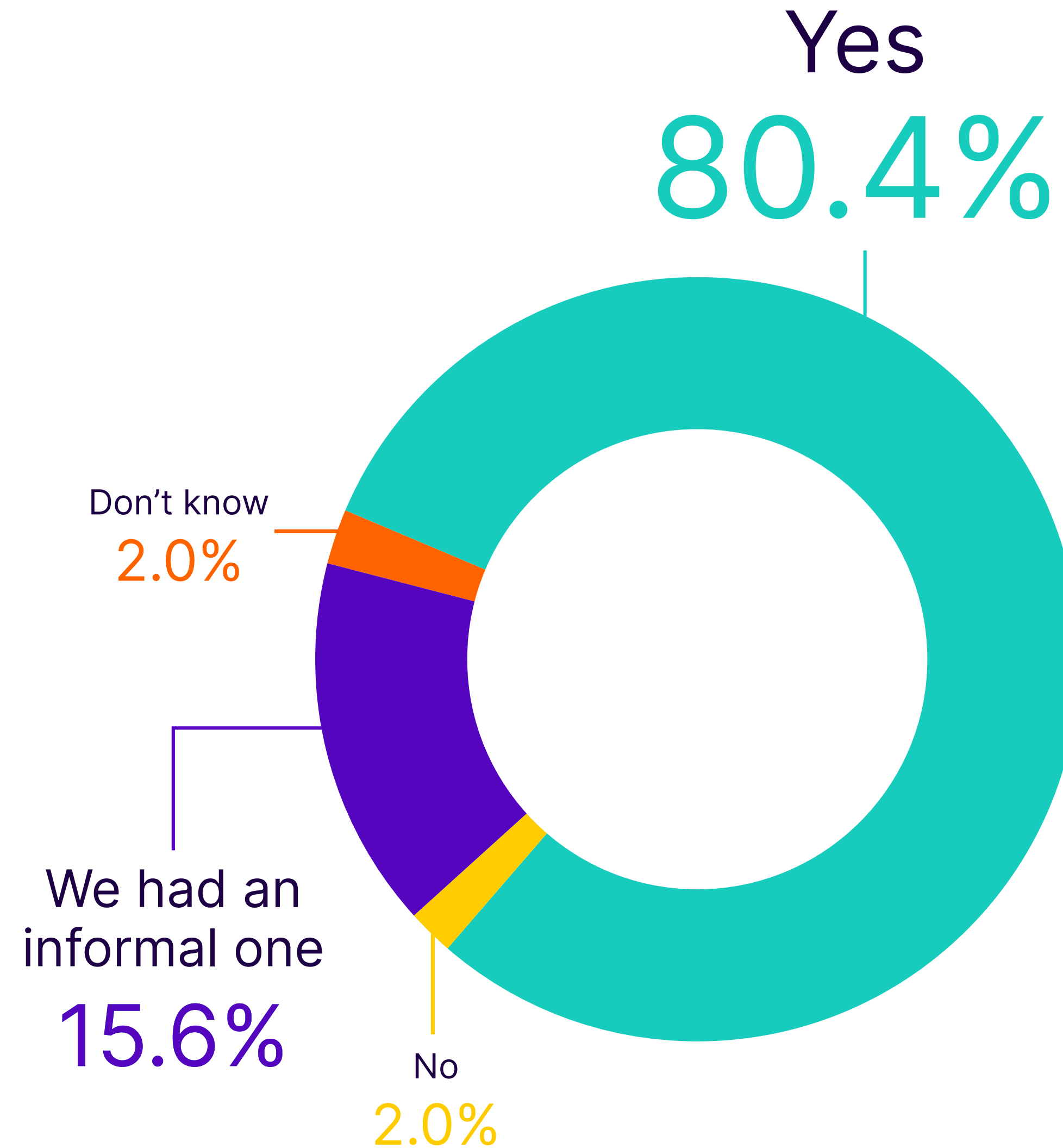


Other
7.3%

PRE THE COVID-19 CRISIS

Q3:
Did your organisation have a formal business continuity strategy/plan prior to the covid-19 crisis?

The vast majority of respondents (80%) had a formal Business Continuity Strategy/Plan prior to the Covid-19 crisis, with a further 16% stating that they had an informal one.

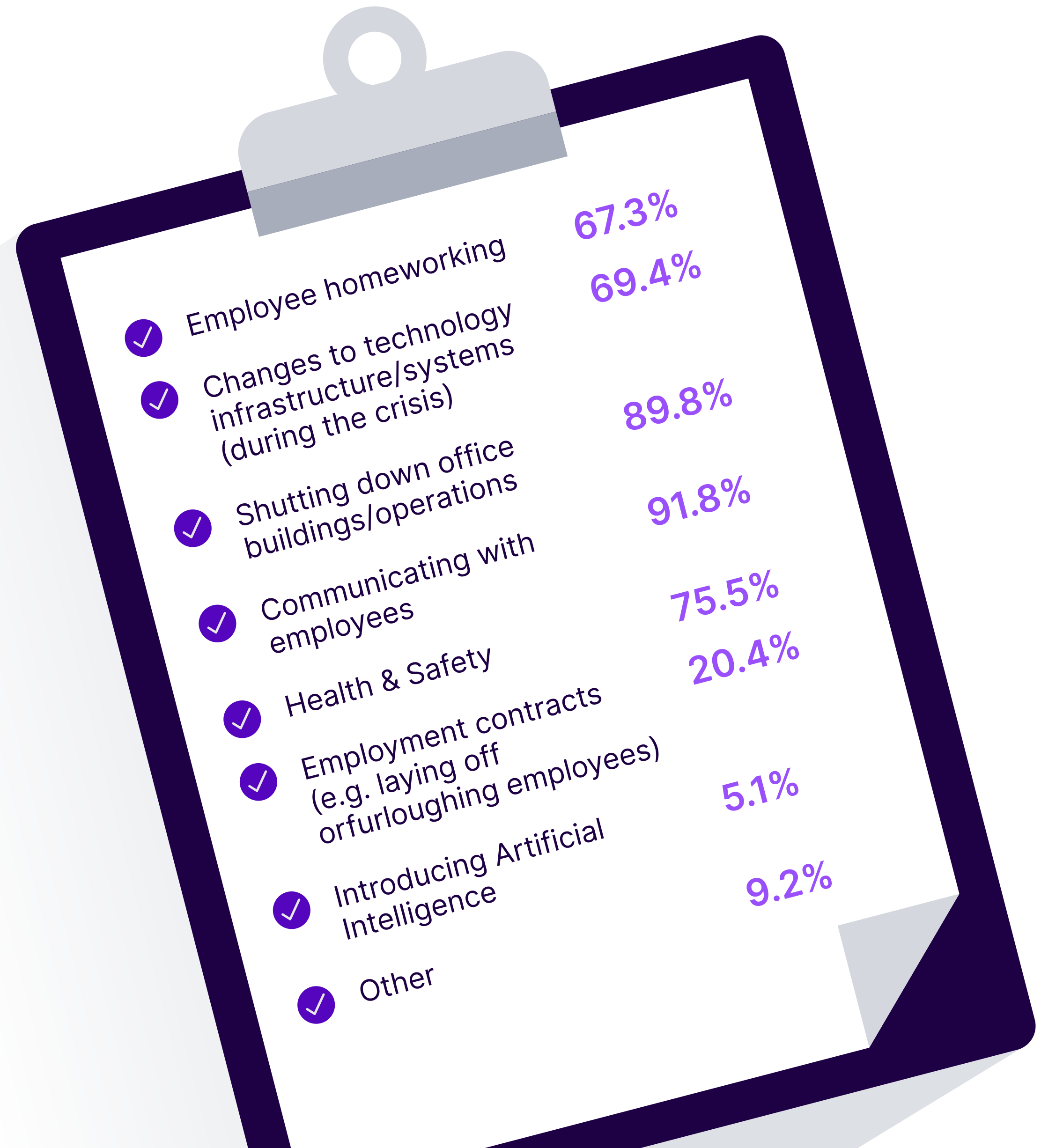


Q4:

In the event of a crisis, did this business continuity strategy consider plans for:

(multiple answers accepted)

92% of organisations with a Business Continuity Strategy/Plan prior to the Covid-19 crisis considered Communicating with Employees as part of their strategy. 90% considered Shutting Down Office Buildings/Operations, and 75% considered plans or Health and Safety as part of their strategy.

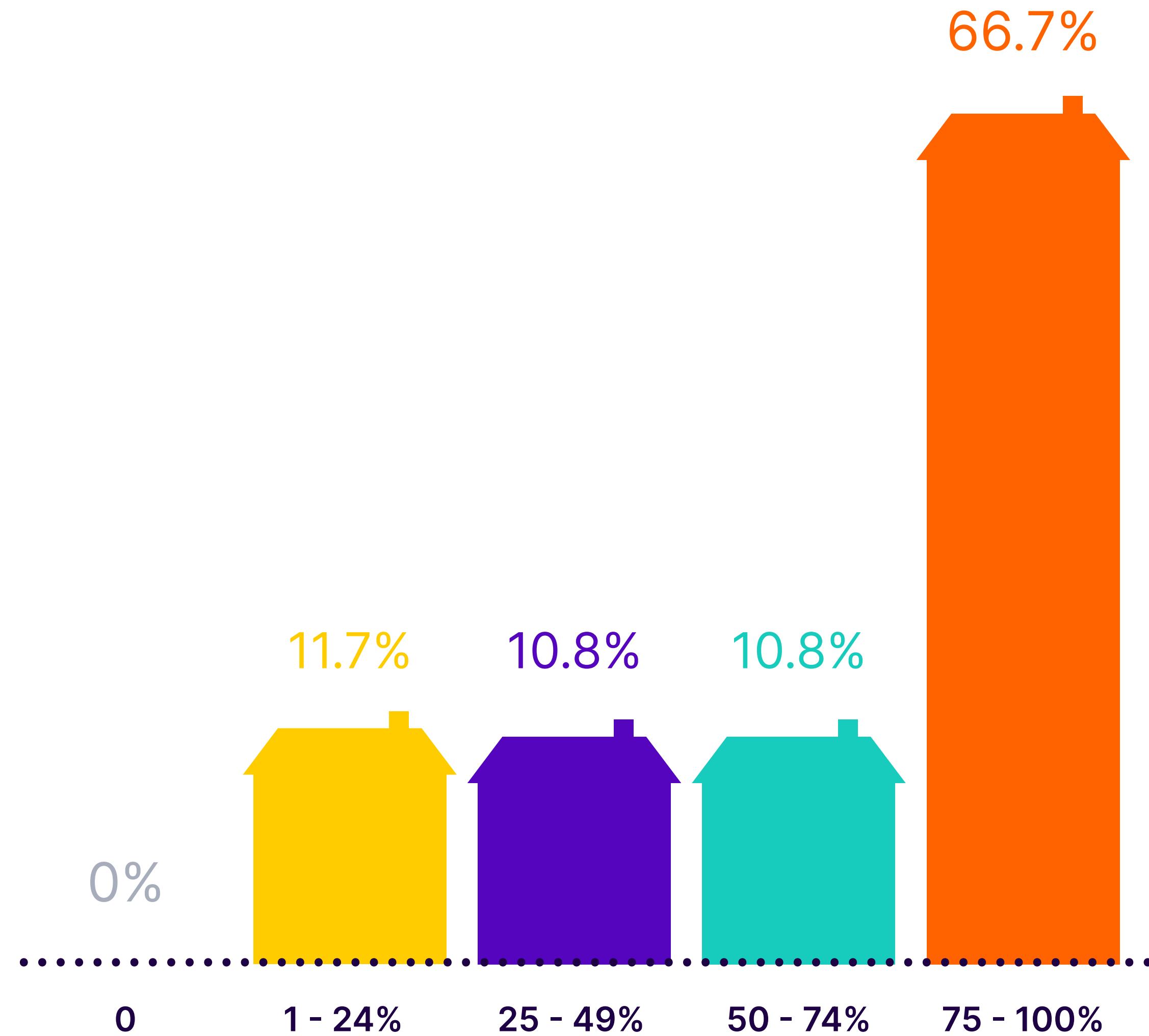


DURING THE COVID-19 CRISIS

Q5:

What percentage of your contact centre staff are currently working from home?

77% of organisations have 50% or more of their contact centre employees working from home during the current crisis. No companies said they had zero contact centre homeworkers.



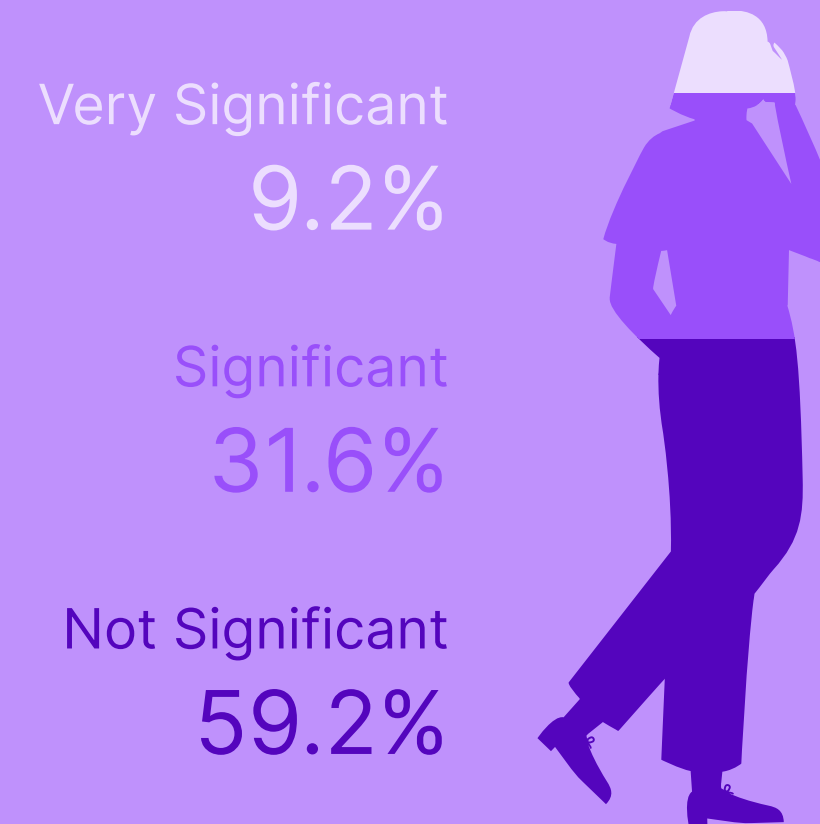
Responses to questions 6-9 are from contact centres that are mainly working-from-home during the Covid-19 crisis¹

Q6:
How significant are the PEOPLE issues you currently face in your work-from-home contact centre?

