



cutting through complexity

TELECOMMUNICATIONS

In search of a better customer experience

A global customer experience study of the mobile market

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Foreword

In the constantly changing mobile telecommunications landscape the market is becoming increasingly saturated with a bewildering variety of products and services, as network operators and mobile virtual network operators (MVNOs) compete for market share and look for new growth opportunities.

As the range of mobile telecommunications product and service options for consumers increases, delivering an exceptional customer experience becomes less straightforward. In fact, the customer experience has become a (if not the) critical differentiating aspect of many offers.

Operators have been actively investing in creating a better customer experience for many years now – developing customer-centric cultures, improving processes and utilizing data in more effective ways to understand the customer experience and identify pain points. However, customer needs are changing faster than ever, along with the competition and the nature of the products and services.

Delivering a great customer experience has become somewhat of a never-ending quest. It is now a top priority of many telecommunications

companies' (telcos) boardrooms and C-suites, and customer experience measures are increasingly used in staff incentive programs – impacting every member of the organization, and even suppliers.

This study seeks to take a genuine customer perspective of the telecommunications mobile experience. We have 'mystery shopped' prepaid mobile products and services in 25 countries and from 106 operators – including retail, online and contact center channels. This has provided powerful insight into how operators are performing when it comes to delivering a great experience to their customers.

We hope that you find the report valuable as you look to understand better practices and emerging global and regional trends, in your own quest to deliver a great experience to your mobile customers.



Graeme Ross
Global Chair
Media & Telecommunications



Chris McLaren
Technology,
Media & Telecommunications
Management Consulting Lead Partner
KPMG in Australia



Customer convenience should be the key priority for operators. How can they simplify processes to save customers time, whatever channel they choose to use? That is what customers remember, and they are getting more and more analytical about these experiences.

Jorge Santos
Partner, KPMG in Portugal

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Executive summary

KPMG performed a global customer experience study across 25 countries and 106 mobile providers to identify better practices and trends in the prepaid mobile market. Many of these practices also apply more broadly to other telco services. Through over 850 store visits, 750 calls to contact centers, 1400 SIMs purchased and over 500 top-ups completed, we were able to compare experiences to gain a comprehensive global view. We have categorized our findings into five key customer experience areas.

Retail customer experience – consistency is key

People do not like to be kept waiting for service; telcos should ensure that in-store wait times are minimal, and useful.

- Store experiences (such as sales approach, closure and soft skills) varied significantly within the same telco, across telcos and across countries. There is a need for a consistent experience regardless of whether a customer visits a flagship, corporate-owned or franchise store.
- The average wait time to be served in a retail store was just under five minutes. The longest wait times were recorded in the United Arab Emirates (UAE) and New Zealand, and zero wait times were consistently recorded in Canada, Indonesia and Nigeria.
- Sixty percent of telcos surveyed leverage queuing systems, setting wait time expectations and allowing the customers to browse products while waiting.
- The leading practices observed were zero wait times, but the use of a concierge who leveraged a tablet device (which identified high-value customers and provided a differentiated customer experience) was the leading practice when wait times existed.

Contact center customer experience – managing expectations

If customers are to be kept on hold they must be told how long they will have to wait, and be presented with alternatives.

- The average time on hold after completing the interactive voice response (IVR) prompts was two minutes.
- Only 25 percent of telcos surveyed provided a call back option and set expectations for wait times.
- The better practice observed saw zero wait times consistently, but the worst practice experienced saw wait times in excess of 30 minutes with no call back option offered.
- We observed examples of specific carriers in three countries (Australia, Spain and Portugal) bringing offshore call centers back to their origin country.

Online customer experience – MVNOs lead the way

Online is an important channel but many telcos are putting their prepaid business at risk by failing to fully exploit online sales and services.

- Only 45 percent of telcos surveyed sell prepaid SIMs online.
- The online ordering process varied significantly between telcos. The best in class allows a customer to complete the whole process in two screens (nine fields and 13 clicks), while the worst in class required up to 14 screens (41 fields and 53 clicks) for the same activity. MVNOs tended to have better practices; merging the ordering, activation and account set-up processes.
- Only 22 percent of telcos surveyed provided the ability to track the delivery of a SIM ordered online.
- Forty percent of telcos surveyed offered online chat to enhance the ordering and support experiences.

Product offering – increased choice and complexity

Customers want choices that match their individual usage patterns, not arbitrary plans that offer only confusion.

- The majority of the telcos surveyed offer a wide range of prepaid plans targeting various customer segments, with some offering in excess of 10 plans.
- We found that, as the number of plans increased, the more confusing it was to interpret and understand what exactly was on offer. Often, the numerous offerings were difficult to compare like-for-like, had different pricing structures and hard to follow promotional materials.
- The better practices were observed in MVNOs. They often offered as few as two plan options with simple to understand pricing structures and inclusions.

Top-up customer experience – developing countries win out

Consumers are making many of their financial transactions online via the web and via smartphone applications. They expect to do the same with prepaid top-ups.

- We observed that e-top-ups were more readily available in developing countries (e.g. Kenya, South Africa and South-East Asia) than in developed countries.
- In Europe there is a trend towards social media and smartphone bank apps being used for top-ups. Bank apps link prepaid mobile accounts directly with bank accounts rather than with a credit card.

Key focus areas

In addition to the research gathered directly from the customer's viewpoint, through KPMG's global network and direct engagement with senior executives at a number of telcos, it is clear that significant investment is being made to create a better customer experience. Three broad focus areas are prevalent.

- Identifying a single owner of the customer (all customer-facing channels and initiatives fall under this one representative) and instilling a customer-centric culture.
- Implementing 'voice of the customer' programs to collect closed-loop customer feedback to measure advocacy across all customer touch points.
- Using customer experience analytics to identify the root cause of negative customer experiences, with a particular emphasis on analyzing cross-channel customer interactions to provide a holistic view of the customer journey.

Objectives and scope

With this study KPMG sampled, compared and tested firsthand the customer experience across a broad range of providers in multiple countries and across multiple channels: retail, online and IVR/contact centers.

In such a competitive market customer experience can make the difference, as appreciation of prepaid customers is a trigger to win these profitable customers for the long term.

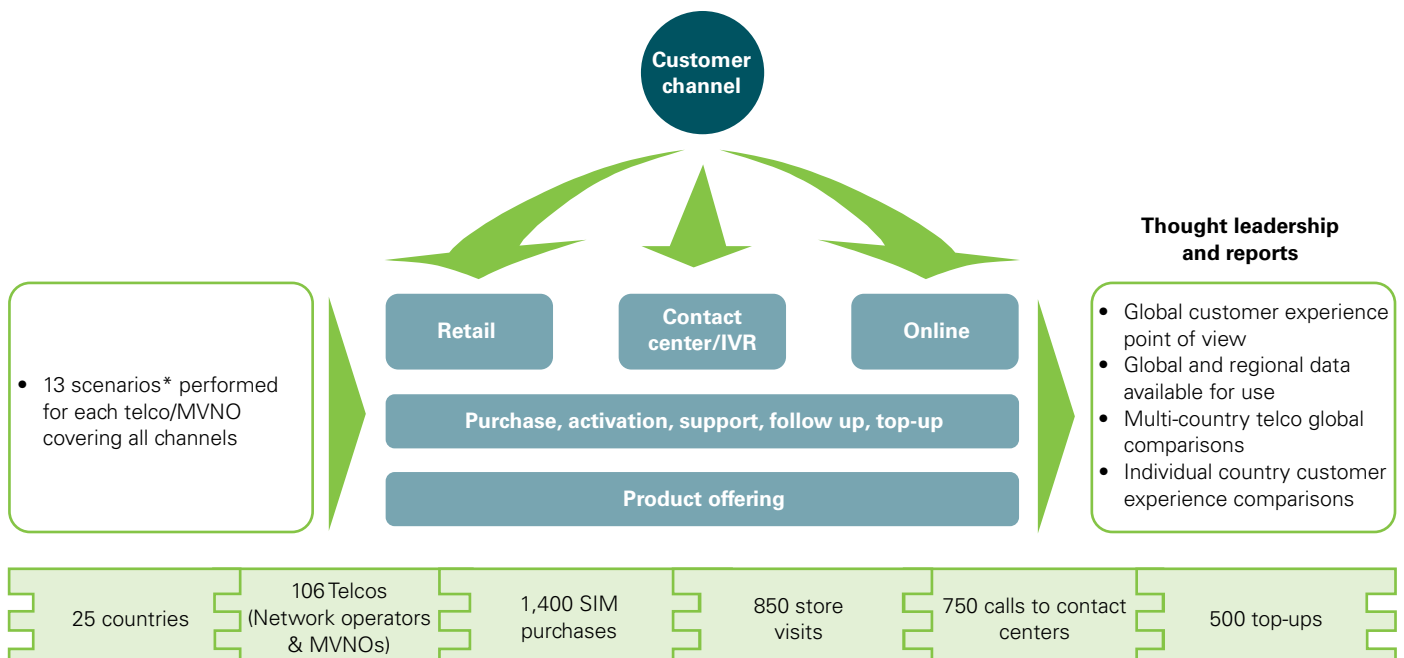
Hans Werner Winterhoff
Partner, KPMG in Germany

The objective of the study was to provide an understanding of global better practices, trends and regional patterns. We chose prepaid mobile as a proxy to test the customer experience as it allowed large scale sampling across the full life cycle of the customer experience (shop, buy, get started, use, recharge, care/support, migrate/churn).

By analyzing and comparing the data from our mystery shoppers we aimed to identify:

- innovations, trends and better practices in customer experience across all channels
- innovations, trends and better practices in product offerings and top-ups
- opportunities for improvement at each 'moment of truth' in the customer journey
- significant shortcomings and omissions in some prepaid offerings.

