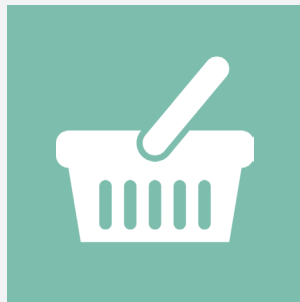


# 2015



## Eptica Multichannel Customer Experience Study



# / CONTENTS

1/ EXECUTIVE SUMMARY .....	3
2/ INTRODUCTION.....	5
3/ KEY FINDINGS .....	8
4/ CUSTOMER SERVICE VIA THE WEB .....	12
5/ EMAIL AND CUSTOMER SERVICE .....	14
6/ SOCIAL CUSTOMER SERVICE.....	17
7/ CHAT .....	20
8/ CONSISTENCY.....	22
9/ SECTOR COMPARISON .....	24
- Insurance .....	24
- Travel .....	25
- Entertainment .....	26
- Food and wine .....	27
- Electronics manufacturers .....	28
- Electronics retailers .....	29
- Utilities .....	30
- Fashion .....	31
- Telecoms.....	32
- Banking.....	33
10/ CONCLUSION AND TAKEAWAYS .....	34
APPENDIX 1: METHODOLOGY .....	38
APPENDIX 2: SAMPLE QUESTIONS .....	40

# 1/ EXECUTIVE SUMMARY

**Whatever sector an organisation operates in, customers are becoming more demanding and competition is increasing.** Consequently delivering the best customer experience is vital if companies are going to win, retain and grow their revenues.

At the same time, companies need to deal with a rapidly increasing volume of interactions with customers across a growing range of channels, from email and the web to chat and social media. They need to be able to respond quickly and consistently to consumers, on their channel of choice, if they are to engage with them and build long-term, profitable relationships.

Today's consumers will not tolerate poor or slow service and will share their experiences, good or bad, with the world via social media. Expectations are continually rising, and companies that sit on their laurels will be punished as they fall behind. Many UK brands are powering ahead when it comes to the customer experience, yet others are going backwards, unable to deliver the levels of service that consumers demand.

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*Speed is improving, but accuracy remains static across many channels. Consistency is lacking, with few organisations providing joined-up service across multiple channels.*

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Building on research carried out over the last four years these are the headline findings of the 2015 Eptica Multichannel Customer Experience Study. This analysed the responses of 100 leading organisations, split between ten sectors, on the web, email, chat and social media channels. Researchers tried to find answers to ten sector-specific questions on each company's website and asked a single question via each of the email, Twitter and chat channels.



# 1/ EXECUTIVE SUMMARY

**The web remains the best channel for customer service, with companies successfully answering 64% of questions on average, up slightly from last year.** However, the gulf between best and worst is growing – nine companies scored 100%, but four only managed 10% or worse.

**Email performance improved when it came to speed, but worsened for accuracy.** More companies had email available to non-customers than in 2014 and the time taken to answer emails more than halved to 29 hours 27 minutes. However, less than four in ten (39%) questions were successfully answered. Six sectors responded more slowly than in 2014.

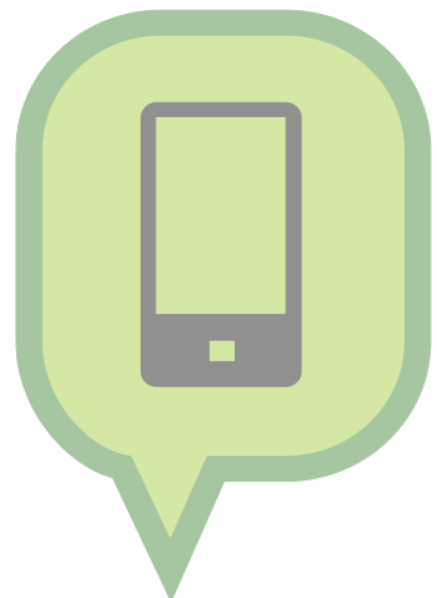
**Customer service on social media has developed significantly over the last twelve months.** Average response times on Twitter dropped by over a third, while accuracy improved to 41%. Again, performance is patchy. 46% of companies failed to respond at all to a tweet sent to their official Twitter handle, while others took over 40 hours to respond.

**Web chat continued to lead the way for both accuracy and speed,** but it is still starved of resources, with just 9% of companies having it working when the research was carried out.

Across many companies **consistency between channels was lacking**, with different answers given between email and Twitter, potentially confusing customers and adding to costs.

To cope with the customer experience challenges they face, companies need to take a step back and think like consumers. It is vital to benchmark performance and adapt best practice, not just from direct competitors, but from other sectors.

*Consequently, this study includes comparisons between key sectors and channels, as well as a best practice guide for C-level executives looking to measure and improve their performance.*



## 2/ INTRODUCTION

In an era of increased competition and growing consumer power, customer experience is the key differentiator across multiple industries. **Delivering a fast and seamless experience builds stronger relationships with consumers, increases loyalty and encourages repeat business.** Forrester Research sees a direct correlation between those companies that offer a superior experience and improved stock performance<sup>1</sup>.

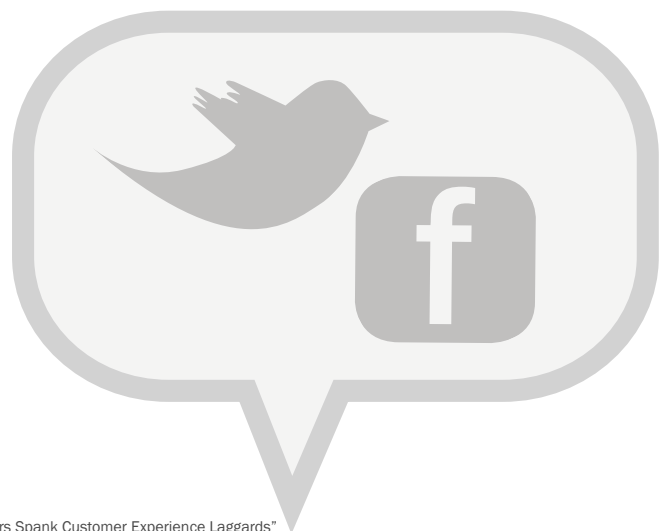
At the same time, this experience has to be delivered through the customer's channel of choice. The last decade has seen a dramatic increase in the number of channels that customers expect, with the rise of the web, social media and chat joining existing channels such as the phone, email, letter and fax. Customers are more demanding however, and expect a fast response that answers their query through whatever channel they use to ask it. Fail to do so and they will vote with their wallets, switching suppliers, while at the same time letting the world know about their poor experience on social media.

How are leading UK companies coping with these challenges? To find out, customer interaction management software vendor Eptica has researched the state of customer service regularly over the past four years. The format aims to replicate real-world customer behaviour by asking the same questions as consumers, across multiple channels and then recording how successful brands are at providing accurate, timely answers across the web, email, chat and social media channels.

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*As in previous years, 100 leading companies from the insurance, travel, entertainment retail, food retail, electronics retail, electronics manufacturers, utilities, fashion retail, telecoms and banking sectors were evaluated. The research covered:*

- 1.** *Ability to find answers to ten basic, sector-specific questions via their websites*
- 2.** *Speed and accuracy of responses via email*
- 3.** *Speed and accuracy of responses via Twitter*
- 4.** *Speed and accuracy of responses via reactive web chat*
- 5.** *Consistency across all of these channels*



1 Source Forrester Research: "When It Comes to Total Returns, Customer Experience Leaders Spank Customer Experience Laggards"

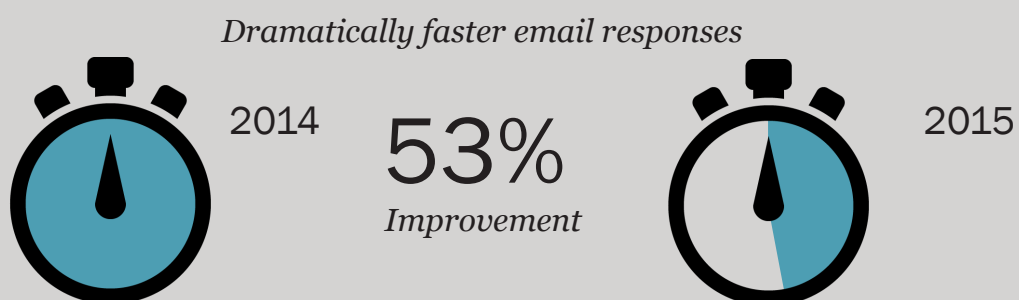
## 2/ INTRODUCTION

The results paint a mixed picture, with significant improvements in some areas, particularly on speed of response via email and Twitter. However the overall percentage of queries successfully answered has remained static, with under half (48%) of questions asked on the web, email and social media channels receiving an accurate response. While many sectors have improved in particular areas, there has been no overall step forward. The UK customer experience is becalmed, neither moving forward nor back:

- If you want to receive an accurate answer from a company visit its website, with 64% of answers to common consumer questions now available online. This improvement from 2014 masks big disparities – five sectors performed worse than last year, although 36 companies improved.
- However the gap between best and worst seems to be growing. In 2014, one company achieved a perfect 100% score on its website, answering every one of the ten questions it was asked. None scored under 20%. This year nine companies scored 100% - but four answered either one or zero questions.



- Another welcome improvement was on the email channel. Over the previous three years the number of brands allowing non-customers to email them has dropped. In 2015 this trend reversed slightly – with 74% of companies having email contact details available, against 71% in 2014.
- Email speed was also dramatically faster, with an average response time of 29 hours 27 minutes. This more than halved from 2014's 61 hours 39 minutes.