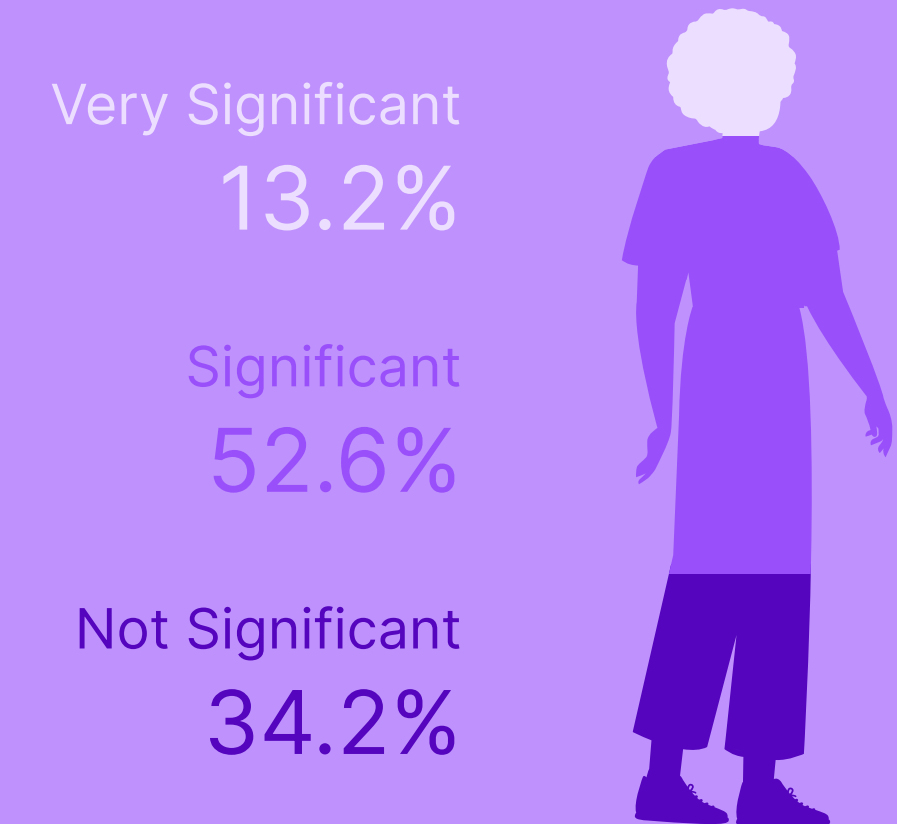
Anxiety/Mental Health has been the biggest concern for organisations operating work-from-home centres during the current crisis, with 66% of respondents stating that it has been a significant or very significant issue. 41% said that Employee Engagement/Motivation was a significant or very significant issue.

¹ i.e. with more than 50% of their contact centre employees working from home

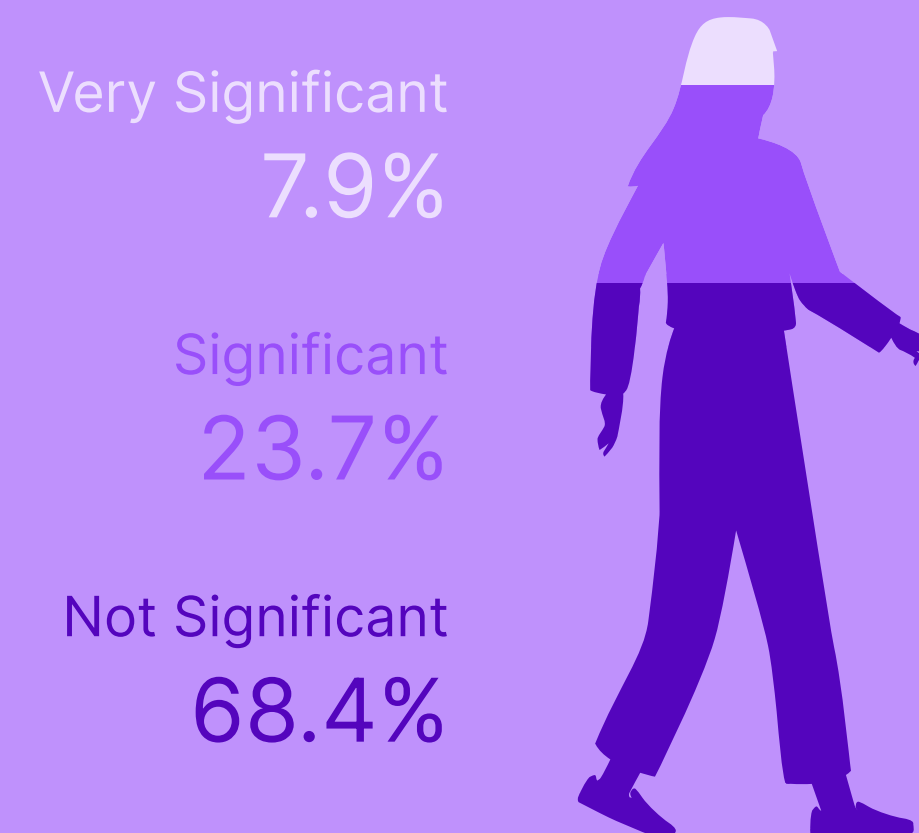
Employee engagement/motivation



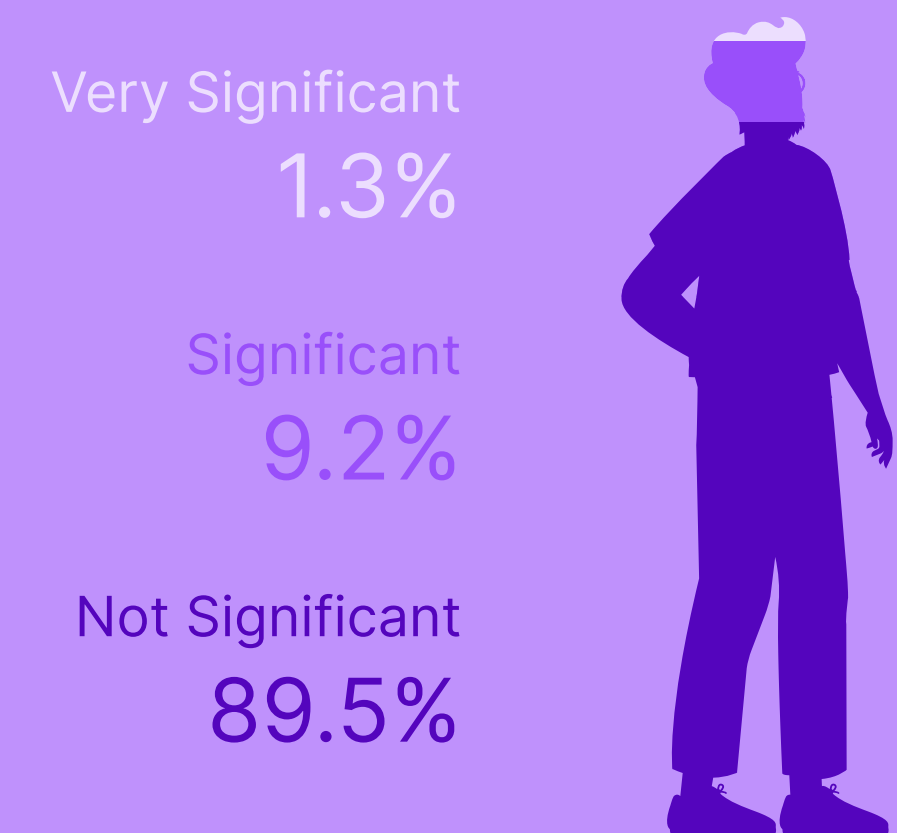
Anxiety/mental health issues



Communications

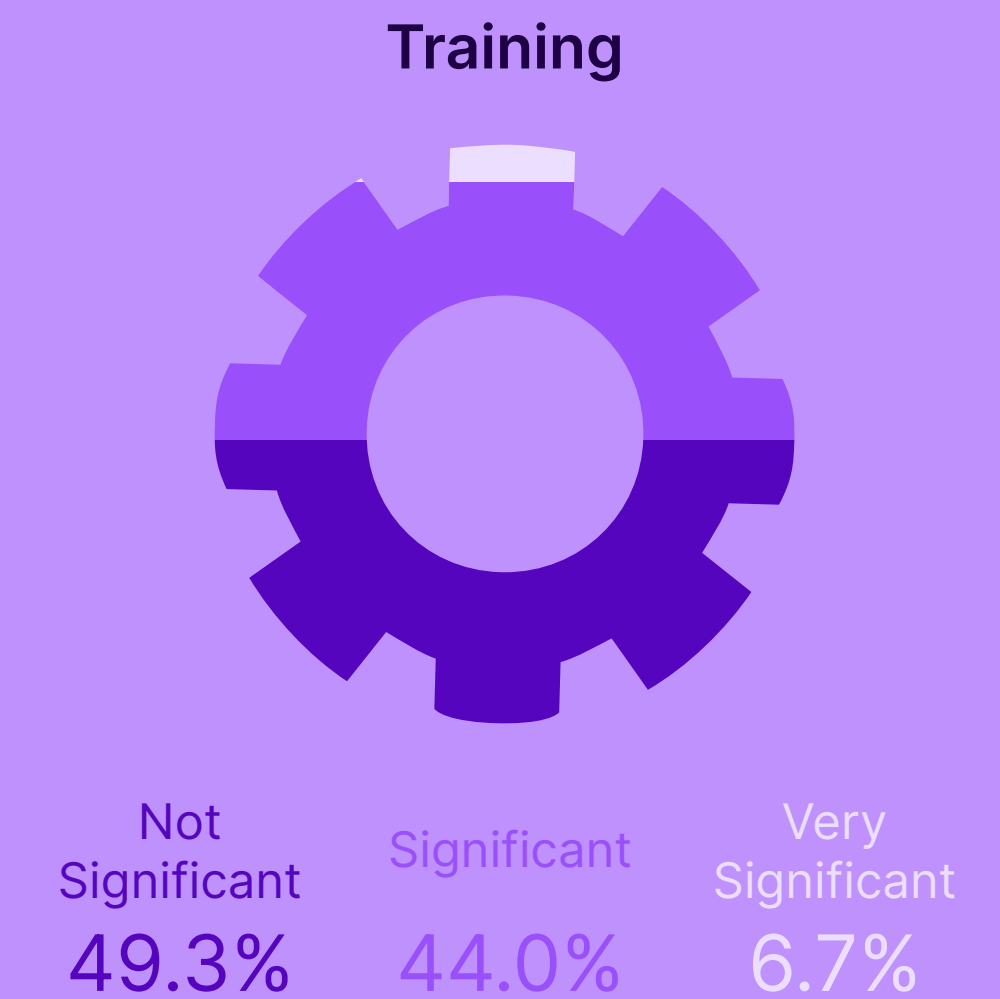
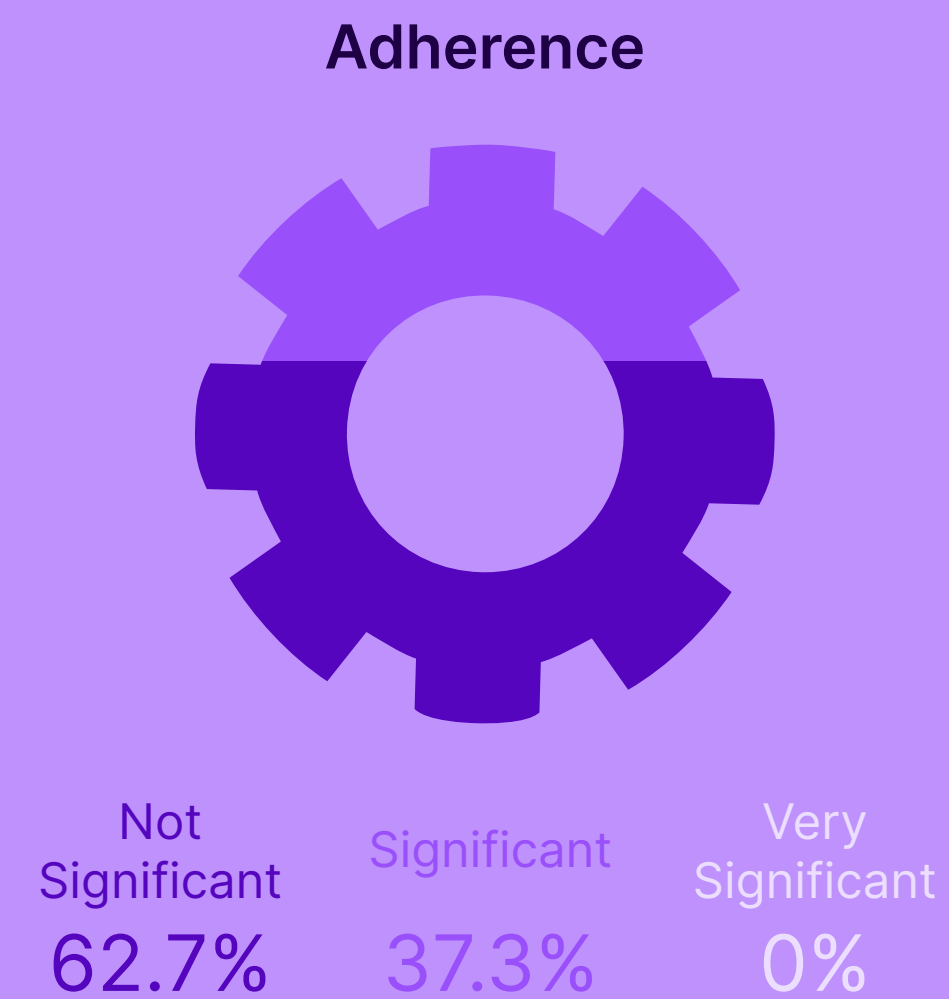
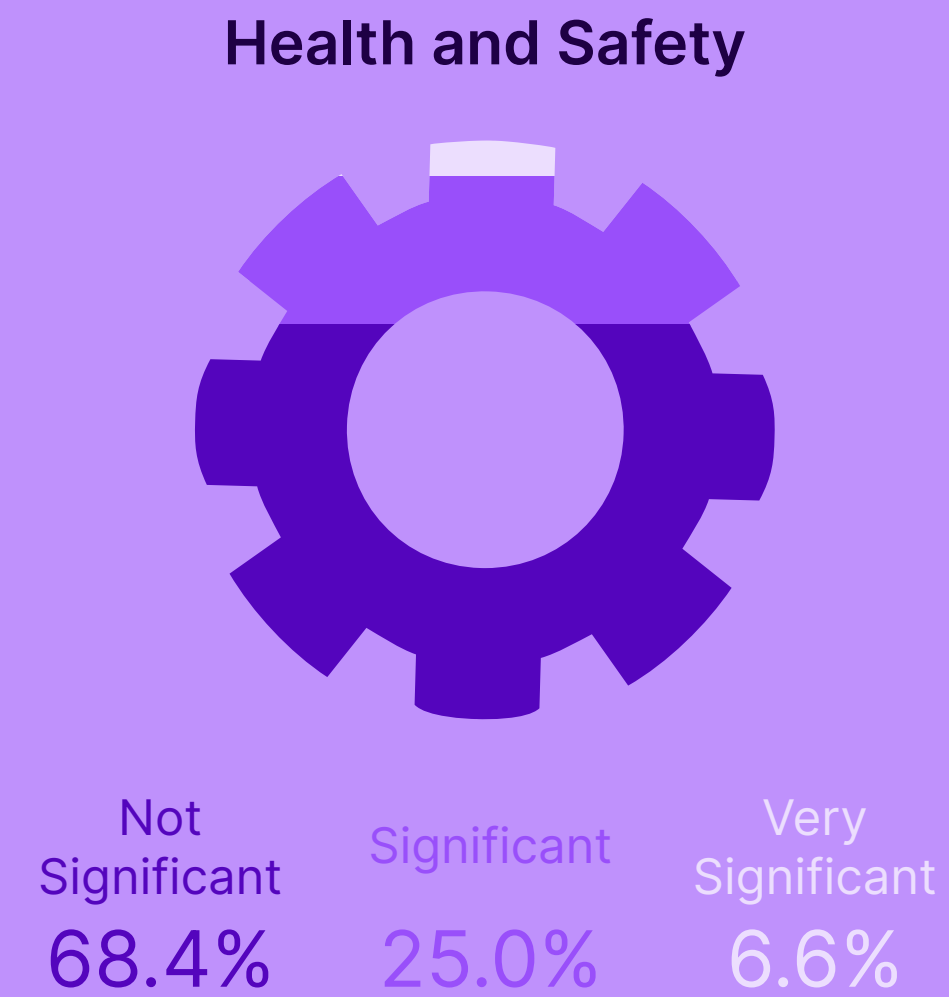


Absenteeism



Q7:
How significant are the OPERATIONAL issues you currently face in your work-from-home contact centre?