Figure 1: Overview of scope and study size



The full customer journey was measured with the exception of network quality and application.



Source: In search of a better customer experience, KPMG International, 2013.

* Usage scenarios were out of scope

Figure 2: Global view of participating countries

% Represents the percentage of the prepaid market share in each country*

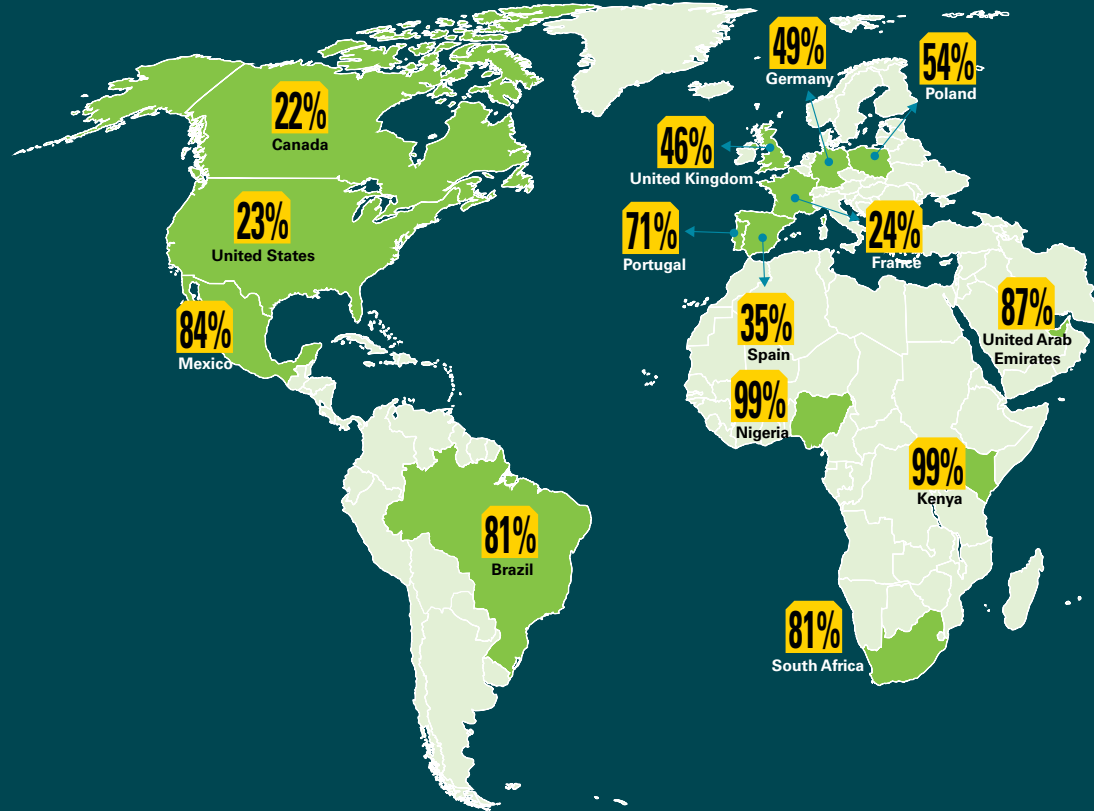
■ Countries participating in the study

Six of the telcos measured operated in five or more countries.

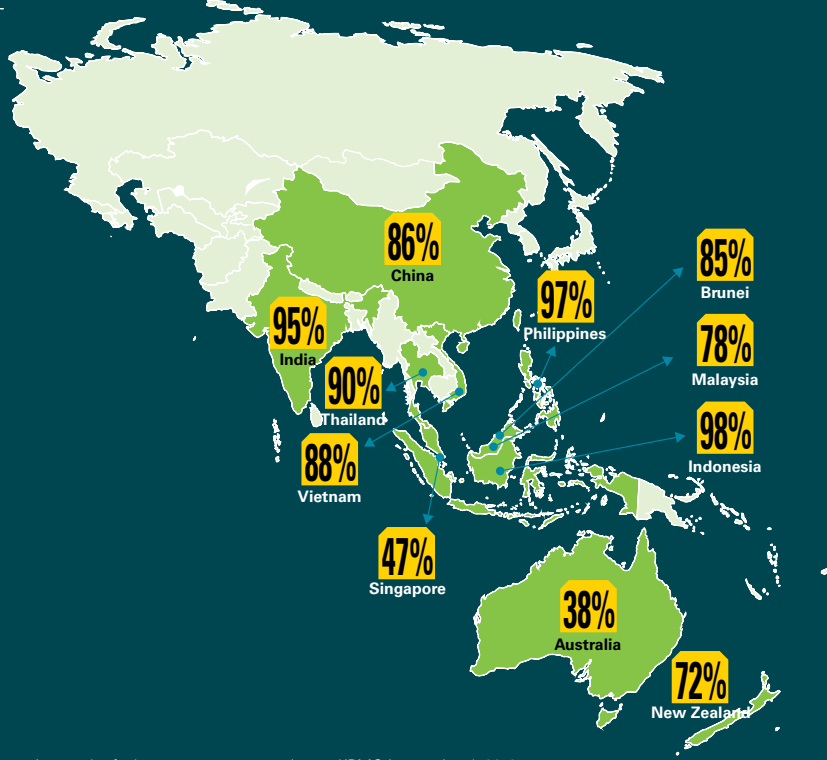
See 'About the survey – methodology' for scenarios tested

*Note: **%** is the percentage of prepaid to postpaid in each country, not the market share of the telcos measured.

Americas, Europe, Middle East & Africa



Asia Pacific



“ Rather than looking at prepaid as a mass market, where everybody is treated as a low-end customer with no differentiation, the operators are now getting smart about identifying high-margin customers. ”

Shea Silidker
Associate Director,
KPMG in Singapore

Today's changing prepaid marketplace

In recent years, a number of factors have combined to increase the popularity of prepaid as well as a need to differentiate on customer experience. With number portability readily available and an increase in contract-free offerings, customers have little reason to remain loyal.



Customer satisfaction has been in the spotlight for quite some time in Brazil. In July 2012, poor customer satisfaction levels and high complaints led Anatel (Brazil's telco watchdog) to order three incumbent mobile operators to stop selling new service plans in some states until they improved.

Manuel Fernandes
Partner, KPMG in Brazil

The impact of the global financial crisis and cheaper smartphones

Prepaid has long been the preferred choice for users wanting greater control over their spending and those unable to qualify for postpaid because of a poor credit rating, the lack of the necessary bank or credit/debit card accounts as well as those unwilling to commit to a contract. In a post-recession marketplace the wireless subscriber is more cash conscious and demands more from the service provider. A more recent development spurring growth in prepaid services has been the availability of low-cost smartphones offering most of the features and functionality of their more costly counterparts.

Rising consumer awareness of prepaid – the role of the MVNO

Another factor driving the growth of prepaid has been the increased number and popularity of the mobile virtual network operators (MVNOs). They generally offer more competitively priced plans than network operators and our research has shown that, generally, they perform better than the network operators in some aspects of prepaid services.

Some MVNOs exist by targeting specific micro segments such as early teens, the elderly and those seeking cheap international calls. MVNOs have also led the way in terms of the convergence of prepaid and postpaid plans. Recognizing the need for greater control of spending and changing consumer patterns, prepaid plans have been merged with postpaid to form hybrid plans that offer postpaid-

style inclusions paid for in advance. All of these have contributed to rising consumer awareness of prepaid.

Towards a great customer experience

The market for telecommunications services is becoming increasingly competitive and differentiation of core product offerings ever more difficult. This is driving providers to seek differentiation through improved customer experience, devoting more resources to customer experience improvements. Many also have a revived focus on prepaid, making their offerings more attractive, raising customer awareness of what prepaid services can offer and targeting particular segments.

Telcos are striving to create the optimal customer experience, to ensure that at the end of every interaction – for purchase, enquiry or support – the customer comes away feeling positive about that interaction. This enhanced customer experience potentially leads to customer loyalty, increased customer spend, additional products, and recommendations to friends and family. The experience needs to also be consistent regardless of the channel (retail, online, contact center).

An optimal customer experience also requires performance from all of the underlying components, including the network elements on which the service depends: for consistent connectivity, voice quality, absence of dropped calls and data speeds. We made no assessment of these factors and their contributions to the customer experience in this study.

Measuring customer experience

Many operators today are trying to determine the effectiveness of the customer experience by using metrics to measure how customers rated their experience for specific interactions. We see these as positive to providing feedback and instilling a focus on improvement. However, these touch point metrics alone can have limitations in identifying true root causes of negative customer experiences.

No short cuts to better customer experience

In *The Customer Experience Index 2013*, Forrester Research sought to assess the quality of customer experience for 154 large US brands across 14 industries (airlines, retailers, hotels, banks, etc.). It did this by asking 7,506 US consumers three simple

questions about their interactions with the target companies: how enjoyable were they to do business with; how easy were they to do business with; and how effective were they at meeting your needs?

Telcos did not fare well in this survey, with mobile service providers coming 10th and internet service providers 12th out of the fourteen industry verticals in the study. Forrester concluded that a laser-like focus on the quality of the customer experience is essential in today's recessionary times and that there is no 'magic bullet' that will deliver great customer experience: "it is a long hard road requiring dedication. Over the next three years, we'll see more value brands win customers by delivering a high-quality customer experience consistent with their overall brand positioning."

The Asia Pacific region has the highest mobile penetration in the world. In well matured markets such as Australia and Singapore, it comes as no surprise that mobile operators are recognizing the need to improve and differentiate their customer service offerings. Customers are willing to pay more for a service they feel is premium, which is significant especially in the face of falling ARPUs (average revenue per user).

