



Auscontact Association
Driving the industry

March 2017

Auscontact Association

Australia the cost of excellence
*Can BPOs survive the customer
excellence boom*

Points to Discuss

- State of the market
- Numbers behind the market
 - Size, growth & dollars
- History of managing costs
 - Outsourcing & multi-skill
- Current drivers
 - CX over cost over enterprise
 - Example of CX in enterprise
- Future drivers
 - Expectations on business
 - Expectations on outsource
- Summary

The Australian Marketplace

CONTACT CENTRE PROFILE

2,076
ORGANISATIONS
OPERATING
213,120
SEATS

INDUSTRY
SIZE
REMAINS
CONSISTENT
SINCE



8% GROWTH
IN 2011

OUTSOURCING



CAPTIVE CENTRES
DOWN FROM **83%**
TO 78%
IN 4 YEARS

43,090
OUTSOURCED
SEATS
ONSHORE 

Numbers behind the market



23% OF ORGANISATIONS

☺ TO OUTSOURCE

55% OF THOSE

HAVE ONSHORE



PREFERENCE

SO, WHY?



Where is it going?



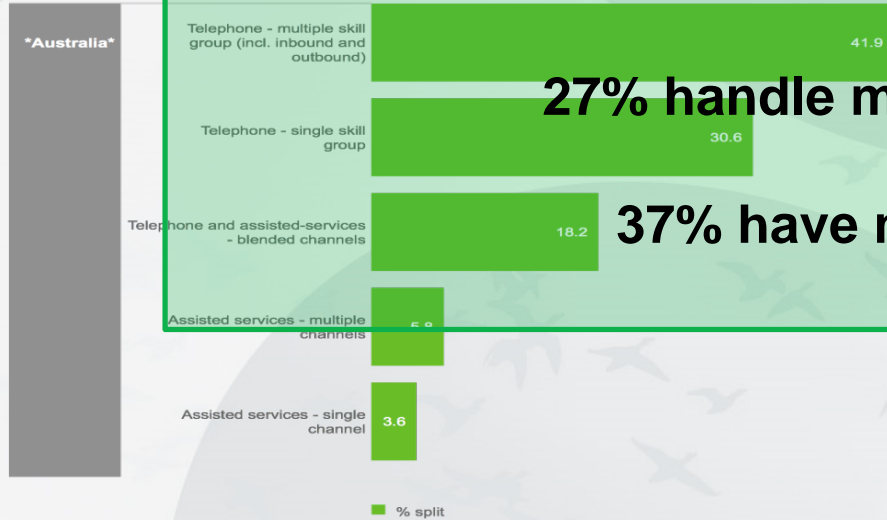
- CX is King – it IS the primary driver
 - ‘Partial’ conversations – transactional vs. complex
 - Back office perceived less risk to outsource
 - Especially with ‘Centres of Excellence’
- Focus has moved to cost containment vs. cost reduction
- Key focus on enterprise vs. functional silos
- Increase in multiple channels vs. single channel

Where is it going?

Australian market is growing Multi skill ahead of rest

1.5 What percentage of your agents are dedicated to a single versus multiple skills / channels?

Year filtered on '2016', AND Agent's location is 'Australia'

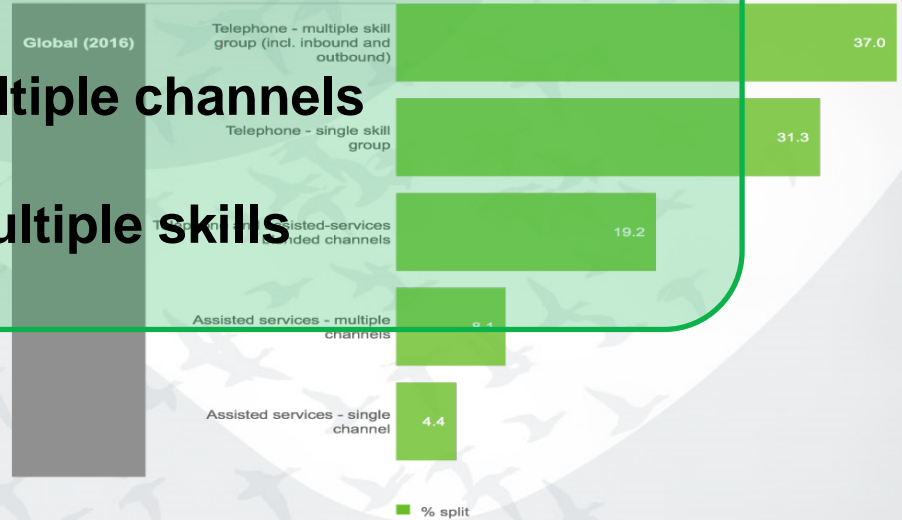


Dimension Data's 2016 Global Contact Centre Benchmarking Report, (c) Dimension Data 2012-2016.

