

CX MARKET LEADERS IN TELECOMS: EXPERT INSIGHTS EBOOK

How telecoms companies are utilizing CX to drive client retention and drive down customer churn rates

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As millions around the world adapt to working from home, and with billions relying on telecoms' technology for respite during and following periods of quarantine and social distancing, it is now, more than ever, mission-critical for telecoms providers to provide high-quality, reliable customer service experiences.

Traditionally, telecom's focus on customer acquisition over retention has led to poor customer experiences and high customer churn levels, as millions of customers switch wireless providers each year, according to the [Database Marketing Institute](#). The Covid-19 pandemic has forced CX professionals within telecoms to reevaluate their priorities and sharpen delivery.

As a handful of operators begin to make progress on prioritizing customer loyalty, this report will explore how four CX practitioners are overcoming hurdles to drive customer loyalty and retention at their telecoms brands.

Following on from the key market trends highlighted by telecoms respondents in the [2020 Global State of CX](#) research, this eBook will dive deeper into the telecoms market and provide readers with real-life examples of how three telecoms firms – Sunrise Communications, BT and Vodafone – have been working to build market-leading customer experiences for their users, strengthen customer loyalty and embolden retention levels.

Customer experience in telecoms:

Market trends – [Pg 3](#)

Case study:

BT's key culture lessons for award-winning CX – [Pg 5](#)

Interview:

CSG: Build telecom customer loyalty in 2020 and beyond – [Pg 6](#)

Case study:

Sunrise Communications: Choose your CX squad wisely and use analytics to steer the direction of CX projects – [Pg 8](#)

Case study:

Vodafone: Digitally transform to fit the preferences of your users – [Pg 10](#)

Final remarks – [Pg 11](#)

Customer experience in telecoms: Market trends

3

Here we look at the CX trends and challenges revealed by the research group of telecoms practitioners in the [2020 Global State of Customer Experience](#) research.



Nine experts within telecoms

1 C-level ... 1 SVP/VP ... 3 Director ... 1 Head ... 2 Manager



All of the group act as part of decision-making teams for CX investments at their brands.



Top five CX trends

- 1 Artificial intelligence and chatbots
- 2 Data and analytics
- 3 Customer loyalty and retention
- 4 Digital transformation
- 5 Digital customer experience



Top five CX challenges

- 1 Building a customer-first culture
- 2 Linking CX initiatives to ROI
- 3 Competing priorities
- 4 Ensuring channel consistency (omnichannel)
- 5 Gaining senior management buy-in





Rising trends in telecoms CX

CX Network's 2020 research group of CX telecoms practitioners indicated that AI and chatbots are their top CX priority, along with data and analytics, digital customer experience and customer loyalty and retention, which remains consistent with last year's findings.

By utilizing AI, brands are finding that they can handle larger amounts of customers and have the capacity to deliver a more personalized experience.

"Customers want to be treated like humans, but that's difficult when they are one of the thousands or millions in your customer base," as highlighted in a blogpost on Freshdesk. Chatbots can be preferred by customers due to their 24/7 availability and competency to resolve customer queries instantly. Also, due to the large amount of information generated from the data collected from customers, chatbots and AI machines can make predictive actions based on patterns in customer behavior. This data provides rich business intelligence to target market groups, improve digital customer experiences and optimize proposition development.



CX market leaders in telecoms: Expert insights eBook

Artificial intelligence and personalization at scale



"AI refers to cognitive systems that can learn and infer intelligently. Stemming from this, AI can administer a personalized human-like touches to customer experiences at scale.

"Recent advances in computing power allow AI systems to handle large volumes of customer data and arrive at meaningful inferences. This enables brands to tailor messaging and services to customer contexts and preferences.

"The end result? Entire customer bases can feel a natural touch in their experiences customized to them as individuals, leading to an effective increase in loyalty."

Gautam Borah,
VODAFONE IDEA LTD.'S INDIA'S
VICE-PRESIDENT OF CUSTOMER OPERATIONS

FACT

100% of the telecoms research group believe that customer expectations are rising

Source: CX Network



Challenges flagged by telecoms respondents

Telecoms companies face many challenges, but some of these challenges are repeatedly appearing in research polls such as building a customer-first culture, linking CX initiatives to ROI and gaining senior management buy-in. When combined with increasing customer expectations, and impatient and fickle customers who are more willing to switch brands, succeeding in CX climate can feel like an impossible feat.

Some in the market are beginning to make progress, however. In this report, we explore the actions taken by four CX practitioners to overcome hurdles to driving customer loyalty and retention at their telecoms brands.