Peter Mercieca

Head of Media & Telecommunications for Asia Pacific, KPMG in Australia

We are observing a tangible shift in the Indian market towards customer experience. Operators are moving from 'service orientation' to 'experience orientation'. Large telcos are setting up dedicated functions responsible for customer experience, and moving to Net Promoter Score (NPS) methodology.

Romal Shetty

Head of Media & Telecommunications,
KPMG in India

Retail customer experience – consistency is key

“We were surprised in such a competitive market to find situations where stores were out of stock on prepaid SIMs and brochures. In a very competitive market you’d expect this to be one of the key things the operators would be monitoring.”

Jorge Santos
Partner, KPMG in Portugal

“In the US market, particularly in New York City, we experienced retail stores leveraging tablets, not only to manage the queue, but to identify high-value customers and provide a differentiated customer experience based on other services purchased from the carrier.”

Ryan McCumber
Associate Director,
KPMG in Australia

Our study identified wide variations in the means by which providers of prepaid mobile services deliver the retail experience, although some broad trends were discernible.

Adequate retail stock availability

In our survey we experienced stock issues in an unexpectedly large number of retail stores; in particular, prepaid micro and nano SIMs were often unavailable, which is surprising given their popularity in smartphones. Globally, in only 46 percent of all the mystery shopping scenarios completed were all types of SIMs available, while 29 percent had standard SIMs only. In Portugal, where a SIM is tied to a plan, the entire range of plans was never available. Despite all operators offering around 10 plans, SIMs were only available for a few of them. Often, brochures and plan information were also out of stock in retail stores, making it difficult to find and take away any information on the available prepaid offers.

The importance of control across channels

In the early days of prepaid, operators were often happy to have their products sold from all retail channels: licensees, non-exclusives, supermarkets, convenience stores, etc. The focus has now changed to the extent that some operators are buying back their franchise and licensee stores so they can have more control over the customer experience. In some cases, operators are trying to identify the best performing dealers and forming stronger partnerships. It is vitally important that operators deliver a consistent experience across all retail outlets regardless of ownership. When customers see the telcos’ brand/logo on a store’s window they are unable to distinguish that store from an operator-owned retail outlet, and expect to receive the same level of service.

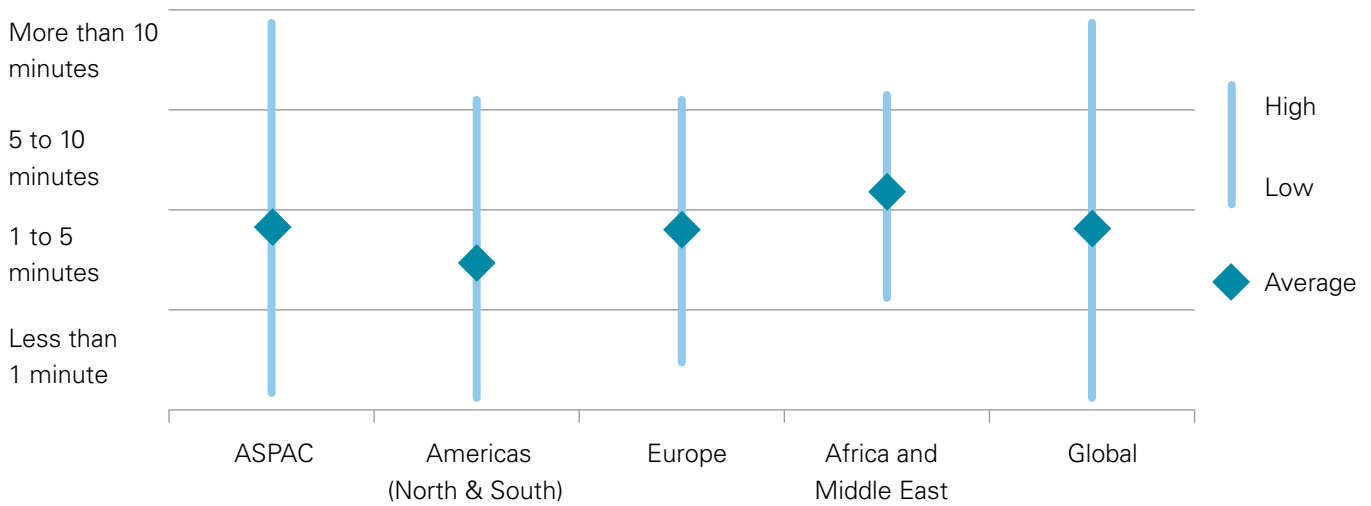
Two leading Australian telcos in April 2013 both moved to end long-standing agreements with sub-distributors of their prepaid offerings to allow for more control of the channel. Furthermore, in early 2013 a leading Australian telco launched a program to use customer experience metrics to reward retailers for performance.

In-store product information and flow

Approaches to product information differed widely across telcos, countries and regions. In each country some telcos are rolling out a variant of the ‘store of the future’, but all are in different stages of the rollout. The future store has an open and free flowing feel with all products on display where customers are able to touch, feel and try. We also noticed a move towards putting brochures on screens to minimize cost.

We identified great variation in the way retail stores handle customers, especially when customers have to wait. The average wait time was just under five minutes before being served. The best practice was to have a concierge (56 percent of retail stores measured had a concierge) to greet customers, gather their information and allow them to browse products. One innovation observed was the use of tablet devices by the concierge as well as the sales staff. In one example, the concierge used the tablet to identify high-value customers and provided them with a differentiated customer experience. Other stores used tablet devices to complete the sales purchase, eliminating the use of a terminal or cashier. The worst practice was to provide minimal in-store guidance together with minimal accessible product information and long customer queues.

Figure 3: Average wait time before being attended to by an agent

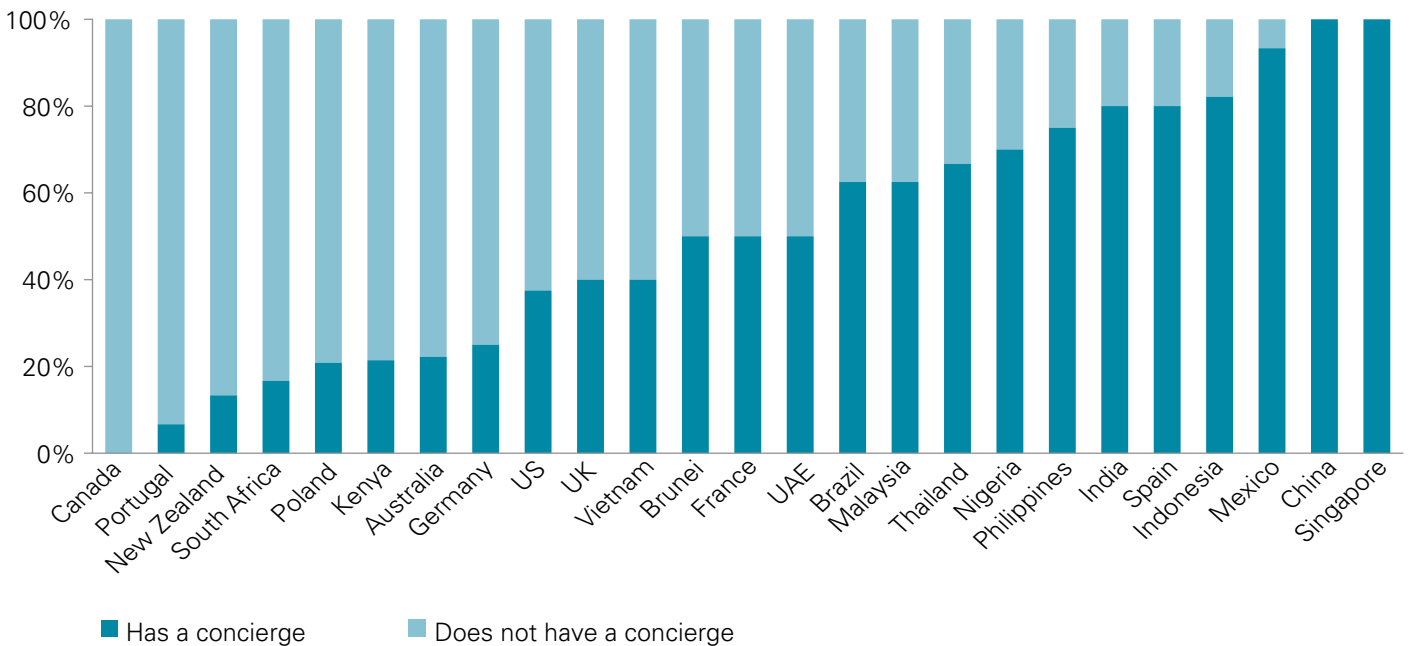


- Globally, the average wait time before being attended was just under five minutes.
- The longest wait times were recorded in UAE and New Zealand.
- Some telcos in Canada, Indonesia and Nigeria consistently recorded no wait times.

Note: the average regional scores measured here are based on the average country scores and thus the range within specific countries may not be reflected.

Source: In search of a better customer experience, KPMG International, 2013.