## 2/ INTRODUCTION

- While welcome, this increased speed may still not be meeting customer requirements. 41% of consumers expect an email response within 6 hours<sup>2</sup> – a target that just 16% of companies met.
- Email speed also came at the price of accuracy. 39% of companies provided an accurate answer, down from 41% in 2014.
- Demonstrating the pressure on resources, the drop in email accuracy was counterbalanced by improvements in Twitter. 41% of companies successfully responded to tweets, up from 39% in 2014, swapping places with email.

*Twitter swapped places with email for accurate responses*

41%

*of companies provided an accurate answer via Twitter (up from 39% in 2014)*



39%

*of companies provided an accurate answer via email (down from 41% in 2014)*

- Twitter also cemented its position as the fastest channel for receiving a response, with the average time dropping by over a third, from 8 hours 37 in 2014, to 5 hours 27 in 2015.
- Web chat continues to be the most accurate and fastest channel for responses, with 89% of companies answering questions asked through reactive chat. But it is also the most likely to be switched off when resources are unavailable – 26% of companies advertised that they had chat, but only 9% actually had it working when surveyed

<sup>2</sup> Source Forrester Research: "Customer service takes on greater importance in tough times"

## 3/ KEY FINDINGS

The 2015 Optica Multichannel Customer Experience Study demonstrates ten key trends in customer service:

### 1 THE WEB IS THE PRIMARY DIGITAL CHANNEL FOR CUSTOMER SERVICE

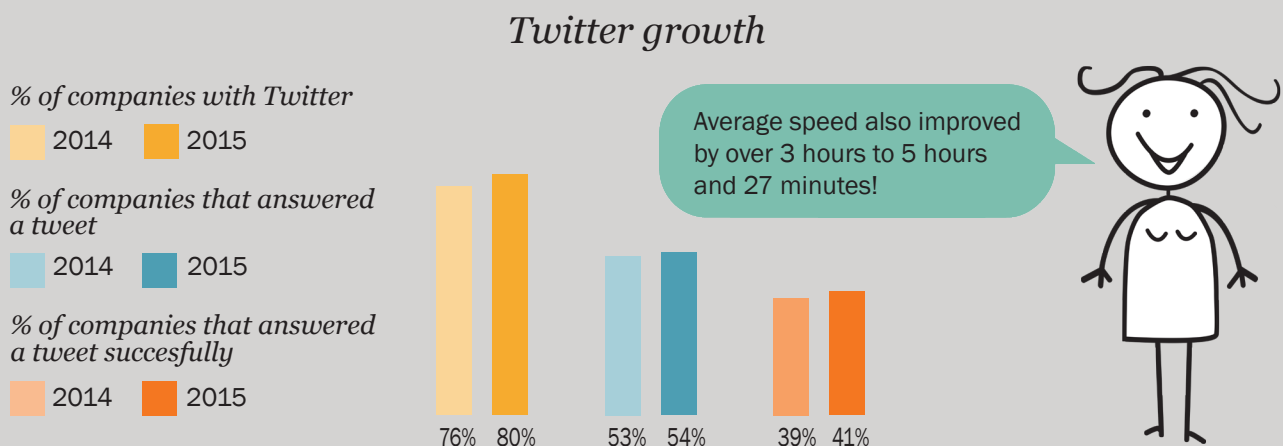
In 2012 companies could only answer just over half (53%) of questions asked online. This has improved to 64% in 2015, making company websites the best place to find answers to common questions. However, improvements have slowed, with just 1% more questions answered compared to 2014. Given that the same questions were asked year-on-year, this shows that overall standards have remained static. Where there was major improvement, the greater use of web self-service systems played a significant role. 90% of banks had deployed web self-service – and they answered an average of 91% of questions successfully. 40% of insurers used web self-service – and they could only provide answers to 4 out of 10 questions on average.

### 2 EMAIL SEES IMPROVEMENTS IN SPEED AND AVAILABILITY

Last year we stated that “email is broken”. In 2015, there were cautious signs of improvement. More brands let non-customers email them, and the average speed of answer halved from 61 hours 39 minutes to 29 hours 27 min. Of the companies that gave an estimated time of response, 94% met their targets, even if many were extremely generous – several promised an answer within 5 days. But while responses were faster, they were less likely to be accurate, with just 39% answering successfully, compared to 41% in 2014.

### 3 TWITTER GROWS IN IMPORTANCE

Last year was the first time we surveyed Twitter customer service and we found it to be fast, yet fragile. The good news for consumers is that the chances of receiving an accurate answer have grown, from 39% to 41%. Average speed also improved, by over three hours, dropping to 5 hours 27 minutes, from over 8.5 in 2014. However, over a quarter (26%) of organisations failed to acknowledge or answer tweets, a higher percentage than on email.





## 3/ KEY FINDINGS

### 4 ARE BRANDS KEEPING PACE WITH CONSUMER REQUIREMENTS?

Customers are becoming increasingly demanding, meaning that company performance cannot remain static. Improvements in speed across email and Twitter are welcome, but need to be judged against continually rising expectations. Six sectors answered tweets more slowly than in 2014, while email speed dropped in six sectors year-on-year.

### 5 COMPANIES ARE FAILING TO BE MULTICHANNEL

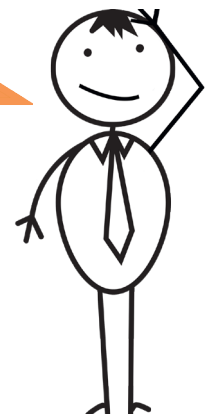
Sectors (and organisations) varied widely in their performance between channels. Banking ranked top for answering questions via the web, yet joint bottom for email. Telecoms scored an average of 20% on email, but 60% on Twitter. Companies seem to be focusing resources on specific channels, with many either not offering every channel or simply not responding at all to questions asked through email or Twitter. This failure to deliver consistent service to all customers hurts the overall experience and reduces consumer channel choice.

SELECTED SECTORS	EMAIL (RANK)	TWITTER (RANK)	WEB (RANK)
BANKING	9th =	5th=	1st
TELECOMS	8th	1st=	6th
ELECTRONICS RETAILERS	1st	1st=	9th=
FASHION RETAILERS	3rd=	3rd=	2nd
TRAVEL	9th =	1st=	3rd

### 6 RESOURCES ARE THINLY STRETCHED

Companies have to cope with a rapidly growing volume of interactions from consumers across a widening number of channels, often with static or shrinking resources. This juggling act is not easy, and in many cases it feels that resources are simply stretched too thinly to cope. 44% of emails and tweets went unanswered entirely, and, despite 26% of companies claiming they had web chat, just 9% had it operational when they were actually surveyed. Given the importance of the customer experience, and its direct impact on revenues, resources need to increase if companies are going to thrive.

26% of companies offered chat but it only 9% had it operational...



## 3/ KEY FINDINGS

### 7 THE GROWTH OF UNICHANNEL

Amazingly, despite the growth in customer contact channels, 15% of companies didn't provide an answer on either email or Twitter, while just 44% responded successfully on one of these channels. 6% didn't score above two on their websites, essentially blocking off this channel to consumers. This move to a 'unichannel' world has serious consequences for business.

*Frustrated consumers will either move to competitors that offer more channels – or will switch to more expensive channels such as the phone or face-to-face, pushing up costs for organisations.*

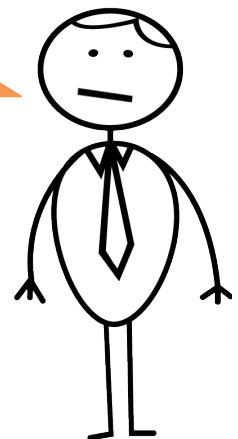
### 8 WIDENING CHASM BETWEEN BEST AND WORST

Last year we talked about the growing gulf in performance between the top and bottom companies. In 2015 this chasm has become even greater, with the best getting better and the worst dropping further behind. 35 companies performed worse when it came to web customer service since 2014, with 36 improving. Entertainment retailers were, on average, 10 hours slower at answering emails than last year.

However, this is not just a gap between different sectors, but individual companies within them. One utility answered 100% of questions on its website – another just 10%. One insurer responded successfully to a tweet in 9 minutes, while a second answered in 43 hours.

*In an era of increased choice and customer expectations, consumers are likely to move to those organisations that deliver the best consumer experience, hitting the revenues of those at the bottom.*

15% of companies didn't provide an answer on either email or Twitter...



## 3/ KEY FINDINGS

### 9 HALF OF QUESTIONS REMAIN UNANSWERED

Individual improvements in particular channels and sectors mask an uncomfortable truth. Overall, across 100 of the UK's leading companies less than half (48%) of all questions are successfully answered on email, web and twitter. Consumers get a response in 59% of cases across these channels – but 11% either don't answer the question or require a follow-up interaction, wasting both customer time and organisational resources.

These figures have remained static over the past two years – essentially there has been no overall improvement in the customer experience for UK consumers across all the organisations they typically deal with on a daily basis.

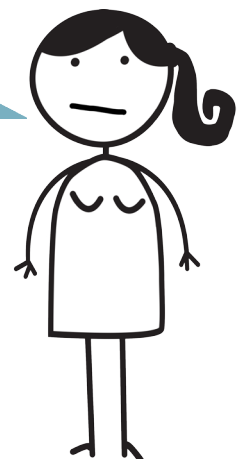
### 10 CONSISTENCY IS LACKING

When it comes to customer service, companies seem to be making it difficult for themselves with an unintegrated, channel-by-channel approach. When asked the same question on email, Twitter and web chat, just 11% of companies provided consistent answers across two or more channels. Others delivered wildly varying responses, showing that they do not have a joined-up approach that shares resources and knowledge across multiple channels.