FACT

Customers are willing to pay up to 16% more for better CX

Source: PWC





BT's customer-centric culture lessons for award-winning CX

Shanna Pedersen, CX Network Advisory Board Member and head of customer experience for the corporate division at UK telecom giant BT, shares some of the key lessons CX award-winner, achieving Gold in the Best Customer Centric Culture category in the 2018 UK Customer Experience Awards, BT has learned on its journey to build a customer-first culture.

Be clear on the task

To change an organization at scale, the directive needs to be driven from the very top and reinforced through each management level via role modelling, repeat messaging, measurements and reward. There needs to be a clear framework in place, which enables decision-making at all levels of the business. This mission must be reinforced at all angles. Pedersen notes: "Everyone at BT now knows that if the idea doesn't improve CX, it isn't the right idea."

Invest in the change

"The organization itself needs to change and make investments into better systems and processes," says Pedersen. "Your colleagues and your customers need to see that the organization is not merely 'talking the talk', but willing to invest to make it happen." Communication

is key, she adds, noting that CX professionals should always be clear how an investment or change will deliver to your top priorities.

"BT's Beyond Limits brand relaunch, at an unprecedented rate and scale - the campaign touched 85 per cent of the country twice in the first week, has publicly signalled that BT is changing," says Pedersen.

If you want to be brilliant for your customers, be brilliant for your people

BT CEO Philip Jensen is focused on improving the lives of BT's customers, people and country. Plans are in place to have BT's people co-located in new state-of-the-art tech hubs improving collaboration, innovation and speed of delivery. Also, everyone who works for BT is now a shareholder. Pedersen says: "These initiatives show that BT people know they are invested in and are supported to be their best. If you want your customers to know you care about them, show this first to your people."

Shout out about the good stuff

Everyone wants to work for an organization they can be proud of and which has a strong purpose. After years of being quite shy about its role in the UK economy, with the new 'Beyond Limits' brand relaunch, BT has started shouting about its role as a UK institution. For example, BT answers 30 million

emergency services calls per year, has plans in place to provide digital skills for 10 million people and businesses, and prevents 4,000 cyber-attacks daily. Pedersen maintains: "If your organization is running initiatives that benefit society, don't be afraid to make sure everyone knows about it."

LESSON



"BT is under no illusion that creating a customer-first culture is easy and the tips above are not an exhaustive list of everything happening to achieve this at BT," Pedersen acknowledges.

"If you make CX your priority and invest in bringing it to life, put your people at the heart of your plans and give them reasons to be proud of your purpose, then your brand will have the foundations in place to build a customer-centric culture. Staff will soon start to bring your vision for your customers to life in their day-to-day work."

Pedersen adds: "When this happens, like at BT, your customers will begin to tell you they can feel the change. That is when you know you are on to a good thing."



Build telecom customer loyalty in 2020 and beyond



Dave Bukovinsky, executive director of product management at CSG, explores the realities of customer experiences in 2020 and the new landscapes opened up by the pandemic.

How customer experiences have been disrupted by 2020 so far

To adhere to government mandates to limit Covid-19's spread, global brands closed stores and moved entire contact centers to remote models and workflows. These moves reshaped customer experiences.

Bukovinsky says the closure of network stores exposed new fracture points in customer journeys. "If customers want to switch from their current carrier to T-Mobile, for example, there are new barriers in place that weren't there before." Customers have to complete their application online and organize shipping their old handset if they want to exchange it for credit, which could take up to a week to process. "It's a very different experience from being able to walk into a branch in

the morning with your old phone and walking out a few minutes later with your new device in hand."

Social distancing needs have pushed customers to rely on digital channels more than ever. Bukovinsky highlights the surge in popularity around digital self-help tools this year. "One leading North American cable and broadband provider witnessed over a 600 per cent increase from January to September in the use of its AI-powered self-help tool. All because, due to Covid-19, customers sometimes couldn't reach contact centers as they were overwhelmed with calls, and in some cases the multi-billion dollar telecoms company had to stop sending technicians to customer homes."

He adds: "The interesting thing is, this change in behavior may be permanent. Some customers may never go back to immediately calling contact centers when they need help. Self-service and digital channels may now become their first choice to solve issues themselves."