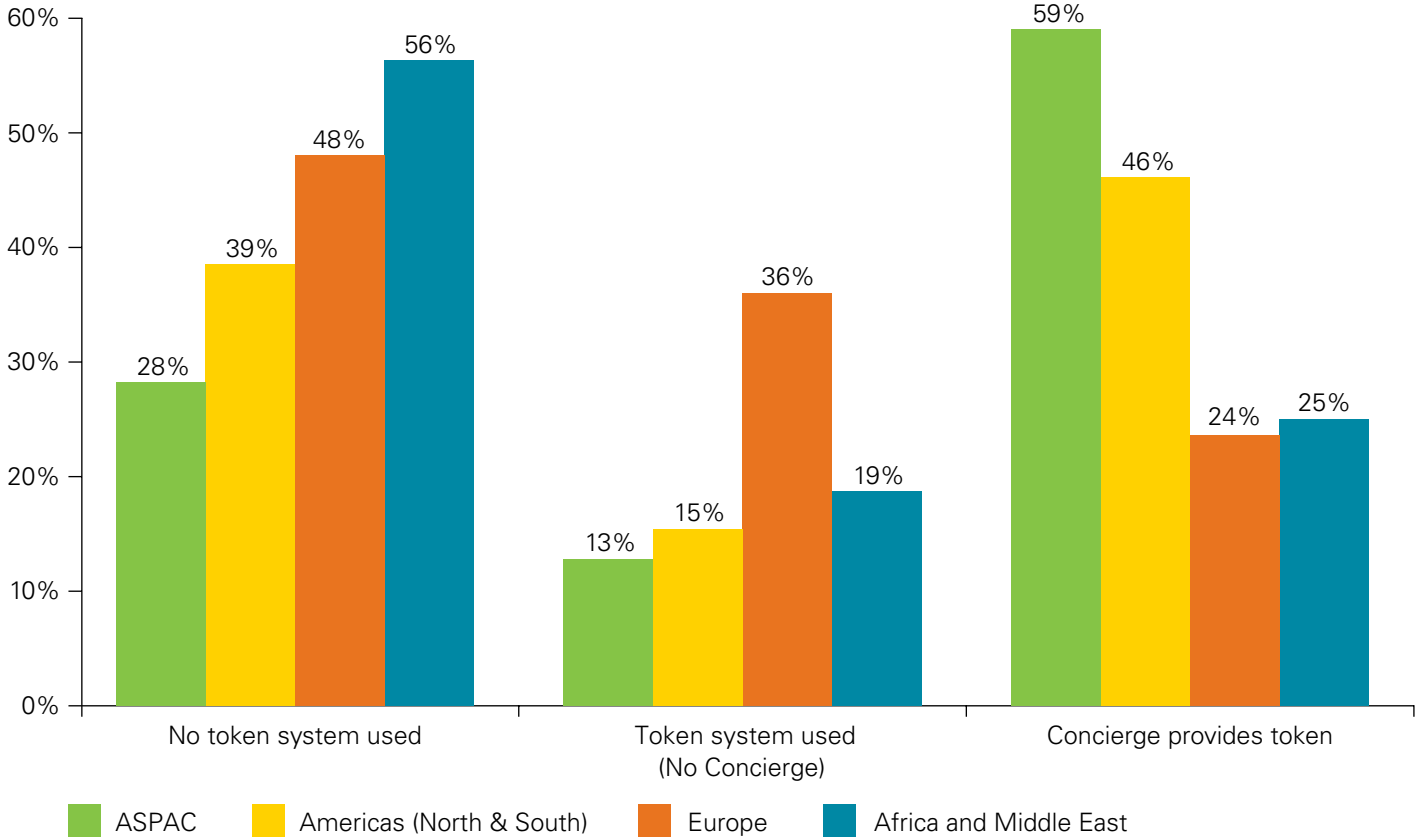
Figure 4: Does the store have a concierge?



- Stores that had a concierge were more prominent in Asian countries.
- There does not seem to be any other particular regional trend in the use of concierges.

Source: In search of a better customer experience, KPMG International, 2013.

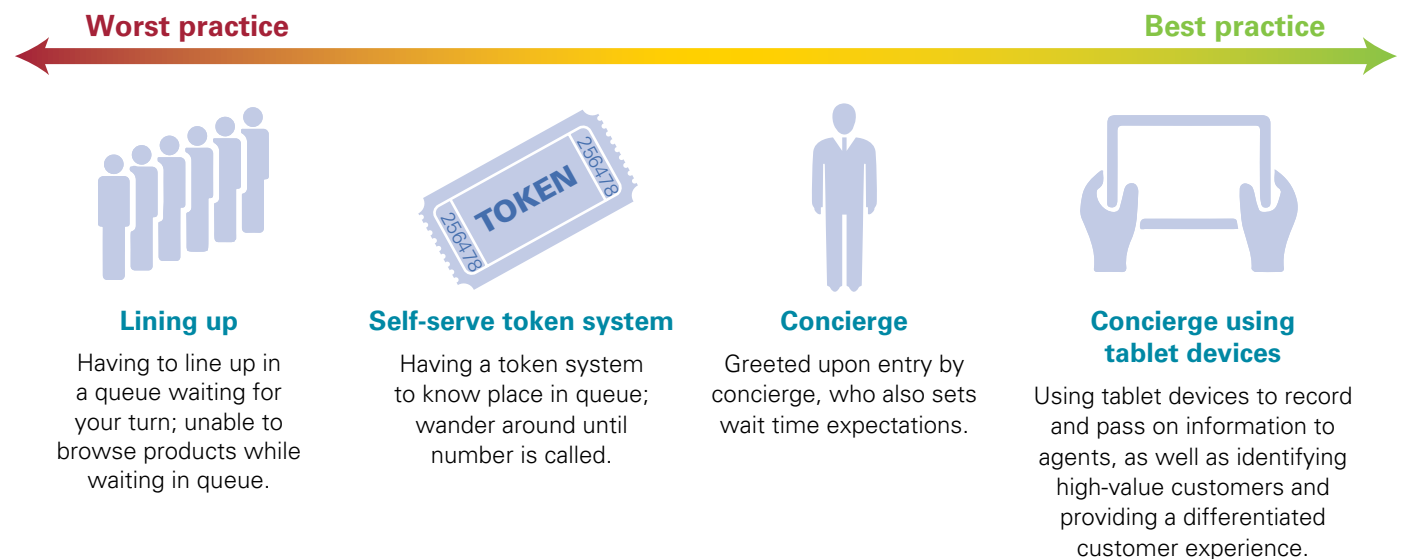
Figure 5: Was a queue management system used?



- Use of queue management is more prominent in ASPAC.

Source: In search of a better customer experience, KPMG International, 2013.

Figure 6: Global queue management approaches



Source: In search of a better customer experience, KPMG International, 2013.

Supplementary services

In some countries operators go to considerable lengths to deliver a good retail experience by providing facilities and services that are peripheral to the core product offering. For example, one operator in Indonesia provides a children's play area in its retail stores, as well as free Wi-Fi for any visitors. Other facilities offered TVs, newspapers, beverages and PCs for Internet access.

Personalizing the sales process

In the 850 store visits we made, sales consultants only introduced themselves by name 20 percent of the time. The sales consultants who introduced themselves and addressed the customer by name made the engagement more personable, resulting in a more positive experience. In Poland one telco has a practice of handing out business cards, providing an additional channel for questions, which made the shopper feel more valued. The soft skills of sales consultants, including their body language, empathy, attentiveness and willingness to help were all scored highly and were consistent across the board. When sales consultants asked

probing questions such as, "Do you make a lot of international calls and to what country" or "How much data do you use per month?"; they were then able to offer an appropriate prepaid plan which matched the customers' needs.

Closing and SIM activation

The act of purchasing a SIM does not create a customer. That happens only when the SIM is activated and the customer starts using it. Despite the importance of this transition, our mystery shoppers identified the need for a better closing experience and for retail outlets to be more proactive in offering assistance with SIM activation and in providing additional information, such as identification of the telephone number and top-up options available. Sales consultants offered assistance in SIM activation in 69 percent of our retail mystery shopping scenarios (this also includes pre-activated SIMs, where the sales consultant informs the customer the SIM is pre-activated).

In Australia, the time to activate fluctuates significantly, with the example of a telco taking more than one hour and others being almost immediate. Countries that scored the highest in sales closing were the US, Germany and the UAE.



When comparing the customer experience for the purchase of SIM cards in the US to other territories, one fundamental difference is that the vast majority of the US market is post-paid, not pre-paid. Many of the activities surrounding the purchase of SIM cards here are not business critical today, however, these learnings have relevance to the broader customer experience environment. »

Paul Wissmann
Head of Media &
Telecommunications,
KPMG in the US



One Spanish telco has a highly personalized token system. They call you by your name instead of by a number, and have the shortest waiting time. The stores are the best visually: white and spacious, with digital marketing material, and all agents using tablets. »

David Oliván
Director, KPMG in Spain

Retail recommendations

Consistency

Keep a close eye on both retail stores not under direct control and distribution channels to control the quality of service and ensure that the brand is being consistently well represented. Consider buying back franchises if they are not representing the brand to the level of corporate-owned retail stores.

Ensure a consistent customer experience across all retail stores, regardless of flagship, corporate-owned or franchise stores.

Concierge queuing token system

Use a concierge to personalize a warm welcome immediately after the customer enters the store (the customer's perception of their experience starts in the first 10 seconds of entering a store).

Concierges should set expectations of wait time. They should be equipped with a tablet device to identify existing high-value customers and where possible provide them a better differentiated customer experience.

Personalize

Sales consultants should introduce themselves, address the customer by name, and potentially hand out a business card to personalize the service.

Soft skills & sales knowledge

Sales consultants should be friendly, passionate and committed to customer service. Training should focus on the product itself, solution selling (including cross/up sell practices), personalization in addressing customers and how to properly close out the experience.

Sales staff should ask inquiring questions to understand the customer's needs. What are their usage patterns; heavy data, international calls, etc. and try to match the best plan to their needs by providing a solution not a commodity.

Closure

Our research shows that the closing out of a retail experience makes a significant impact on the customer's overall experience.

Sales consultants should make sure the SIM is activated, explain the various top-up options, and review the customer's phone number with them before saying goodbye and thank you.



The most striking difference between retail stores is the waiting time. It ranges from less than two minutes to up to half an hour in the worst case. We also noted great variation in consultants' knowledge of offerings. In some cases, consultants are very proactive in finding a suitable plan and presenting all available offers. In other cases, consultants had difficulties explaining the plans themselves.