*Only two companies offered email, Twitter and web chat – and interestingly both of these gave the same answers on all three channels, pointing to a strategic, multichannel investment that is bearing fruit.*

In contrast others failed to integrate the experience - one utility company pushed chat in one corner of its web site, while saying that it was closed in another area of the same page.

Just 11% of companies provided consistent answers across two or more channels...



## 4/ CUSTOMER SERVICE VIA THE WEB

The internet has radically changed how consumers research and buy products and services and interact with brands. 2014 was a milestone year for UK ecommerce, with sales breaking the £1 billion barrier for the first time, ending at £1.04 billion<sup>3</sup>. This is the equivalent of £1 in every £4 being spent online, with the remaining 75% heavily influenced by online research and interactions. Whether it is in banking, insurance, travel or utilities, customers want to be able to find the information they need online, without needing to call, email or visit a branch.

The combination of more impatient customers and greater competition means that companies that fail to provide the right online service will lose out. Potential customers will simply move elsewhere, without even bothering to use other channels (such as email or phone) to get in contact. Over three quarters of consumers say they are happy to use web self-service systems<sup>4</sup> and more than half (52%) of consumers say they will abandon an online purchase if they can't find a quick answer to their question<sup>5</sup>. Brands therefore need to ensure that their websites provide the information and answers visitors require, in a simple to find and easy to access format if they are going to win and retain customers.

More and more of Britain's top companies are achieving this, delivering the answers that consumers want online. The 2015 Eptica Multichannel Customer Experience Study found that brands could answer 64% of questions asked online, up slightly from 63% in 2014. However, this headline figure masks a widening chasm between best and worst. In short, poor performers are falling back, and leaders are moving further ahead. 36% of companies improved, and 35% got worse. And in total, over a third of questions remain unanswered, pushing customers to use more expensive channels instead.

### THE WIDENING GAP

2014 saw a clustering of web performance in the middle, with 58% of companies scoring between five and seven out of ten, and just one scoring ten. None scored under two. 2015 saw this change radically – with a gulf developing between best and worst. Nine companies scored 100% online, yet four answered either one or zero questions. 69% scored six or more out of ten, meaning that just under a third of companies answered five or fewer questions online.

**37%** of companies answered between **5-7** questions online



**46%** of companies answered between **8-10** questions online



**17%** of companies only answered **0-4** questions online



<sup>3</sup> Source IMRG: "Online sales grew by 14% to £104bn in 2014, according to retail trade association the IMRG"

<sup>4</sup> Source Forrester: "Customer Service Channel Usage Highlights The Importance Of Good Self-Service"

<sup>5</sup> Source Forrester: "Channel Hopping. Online Protests"

# 4/ CUSTOMER SERVICE VIA THE WEB

## BANKING ROCKETS TO THE TOP

In previous research, fashion retailers have set the standard, leading the rankings over the last three years. This changed in 2015, due to a 27% improvement amongst banks, which successfully answered 91% of questions on average. Fashion remained second, dropping 1% to 78%.

Five out of ten sectors performed worse year-on-year, with insurance dropping most. Insurers moved from an average score of 57% in 2014 to 40% in 2015, leaving them last in the sector league table. As the questions asked were consistent with previous research, this demonstrates that, as a sector, insurance has gone backwards over the last twelve months.

## WEB SELF-SERVICE POWERS SUCCESS

Last year saw a dramatic increase in the deployment of web self-service systems, up from 21% in 2011 to 53% of sites in 2014. This rose even higher in 2015, with 56% of companies having it available on their sites. Web self-service allows consumers to ask questions in their own words and receive fast, accurate answers from a continually updated knowledgebase. Unlike keyword search or static FAQ pages, they make it easier for consumers to find what they are looking for – no wonder that Gartner predicts that just a third of interactions will require the involvement of a customer service agent by 2017<sup>6</sup>.

*Much of the overall improvement in the online customer experience is due to this rise in self-service systems. The sector league table backs this up - 90% of banks have web self-service, but just 40% of insurers.*

We live in an online world, with the web the first port of call for an increasing percentage of our interactions with companies of all types. The continuing roll-out of superfast broadband, 4G smartphones and even internet-enabled televisions will simply deepen the importance of online.

However, while many companies are improving the web experience, countless others aren't, leading to a polarised market that feels becalmed, with little overall progress since 2014. With consumers demanding more, and competition increasing as the economy grows, this will lead to more poorly performing companies losing out, unless they address their online customer failings quickly and comprehensively, particularly through the adoption of self-service technology.



6 Source Gartner: "Gartner Says Weak Mobile Customer Service Is Harming Customer Engagement"

## 5/ EMAIL AND CUSTOMER SERVICE

Despite the rise of new channels such as social media and web chat, email is still central to how consumers want to communicate with brands.

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*There are 144.8 billion emails sent every day<sup>7</sup>, half via mobile devices. Email is valued across all demographics - 58% of consumers want to be able to communicate with companies via email, rising to 69% amongst members of Generation Z (those born after 1990)<sup>8</sup>.*

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There are multiple reasons for the continuing importance of email. It is simple to use, has a built in audit trail (unlike a phone conversation), can be accessed through multiple devices, and consumers can send and read emails at their own convenience.

All of these factors are increasing the volumes of emails sent to customer service teams – and they are struggling to cope. Since the Eptica Multichannel Customer Experience Study began in 2011, performance on the email channel has worsened every year.

### EMAIL IMPROVEMENTS

This year saw a distinctly mixed picture. On the positive side, the speed of response continued to accelerate, with the average time to get an answer falling dramatically from 61 hours 39 minutes in 2014, to 29 hours 27 minutes in 2015. More companies (74% versus 71%) let non-customers email them, either by providing an email address or through a web form. This reverses the trend of companies shutting off email, but is still well below the 87% who provided email contact details in 2011. Many organisations made it difficult to email, forcing customers to go through FAQ pages or hunt around to locate details hidden in obscure corners of their websites.

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*However, accuracy and response rates both declined in 2015. Out of 100 companies, just 59 answered emails, with only 39 successfully replying to the query. That means one fifth (20%) of brands went to the effort of responding, but couldn't then answer a simple question via email.*

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Email contact details could not be found for 36 companies. When it came to accuracy six sectors were worse compared to 2014. Last year companies successfully answered 41% of queries, but 2015's drop means that you are now more likely to get your query dealt with successfully<sup>1</sup> on Twitter than email.

<sup>7</sup> Source Brandspeak: "Did You Know 144.8 Billion Emails Are Sent Every Day?"

<sup>8</sup> Source Forrester: "Channel Hopping, Online Protests"

# 5/ EMAIL AND CUSTOMER SERVICE

## THE EMAIL LOTTERY

Email may be faster in 2015, but it increasingly feels like a lottery as hard-pressed customer service teams battle to answer a growing tide of incoming messages. For example, five companies sent an acknowledgement email – and then failed to follow up with an answer. Another phoned to give an answer, while a third sent an apologetic response that should have obviously gone to a different, aggrieved customer. One retailer took 30 days to answer a time-sensitive query.

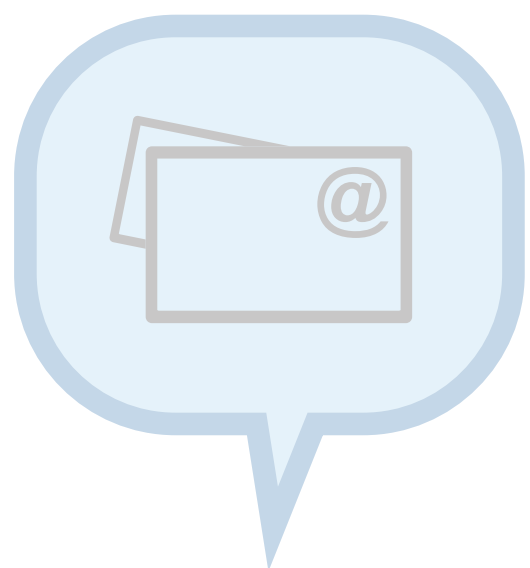
All of this has a dual effect. It annoys consumers and drives them to competitors, whilst increasing the number and costs of incoming interactions. If they fail to get an answer to their initial email, consumers may well switch to other, more expensive channels such as the phone, or simply send a further message, adding to volumes.

## EMAIL – THE BEST AND WORST

As in 2014, electronics retailers were the best performers on email, successfully answering 80% of questions sent to them. However this was also the slowest sector, with an average response time of over 107 hours.

In comparison, the travel sector replied in an average of 16 hours 27, but out of the two companies who answered, only one successfully responded to the query. This put travel joint bottom of the table, alongside banking, managing a pitiful 10% score.

Demonstrating that email is very much a lottery, there were wide differences between companies in the same sector. One fashion retailer answered in 9 minutes – another replied to the same question in nearly 68 hours. Overall just 16% of companies responded to email within 6 hours, a figure that is wildly out of kilter with Forrester research that states that 41 per cent of customers expect a response to their email within six hours<sup>9</sup>.



<sup>9</sup> Source Forrester: "Customer service takes on greater importance in tough times"

## 5/ EMAIL AND CUSTOMER SERVICE

### Speed of email response



The fastest sector to answer was **Travel**, with an average response time of:

16 HOURS 27 MINUTES

Only 1/10 of travel companies successfully answered the question.