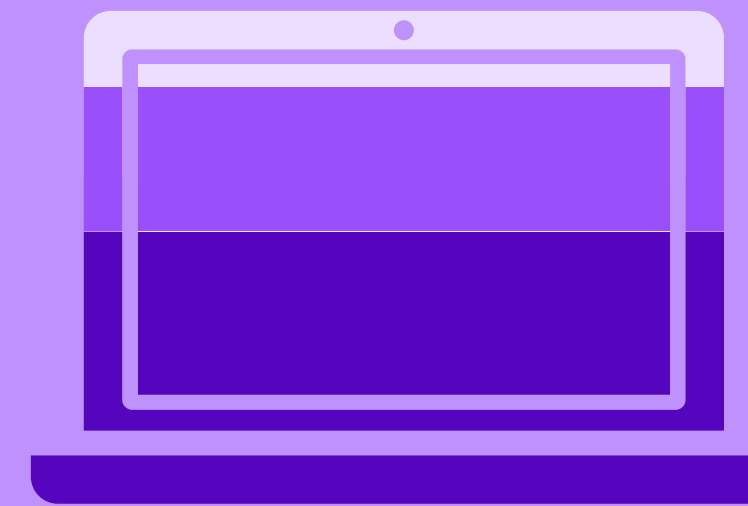
51% of respondents said that Training has been a significant or very significant issue during the crisis. 38% stated that Productivity was a significant or very significant issue.



Q8:
How significant are the TECHNOLOGY issues you currently face in your work-from-home contact centre?

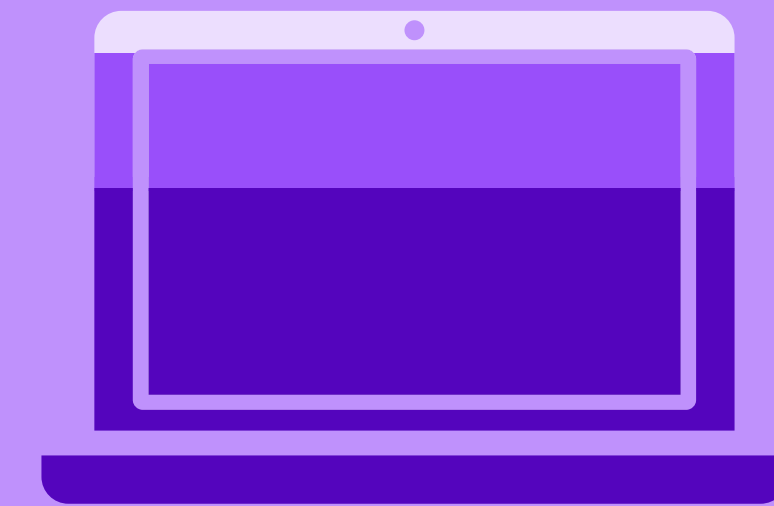
While Technology issues have typically not been as big a problem for work-from-home contact centres as People or Operational issues during the current crisis, there are still areas for concern. 44% of respondents said that Managing Contact Volumes had been a significant or very significant issue, while 37% pointed to Managing Multiple Channels as a significant or very significant issue.

Managing contact volumes



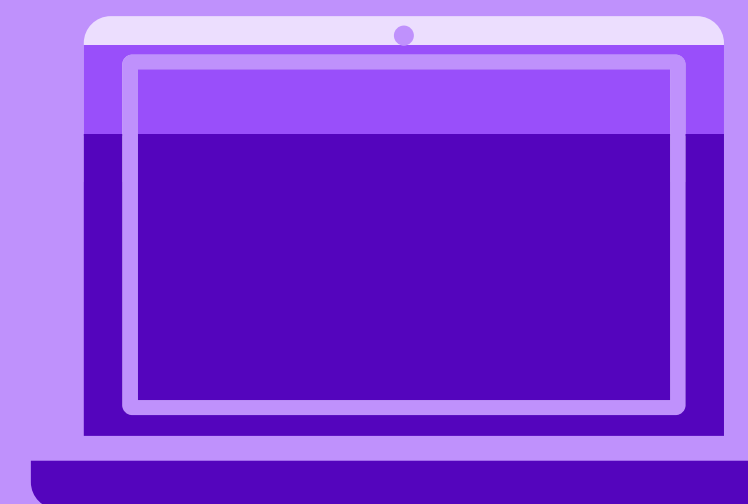
Not Significant	Significant	Very Significant
55.3%	28.9%	15.8%

Managing multiple channels (voice, email, web, chat, social etc.)



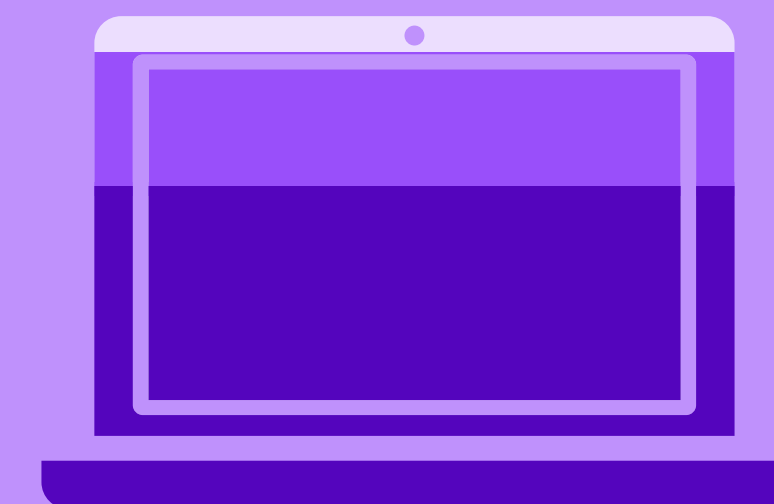
Not Significant	Significant	Very Significant
63.2%	27.6%	9.2%

Communicating with managers/agents



Not Significant	Significant	Very Significant
77.6%	17.1%	5.3%

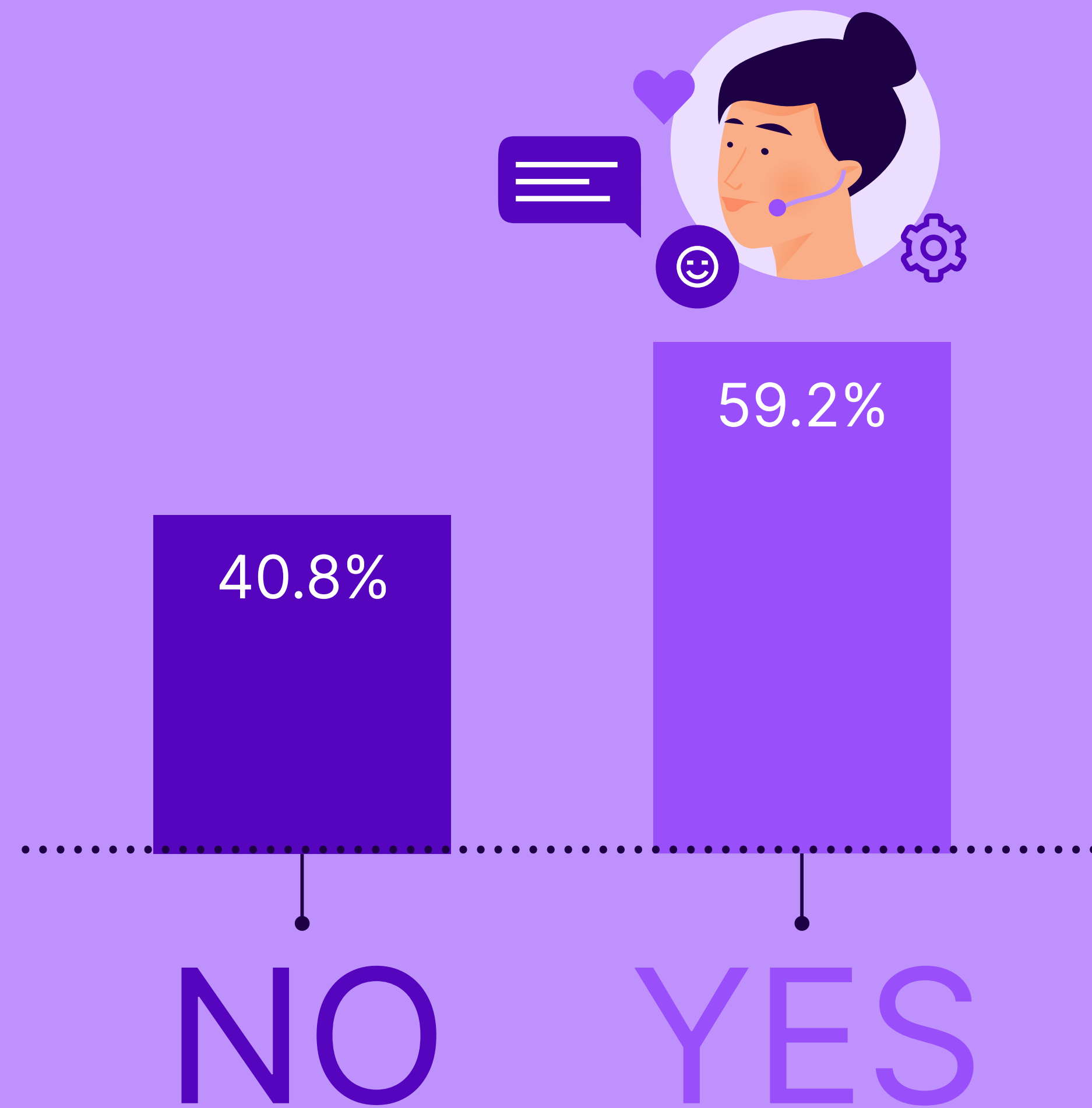
Monitoring/reporting



Not Significant	Significant	Very Significant
65.8%	26.3%	7.9%

Q9:

Did you create any innovative solutions during the Covid-19 crisis for VIRTUAL recruitment, on-boarding, management, training, communications, health & well being etc.?



Q9 cont.:

Examples of innovative work-from-home solutions created by contact centres during the Covid-19 crisis

A huge range of innovative work-from-home solutions have been implemented by companies during the crisis. Here is a selection provided by survey participants:

1. We have still continued to recruit during the past few months with training taking place via Zoom
2. Introducing a Refer a Friend scheme so the candidate not only has a buddy but also a realistic view of the role prior to starting
3. Virtual training, increased e-learnings, manager clinics
4. Used Microsoft Teams for many different type of communications/video meetings, training has adapted. Induction is a challenge with new staff We have a daily welfare register and a member of another team makes daily welfare checks on staff
5. Created a How-to Guide for staff working from home
6. Virtual recruitment, health and wellbeing, and motivational drop in sessions
7. Brand new on-boarding programme, comms channels and methods, several employee engagement initiatives
8. Daily virtual management meetings, virtual training for all contact centre staff - ongoing programme, daily communications with all staff, well being is our top priority
9. Brought in new technology to recruit and train fully virtually, created new comms channels and feedback

10. Virtual learning teams, coaching and teams. Although I wouldn't say it was innovative, it was effective
11. Since lockdown we have recruited and trained 40 people remotely
12. Introduced new way of dealing with non urgent contacts (message transfers to wav file)
13. Transformed our Contact Us to auto resolve queries to stop demand drivers
14. Soon implementing Virtual Assistant (chatbot)
15. Utilised social learning and collaboration tool to train and engage agents

16. Virtual recruitment, weekly communications and whole department stand-ups via conference for those both in and out of the office
17. Once it was clear that we could train people that were on furlough scheme we used the time to upskill our teams in readiness for the new world and return to work
18. To other companies maybe what we are using is the norm, but we had to remodel our entire business, new telephony system etc.
19. Put all of our customer services online, created new offerings according to need and installed daily powows for the team internally