Jerzy Kalinowski

Head of Technology, Media & Telecommunications,
Central & Eastern Europe, KPMG in Poland

Online customer experience – MVNOs lead the way

“ We want to make a difference and disrupt all perceptions of the telecommunications industry. By using social networking as our platform to interact, support and empower our members, we can develop good relationships and understand our members, who they’re connecting with and how to make mobile simpler – a telco for the people, run by the people! **”**

CEO, Australian MVNO

Selling online

Surprisingly only 45 percent of the telcos measured sold SIMs online, with one US operator requiring the sale of a handset in order to have a SIM card ordered online. In Europe, Australia and New Zealand selling SIMs online was common. Interestingly, we observed that in Portugal carriers ship SIMs at no cost.

Ordering process

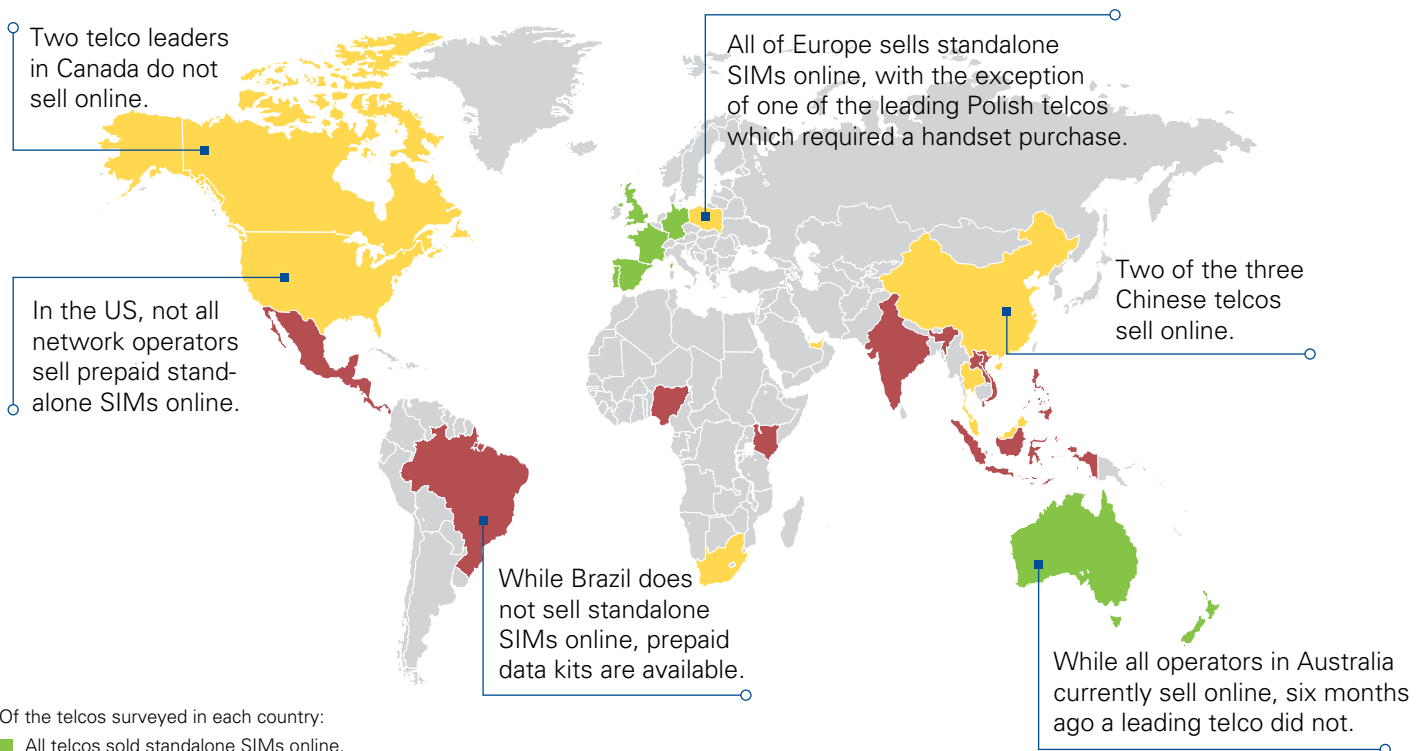
MVNOs generally offered an online experience superior to that offered by network operators. Their processes were more straightforward with fewer screens, easier navigation and fewer

data entry fields. For example, in Spain one MVNO enables a prepaid SIM to be purchased online using only four screens, whereas the same exercise at one of the network operators requires 14 screens.

Online assistance, support and information

Online chat functionality was offered by 40 percent of the telcos surveyed. However, the experience was often less than satisfactory due to application instability or excessive wait times. The leading practice observed involved a readily-available chat pop-up, help prompts and even the provision of information on the queue wait time.

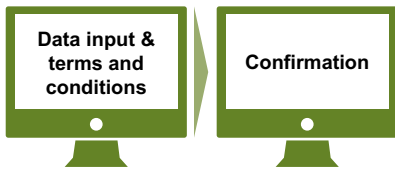
Figure 7: Online prepaid SIM purchase availability



Source: In search of a better customer experience, KPMG International, 2013.

Figure 8: Number of screens to complete online prepaid SIM purchase

Best practice



- We found the best practice to be associated with telcos that offered free SIMs.
- A SIM could be ordered in as little as two screens and nine fields and 13 clicks.

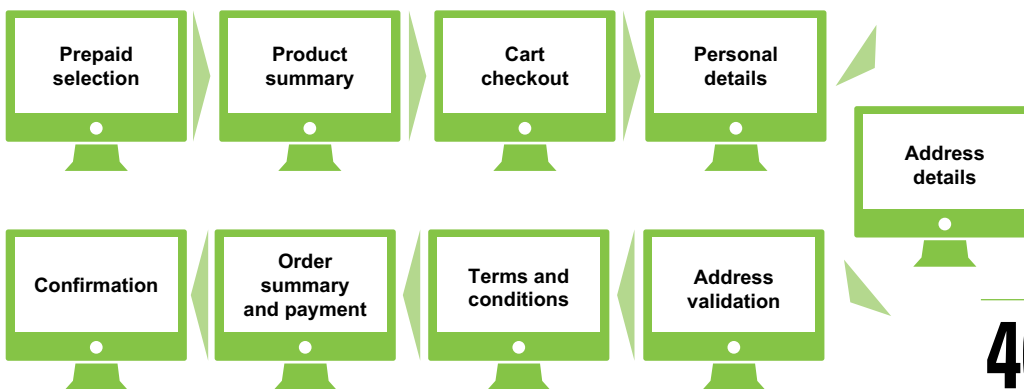
30% of telcos surveyed needed five or less screens. most of these were MVNOs.

Better practice



- Even with payment, a SIM could be ordered in as little as four screens.

Worst practice



- However, for some, it took as many as nine screens, 41 fields and 53 clicks.

40% of telcos surveyed needed nine or more screens.

Source: In search of a better customer experience, KPMG International, 2013.



We believe that the future of prepaid in Spain is the online channel. MVNOs primarily use the web and they grew surprisingly fast last year. The MVNOs provide the better customer experience; their products are simpler and their websites and IVRs are friendlier to navigate than those of the network operators. »

David Oliván
Director, KPMG in Spain

To reduce costs, some telcos are discouraging customers from phoning the call center and encouraging them to use the Web. We identified one operator who offers USD10 extra credit if customers activate their SIM online, while many others offered some form of online discounts. In addition, we found that some operators are making a deliberate attempt to improve usage tracking functions by providing real-time rating to ensure customers are best equipped to control their spend.

Online becomes the primary channel

Most MVNOs rely heavily on their online channel, with limited retail presence. One Australian MVNO has no retail or contact center and makes its SIMs and customer service available only through online channels with an emphasis on social media.

One UK MVNO runs its entire operation online and even depends on its users for new product and service ideas, for answering support queries and for recruiting new customers. Customers are rewarded accordingly with airtime credits or cash that they can either take or donate to charity.

Leveraging technology for next best offer

We were surprised at the almost non-existent use online of next best offer for cross-sell and up-sell as the capability exists today. One French telco appeared to be a leader in cross-sell and up-sell, offering complimentary products and ad-ons similar to the Amazon model upon checkout. Through the use of real-time decisioning software, telcos can have a better targeted approach and improve customer experience.