4 companies responded, so in 75% of cases the customer would have needed to re-contact the company to receive an answer, showing that speed may have been sacrificed to accuracy.



It took one fashion retailer just **9 minutes** to successfully answer a question.



Another, in the same sector, took over **68 hours** to answer the same question!

The slowest sector to answer was **Electronics Retailers**, with an average response time of:

170 HOURS 12 MINUTES



The quickest electronic retailer took 24 minutes to respond. But the slowest took 720 hours

– that's **30 days!**



Average response times are falling dramatically



### SOLUTIONS TO EMAIL HELL

Brands need to address their drop in email performance through a combination of improved processes, better technology and a greater focus on the channel. Clearly leaving an email unanswered for 30 days isn't acceptable in today's world, so companies need to invest to ensure they are meeting customer expectations when it comes to email.

Linguistic-based email management technology can also help deal with growing email volumes in four key ways:

1. By understanding incoming messages, linguistic-based technology can automatically suggest potential templates to agents, dramatically accelerating response times.
2. Companies can better understand positive and negative tones of the message and use this to prioritise emails, and measure longer term performance.
3. Brands can deliver joined-up service, with linguistics extracting information freely provided within emails (such as signatures) and using this to provide a multichannel view of the customer.
4. Linguistics can route emails to the right department or agent first time, reducing handling time and ensuring answers are faster and more accurate.



## 6/ SOCIAL CUSTOMER SERVICE

The rise of social media presents both a challenge and an opportunity to brands. It tilts the balance of power towards the consumer and away from the company by providing a platform to share experiences, good and bad, with the wider world. Companies need to respond to this, engaging with consumers and solving their problems quickly, before they are magnified by the lens of social media. At the same time brands that invest time and resources in building relationships with customers on social media will benefit from greater loyalty, the creation of brand advocates and improved reputation.

This starts with social customer service. A study by J.D Power found that two thirds of customers who contacted a company on social media did so for customer service<sup>10</sup>. Getting it right delivers major benefits - research by American Express has found that consumers who have received customer service on social media are willing to pay 21% more for excellent service<sup>11</sup>. The same study found that people who have received customer service on social media tell an average of 42 people about good experiences and 53 people about bad experiences (while someone in the general offline population tells only 15 and 24 people respectively).

### TWITTER AND CUSTOMER SERVICE – THE RESULTS

How are UK brands faring? 2015 was the second year that we measured how well companies respond to queries sent directly to their official Twitter handle. By asking the same question as through email (and web chat for those that offer this service) the 2015 Eptica Multichannel Customer Experience Study not only assessed the success of responses and how long they took, but consistency across digital channels.

Overall the study saw some modest improvements:

- 81% of companies in the sample advertised a Twitter handle, up from 76% last year
- The average time taken to respond to tweets was much faster, dropping from 8 hours 37 minutes to 5 hours 27
- 41% of companies successfully answered the question tweeted to them, a 2% increase from 2014
- There was a big improvement in the speed of the fastest responses. Two food and drink retailers answered in 2 minutes – twice as fast as 2014's fastest 4 minute answer from an electronics retailer



While **81%** of companies were on Twitter



only **54%** of them responded to a tweet sent directly to them



with only **41%** providing an accurate response.

<sup>10</sup> Source J.D. Power: "Poor Social Media Practices can Negatively Impact a Businesses' Bottom Line and Brand Image"

<sup>11</sup> Source American Express: "Social Media Raises the Stakes for Customer Service"

## 6/ SOCIAL CUSTOMER SERVICE

### MEETING CUSTOMER NEEDS?

However despite the improvements, over half (59%) of questions are not being answered successfully, and 46% of companies did not respond at all to a tweet – demonstrating a lack of processes to monitor, control and answer social questions. Six sectors proved slower than 2014 and many brands gave radically different answers to the same question asked on email. This shows a lack of integrated thinking, with separate teams (or departments) responsible for social and email customer service, leading to a disjointed, inconsistent approach.

Additionally, customers are becoming increasingly demanding. Separate research carried out by Eptica found that nearly half (44%) of consumers expect a response to their tweets within an hour<sup>12</sup>. In the Eptica Study, just 32% of brands responded within this time frame.

### THE TOP SECTORS FOR TWITTER CUSTOMER SERVICE

Unlike other channels, no sector was a clear leader when it came to answering questions on Twitter, with seven sectors averaging between 40-60%. At the top, telecoms and electronics retailers both scored an average of 60%. The entertainment retail sector brought up the rear, with only one company successfully answering a tweet (as in 2014).

For speed, banking was the clear winner, with an average response time of just 12 minutes. However just four out of the six messages actually answered the question, showing that in some cases accuracy may have been sacrificed for speed. Utilities were slowest to respond, with an average of 19 hours 11 minutes. Ironically this was also based on six replies, two of which didn't answer the question, giving the same overall score as the much faster banks.



Twitter average  
successful response  
**5 hours 27 minutes**



Email average  
successful response  
**29 hours 27 minutes**

12 Source Eptica: "Over half UK shoppers can't find basic information online"

## 6/ SOCIAL CUSTOMER SERVICE

### TWITTER AND FACEBOOK

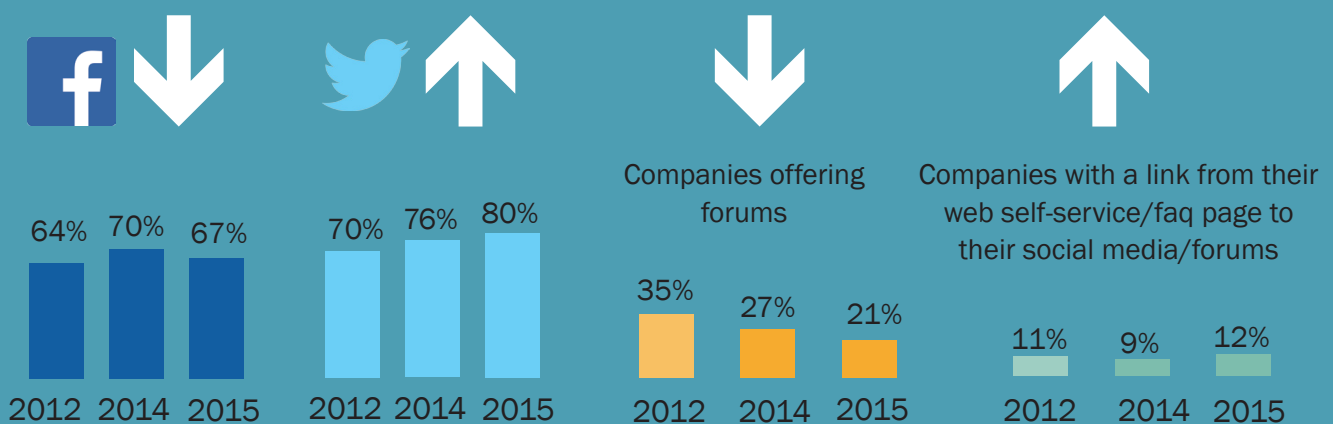
As in previous years the 2015 Eptica Multichannel Customer Experience Study researched the number of companies that offered Twitter, Facebook and their own forums. This showed some surprises – while 80% of companies had a link to their Twitter handle on their website (up from 76% in 2014), the number of Facebook links dropped from 72% to 67%.

The number of companies hosting their own forums, which provide a simple means of sharing technical information, also dropped from 27% to 21%, continuing a longer term decline from 35% in 2012. Equally worrying was the lack of integration between social media and customer service. While more companies (12% versus 9%) had a link from their web self-service or FAQ page to social media/forums, the vast majority are not adopting an integrated approach to multichannel service.

*What these results show is that companies need to balance speed and accuracy if they are to deliver the service levels that customers require.*

*The huge number of customer service tweets left unanswered, shows that more resources need to be dedicated to monitoring social media and integrating it with other customer service channels.*

### Companies and Social Customer Service



Web chat delivers significant benefits to both consumers and brands. It provides a similar ability to hold a real-time conversation as the phone, but doesn't involve consumers having to leave their PC or mobile device and call a contact centre. With the same type of interface as instant messaging apps, it is easy to use by consumers and increasingly accepted when they require fast, personalised answers. It also delivers the highest satisfaction scores of any channel<sup>13</sup>. No wonder consumer usage is increasing – from 38% in 2009, to 58% in 2014, according to Forrester<sup>14</sup>.

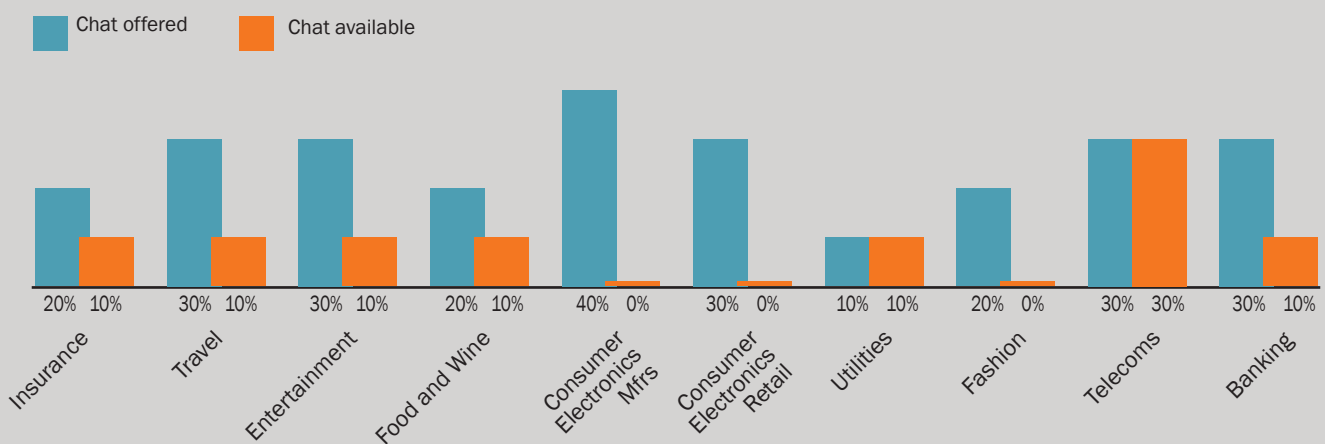
There are also significant benefits for companies that deploy web chat. Not only does it increase consumer engagement, but it also boosts productivity and sales. Unlike the telephone channel, a single agent can handle several chat conversations at once, without impacting quality. Additionally it provides the chance to cross-sell and up-sell within the context of the conversation. Proactive chat, which can be triggered by specific events or at certain points in the customer journey, gives even greater benefits as it reduces abandoned transactions.