Enter the new customer expectation: Safety

The baseline expectations for convenient, fast and intuitive customer experiences indeed remain, and have been intensified in many cases due to the widespread stress caused by the pandemic. However, Bukovinsky urges that brands need to acknowledge the new

priority for customer experiences: safety. "There is a lot of risk avoidance now. Before consumers undertake any experience they have to conduct some form of due diligence. Am I going to eat at this restaurant even though the establishment is not adhering to social distancing? Or am I going to enter this shop even though there are over 50 people in there?" To gain customer trust, telecom brands must re-examine their customer journeys to identify where shifts need to be made to deliver robust contactless options or allay other safety concerns.

"It is vital that CX practitioners implement a predictive CX program."

Dave Bukovinsky,

EXECUTIVE DIRECTOR OF PRODUCT MANAGEMENT AT CSG

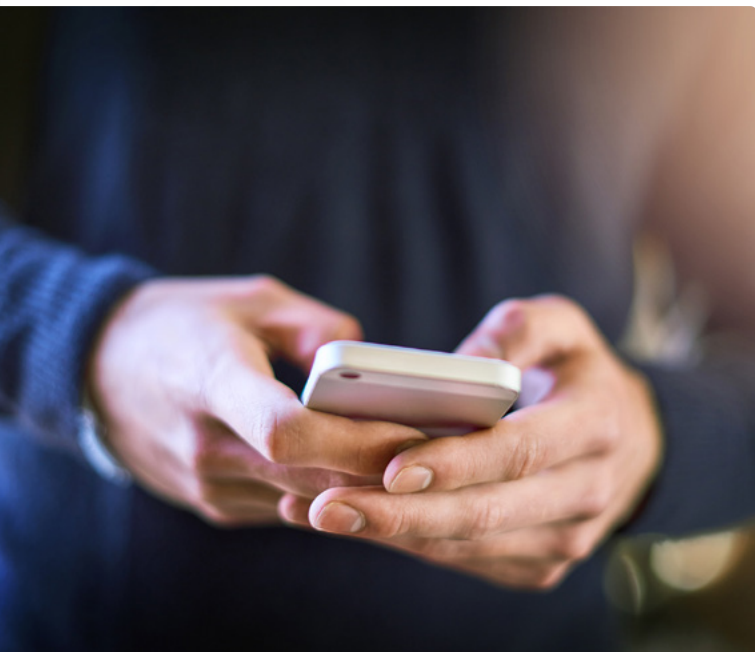
Going one step further – Predictive experiences

Although proactive customer experiences can intimidate some CX practitioners, telecoms brands must go beyond delivering reactive customer experiences. Bukovinsky notes: "It is vital that practitioners implement a



» Build telecom customer loyalty in 2020 and beyond

predictive CX program. When we talk to some of our larger customers they seem intimidated by it because it is such an endless space. They ask us: where do we start?"



CSG has discovered discrete entry points for integrating predictive CX into journeys. These subtle inclusions bring value to customers and also provide a stepping stone as brands build a practice around more proactive customer care.

One CSG customer has demonstrated a great proactive CX use case. Similar to other telecoms operators, the

company has incentives and promotions to acquire new customers. Historically a customer wouldn't know their promotion was ending until they were surprised by a bill that was higher than previous installments. At the end of last year the company implemented a service so when a customer is within a month of their promotion expiration, telecom operator proactively notifies them and provides links to other promotions they are eligible for so the customer can continue to accumulate savings.

"Think about the experience this creates," Bukovinsky highlights. "Yes, it lowers the telecom's contact center costs by reducing bill-related calls. But as a consumer it evokes a sentiment that the company is taking care of me and providing good value. That is a great model can apply to any telecoms provider— it is an incremental change that can encourage customers to be a little more loyal to your service."

CSG is also working with a major telecoms provider in Europe to implement proactive troubleshooting journey maps utilizing CSG's journey orchestration platform. The provider seeks to handle all customer care via self-help and digital channels.

The telecoms provider proactively monitors customer experiences, and if a journey appears to be deviating from the ideal road-map, then intervention journeys are triggered to troubleshoot. These proactive micro journeys manifest in many forms, with new ones being continually added:



BANDWIDTH ISSUES

If a customer's bandwidth has started to degrade, the provider proactively sends the customer a text inviting them to reboot their modem, or notifying them of an outage in their area and the expected resolution time.



EXCEEDING PACKAGE USAGE

If, despite receiving notifications of reaching their usage cap, a customer consistently exceeds their usage limits, the provider often contacts the customer to discuss new packages that would better suit their behaviors so they avoid hitting their package caps and encountering overages or service slowdowns.



ONBOARDING

The provider walks customers through every step of acquiring a mobile device and will send delivery notifications. The telecoms firm will also monitor when the device or service has been activated. If a certain period of time passes without the customer activating their device, the telecoms brand reaches out through digital channels to see if they have a problem and whether assistance is needed.