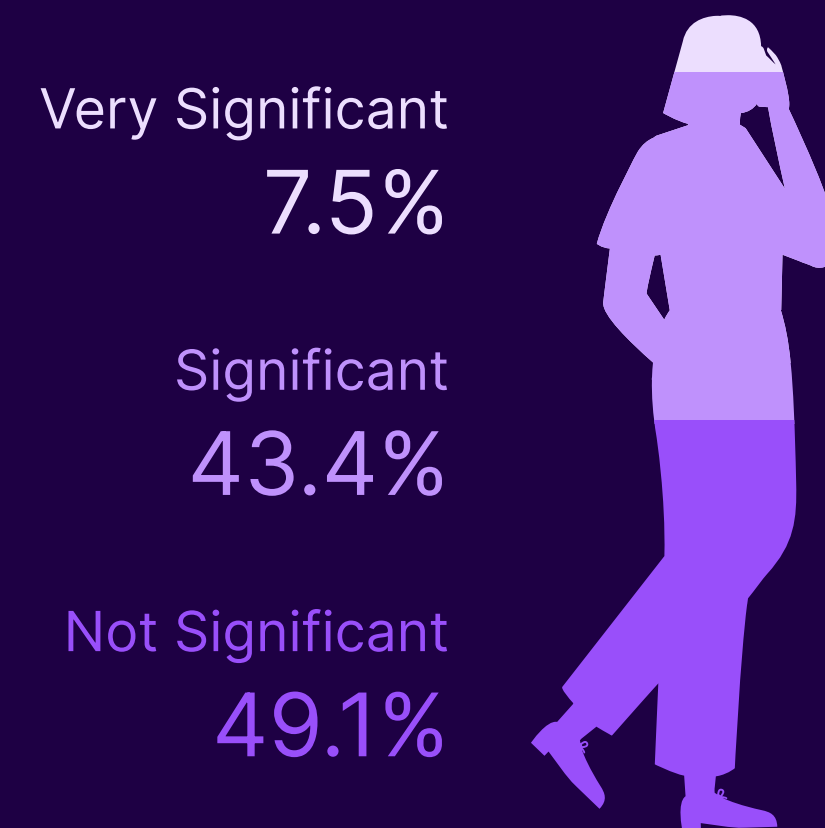


Responses to questions 10-12 are from organisations that are mainly operating from bricks and mortar contact centres during the Covid-19 crisis²

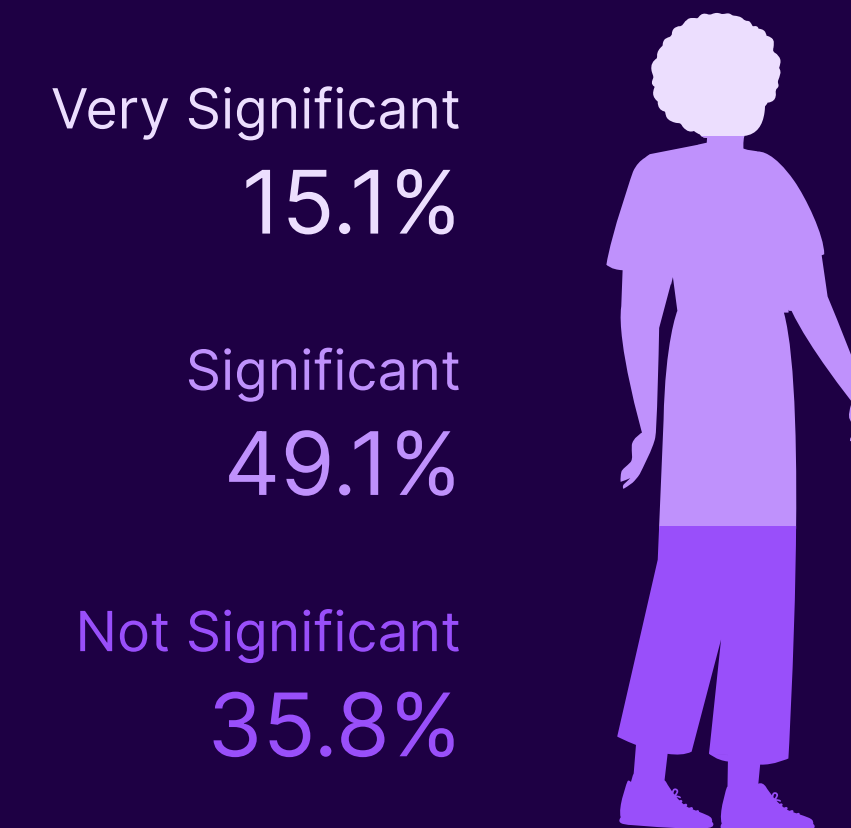
Q10:
How significant are the PEOPLE issues you currently face in your contact centre?

It hasn't just been work-from-home centres that have experienced significant People issues during the current crisis. 64% of contact centres still operating on a mainly Bricks & Mortar basis stated that Anxiety/Mental Health Issues had been a significant or very significant issue. 51% said that Employee Engagement/Motivation was a significant or very significant issue.

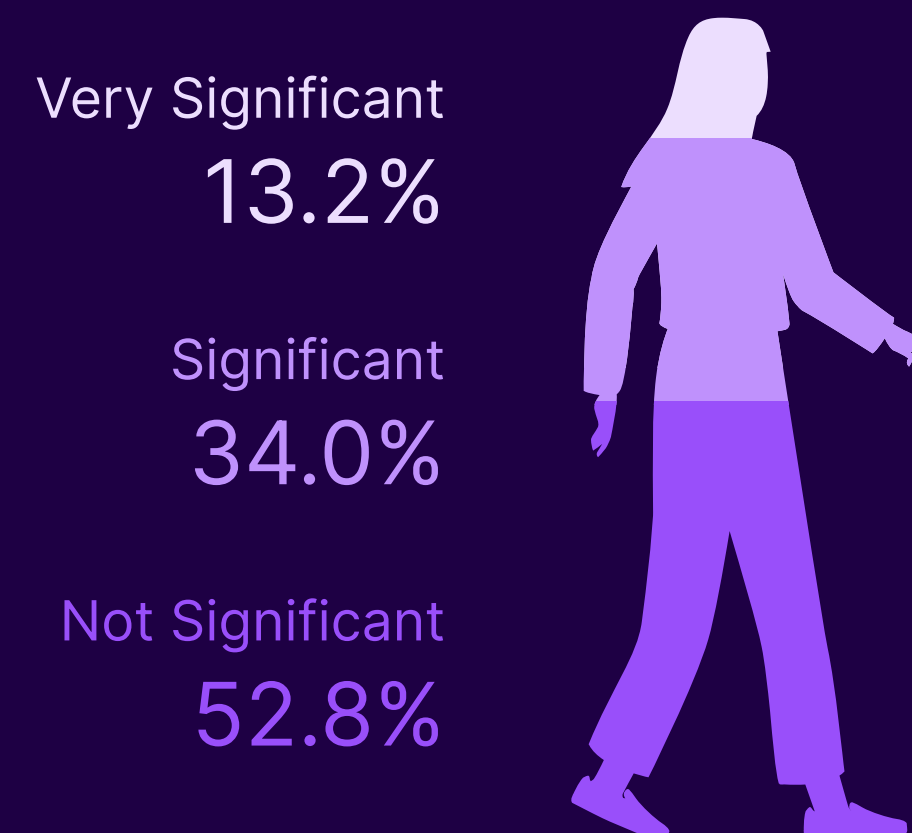
Employee engagement/motivation



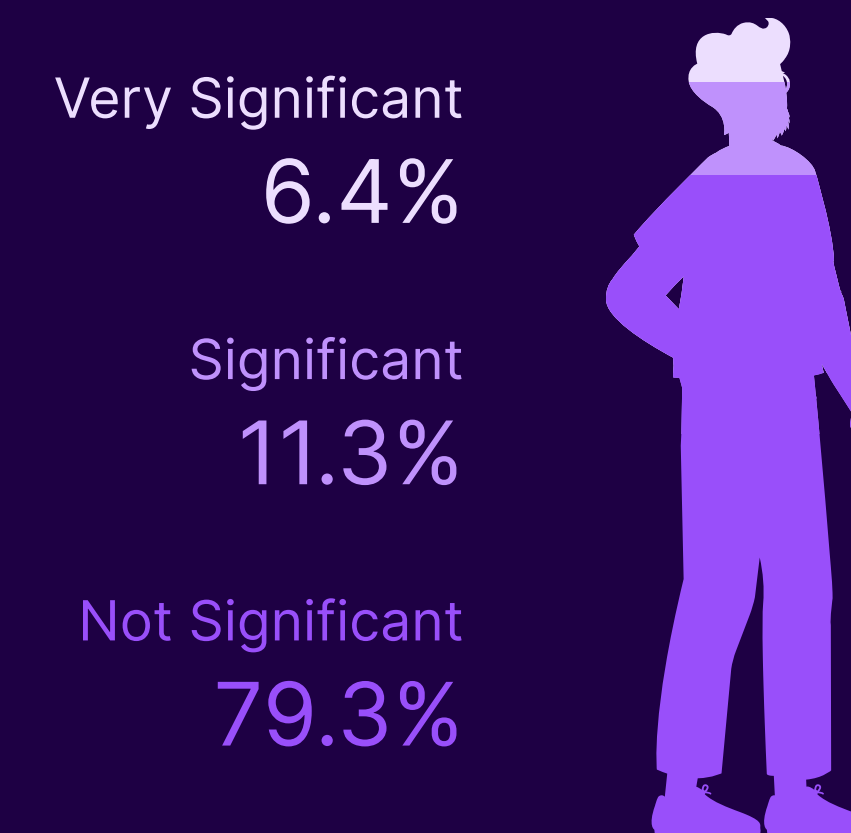
Anxiety/mental health issues



Communications



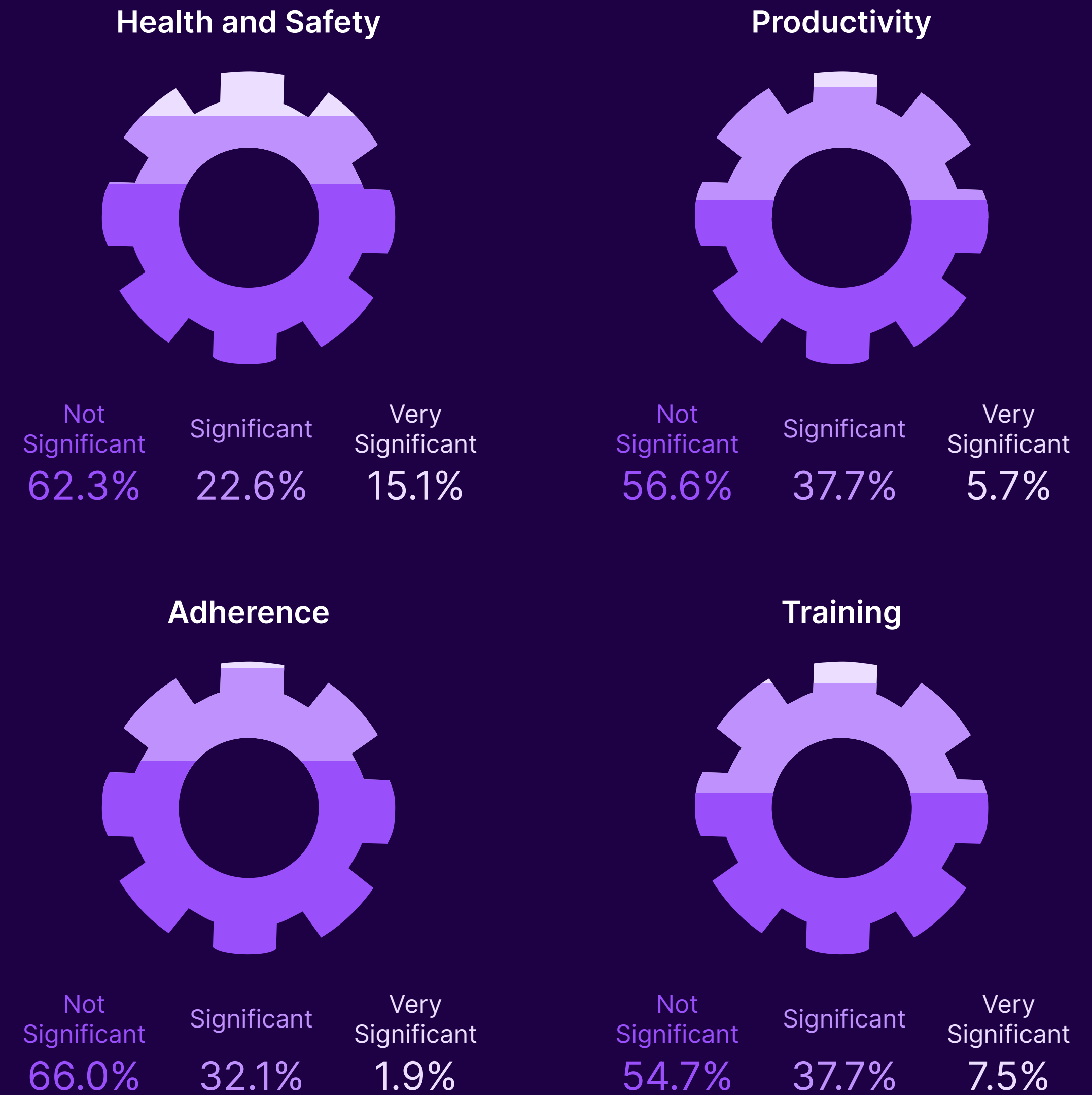
Absenteeism



² i.e. with more than 50% of their contact centre employees working from bricks and mortar contact centres

Q11:
 How significant are the
OPERATIONAL issues you currently
 face in your contact centre?

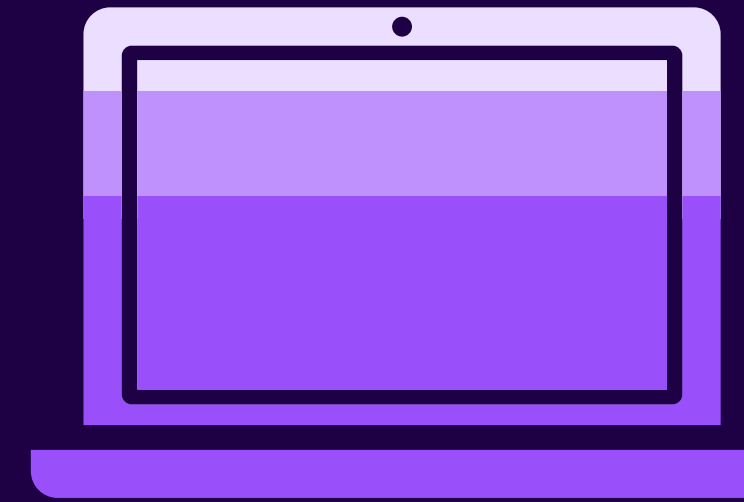
45% of respondents said that Training has been a significant or very significant issue during the crisis; with 43% stating that Productivity was a significant or very significant issue.



Q12:
How significant are the TECHNOLOGY issues you currently face in your contact centre?

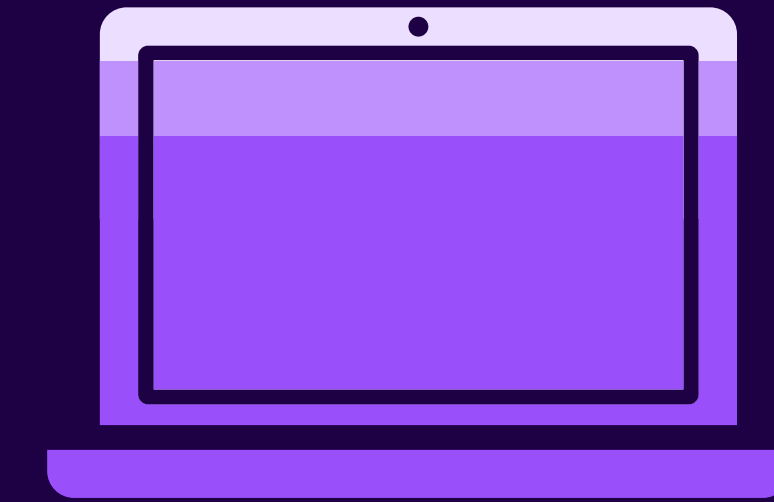
38% of respondents said that Managing Contact Volumes had been a significant or very significant issue. 38% also pointed to Monitoring/Reporting as a significant or very significant issue.