Full transparency

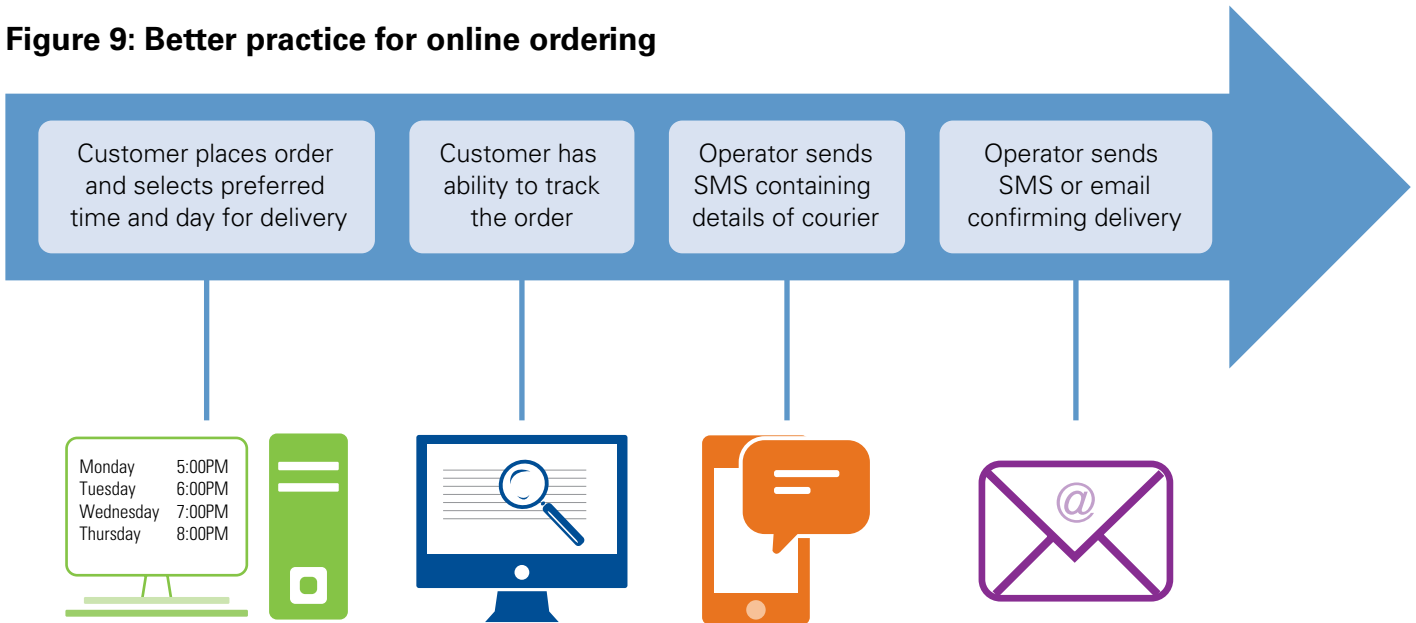
A growing online trend is for operators to provide information on the progress of shipment of SIMs ordered online, showing full transparency of where the shipment is in the process. In addition, sending an SMS or email to confirm acceptance of an order, shipment of the SIM and delivery of the SIM. Our study showed that only 22 percent of operators provide the capability to track orders online.



One Portuguese operator stood out due to simplicity of the product layout and plan explanation and a number of other factors. A dynamic toolbar sped up navigation and helped with both cross-selling and up-selling. Plus, the option to request a consultant to call you back for assistance during the process was helpful. This operator also had the most payment methods available, including PayPal, compared to its peers.]

Jorge Santos
Partner, KPMG in Portugal

Figure 9: Better practice for online ordering



Source: In search of a better customer experience, KPMG International, 2013.

Online recommendations

Simplify and optimize

The online processes should be optimized by merging the ordering, activation and account set up so that number of fields to be populated and screens to be navigated is minimized.

Online chat

Introduce or improve the effectiveness of an online chat function. Ensure that the function is available at all times and offer a proactive rather than reactive solution for customers.

Real-time rating

Provide the customer with real-time rating for both voice and data. The ability to track this is vital to some cash conscious users.

Cross sell/up-sell

The online purchase experience should be improved by leveraging models such as Amazon.com to optimize cross-sell and up-sell. Real-time decision software should also be used to provide targeted products during the sales process.

Transparency

Provide the ability to track the shipment of the SIM, including sending personalized SMSs for when the SIM gets shipped and again when delivered/signed for.

Contact center and IVR customer experience – managing expectations

Being in a country where 90 percent of the population is expatriate, the customer service of the telecom operators in the United Arab Emirates need to be prepared to address a multi-cultural customer environment, providing products and services that can cater to the needs of all customer segments.

Ricardo Faria
Manager,
KPMG in the
United Arab Emirates (UAE)

There are often cases where a customer may simply wish to speak to someone over the phone to enquire about any number of details or issues. As part of the study, mystery shoppers made over 750 calls to contact centers and observed a wide range of experiences.

A majority of telcos pre-store the contact center number on the SIM, so it is in the customer's contacts address book from day one. This makes it easy for customers to know where to go if they have any queries. However, we found that the cost of a call to the contact center varied between carriers; some offered a toll free call number, others offered it free of charge for existing customers only, and others had a fixed fee for the call.

Initial impressions of IVR and voice recognition

We found the experience of negotiating IVR menus varied widely. While some MVNOs chose not to implement an IVR system at all, network operators tended to have IVRs that were complex and not intuitive. In 10 percent of scenarios completed, a task as simple as activating the SIM took more than five prompts. In some cases, even after inputting all the information in the IVR, the customer still had to speak to an agent, repeating content, which had a negative impact on the experience.

Surprisingly only 20 percent of telcos surveyed utilized voice recognition software, and the consensus was that it was not working well. Only Spain reported a positive voice recognition experience.

Wait time to reach contact center agent, availability of call back

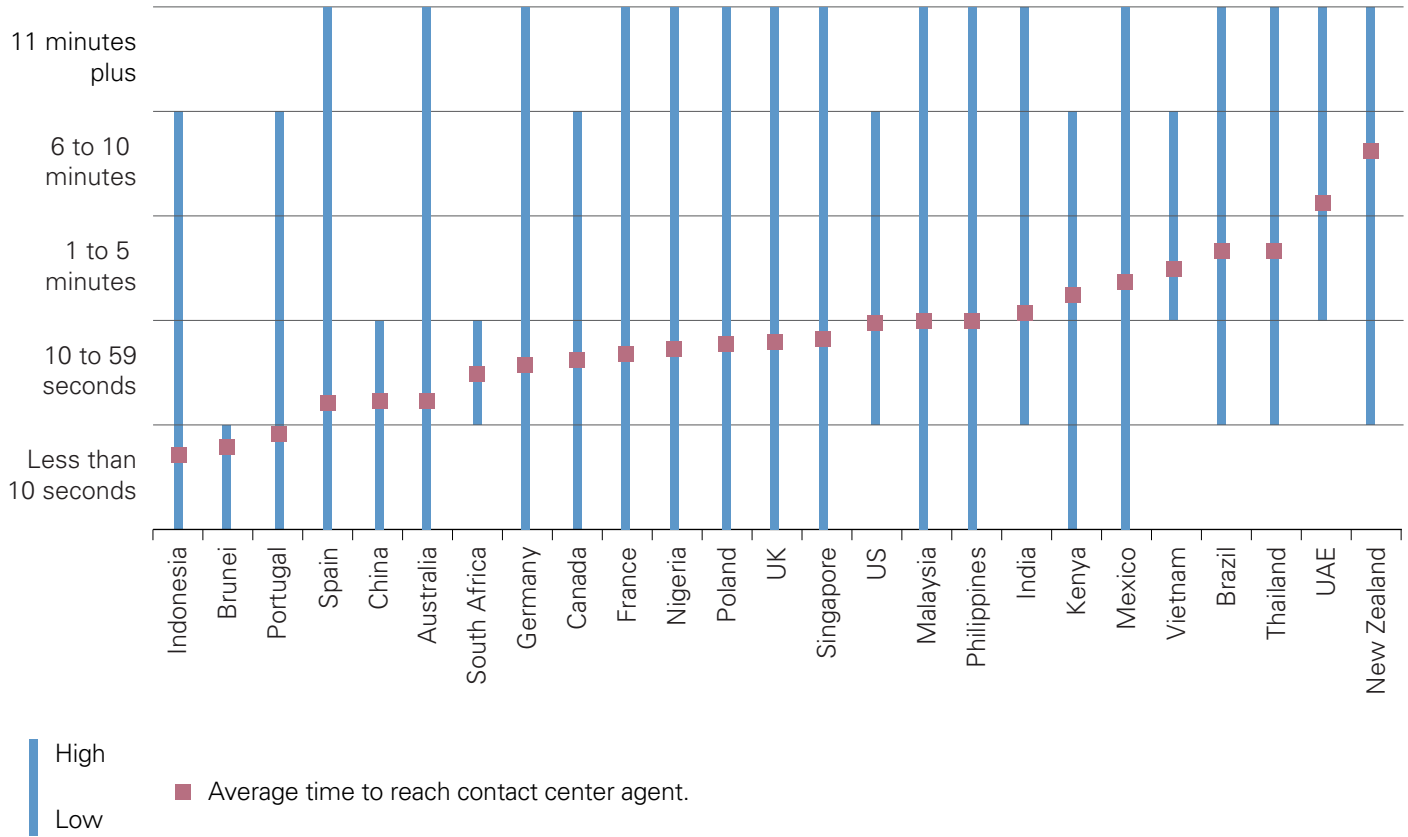
For most providers it was possible to reach and speak to an agent, but the wait time to reach an agent varied significantly. Mystery shoppers experienced wait times longer than five minutes 17 percent of the time. The telcos that communicated wait time expectations upfront and offered a call back service were rewarded with positive experience scores despite the long wait. However, a call back service was only offered 21 percent of the time, and it was often telcos that had shorter wait times that offered this service.

24/7 and language options

The convenience of being able to speak to a person at any time, day or night, is a growing expectation worldwide. In our survey we found 68 percent of telcos had contact center agents available 24/7.

Also, the number of language options varied widely, and what constitutes best practice varied by region depending on the number of languages in use in that region. The standard practice in IVR was to have English as an option in the menu. Canadian operators routinely offer English and French, US operators English and

Figure 10: Average time to reach agent post IVR selection



Source: In search of a better customer experience, KPMG International, 2013.

Spanish. In Portugal we observed the IVRs in Portuguese only, even though most operators speak English.

In Spain the IVR is usually in Spanish, except for some MVNOs like Lebara – which caters to minority nationalities – whose IVR is in English and Spanish

but also offers support in several other languages.

First call resolution

Customers who call a contact center with problems expect a solution as quickly as possible. Where the customer may already be having a bad experience,

the last thing they want is to be transferred between agents due to their inability to resolve the issue. With every transfer, the customer has to explain the issue again, which only worsens their overall experience. Ensuring that agents are properly equipped to deal with problems on first contact is something customers value.