"These are very subtle, achievable examples of proactive CX that help customers stay informed while deflecting their need call the provider. This saves the telecoms provider money, but it also saves the customer time."

Sunrise

Choose your CX squad wisely and use analytics to steer the direction of CX projects

After data analysis highlighted a CX problem that required fixing, Regina Urbani, director of digital business at Swiss telecoms provider Sunrise Communications, channeled her determination into building the right CX project team to bring convenience back into the customer journey.

Use data analytics to identify points of friction

Rather than having customers visit stores for simple questions, Sunrise Communications wanted to empower customers to solve simple tasks such as bill paying, tariff updates or service changes via its app My Sunrise.

However, data analysis revealed that the app's arduous login process, riddled with information and password requests, was stifling user adoption. As a result, Sunrise committed to creating a seamless login experience for the app.

To build your vision, listen to the customer

Team members initially charged ahead with building models for the new login process that the current tech

stack could provide. Urbani corrected the team's starting point to be with validating the existing log in process with customers.

"Solid data analytics is the heartbeat of CX. Use analytics to understand customer preferences so you can serve users in a better, more personal way."

Regina Urbani,
DIRECTOR OF DIGITAL BUSINESS AT
SUNRISE COMMUNICATIONS

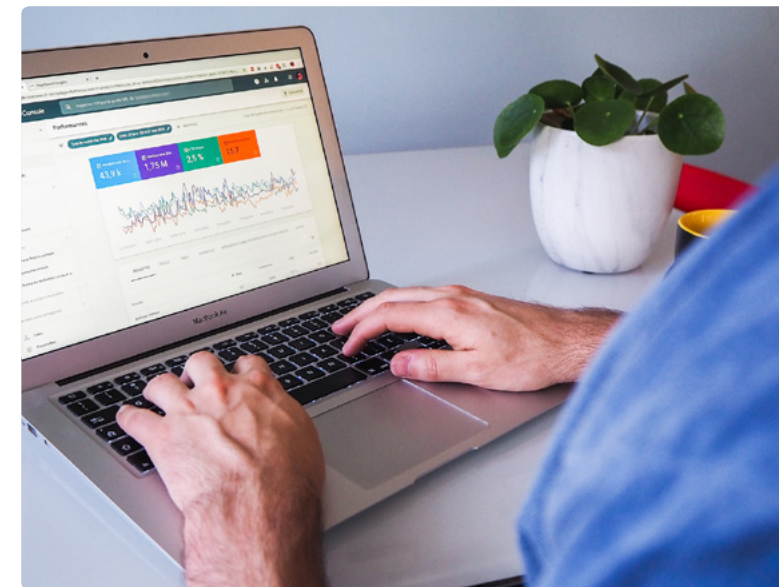
Rather than being guided by the limitations of current tech stack systems at Sunrise, teams were encouraged to be adventurous and draw on customer feedback to sketch out how the log in experience should be an ideal world.

New workflows

Then, Urbani and the team started to troubleshoot how to overcome the roadblocks preventing the

ideal log-in process. She explains: "Instead of tech limitations driving the end results, the desired end result was driving the limitations."

This ambitious mindset opened up a completely new way of working, testing and learning iteratively so the desired result could be achieved. The realities of this framework, however, initially created a state Urbani describes as 'pure chaos' with team members constantly asking the board and senior leaders for approval or reassurance with decisions.



» Case Study: Sunrise Communications: Choose your CX squad wisely and use analytics to steer the direction of CX projects



With the team created and the vision set, Urbani sat down with the project group to reiterate that although she would provide support the team members themselves needed to take ownership to make decisions. Demos and prototypes would be tested by senior leaders and stakeholders to expose if revisions were needed.

However, Urbani reflects: "I can't remember one demo version in the whole project that needed huge fundamental changes." For her, this emphasized the importance of wise team member selection for transformative CX programs. When a project is executed by a well-selected team that is aligned in its mission, the initiative has strong chances for success, Urbani explains.

Taking ownership for the customer experience

It was vital that team members felt personally accountable for the quality of the log-in experience delivered to customers. This was a culture shock for some team members who didn't see their job as a 'customer facing role'. For example, instead of developing HTML code with a 'launch and forget' mindset, developers now had the ongoing responsibility to rectify issues with the app's login process if customers flagged they were unsatisfied.