Managing contact volumes



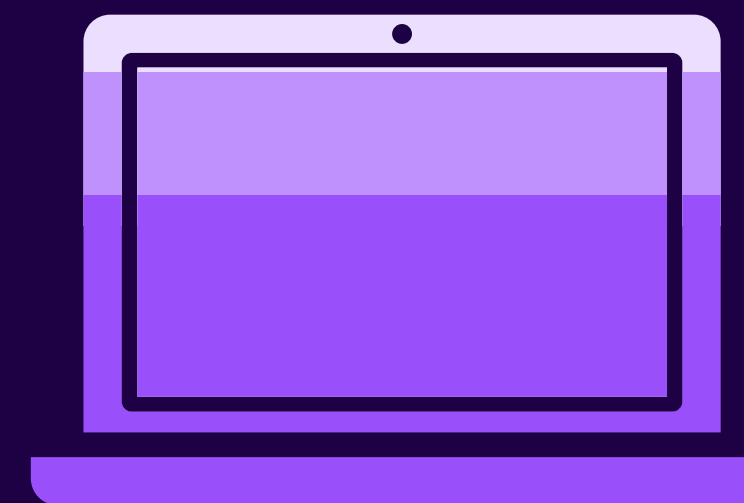
Not Significant	Significant	Very Significant
61.5%	21.2%	17.3%

Managing multiple channels (voice, email, web, chat, social etc.)



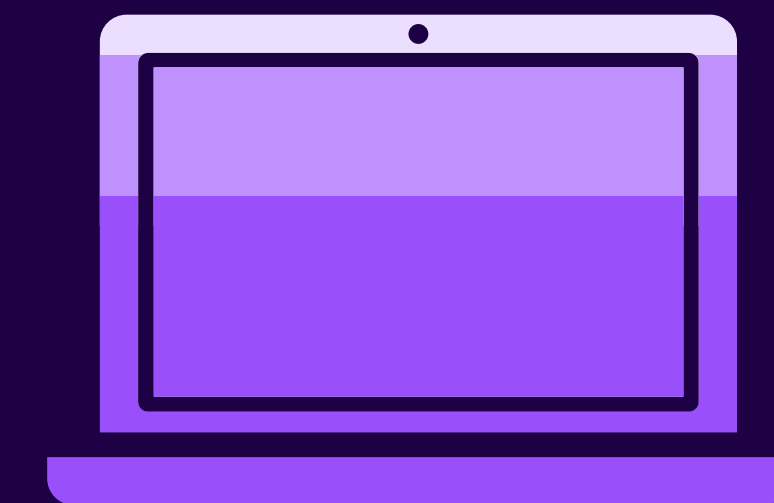
Not Significant	Significant	Very Significant
73.6%	15.1%	11.3%

Communicating with managers/agents



Not Significant	Significant	Very Significant
62.3%	26.4%	11.3%

Monitoring/reporting



Not Significant	Significant	Very Significant
62.3%	28.3%	9.4%

Q13:
 During the last few months,
 did you invest in the following
 types of solutions to see you
 through the current crisis
 and beyond?

(multiple answers accepted)

79% of respondents have invested in Employee Communications (including Microsoft Teams and Zoom) during the crisis, with 34% investing in Contact Handling technology, 30% in Cloud Technology solutions, and 25% in digital/online solutions.



Cloud technology

29.9%



Contact handling
 (for call, emails, social media,
 web chat etc.)

34.0%



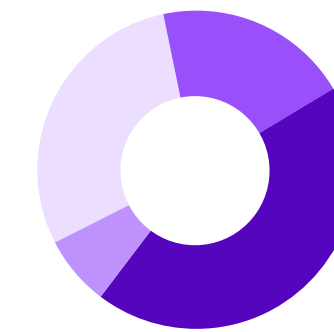
Employee communications
 (e.g. Zoom, Microsoft Teams)

79.4%



Virtual management
 & training
 (e.g. Adobe Connect)

17.5%



Monitoring/
 reporting

18.6%



Security

19.6%



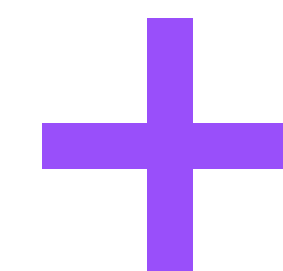
Compliance

18.6%



Digital/online

24.7%



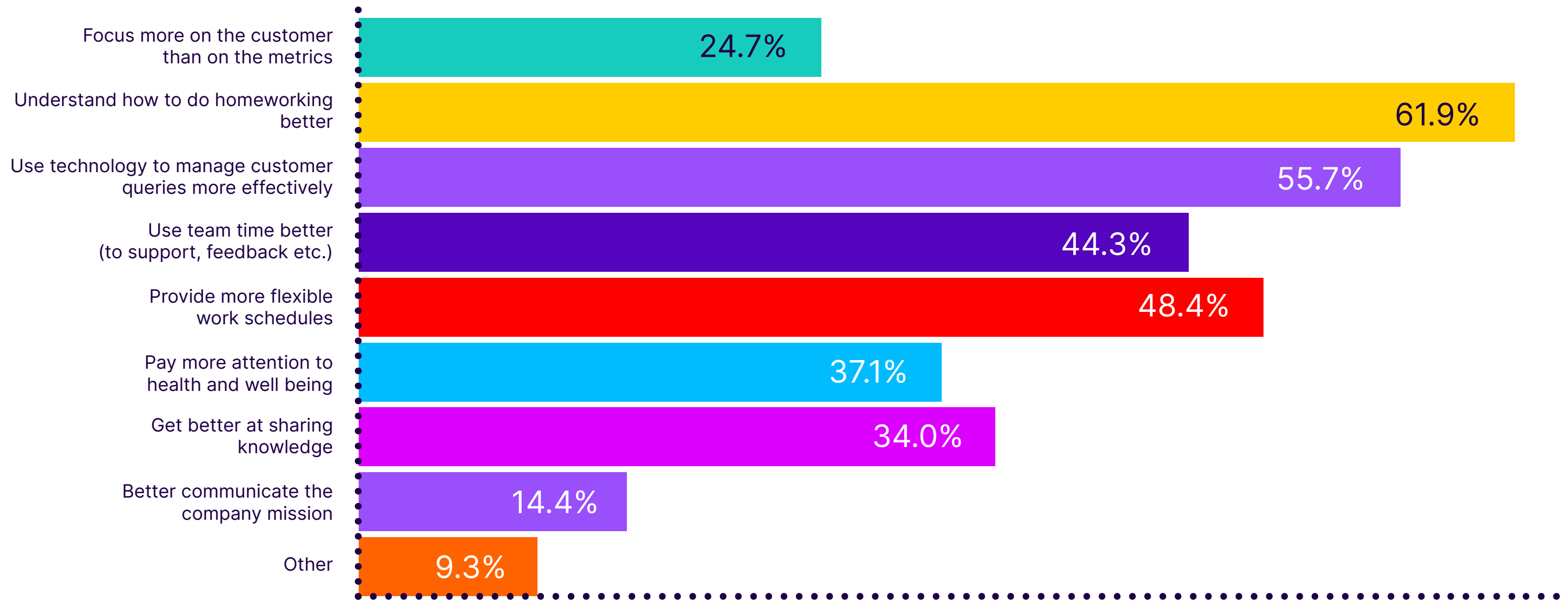
Other

14.4%

Q14:

What lessons have you learnt that can be used in future contact centre strategies and implementations? We should...

The most popular response was We Should Understand to Do Homeworking Better (62% of respondents) followed by We Should Use Technology to Manage Customer Contacts More Effectively (56%). 48% stated that they should Provide More Flexible Work Schedules.



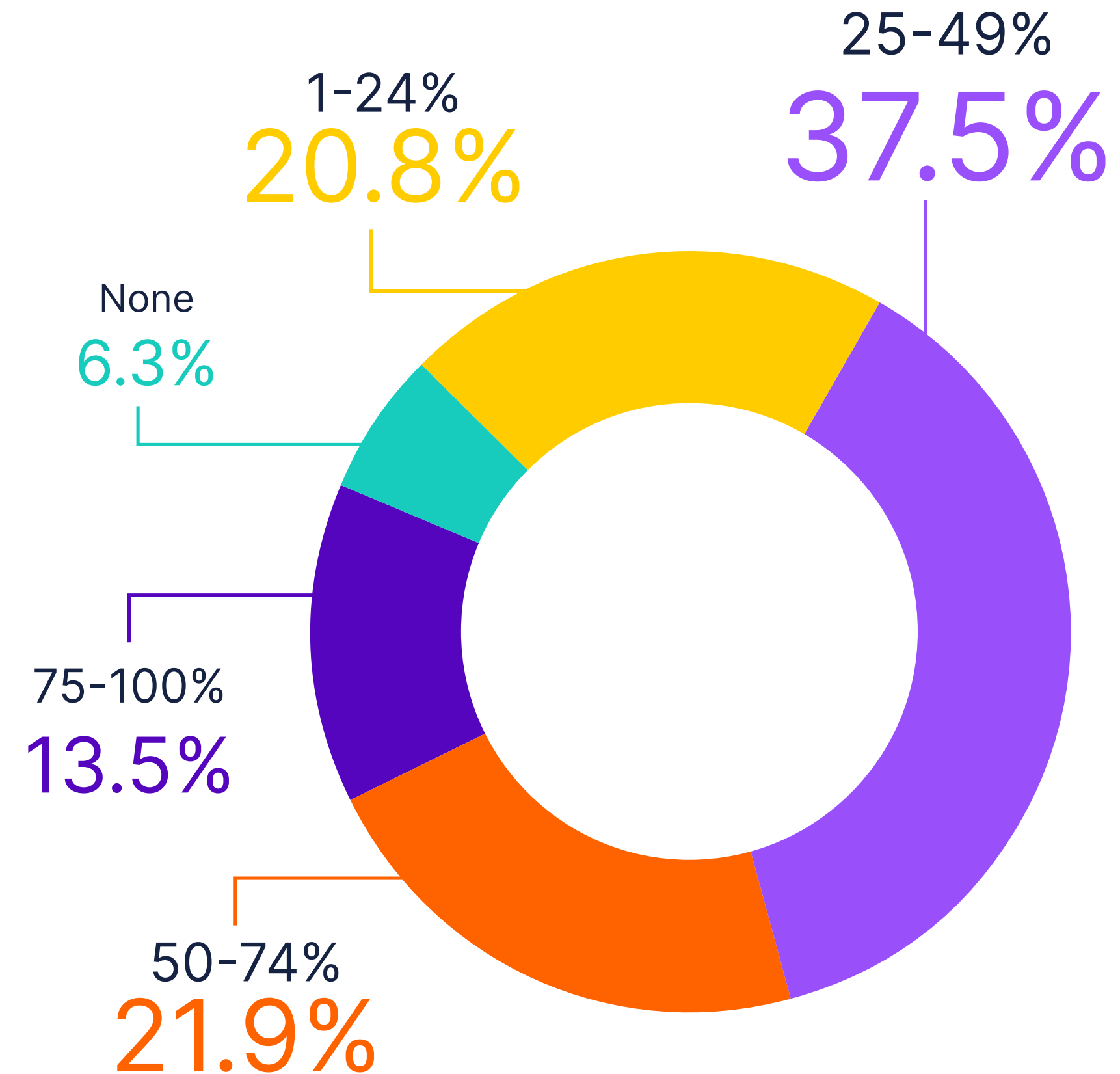
Other ideas/comments proposed by respondents included:

- Our team represent our organisation as ambassadors so we will continue to ensure we invest and support them
- (We should) involve the operational areas more in planning
- (We should) focus on outcomes
- (We should) think outside the norm, continue to push technology, find different ways to work
- (We should) support and equip our managers and leaders more to facilitate effective online meetings; provide online engagement activities to give variety and momentum throughout the day; and change working patterns to avoid video conferencing fatigue (more breaks essential)
- (We should) provide better IT support and training for staff
- (We should) deliver quicker and more effective communication of tactical changes

POST LOCKDOWN

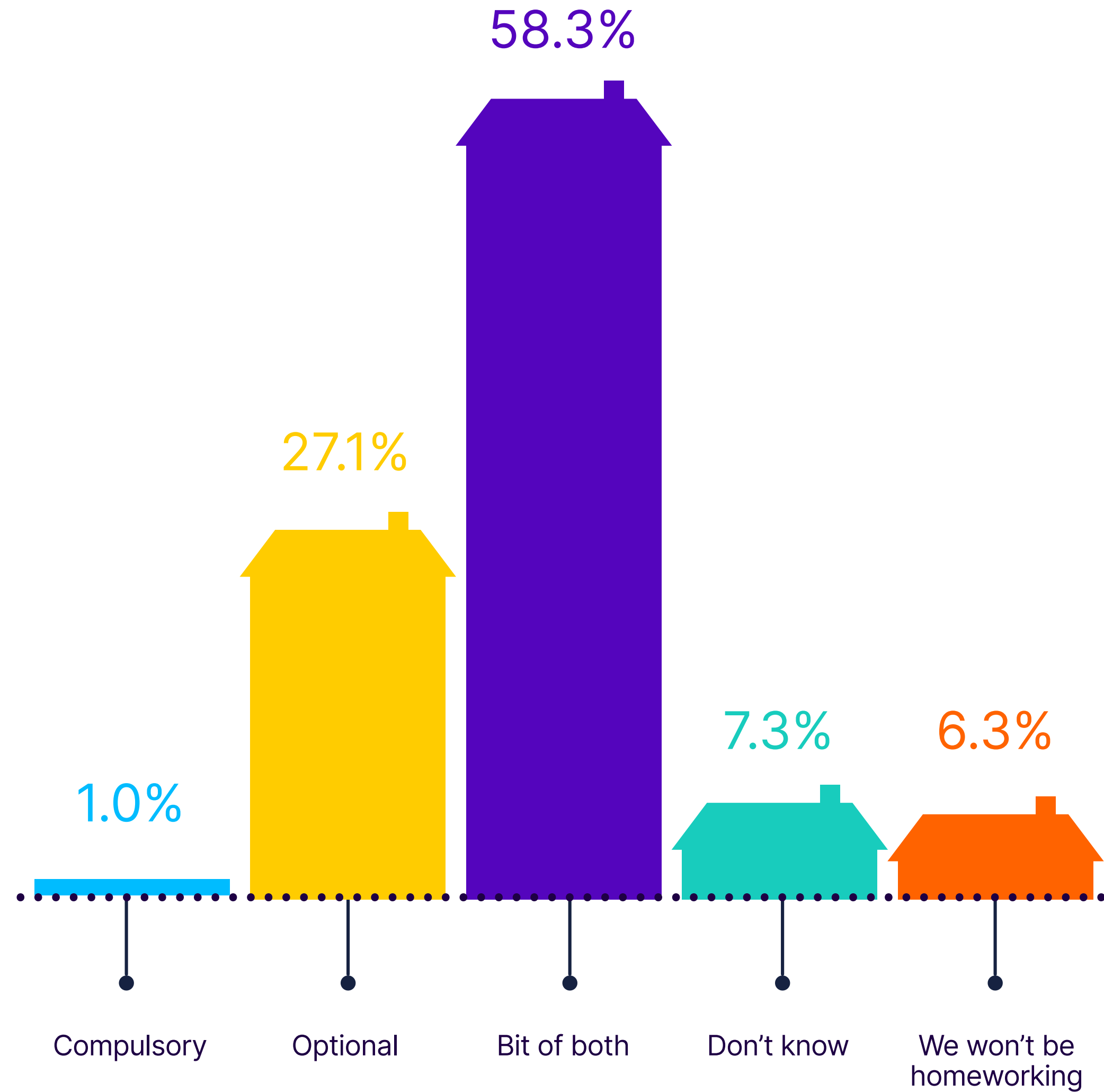
Q15:
In 2021, what percentage of your contact centre staff do you think will be working from home?