2014 was the first year that Eptica researched the use of web chat, asking the same sector-specific question as through email and Twitter, and measuring the response rate.

*The findings backed up analyst research, with the channel being both fast and accurate. It took an average of just 4 minutes 7 seconds to get an answer through chat, with a 93.5% accuracy rate.*

However the positive news was outweighed by the fact that adoption was in its infancy, with only 13 companies claiming to offer chat – and just 9 having it working when tested.

*2015 Chat Adoption and Availability*



<sup>13</sup> Source Econsultancy: "Consumers prefer live chat for customer service: stats"

<sup>14</sup> Source Forrester: "Customer Service Channel Usage Highlights The Importance Of Good Self-Service"

In 2015 there has been some progress, but constraints on resources are still hampering adoption. Over a quarter (26%) now advertised chat prominently, double 2014 numbers. These were spread across every sector. However only 9 had it working when tested, with many others apologising for being too busy to start chat conversations. Others reserved it for existing customers, missing out on engagement with potential new business.

The Study found that chat was still the fastest and most accurate channel, though both measures have declined year-on-year. 89% responded accurately (one chat session crashed part way through), and the average answer time was 7 minutes 13, nearly double the time taken in 2014.

The strongest chat sector was telecoms, with 30% of companies offering it – and all of these had it available when the research was conducted. In contrast four electronics manufacturers claimed to provide chat, but did not have it working when tested.

---

*The greater spread of chat is a positive development, but it is being hamstrung by a lack of resources. It seems that chat is the first channel to be shut down when companies are busy – even though a chat session can be quicker, cheaper and more productive than dealing with the alternative of a phone call.*

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This false economy can potentially cost companies more and also risks the customer relationship – by offering chat and then not delivering brands will disappoint and annoy consumers that are keen to use the channel.

Companies need to invest more in chat in order to reap its benefits, otherwise it will remain the bridesmaid channel, continuing to be pushed into the background, despite its obvious charms.

Consumers are increasingly keen to chat – brands must ensure that they are embracing the channel, before their competitors do.



## 8/ CONSISTENCY

**Consumers expect to receive the same answer to their query, whatever channel they choose to make contact through.** This requires a joined-up approach to service, otherwise it causes confusion, and frustrates consumers. Consumers want the peace of mind of knowing they have the right answer, however they make contact.

A lack of consistency hurts companies in two ways. Firstly, it reduces efficiency if organisations fail to share information between channels, with different teams relying on separate silos of knowledge, all of which have to be maintained individually. This is not only bad practice, but time-consuming and costly. Giving wrong or unclear answers on different channels will also push up costs – consumers will be forced to make contact again to check whether they received the correct response, or may share the negative experiences on social media.

Secondly, particularly in regulated industries, inconsistency risks potential fines for not treating customers equally or providing poor advice. Brands need to ensure that agents, and channels such as the web, are meeting regulatory guidelines when it comes to delivering answers, and that there is a full audit trail in place to show that processes are being adhered to.

2015 was the second year that the Eptica Multichannel Customer Experience Study analysed how consistent brands were between different digital channels (email, Twitter and chat), by asking the same question across all three channels, and studying how consistent responses actually were.

Last year we found that consistency was lacking across channels – and 2015 has seen little improvement.

### INCONSISTENCY RIFE

Only 2% of companies offered email, Twitter and chat, down from 3% in 2014. However even those brands that responded on just two channels, showed a worrying lack of consistency. Just 11% delivered the same or similar answers through multiple channels, despite being asked basic questions that were neither complex nor required personalised answers. This has worsened slightly since 2014, when 12% gave consistent answers. Companies obviously do not have in place the processes and centralised knowledge they need to deliver the consistent experience that customers expect.

**2%** *of companies offered email, Twitter and chat, down from 3% in 2014*

**11%** *delivered the same or similar answers through multiple channels*

**1 in 9** companies gave the same answer across two channels.



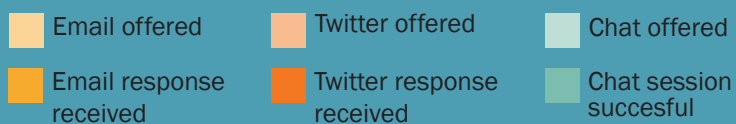
## 8/ CONSISTENCY

### LACK OF MULTICHANNEL RESPONSES

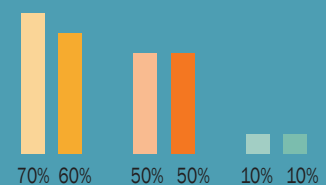
Many brands simply failed to respond via certain channels. 85% only answered on one channel (out of email, Twitter and chat), ten fewer than in 2014. Essentially this means that 15 brands are failing to engage with non-customers who are trying to make contact. It is the digital equivalent of slamming a shop door in a potential customer's face.

The UK's leading brands seem to be suffering from a lack of joined-up thinking, with a channel-by-channel approach that serves no-one well. It frustrates consumers and pushes up costs, squandering precious resources while risking potential future regulatory fines and litigation. What is needed is to take a step back, and adopt a unified approach that centralises knowledge, makes it available across every channel, current and future, if companies want to compete in today's multichannel environment.

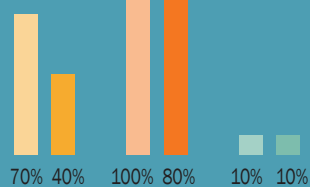
#### Performance by sector



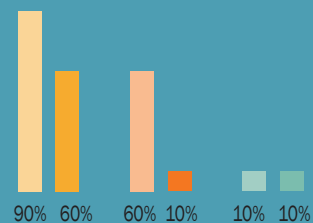
#### Insurance



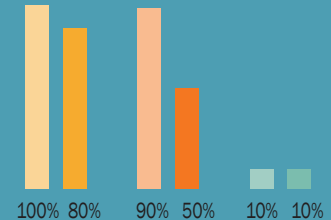
#### Travel



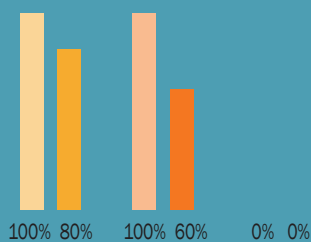
#### Entertainment



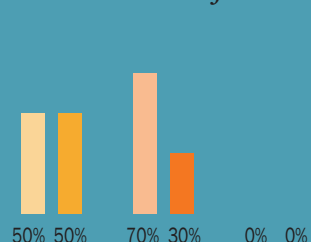
#### Food & Wine Retail



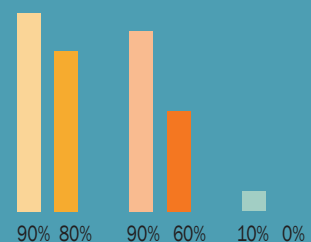
#### Consumer Electronics Retail



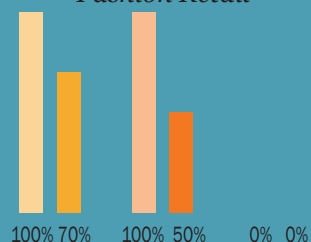
#### Electronics Manufacturers



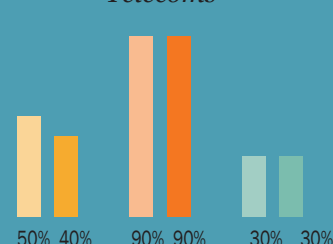
#### Utilities



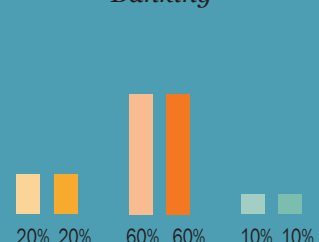
#### Fashion Retail



#### Telecoms



#### Banking



## 9/ SECTOR COMPARISON


### INSURANCE


The web is now the default channel for researching and buying insurance for the majority of consumers. However it feels that the insurance industry hasn't yet woken up to this trend. Too many companies made it difficult to find information online, with the sector coming bottom for online responses (scoring 40%), dropping 17% since last year. The highest web score was 6 out of 10, with one insurer failing to answer any questions at all.

*Email did show a marked improvement – moving from answering an average of just 3 questions to 5, with the average speed for the sector halving from 40 to 20 hours.*


However this means that half of companies failed to provide a satisfactory response, with 3 not even offering email. As in 2014, 50% of companies were on Twitter, but there was a wide range of response times. One company answered in 9 minutes, another took over 43 hours. 20% of companies failed to provide an answer at all on email, Twitter or web chat. Overall, big discrepancies between companies shows that much needs to be done to ensure insurance becomes truly multichannel.