Real-time decisioning

Surprisingly we didn't witness consistent cross-selling or up-selling from any telcos. While some agents attempted to offer postpaid or other plans, it was not consistent. Telcos should leverage real-time decisioning tools to provide next best offer and targeted cross-sell and up-sell products. Real-time predictive

analytics allow the agents to quickly offer the next best offer, but also stop agents from trying to sell when a customer has an open trouble ticket. Our experience shows that agents attempting to up-sell when a customer has an open issue compounds the situation and irritates the customer. Leveraging these tools is critical to providing an optimal experience in the contact centers.

Contact center/IVR recommendations

Simplify and optimize

IVR systems should have a short and simple personal greeting menu with an option to speak to an agent among self-serve IVR options. IVR prompts to route calls need to be efficient, but the data needs to transfer with the call.

Ensure 'warm handovers' occur when there is a transfer between agents. The agents involved should briefly discuss the details of the situation to ensure a seamless experience for the customer.

Set expectations and call back

Callers should be given estimates of wait times and be provided with the option to receive a callback within a specified time, especially if wait times are long.

24/7 and language options

Telcos should have contact centers available 24/7 with multiple languages available.

Operators need to carefully assess whether the savings obtained from outsourcing their contact centers to a lower cost location outweigh the potential for negative customer experiences.

First call resolution

Agents should be empowered and incentivized to solve complaints and problems on first customer contact.

Flexible and powerful customer relationship management (CRM) systems that easily provide a 360 degree view on the customer should be implemented to help eliminate the need for transferring calls.

Know me and value me

Real-time decision software should be used to provide targeted products during the sales process, and avoid trying to sell something when there is an open trouble ticket.

A more personalized and familiar feel can be created by thanking the customer and by addressing them by their name.

Any open issues should be followed up as promised in a timely manner by the method of the customer's choice.

Network operators' sales agents don't show enough interest in prepaid customers and their attitude changes as soon as they realize that the client is only interested in a prepaid service. One telco offers a free customer contact number, for example, but if it identifies the caller as a prepaid customer it will not allow them to talk to an operator.

David Oliván
Director, KPMG in Spain

Product choices customer experience – increased choice and complexity

Start-up costs varied significantly globally

In some countries, SIMs were available free of charge or for a very low cost; but in others, certain requirements meant start-up costs were significantly higher. Even within countries, there was quite some variance. In the US, certain carriers sell SIM cards separately, whereas other carriers require the purchase of a handset, due to network technology limitations. In cases where SIM cards are available, there may be an upfront cost of as much as \$50, though the net cost is often minimized by a rebate. In Portugal, where SIMs were readily available across all carriers at no cost online, it was not necessarily the case in the retail stores. In some cases, the inconsistency meant the minimum start-up cost was up to USD10.

Handset required

In countries where Code division multiple access (CDMA) networks were present (North America, Indonesia, China and Brazil), handset purchases were required, which significantly drove up the initial cost. In today's global market, customers expect to be able to purchase a local SIM and use it on their existing phones when in a foreign country; not be required to purchase a new handset.

Usage plans – extreme variety vs. simplicity

KPMG's view is that the majority of prepaid plans have become too complex and confusing. We see two trends happening globally: network providers are typically offering many plans with many variations and MVNOs are opting for simplicity. There are exceptions,

Figure 11: Minimum start-up costs by country

Country	Min. start-up cost (USD)
US	\$10-50
Germany	\$10-15
Canada	\$10
China	\$5-10
Australia	\$1-2
India	\$1-2
Nigeria	\$1-2
Spain	\$0-10
Portugal	\$0-10
UK	\$0

Source: In search of a better customer experience, KPMG International, 2013.

Note: All values have been approximately converted to USD.

such as a global French operator whose simplicity is refreshing and who scored the highest globally. Network providers are trying to create great variety with multiple different, but rigid, plans that often fail to meet the needs of individual customers, whereas MVNOs tend to have simpler and more flexible offerings. For example, an Australian MVNO allows the user to decide with each monthly recharge how much credit goes to voice, text and data.

In Portugal every telco has between eight to 11 prepaid plans – the highest average number of plans of countries and telcos surveyed. One plan might have rates that differ depending on destination network, the frequency of top-ups and sometimes the time at which the call is made. The range of plans and choices become overwhelming for the customer.

We identified a need in the Australian market for straightforward, clean and simple pricing structures and believe that our three plans tick all those boxes, making it hassle-free for customers to stay connected.

**Australian MVNO
spokesperson**



Loyalty plans

Globally, the majority of telcos were offering some sort of bonus for top-up to drive loyalty. One operator goes as far as offering a prepaid plan where up to USD150 bonus credit is offered if a customer continues to recharge with the same plan. With each additional recharge, the bonus credit incrementally increases from USD50 on the second to USD150 on the fourth or more top-up. Telcos need to continuously innovate with loyalty programs to drive ARPU, and decrease churn.

SIMs

With three different SIM sizes now in common use, getting the right size SIM or a universal SIM was an issue for many shoppers. Not all retail stores stocked all sizes. Some stores will cut mini SIMs down to micro or nano size – a practice that can make the SIM unreliable. One operator gets around this problem by providing a nano SIM

with an adaptor that enables it to fit phones that take only the mini SIM. The worst practice encountered was when our mystery shoppers were told to cut the SIM themselves.

Around the world the standard start-up cost seems to be USD2 upfront for the SIM plus a small denomination in top-up. Costs are higher in the US, given marketplace dynamics where the wireless market is not driven by prepaid service. All Portuguese operators' SIMs are provided at no cost and when ordered online are shipped at no cost.

As with other aspects of prepaid, even small details like the packaging of the SIM can affect the customer's experience. One shopper said: "The packaging had strong plastic wrap which required sharp objects to open, very inconvenient." Another commented that one operator's packaging was noticeably inferior. "It feels cheap compared to the others."

It is quite difficult to predict how the market will evolve. We believe the operators need to find a strategic solution for how to bundle mobile voice and mobile broadband. At present there is clear differentiation between SIMs. There are SIMs dedicated for voice and SIMs for broadband. And there are specific plans for use of smartphones.

Jerzy Kalinowski
Head of Technology,
Media & Telecommunications,
Central & Eastern Europe,
KPMG in Poland

International roaming

In the past, prepaid SIMs were generally restricted to in-country use. The trend today is to offer international roaming. However, international roaming charges and pricing practices vary greatly between SIMs. One operator in Spain has a particularly interesting offer: its SIMs have both a Spanish and a Romanian number, so they can be used in either country without international roaming charges being incurred.

One multinational mobile operator has created a 'virtual international network' that incorporates an international

roaming arrangement across all of its operating countries and eight other countries through partnerships with operators in those countries. Though access to this network is currently available to its African customers only, it will be extended to customers in other countries in which it has operations. The key benefits of this arrangement are that it allows customers travelling to countries within this single virtual network to make calls/SMS at the same rates as local customers; and they are also able to recharge using local top-up cards or home network top-up cards while using the same number and SIM.

Product recommendations

Simplify

Telcos should endeavor to increase the transparency and simplicity of their prepaid plans. They should also have brochures that are clear and concise and compare each plan side by side.

Have stock

All SIM sizes need to be in stock at all times.

Packaging

Packaging should be simple yet informative, should include the contact center number, top-up methods available and directions for their use. Multiple languages should be considered on the labeling for specific countries.

Loyalty

Innovative loyalty promotions should be considered and implemented to increase top-up as well as reduce churn.

International roaming

The option to offer international roaming across similar properties should become commonplace and this will provide an advantage to the global telcos.



One Australian operator has one plan with free social media, but the international rates are very expensive. When asked how to get a competitive data plan with competitive international rates, the sales consultant said to buy two different SIMs and switch as needed!



Ryan McCumber
Associate Director,
KPMG in Australia



Top-up customer experience – developing countries win out

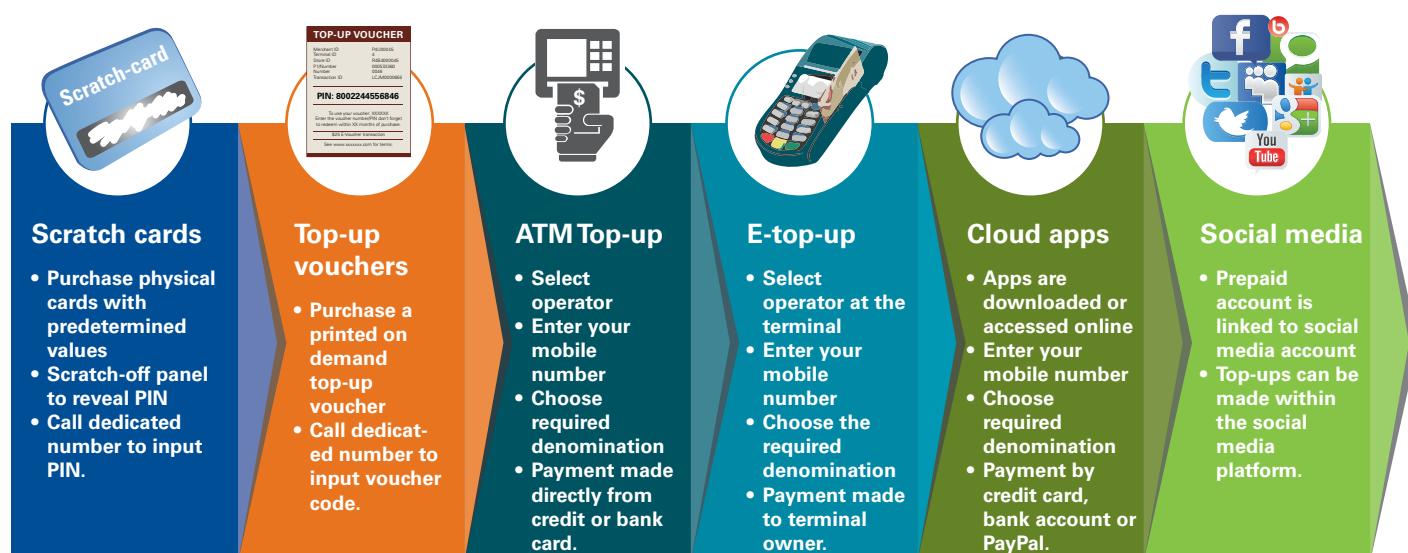
The range of top-up methods available is very wide and growing, although not all methods are available in all countries. The once popular scratch cards bought in retail outlets are nearly extinct, with modern methods such as e-top-up and bank apps becoming increasingly popular. Payment methods have also expanded to include micro payment systems, PayPal and the use of social media.