Turning our attention now to what people think their contact centres will look like in 2021, work-from-home will be a significant part of the picture according to most respondents. With the likelihood of staggered rotas, social distancing and other regulations in place, 35% of people think that their contact centres will mainly be homeworking in 2021. Indeed, only 27% of respondents think that under a quarter of their contact centre employees will be working-from-home in 2021.



Q16:
In 2021, do you think work-from-home will be compulsory or an option for your contact centre agents?

Our respondents indicate that homeworking will be necessary rather than optional. Indeed only 27% think that the decision to homework will be a totally optional one for contact centre agents. The majority (58%) think that homeworking will be partly optional/partly compulsory.

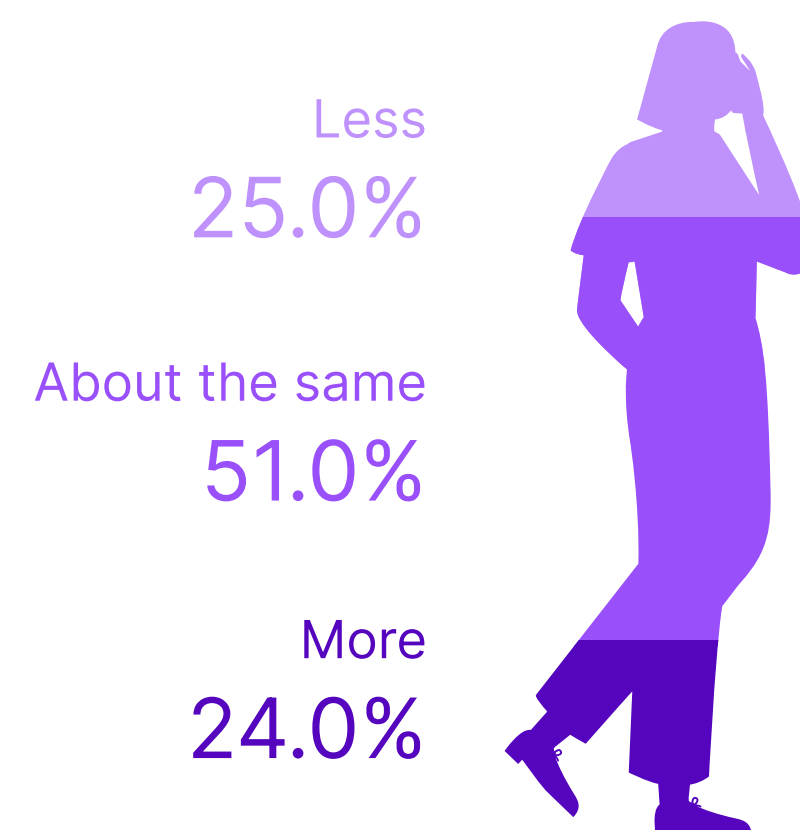


Q17:

Do you think the contact centre PEOPLE issues described earlier will be more or less of a challenge in 2021?

Returning to the question of People issues within contact centres, the general feeling amongst respondents is that they won't be any less serious next year. Only 25% see Anxiety/Mental Health issues as being less of a challenge in 2021, although a higher percentage (29%) do see Absenteeism as being less of a problem. In fact 30% see Anxiety/Mental Health issues as being more of a challenge next year.

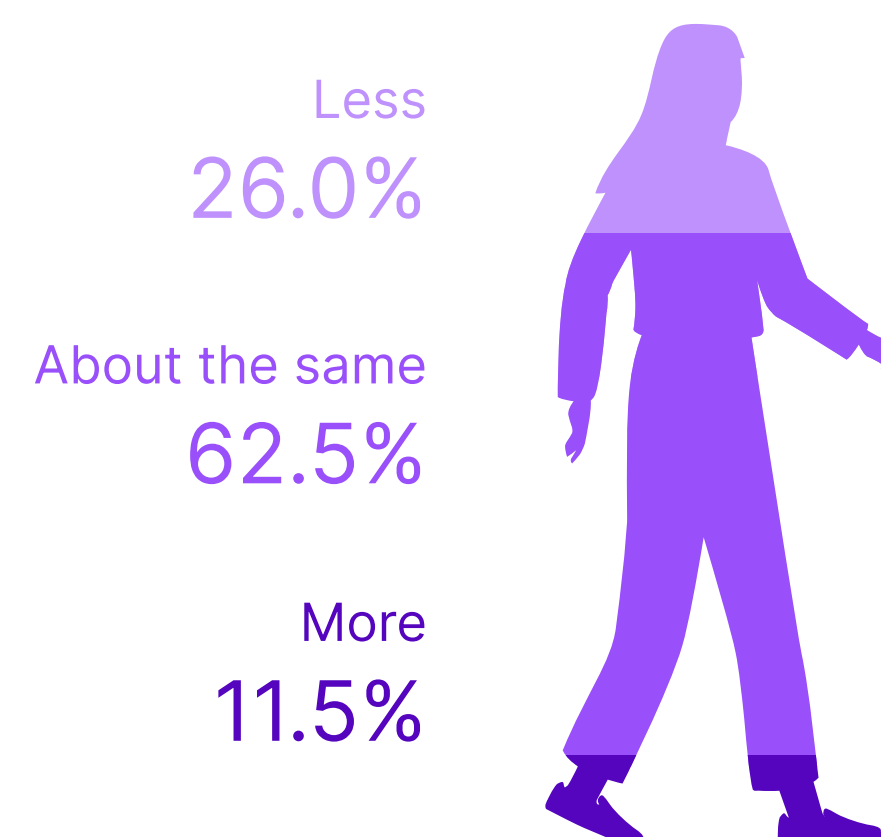
Employee engagement/motivation



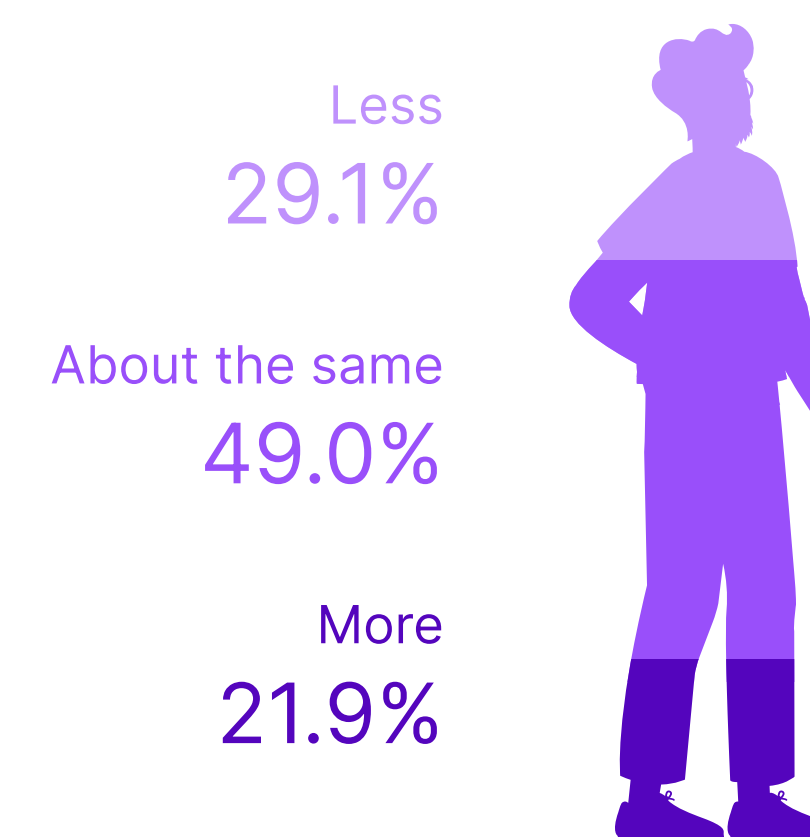
Anxiety/mental health issues



Communications

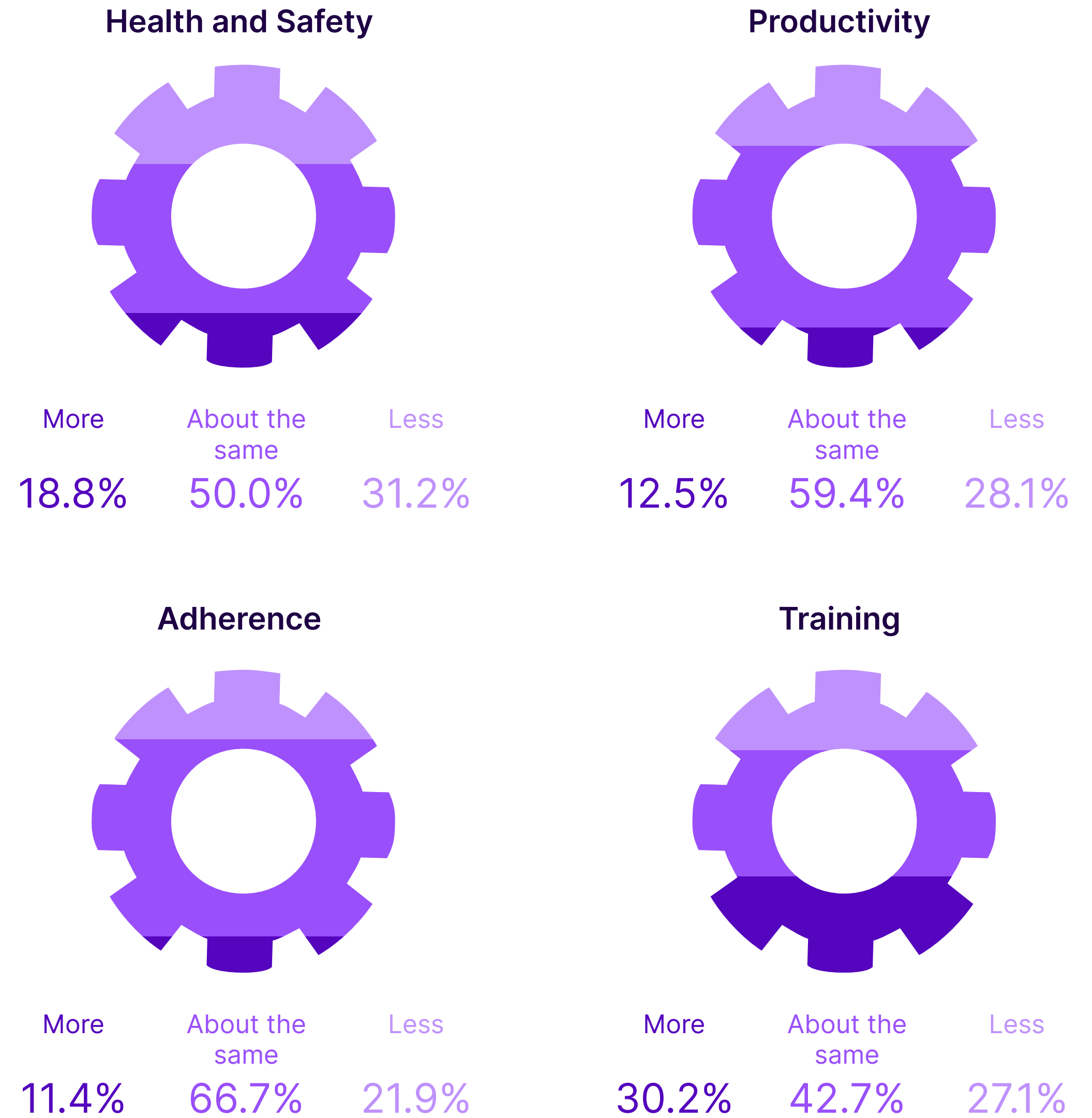


Absenteeism



Q18:
Do you think the contact centre
OPERATIONAL issues described
earlier will be more or less of
a challenge in 2021?

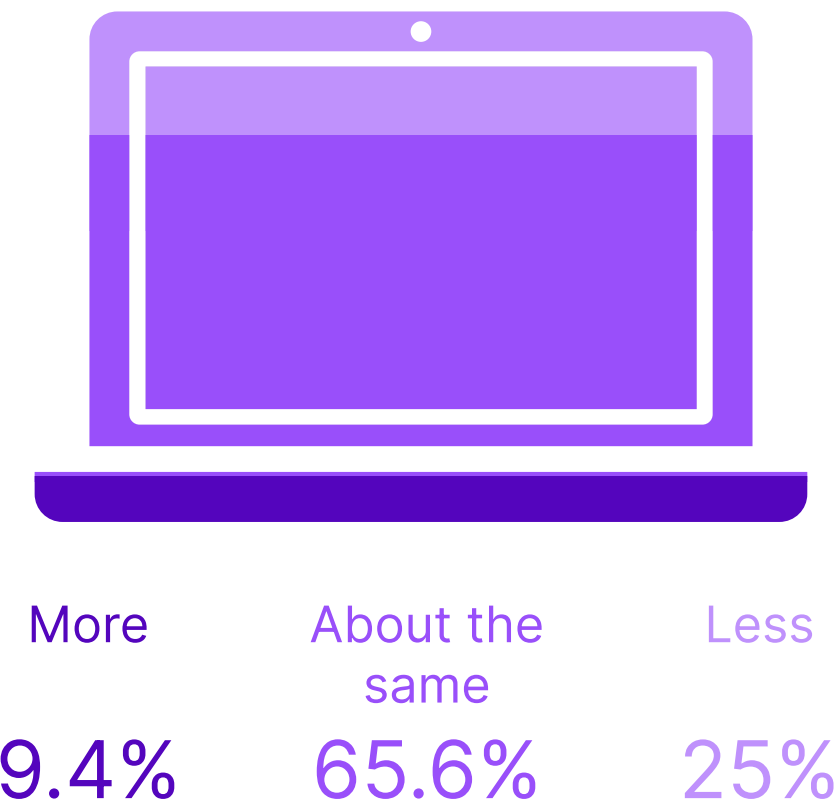
A similar story when it comes to Operational issues. Only 28% see Productivity issues as being less of a challenge in 2021 - while 30% see Training as being more of an issue next year.