#### Web questions answered:


 6/10 questions answered online  
(One company) - Highest score

 0/10 questions answered online  
(One company) - Lowest score

#### Twitter response:

 3/10 companies successfully  
responded on Twitter


 Fastest correct  
response:  
9 min

 Slowest correct  
response:  
43 hrs 27 min


#### Successful email:

 5/10 companies successfully  
responded to email

#### Fastest response

  
HOURS MIN

#### Slowest response

  
HOURS MIN



One company made chat  
available, with 100% success

Companies surveyed: (Alphabetical)

Aviva / Axa / Churchill / Esure / First Direct / Legal & General /  
Liverpool Victoria / More Than / NFU Mutual / Zurich





## 9/ SECTOR COMPARISON


### TRAVEL


Consumers have enthusiastically embraced digital channels when researching and booking flights and holidays, but performance from both airlines and package operators is patchy. Just over half (59%) of questions were answered on company websites, but there was a tremendous range of results. 1 company scored 9 out of 10, another just 1. Email performance has deteriorated over the last three years, with just 2 companies responding with partial answers in 2015 – meaning that the consumer would need to re-contact them.

*Last year's bright showing on Twitter, where 60% of questions were answered, has not been sustained. Perhaps due to increased demand, just 40% of companies successfully responded to a tweeted question.*


Only 7% of answers were consistent across 2 or more channels, with 1 company not answering on email, chat or Twitter. Given that online is now the primary sales channel for the travel industry, more needs to be done to provide the consistent experience that customers are looking for – otherwise the companies at the bottom of the rankings are likely to lose business to sector leaders.

#### Web questions answered:


 9/10 questions answered online  
(One company) - Highest score

 1/10 questions answered online  
(One company) - Lowest score

#### Twitter response:

 4/10 companies successfully  
responded on Twitter

 Fastest correct  
response:  
5 min

 Slowest correct  
response:  
15 hrs 59 min

#### Successful email:

 1/10 companies successfully  
responded to email

#### Fastest response

  
HOURS MIN

#### Slowest response

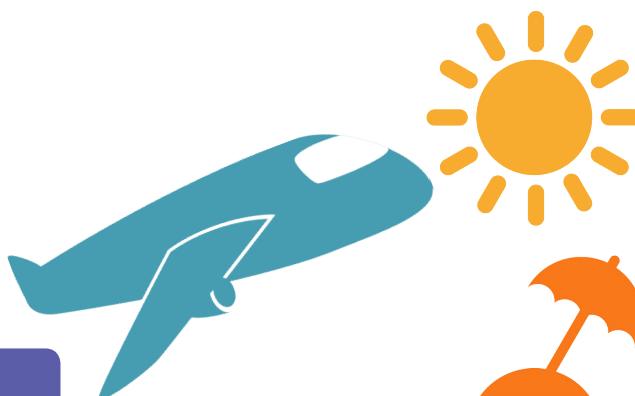
  
HOURS MIN



One company made chat  
available with 100% success

#### Companies surveyed: (Alphabetical)

British Airways / Co-operative Travel / Cosmos /  
Easy Jet / Emirates / Flybe / Ryanair / Thomas Cook /  
Thomson / Virgin Holidays



# 9/ SECTOR COMPARISON

## ENTERTAINMENT

In 1994 the first recorded ecommerce transaction took place, with the purchase of a CD. Twenty years later, the majority of entertainment products are now purchased online, even if physical CDs, DVDs and books are being supplanted by digital versions.

Given the fact that multiple retailers are selling the same product, they can only differentiate on either price or customer experience. On the positive side, there have been improvements in the experience in 2015, with 40% of questions answered by email (up from 30% in 2014), although the overall average speed of response was slower by 3 hours.

As in many sectors this masked big differences – 1 company answered 100% of web questions, another just 2, leading to an average score of 52%, which was identical to 2014. Twitter performance remained dire, with a single company answering on the channel – despite 6 providing details of their Twitter handle.

*Too many companies seem to be solely competing on price, pointing to further market consolidation as 2015 unfolds.*

### Web questions answered:



10/10 questions answered online  
(One company) - Highest score



2/10 questions answered online  
(One company) - Lowest score

### Twitter response:



1/10 companies successfully  
responded on Twitter



Response received:

23 min (down from 23 hrs 45 min)

### Successful email:



4/10 companies successfully  
responded to email

Fastest response

00 25

HOURS

MIN

Slowest response

47 18

HOURS

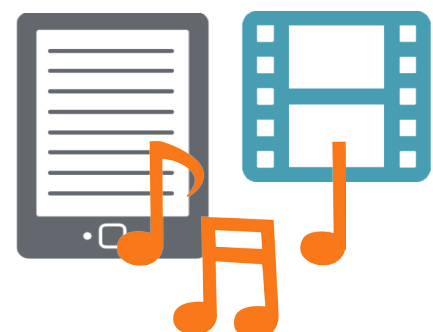
MIN



One company made chat  
available with 100% success

Companies surveyed: (Alphabetical)

Amazon / Apple iTunes / Google Play / HMV / Rakuten Play /  
Tesco / The Book People / Waterstones / WH Smith / Zavvi



# 9/ SECTOR COMPARISON

## FOOD AND WINE


The combination of improved online offerings and greater consumer acceptance is increasing the percentage of food and wine spending through digital channels. As well as major supermarkets it also includes specialist retailers, in areas such as wine, with the opportunity to reach a wider market.


On the web, companies saw dramatic improvements, with an average of 70% of questions answered, up from 40% two years ago. More companies scored 8 or 9 out of ten than before, with fewer laggards, although 1 company scored just 5.

Email dropped significantly, from 70% of companies successfully responding in 2014 down to 60% this year. Average time to respond to email improved, from over 55 to around 22 hours. The company that was fastest in 2014, was actually slowest in 2015, showing the need to invest to ensure retailers are meeting increasing customer demands.


Half (50%) of companies answered successfully on Twitter, but this was slower on average than 2014, and 40% of retailers failed to respond to tweets. One retailer managed to answer consistently on the email, web and chat channels, showing a multichannel strategy that others lack.


### Web questions answered:


 9/10 questions answered online  
(One company) - Highest score

 5/10 questions answered online  
(One company) - Lowest score


### Twitter response:

 5/10 companies successfully  
responded on Twitter

 Fastest correct  
response:  
2 min

 Slowest correct  
response:  
2 hrs 3 min

### Successful email:

 6/10 companies successfully  
responded to email

#### Fastest response

  
HOURS MIN

#### Slowest response

  
HOURS MIN



One company made chat  
available with 100% success

### Companies surveyed: (Alphabetical)

Asda / Hotel Chocolat / Laithwaites / Majestic Wines /  
Morrisons / Ocado / Sainsbury / Tesco / Thorntons / Waitrose



# 9/ SECTOR COMPARISON

## ELECTRONICS MANUFACTURERS


In an increasingly digital world, it is natural that consumers look at digital channels when they are researching, buying and connecting consumer electronics.


On the web, performance in the sector seemed to drop, from 70% in 2014 to 67% in 2015. However this was affected by 1 company that failed to answer any questions at all, pushing down the sector average and masking overall improvements.

The same number of companies (5) allowed non-customers to contact them by email as in 2015, but accuracy increased, with 40% of companies now providing a successful answer. This is just half the score of electronics retailers, so manufacturers risk being sidelined when it comes to building customer relationships.


As in 2014, Twitter performance was also disappointing – 70% were on the network, but only 30% responded and delivered a useful reply. Again, these figures are half those of electronics retailers. There is also a reality gap on chat – four companies advertised it, but none had it working when being tested, pointing to a lack of resources being invested in staffing the channel.

### Web questions answered:


 9/10 questions answered online  
(Two companies) - Highest score

 0/10 questions answered online  
(One company) - Lowest score

### Twitter response:

 3/10 companies successfully  
responded on Twitter

 Fastest correct  
response:  
54 min

 Slowest correct  
response:  
8 hrs 1 min


### Successful email:

 3/10 companies successfully  
responded to email

Fastest response

  
01 15  
HOUR MIN

Slowest response

  
49 22  
HOURS MIN



No companies  
offered web chat!

Companies surveyed: (Alphabetical)

Apple / Dell / LG / HP / Microsoft / Nintendo / Panasonic /  
Samsung / Sony / Toshiba



# 9/ SECTOR COMPARISON

## ELECTRONICS RETAILERS

In contrast to electronics manufacturers, retailers of TVs, computers, phones and other gadgets have fully embraced digital channels. They seem to understand the need to explain complex technology and reassure consumers that they are buying the best product for their needs.


After web performance worsened between 2013 and 2014, dropping from 58% to 52%, it rebounded in 2015, with 64% of questions answered online.


Email remained strong, with the sector scoring highest of all for the second year in a row. 80% of companies successfully responded to questions, but the range between best and worst widened. One company answered in 24 minutes – another took over 30 days.

Last year electronics retailers were slowest of all on Twitter, with an average of over 25 hours and just 3 responses, but this year saw major improvements, with 6 companies answering in an average of just over 5 hours.


As with electronics manufacturers, web chat flattered to deceive – 3 companies claimed to offer it, but none had it working when being tested. Again, further investment is needed to ensure that the customer experience is truly multichannel.