Global Market is moving faster in non Multi Skill Group

1.5 What percentage of your agents are dedicated to a single versus multiple skills / channels?

Year filtered on '2016', AND Agent's location is 'Global'



Dimension Data's 2016 Global Contact Centre Benchmarking Report, (c) Dimension Data 2012-2016.

68% of agents continue to be dedicated to Telephone

27% handle multiple channels

37% have multiple skills

Australian Customer Expectations

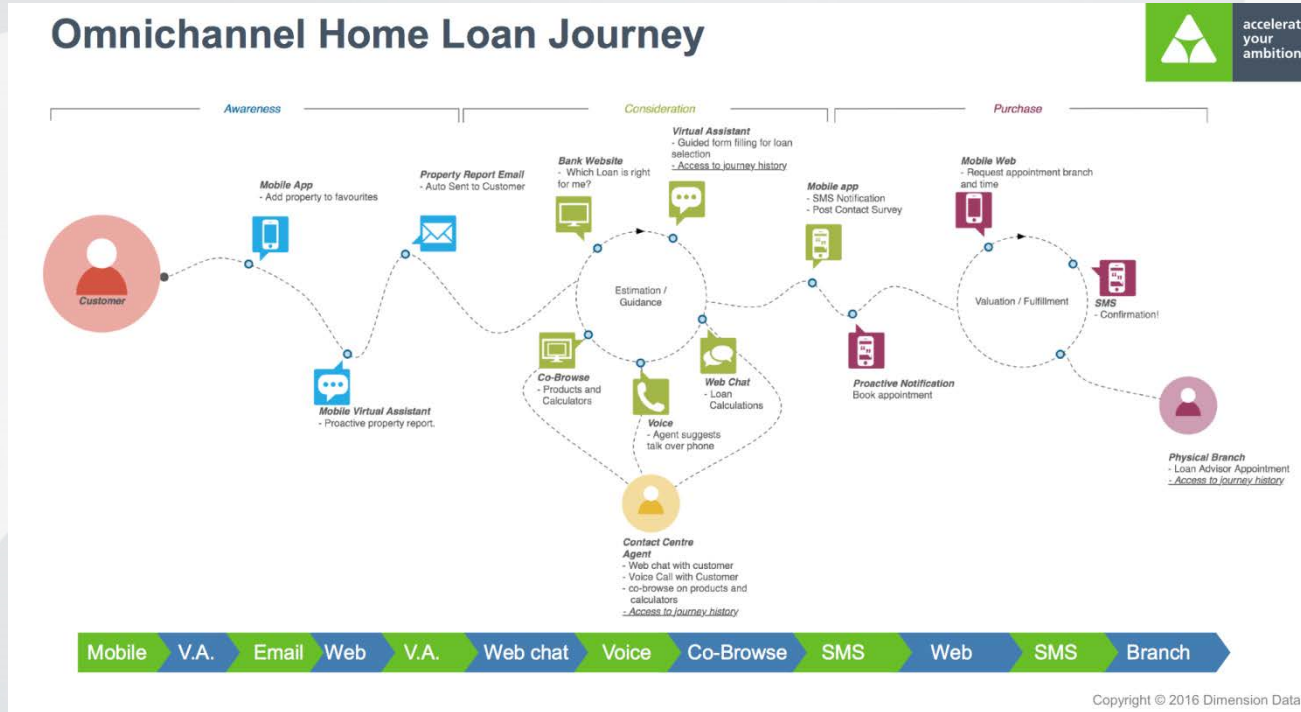
dimension
data 

DD Bank: Digital Omnichannel
Customer Journey

Australian Customer Expectations



What should it look like



Drivers

- Cost containment vs. cost reduction
- Perceived that 'Customer Excellence' will drive onshoring
- Brand damage – operating enterprise wide
- Customers engaging in up to 9 channels for single interaction (omni/multi channel)
- Servicing more than 4 generations adds complexity
- Busy lives requiring mobility/flexibility – customers are more tech savvy
- Need for deeper customer understanding to support complexity of the interaction
- Banks no longer have contact centres but rather 'bankers' or 'associates'

What are businesses looking for?

- Revolution or evolution
- Stronger requirement for more complex skills
- Customer expectation drives everything
- Service across multiple channels
- Broader conversations in every channel vs. heavy scripting
- Agility to fit changing requirements
- Anticipating the next move

Partners that add value



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Questions??

Thank You

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