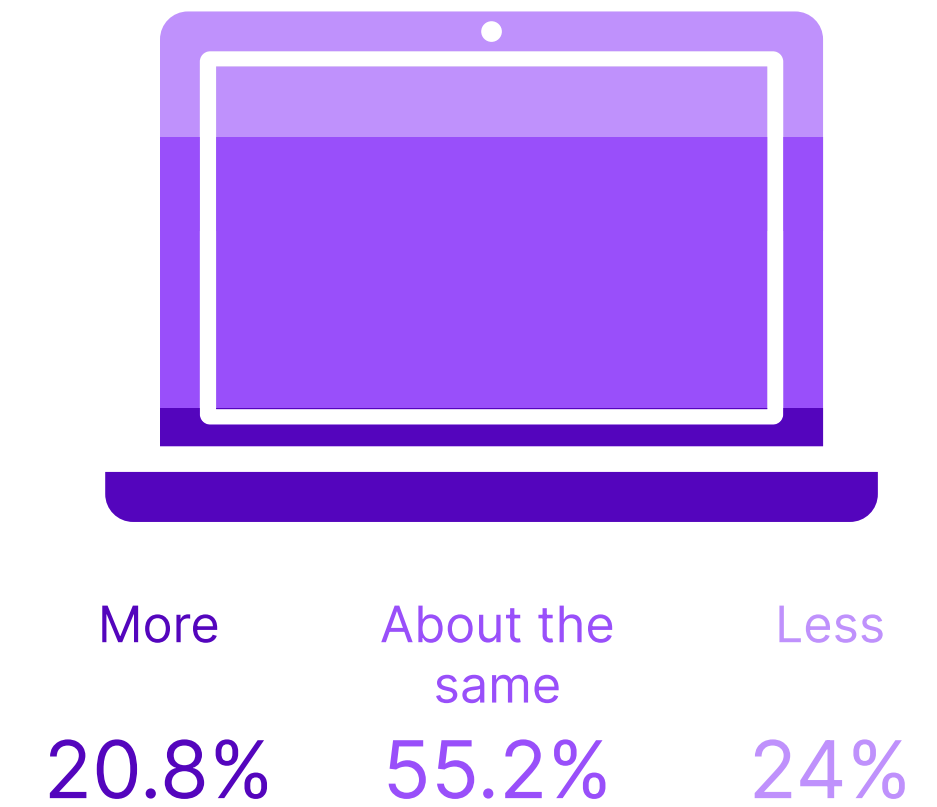
Q19:
Do you think the contact centre TECHNOLOGY issues described earlier will be more or less of a challenge in 2021?

In terms of Technology, the majority of respondents didn't believe that the issues we listed will be significantly more or less of a problem next year - although 21% did consider that Managing Multiple Channels would be a bigger issue.

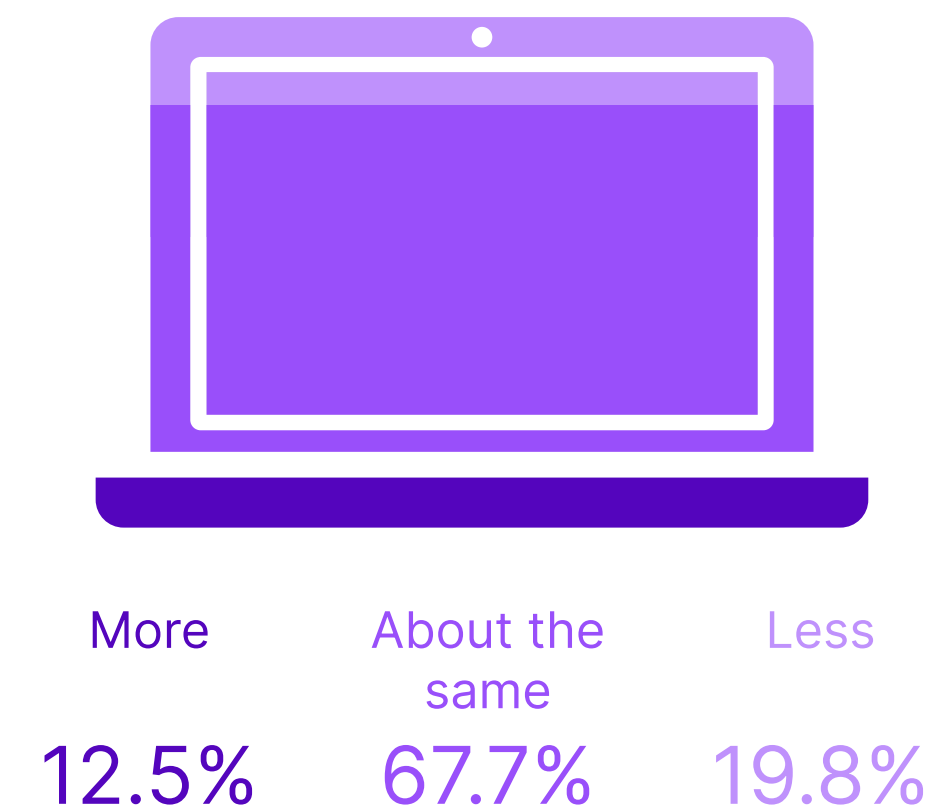
Managing contact volumes



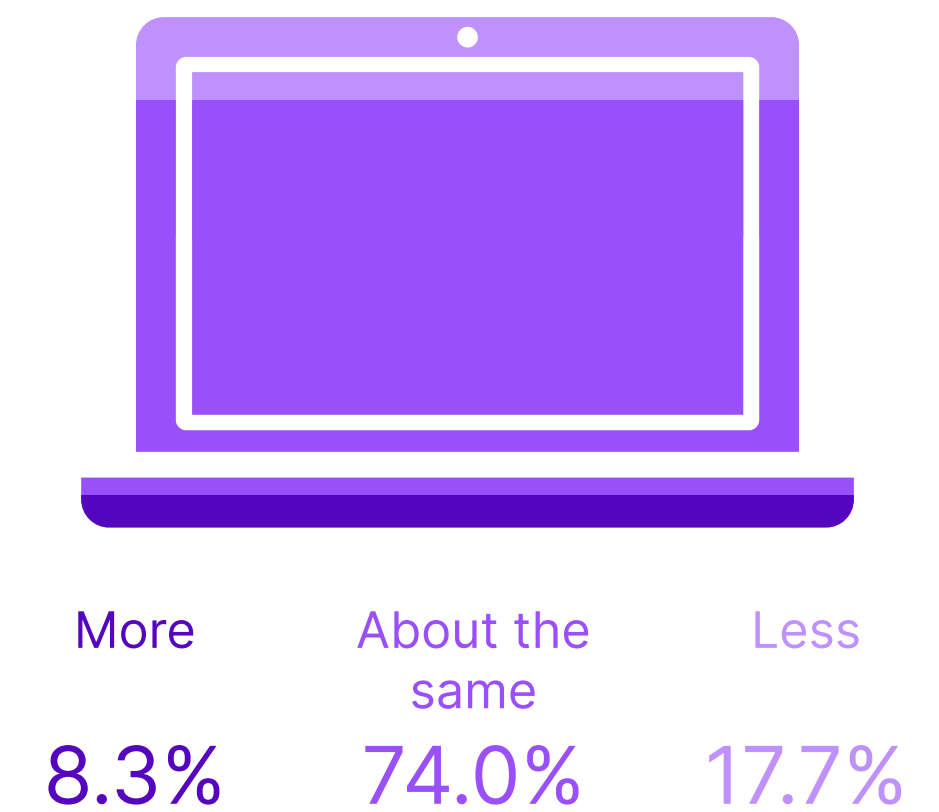
Managing multiple channels (voice, email, web, chat, social etc.)



Communicating with managers/agents



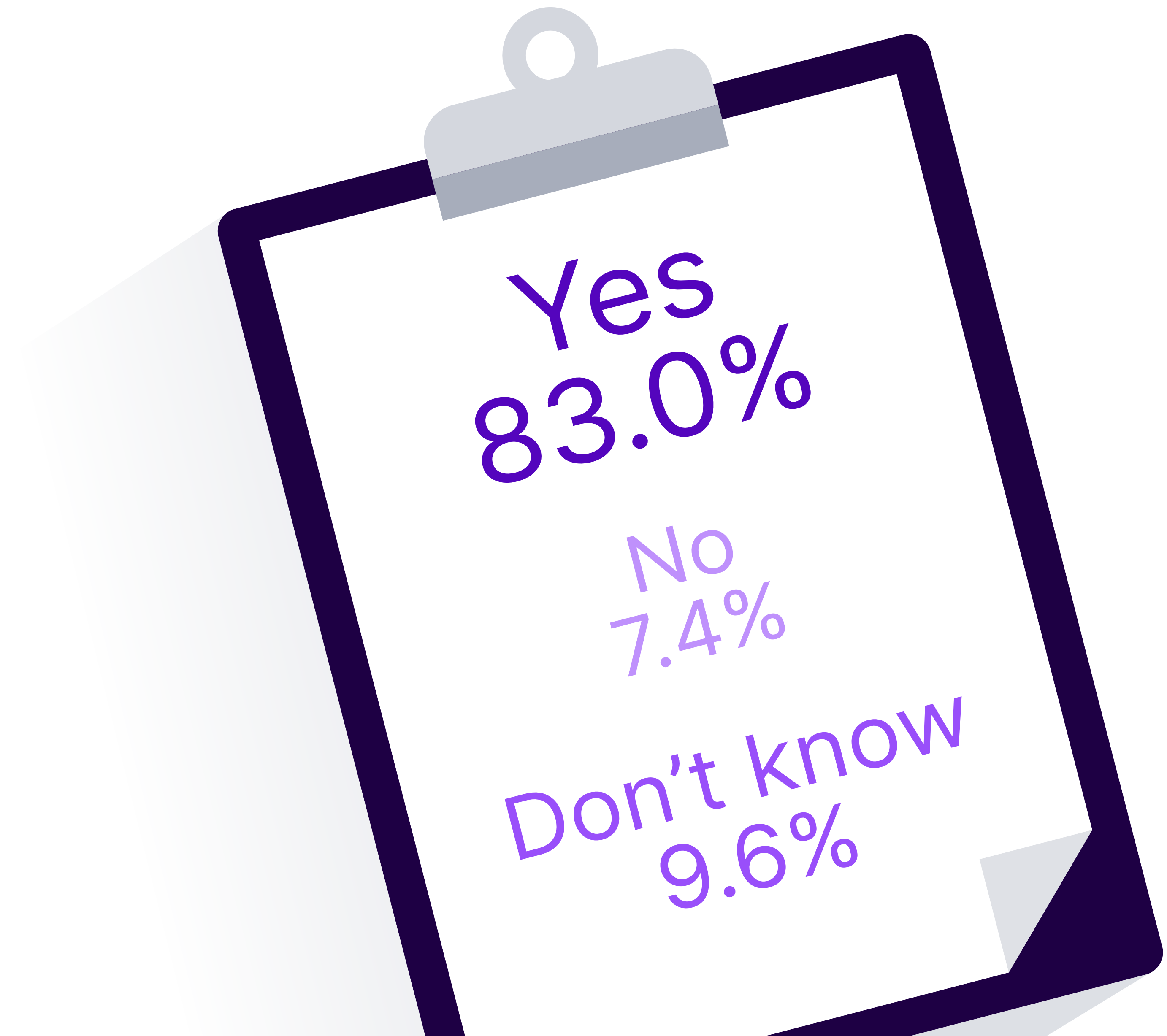
Monitoring/reporting



Q20:

Will you be revising your Business Continuity Strategy/Plan to address the possibility of subsequent waves of Coronavirus?

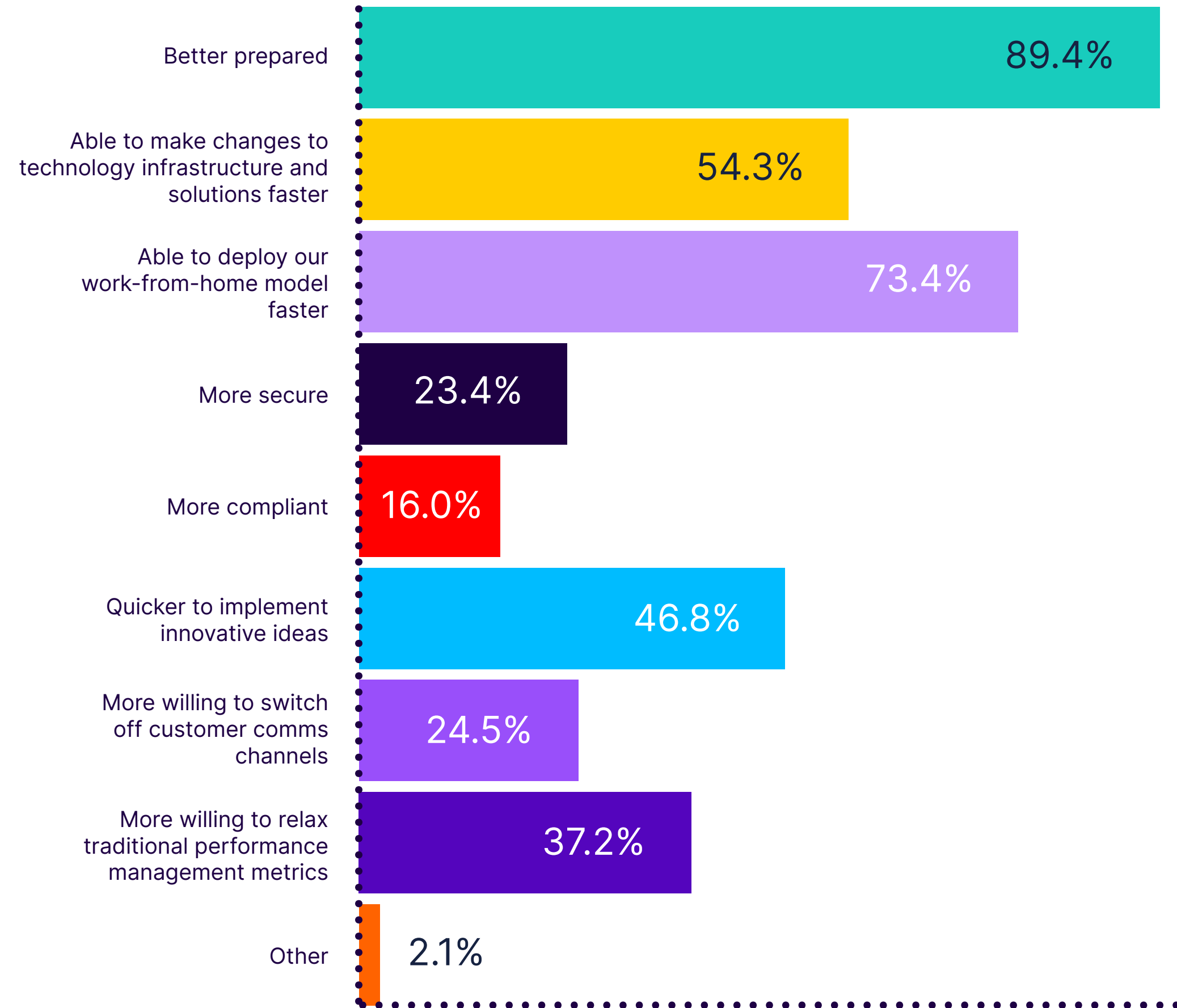
83% of participants said that they will be revising their Business Continuity Strategy/Plan to address the possibility of subsequent waves of Coronavirus. Only 7% said they wouldn't, the rest didn't know.