Urbani achieved this awareness through strategic and consistent communication to emphasize the CX project's

importance and, more importantly, the value each team member contributed. "It's all in the framing," she notes. "For instance, I highlighted that we needed the developers' perspectives to enlighten us of the great user experiences available to us." Also, rather than being passive and waiting for invitations for ideas, developers needed to take initiative where possible so the project was streamlined in reaching its full potential.

As a result of wise team member selection from the outset and the team's evolving dedication to the quality of the experience felt by the end user the 'ideal-world' version of the log-in process for the app was achieved. The log-in success rate now stands at 99 per cent and the app's rating has increased to 4.6 stars.

LESSON

As indicated by our research group, data and analytics should be a primary focus for CX practitioners. Use analytics to steer the direction of CX projects and invest in sound analytics software to extract meaningful data insights to action. Then the right team can be selected and empowered to bring CX visions to life.





Vodafone collaborates with Facebook to digitally transform in alignment with users

Sacha Nikita Kraft, client partner at Facebook, reflects on a pioneering digital transformation project at Vodafone which was perfectly aligned to a target audience.

In 2018, in collaboration with Facebook, Vodafone launched one of the first asynchronous messaging customer-care channels. The aim was to provide full automation and efficiencies from call centers. Speaking of his experience on the project, Nikita Kraft said his team were “very proud to drive digital service innovations together with the telecoms firm to deliver efficiency gains”.

Align with the voice of the customer

The traditional telecoms approach has been to connect with customers through tried and tested available channels. The Facebook–Vodafone partnership was unique in that it built a communication strategy around the customer and their preferred platform.

Vodafone recognized that, for its demographic, WhatsApp was the most popular communication tool. Rather than force the customer to conform to the business, the business conformed to the customer.

Alignment breeds strong adoption

Although the project presented technical difficulties, especially with only a three-week implementation, Vodafone was one the first brands to deploy WhatsApp as a customer-care channel.

From Kraft’s perspective, he found the adoption of the service to be natural for customers. People already using WhatsApp were now able to communicate directly with Vodafone, whether that was to make purchases or ask for assistance.

Encouraging fun and engagement drives loyalty

By meeting the customers where they were, it enabled the brand to get closer to their customers.

“With messaging solutions you can increase preferability, upsell and have the right conversations at the right time, in the right medium,” Kraft notes. “By offering your customers the opportunity to engage with the brand, the customers have fun and this, in turn, drives loyalty.

“It’s important to not lose sight of what the client wants. Once you start a project, you must always keep the

client front of mind. If you’re dedicated and committed to what’s driving the customer’s behavior, then you’re heading in the right direction.”

LESSON



With CX Network’s telecoms research group labelling digital customer experience as a primary trend, we urge telecoms to keep their customers’ needs and habits front-of-mind, at all times. This knowledge should be what drives decision-making rather than an infatuation with a shiny new tool to impose upon customers.

Speaking exclusively to CX Network, Vodafone Idea Ltd.’s India’s vice-president of customer operations advises telecoms decision-makers to ensure they do not fit their businesses into a technology – “it has to be the other way around”.

“Don’t fit your business into the technology,” Gautam Borah remarks. “Instead, define the metrics, create an operating model and make sure the employees responsible possess the right skill set and a digital mind set.”

It is no secret that telecoms companies have struggled to rehabilitate the industry's tarnished reputation for customer care. The focus on customer acquisition over retention has been demonstrated in the sloppy customer experiences traditionally delivered by telecoms operators.

As evidenced by the case studies explored, many telecoms providers are now prioritizing customer retention and recognize the power of loyalty. The telecoms providers interviewed illustrated that the trends enabling CX excellence are the driving force behind achieving their goals.

Utilizing buy-in from senior leadership, data insights, fixing customer pain points and digitally transforming in alignment with user preferences are all tools to facilitate exemplary CX and in turn customer retention. This approach will be vital in the midst of the global health epidemic where stable telecoms services are crucial for an individual's wellbeing and the survival of corporations.

High quality and reliable customer experiences will be vital in the midst of 2020's global health epidemic where stable telecoms services are crucial to safeguarding an individual's wellbeing and the survival of corporations.

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Dave Bukovinski

Executive Director of Product Management at CSG



Joana van den Brink-Quintanilha

VP, Principal Analyst at Forrester

Fifty-nine percent of companies agree customers are demanding more personalization. But there is a gap between the companies with the resources to create cohesive customer journeys — and those who can actually do it.

Hear from Forrester and CSG discuss the findings of a recent study on how end-to-end CX solutions break down silos and optimize data management. You will also learn about best practices in applying end-to-end CX solutions.

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- > How end-to-end CX solutions can address customer expectations
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