### Web questions answered:


 10/10 questions answered online  
(One company) - Highest score

 4/10 questions answered online  
(Three companies) - Lowest score

### Twitter response:

 6/10 companies successfully  
responded on Twitter


 Fastest correct  
response:  
3 min

 Slowest correct  
response:  
24 hrs 44min

### Successful email:

 8/10 companies successfully  
responded to email

Fastest response

  
HOURS MIN

Slowest response

  
DAYS!



No companies  
offered web chat!

Companies surveyed: (Alphabetical)

Argos / Carphone Warehouse / Currys / ebuyer /  
Euronics / Game / Hughes / Jessops / John Lewis / Maplin



# 9/ SECTOR COMPARISON

## UTILITIES

Over the last year the utility sector has been the subject of significant government action to simplify tariffs and make it easier for consumers to switch. In a commodity market, this means that customer service is the only real differentiator for utilities.

However companies do not seem to be taking service seriously. While 66% of questions were answered online, this showed no improvement since 2014, and while 1 company scored 100% another provided the answer to just 1 question.

Email performance worsened, with only 3 companies responding to a simple emailed question. Two years ago 6 companies answered the same question – showing a significant drop in customer service levels. Utilities did answer email faster than in 2014, with the overall average dropping from 49 hours to 24, but this is obviously based on fewer responses.

More companies offered Twitter, but while half of companies answered successfully in 2014, just 4 responded accurately in 2015. The fact that the web chat crashed when we tested the single utility company who offered this channel seemed to sum up the experience in this sector. There is still a long way to go to deliver the experience that consumers demand.

### Web questions answered:



10/10 questions answered online  
(One company) - Highest score



1/10 questions answered online  
(One company) - Lowest score

### Twitter response:



4/10 companies successfully  
responded on Twitter



Fastest correct  
response:

1 hr 57 min



Slowest correct  
response:

96 hrs 3 min

### Successful email:



3/10 companies successfully  
responded to email

Fastest response

00 45

HOURS

MIN

Slowest response

96 03

HOURS

MIN



One company offered  
web chat - 0% success  
rate (crashed)

Companies surveyed: (Alphabetical)

British Gas / Ecotricity / EDF / Eon / First Utility /

Good Energy / nPower / Ovo Energy / Scottish Power / SSE



## 9/ SECTOR COMPARISON

### FASHION

Over the past three years fashion retailers have led the way for the digital customer experience, with the highest scores for answering questions on the web, and above average email response rates.

On the positive side, little has changed in 2015, with 78% of online questions answered (against 79% last year). However the improved web performance of the banking sector relegated fashion to second in the Study, and, while email performance was faster than 2014, it was less accurate, dropping from 70% to just half (50%). This is based on asking similar or the same questions, showing that fashion appears to have rested on its laurels rather than moving forward.

Results on Twitter backed this up – while all 10 companies offered it, just 5 responded and answered the question tweeted to them. This was down from 7 in 2014, and fashion was one of the few sectors where Twitter performance was slower in 2015, ballooning from 3 hours to over 10.

Fashion retailers need to be more proactive when it comes to improving the customer experience – at a time when consumers are ever more demanding, standing still is not an option.

#### Web questions answered:



9.5/10 questions answered online  
(One company) - Highest score



6.5/10 questions answered online  
(Two companies) - Lowest score

#### Twitter response:



6.5/10 companies successfully  
responded on Twitter



Fastest correct  
response:

2 hrs 10 min



Slowest correct  
response:

35 hrs 2 min

#### Successful email:



5/10 companies successfully  
responded to email

Fastest response



HOURS

MIN

Slowest response



HOURS

MIN



No companies  
offered web chat!

#### Companies surveyed: (Alphabetical)

Asos / Debenhams / House of Fraser / Marks and Spencer /  
Monsoon Accessorise / New Look / Next / River Island /  
Top Shop / The White Company





## 9/ SECTOR COMPARISON

### TELECOMS

The telecoms market is extremely dynamic, being marked by downward pressure on prices, consolidation amongst different players and a blurring of the lines between mobile, fixed line, broadband and TV providers. In the past this complexity has translated into a reputation for poor customer service.

In 2014 there appeared to be a concerted effort to change this perception, with companies investing in web self-service to improve the customer experience. However in 2015 little further progress has been made, with web scores falling from 63% to 60% and just 2 companies answering emails correctly. Another failed to answer the email question at all, providing a heartfelt, if misplaced, apology for poor service.

On the plus side email was much faster than 2014, falling from an average of 67 hours to 18.5 in 2015.

Twitter remained strong, with 60% of companies answering on the channel, and the average response time dropping from 12 to 4 hours. The telecoms sector had also embraced web chat, with all 3 companies that offered it having it working when tested, all of which successfully answered the question asked of them.

#### Web questions answered:



8/10 questions answered online  
(One company) - Highest score



4/10 questions answered online  
(One company) - Lowest score

#### Twitter response:



6/10 companies successfully  
responded on Twitter



Fastest correct  
response:  
3 min



Slowest correct  
response:  
18 hrs 35 min

#### Successful email:



2/10 companies successfully  
responded to email

Fastest response

04

HOURS

34

MIN

Slowest response

49

HOURS

00

MIN



Three companies  
offered web chat  
- 100% success rate

Companies surveyed: (Alphabetical)

BT / EE / GiffGaff / O2 / Sky / Talk Talk / Tesco Telecom /  
Three / Virgin Mobile / Vodafone





## 9/ SECTOR COMPARISON

### BANKING

Perhaps responding to persistently low consumer trust and increased government regulation, banks seem to have invested heavily in customer experience, albeit on certain channels. Performance on the web was the highest of any sector, with 91% of questions answered online, up from 64% in 2014.

But the email channel fared less well – just 2 banks offered email to non-customers, and just 1 of these fully answered the question sent to them.

Twitter seemed to favour speed over substance, with all 6 banks that offered the channel responding within 21 minutes, making it the fastest sector in the Study. However just 4 answered the question correctly, showing that more work is needed on backing up speed with knowledge. Just 2 banks provided consistent answers over 2 channels, with 30% not answering on either email, Twitter or chat.

*Clearly banks seem to be focusing solely on the web, rather than delivering the rounded, multichannel experience that customers want. At a time when there are increasing numbers of new entrants in the market, this could backfire, with existing players losing out to faster, nimbler and more customer-centric rivals.*

#### Web questions answered:



10/10 questions answered online  
(Five companies) - Highest score



6.5/10 questions answered online  
(One company) - Lowest score

#### Twitter response:



4/10 companies successfully  
responded on Twitter



Fastest correct  
response:

17 hrs 34 min



Slowest correct  
response:

19 hrs 40 min

#### Successful email:



1/10 companies successfully  
responded to email

Response received

17

HOURS

34

MIN



One company made chat  
available with 100% success

Companies surveyed: (Alphabetical)

Barclays / Co-operative Bank / First Direct / Halifax /  
HSBC / Lloyds / Natwest / Nationwide / Santander / TSB



# 10/ CONCLUSION AND TAKEAWAYS

## CONCLUSION AND TAKEAWAYS

The 2015 Eptica Multichannel Customer Experience Study saw some improvements in how companies perform when answering consumer queries across the web, email, chat and social media channels. Given the rising volume of interactions, ever more demanding customers and pressure on resources, even delivering the same levels of service is an achievement for many brands.

However the Study also highlighted that good practice is not universal, and there are major inconsistencies in how different companies and sectors perform across multiple channels. By combining analysis of the research with its own experience, Eptica believes there are ten areas where companies need to focus if they want to succeed in 2015 and beyond:



### BE TRULY MULTICHANNEL

Too many companies are still not integrating different channels, with multiple teams or departments involved in the process. Customers expect consistent responses on their channel of choice – and in too many cases are not currently receiving this. Unifying customer service and sharing resources amongst everyone dealing with customer interactions not only delivers consistency, but will also increase efficiency and therefore reduce costs.



### INTEGRATE YOUR KNOWLEDGE

Effective knowledge management is at the heart of good customer service. Make sure that you centralise information and make it available across every channel. The same knowledge can power web self-service systems and be available to agents answering email, web chat and social media enquiries. A self-learning knowledgebase, that is easy to update with agent and customer feedback, will underpin the customer experience, bring down answer times and increase agent productivity.



### LISTEN TO YOUR CUSTOMERS

The questions consumers ask deliver vital insight into what they are looking for from your brand. Make sure you are tapping into this source of feedback, for example by using technology such as linguistics to analyse what they are asking, the context and their tone. This can then power decision making, such as changing processes, updating products or investing in more training for staff working in particular areas.



# 10/ CONCLUSION AND TAKEAWAYS



## TEST YOUR SYSTEMS

The 2015 Eptica Multichannel Customer Experience Study aims to replicate how consumers behave, asking the questions that they do, across their channels of choice. Run similar, regular mystery shopper exercises yourself to see how you perform and benchmark yourself against competitors and leaders in other industries.



## RESOURCE WEB CHAT PROPERLY

Customers like the speed of web chat and its personal, conversational feel. For businesses it also delivers significant efficiency gains against channels such as the phone. Over a quarter of organisations surveyed claimed to offer it, yet too many companies are failing to resource the channel, meaning it is switched off or busy at key times of day. Brands need to dedicate greater investment to web chat if they are to reap the benefits it brings, rather than treating it as a secondary channel that they can switch off and on at will.



## MEET CUSTOMER NEEDS, NOT YOUR OWN

The speed of answering emails and tweets has improved dramatically over the last year. However so have customer demands. Too many companies gave themselves generous targets for how long it would take them to respond (2-3 days was common for email), and then only managed to answer 15 minutes within their self-set limit. Rather than focusing on your own Service Level Agreements (SLAs) look at what your customers expect, and challenge yourself to achieve the targets they set.