Q21:
What do you think would happen differently if there was a subsequent wave of Coronavirus?
We would be...

(multiple answers accepted)

89% of people said they would be Better Prepared if there was a subsequent wave of Coronavirus. In terms of practical actions, 73% said that they would be Able to Deploy Our Work-From-Home Model Faster, while 54% said that they would be Able to Make Changes to Technology Infrastructure.



Q22:
Are you likely to invest in solutions in the next 12 months for...

40% of participants said that they would be investing in Communications with Remote Managers/ Agents, the same percentage as said that they would be investing in Remote Management and Monitoring Solutions. 39% expect to invest in AI solutions in 2021.

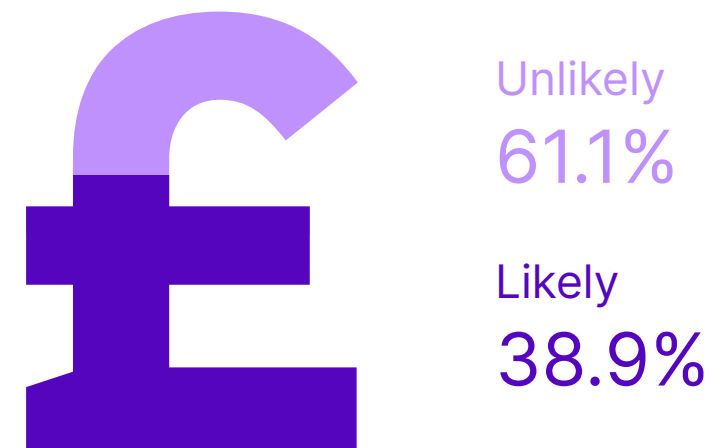
Contact handling
(voice, web chat, social media etc.)



Workforce forecasting and scheduling



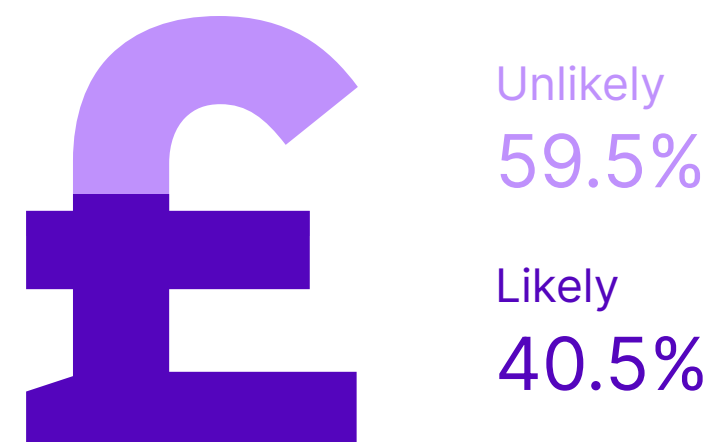
AI



Automated recruitment and onboarding



Communications with remote managers/agents

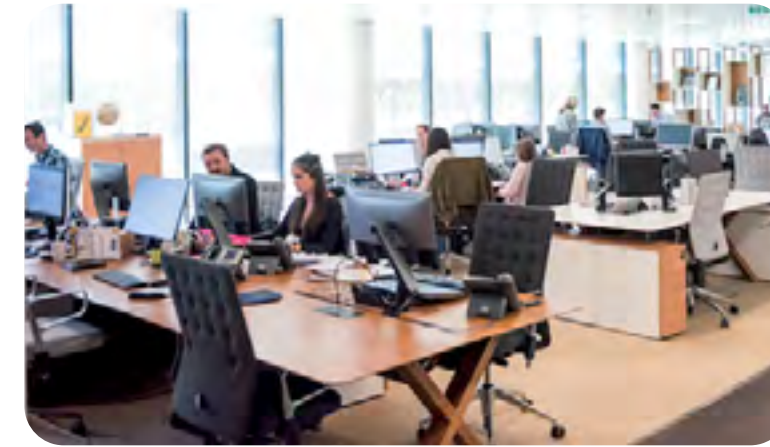


Remote management and monitoring



Q23:
What will your working environment MAINLY look like in 2021?

Participants were then shown five images and asked What Will Your Working Environment Mainly Look Like in 2021? 57% expected their contact centre to mainly look like the image of a Socially Distanced Centre in 2021, a significant 35% selected the Work-from-Home centre, and only 7% the Normal Contact Centre image.



Normal contact centre
18.6%



Socially distanced centre
57.0%



C. Modern office workspace
0%



Work-from-home
35.5%

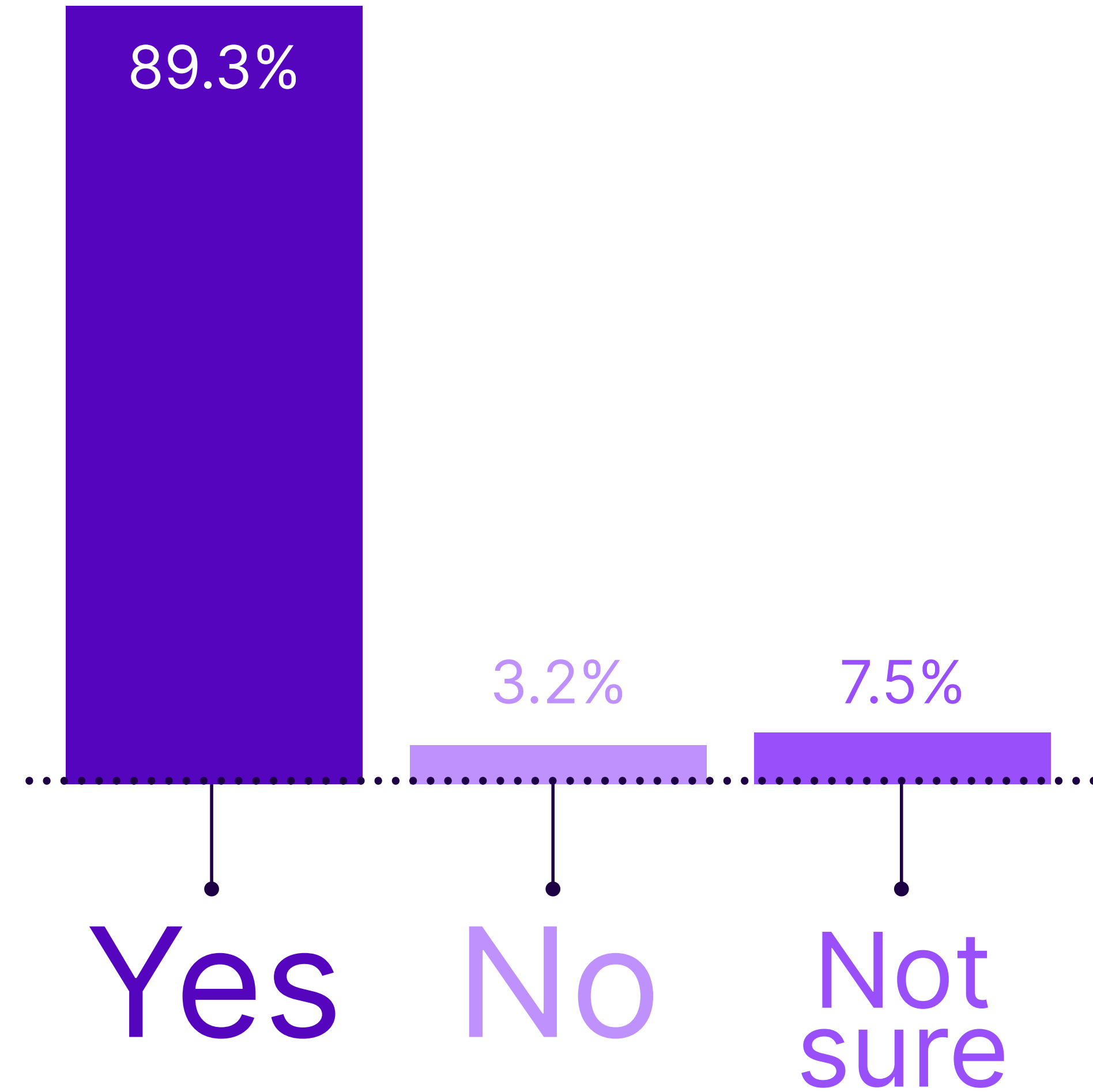


AI or self-service
0%

Q24:

In the light of Covid-19, do you think the contact centre industry has changed forever?

89% of participants believe that the Covid-19 crisis has changed the contact centre industry forever. Only 3% believe that it hasn't. The remaining 7% said they were not sure.



Examples from contact centre leaders of learnings and what they think the future will look like

- Will be interesting to see what policies become acceptable to us as an organisation and to the industry. For example 12 months ago an agent or even other officer working from home and childcaring wouldn't have been acceptable - currently it is normal. Will we accept this in the future - both within my organisation and as an industry norm? Interested to note what factors will motivate future candidates/agents
- This has provided a fantastic opportunity to think differently, and provide a great flexible working opportunity for colleagues. I believe this will provide our industry with a platform to become an industry of choice through homeworking options, driving a greater Customer Experience through highly engaged agents. Covid-19 also demonstrated how limited our business continuity plans were initially, and as a result and in anticipation of a second wave, we are moving onto new technology to enable homeworking across the entire workforce
- I have learnt a lot having to enable a remote contact centre at short notice and whilst I still think fundamentally there are more benefits to have an office environment for training support, peer to peer engagement, and for the health and wellbeing of individuals, there are clear benefits to a blended approach. However, you need the right systems in place to do this and we just don't quite have that and will need to invest in better than what we have if this is the long term - which I feel it needs to be
- All the questions were related to contact centre. The non operations which support the site are also 100% working from home. This potentially will continue into 2021
- A consistent and reliable service has been one of our biggest issues with the technology
- More likely to influence training/HR decisions regarding virtual interviewing, previously frowned upon so held back CC forward thinking

- Important to recognise that we remain in a state of crisis, and that no-one is clear on what the future holds because we can't predict how the virus will behave from hereon. This means that businesses currently remain reactive, and that making decisions about future strategy is something we should be cautious about
- I think the impacts and changes are sector and industry dependant
- As we had already trialled WFH last year and most staff were doing this on a part time basis (40% of working week was WFH) the transition for us was quite easy and simple to implement
- This has provided the industry with an opportunity to be innovative and agile trying things we would never have considered previously possible

- I think that there will be businesses where interactions are quite transactional where directors and business leaders may now be prepared to consider work from home options after this forced proof of concept. Certainly in my business I expected to see some drop in productivity and efficiency but it's remained largely stable. My centre relies on lots of face to face interaction and knowledge sharing so I am keen to return to the office. But thinking back to other businesses I have operated in, I would be keen to explore home-working more widely if there was no negative quality/productivity/well-being impact



III. Profiles

:talkdesk®

Talkdesk® is the cloud contact centre for the customer-obsessed. Combining enterprise performance with consumer simplicity, Talkdesk easily adapts to the evolving needs of support and sales teams and their end-customers, resulting in higher customer satisfaction, productivity and cost savings. Over 1,800 innovative companies around the world, including IBM, Acxiom, 2U, Trivago and Peloton, rely on Talkdesk to make customer experience their competitive advantage.

A “leader” in Gartner’s Contact Center as a Service Magic Quadrant, Talkdesk offers ongoing innovation, superior call quality and instant integration to the most popular business applications.

Get started today:

www.talkdesk.com/get-started



ContactBabel is the contact centre industry expert. If you have a question about how the industry works, or where it’s heading, the chances are we have the answer. The coverage provided by our massive and ongoing primary research projects is matched by our experience analysing the contact centre industry. We understand how technology, people and process best fit together, and how they will work collectively in the future.

We help the biggest and most successful vendors develop their contact centre strategies and talk to the right prospects. We have shown the UK government how the global contact centre industry will develop and change. We help contact centres compare themselves to their closest competitors so they can understand what they are doing well and what needs to improve.

If you have a question about your company’s place in the contact centre industry, perhaps we can help you.

Telephone +44 (0)191 271 5269

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Established in 2008, the SWCCF covers one of the largest regions in the UK, which includes Bristol, Bath, Swindon, Cheltenham and Plymouth. The Forum delivers extensive support to the region's 250 employers who collectively employ circa 52,000 people in both the Public and Private sector.

It represents clients in the highly professional and regulated areas of financial and legal services, ICT, retail, utilities and creative sectors, and boasts some of the biggest companies in the UK.

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Where it all started...

October 2003, Call North West was launched with backing from the North West Regional Development Agency and the University of Central Lancashire. The aim of the project, to support the call and contact centre industry which spans across many sectors in the North West.

15 years later...

Call North West supports the 700 plus contact centres in the region through a diverse 12-month calendar of specialist events including the Annual Employee and Team Engagement Challenge, Quarterly Forums, Specialist Training, Contact Centre Conventions, Bi-monthly User Groups, culminating in the Annual Call North West Awards Ceremony, the showcase event of the year!

Call North West offers a huge support network for all contact centre professionals in the North West.

Our successes and achievements are centred around offering the contact centre industry key initiatives and events, all with the objective of sharing best practice, giving members insight and expertise to enable them enhance their businesses and position in the industry. Call North West develops close partnerships with members and supporting a vibrant membership community in the region.

Call North West is an excellent networking organisation, whatever the size of your contact centre business there is opportunity to be a part of a success contact centreforum, where businesses build a dynamic network and receive support for all areas of their contact centre business.

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