## SORT OUT SOCIAL

Social media has grown quickly to be a key channel for customer service. But it is much more than this, providing a chance to engage with customers, build relationships, distribute news and even sell. This means multiple departments are involved, and brands need to take a holistic approach that involves everyone concerned in managing social media strategy and execution.



# 10/ CONCLUSION AND TAKEAWAYS



## USE TECHNOLOGY TO HELP

The rising tide of digital interactions mean that brands simply cannot function without specialist customer service technology to underpin their activities. From a centralised knowledgebase that automatically suggests relevant answers to workflow that analyses incoming interactions and uses linguistics to understand tone and context, technology provides the framework for success and fast return on investment.



## VALUE YOUR CUSTOMER'S TIME

In a world with an increasing number of channels, brands are under greater pressure than ever before to deliver superior service. However, rather than taking a channel by channel approach, start with your customers. How can you design processes and provide information that makes the customer journey simple and values their time, whatever channel they chose?



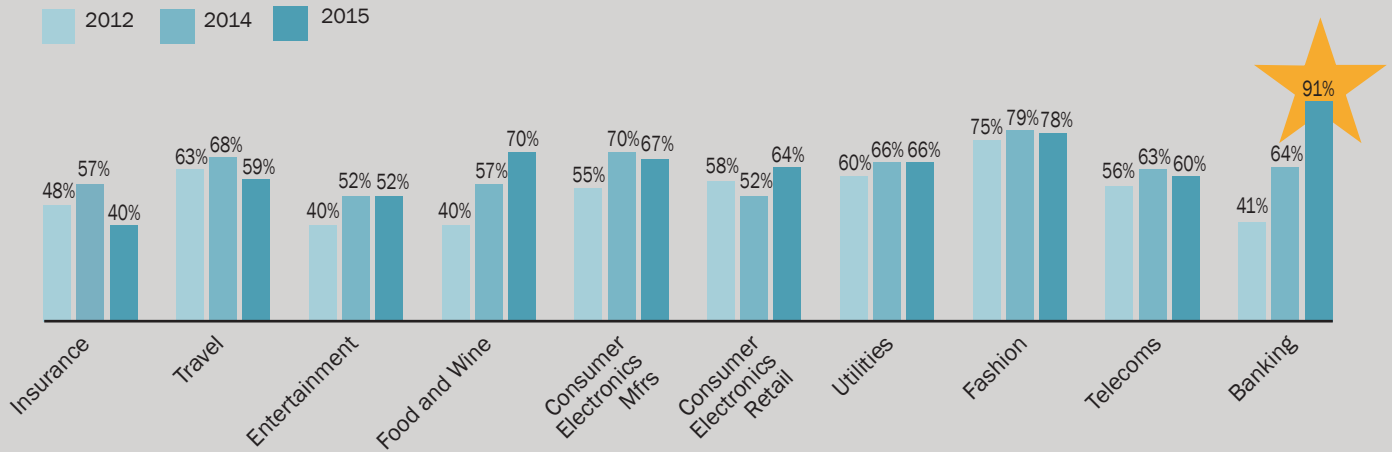
## BE MOBILE

Smartphones and tablets are now mass-market devices, and for many consumers are their primary method of accessing the web, sending emails and interacting on social media. Make sure that you are catering for mobile. This doesn't just mean that your website should be mobile optimised or that you offer apps for customers. By making it easy to get in contact, mobile devices are changing when consumers want to contact you, so ensure you have the resources in place to answer in a timely and effective manner.

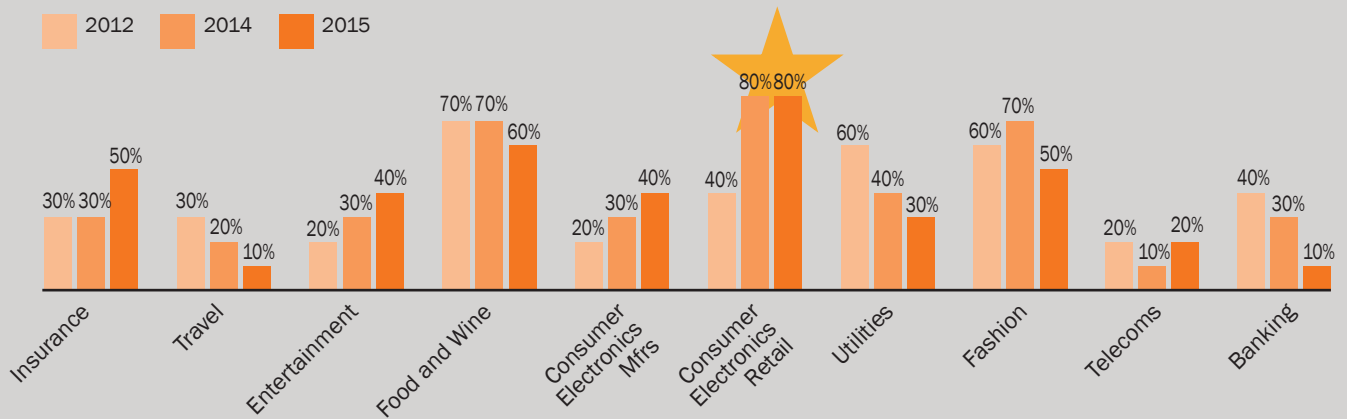


# 10/ CONCLUSION AND TAKEAWAYS

Web performance by sector



Email: Successful answers



Twitter response rates for successful answers (out of 10)



# APPENDIX 1: METHODOLOGY

*The 2015 Eptica Multichannel Customer Experience Study evaluated the customer service capabilities of 100 leading UK companies in four ways – through the web, email, social media and chat.*

The aim was to replicate the actual consumer experience to provide effective, meaningful results across each channel.

## WEBSITE METHODOLOGY:

1. Visit each website and look for answers for each of the ten sector-specific questions
2. Use the following order to look for information:
  - Begin with the home page and scan for the answer
  - Look for the most obvious search box and ask the question
  - Look for the help/FAQ section and search under this area
  - Record the answer – score 1 for a complete answer, 0 for not found or  $\frac{1}{2}$  for partial answer
  - Work to a time limit of 2 minutes per question – stop searching when limit reached

## EMAIL METHODOLOGY:

1. Visit each website, search for email option
2. Email 1 sector-specific question if possible, note down if no email option
3. Record if auto-response email received
4. Record if auto-response provides a time frame within which the question will be answered
5. Record the time taken to respond – was it within the promised timeframe?
6. Did the response answer the question - score 1 for a complete answer, 0 for not found or  $\frac{1}{2}$  for partial answer

# APPENDIX 1: METHODOLOGY

## **SOCIAL MEDIA/TWITTER METHODOLOGY:**

1. Visit each website
2. Record if there is a user forum on the site
3. Record if there is a link to the company Facebook page
4. Record if there is a link to the company presence on Twitter
5. Note down if there is a specific customer service Twitter handle for the company
6. Record if there is a link from the self-service section of the website to the user forum and/or social media as part of the answering process
7. Go to Twitter and tweet the company directly with the sector specific question
8. Record the time taken to get a response
9. Did the response answer the question - score 1 for a complete answer, 0 for not found or  $\frac{1}{2}$  for partial answer
10. Did you have to ask a follow up question? Yes/No
11. Time the session from first tweet to end
12. Compare the Twitter answer with those received via chat and email. Were they consistent? Score 3 if consistent across all three channels, 2 for two channels and 0 if all three answers are different.

## **CHAT METHODOLOGY:**

1. Visit each website, search for web chat option
2. Note down if there is web chat or not
3. Start chat session and ask sector-specific question
4. Time the session from initiation of conversation to end
5. Record whether you were given the option to have the conversation emailed to you. If so, request this
6. Did the response answer the question? Score 1 for a complete answer, 0 for no or  $\frac{1}{2}$  for partial answer
7. Compare the web chat answer with those received via Twitter and email. Were they consistent? Score 3 if consistent across all three channels, 2 for two channels and 0 if all three answers are different.

The research across all four channels was carried out in Q4 2014 with companies in the retail sectors, to link to their busiest time of year. Research with the 60 other brands took place in Q1 2015.

# APPENDIX 2: SAMPLE QUESTIONS

These are examples of the sector-specific questions asked within the research. Ten questions were asked on each company's website and one single question was asked via each of the email, Twitter and chat channels.

## INSURANCE

- What is your cancellation policy?
- Do you offer a loyalty discount if I take out more than one type of insurance policy with you?

## TRAVEL

- What assistance do you offer for disabled passengers?
- My flight was cancelled. How do I get a refund?

## ENTERTAINMENT

- What is the last day I can order to guarantee UK delivery for Christmas?
- Can I amend an order?

## FOOD RETAILERS

- Can I add items to an order before it is delivered?
- Can I order online and pick instore?

## ELECTRONICS MANUFACTURERS

- If my product is out of guarantee, how do I get it repaired?
- How do I get a replacement manual for my product?

## ELECTRONICS RETAILERS

- Can I order online and pick up instore?
- Do you offer finance facilities?

## UTILITIES

- How do I get my meter checked?
- How much notice do I need to give you that I am moving home?

## FASHION RETAILERS

- Can I return items bought as presents?
- Do you have an ethical sourcing policy? If so where can I find details?

## TELECOMS

- Do you have a 24 hour customer service line?
- How do I cancel my contract?

## BANKING

- How much do you charge for withdrawals made abroad?
- Who do I need to contact to cancel a direct debit?





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