The ability to top-up via ATM varies greatly between countries. In Europe it is nearly universal - any ATM can be used to top-up services from any telco and the top-up is processed straight to the prepaid account from a bank account. In the US, the availability of top-up via ATM is limited and in a number of other countries there is no link between the ATM network and

the operators' networks. In Australia only a select few ATMs offer top-up and even then, limited to only two telcos.

In countries such as Kenya, where the use of mobile micro payment systems is prevalent (up to 17 million users), top-up through such systems is supported and even preferred.

Figure 12: The evolution of top-up methods has improved the customer experience with the ability to top-up anywhere, anytime, and in any denomination



Source: In search of a better customer experience, KPMG International, 2013.

Top-up recommendations

Bank apps

Provide a more flexible top-up experience allowing the customer to top-up easily whenever and however they want, and with whatever denomination they choose.

Partner with banks to allow applications and ATMs to connect to a customer's bank account in addition to traditional telco links to a credit card.

Social media

Leverage the popularity of social media by offering social media top-up and exclusive social media campaigns.

Loyalty

The visibility of top-up bonuses needs to be increased and customer loyalty campaigns more broadly advertised across all channels.

Self-serve

Allow customers to set up an account online, and with two to three clicks create repeatable top-ups using stored account and billing information.

In-store top-up kiosks should be available that allow easy self-service, but with staff support nearby if required.



MVNOs do not offer smartphone bank apps for top-up and it is extremely difficult to find stores where you can activate SIMs from these MVNOs.

David Oliván
Director, KPMG in Spain

Achieving a superior customer experience

Customer experience has become a C-level and board priority for the majority of telcos. Increasingly, they are creating customer experience teams headed by a chief customer officer who in many cases reports directly to the CEO and who owns all customer-facing business units. Telcos are looking at end-to-end business processes and applying techniques such as Six Sigma to drive process improvement.

Top three recommendations

Create and embed customer-centric culture

The provision of optimal customer experience requires the creation and nourishment of a customer-centric culture that pervades all levels of the organization. A customer-centric company should create a dedicated customer experience team with customer experience specialists for all channels – retail, online, contact center/IVR – and have a chief customer officer at a sufficiently high level to ensure that employee recruitment, training and performance management all focus on delivering the optimal customer experience.

A customer-centric company must:

- understand its customers deeply and adapt customer care to different target segments and different lifecycle stages, according to the customer's individual lifetime value and different needs
- identify which interactions create (and destroy) loyalty among their target customers (the key interactions which make or break the customer experience) to increase lifetime value
- ensure a consistent, positive customer experience across all channels and customer touch points
- strive for single-contact problem resolution across all channels
- tie remuneration to the provision of an exceptional customer experience.

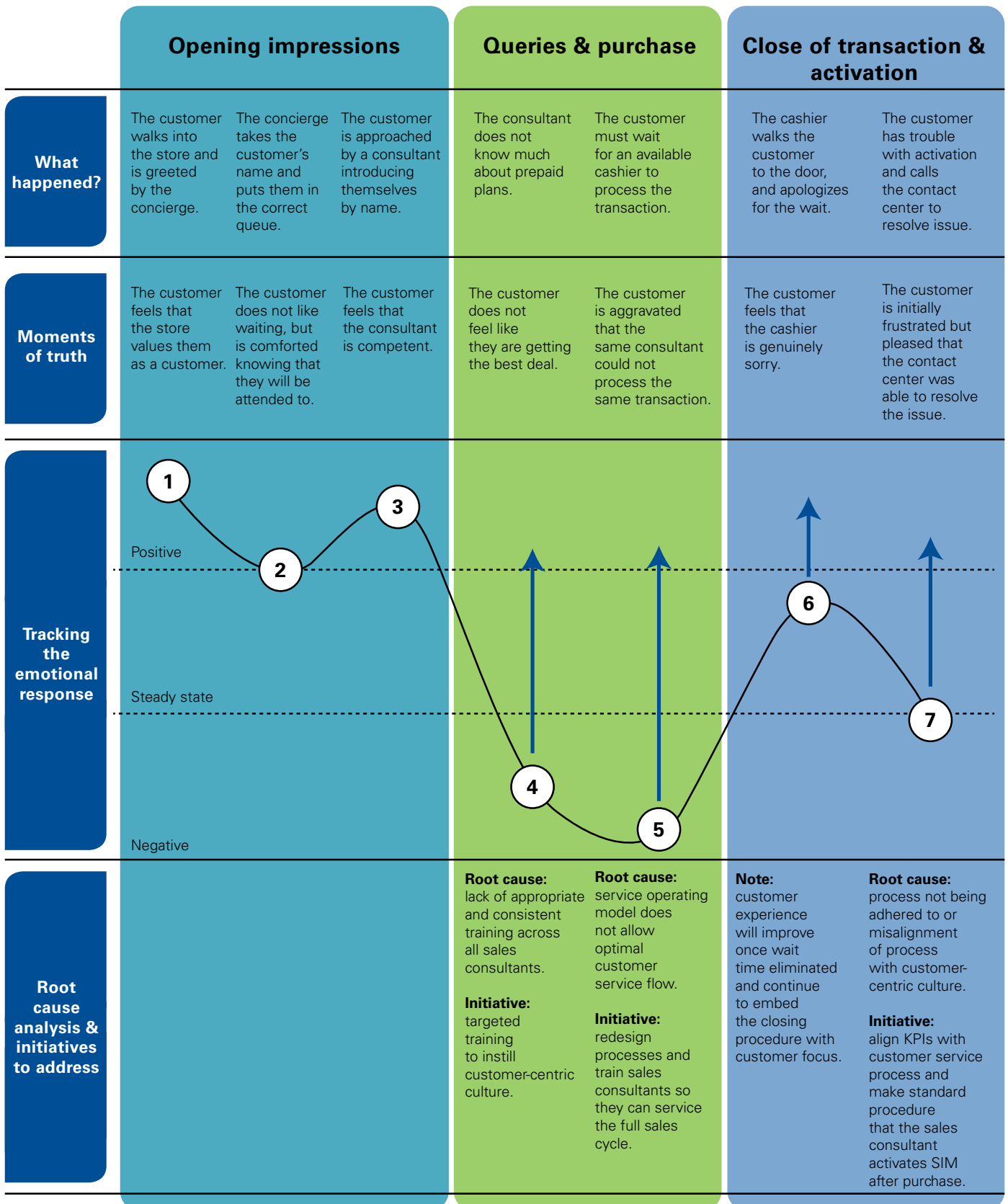
Understand how the customer feels throughout their journey

Service providers need to put in place the means to get direct feedback from customers on what they are feeling (rather than relying on their own assessments) and examine what they can do to increase customer satisfaction levels where required. Customer responses and feedback can provide valuable insights into where the customer thinks their service provider is getting things right, or wrong.

By tracking these 'customer experience scores', organizations are able to limit negative experiences and accentuate positive ones. However, there is always the danger of associating a low score with a customer experience at one touch point that is not the root cause of the problem.

Take for example the experience of one mystery shopper who went online to activate their SIM - a process that requires the entry of a valid address. The system failed to recognize the address as valid. The customer rang the contact center, was transferred to another contact center and spent half an hour resolving the problem. At the end of the process the customer was surveyed to determine a 'customer experience score'. Not surprisingly they returned a low score, but without knowing the root cause of the customer's dissatisfaction, that poor result would most likely be attributed to the performance of the second call center, when in fact the root cause was online address validation.

Figure 13: Example of 'moments of truth' across the customer experience journey



Source: In search of a better customer experience, KPMG International, 2013.

Figure 14: Global innovation to address potential negative experiences

Negative customer experience observed	Corresponding better practices observed
I had to wait in line 20 minutes to be served.	Token systems and concierges who greet upon arrival.
I did not feel like a valued customer.	Concierge leverages tablet devices to identify high-value customers. Staff introduce themselves and address customers by their names. Provide a business card. Personalize SMS and emails to the customer.
My SIM was supposed to ship within three days, but I didn't receive it.	Provide transparency with an online tracking system.
There were too many plan choices.	Simplify the product offering – allow the customer to customize allocation of voice, international, data, etc.
The online ordering process was confusing.	Provide online chat option and prompt the chat when delays on any page.
I was forced to take the phone number that they gave me.	Provide the ability to search and select a gold or vanity number.
I had to activate the SIM and was told it could take up to one hour.	Activation of the SIM upon first call made.
I couldn't find a store that was open to top-up.	Allow for bank apps on smartphones tied not only to credit cards but to bank accounts as well.
I was on hold for 15 minutes before I spoke to an agent.	Set expectations of wait time, and offer a call back option.
The IVR was in the local language which I don't speak.	Offer a second language in the IVR.

Source: In search of a better customer experience, KPMG International, 2013.

Organizations that aim to achieve a first class customer experience must devote the same rigor and attention to detail to every step in the customer 'journey' that they would use to re-engineer workflow or their supply chain. The diagram (Figure 13) shows what happened at each 'moment of truth' during a visit to a retail store.

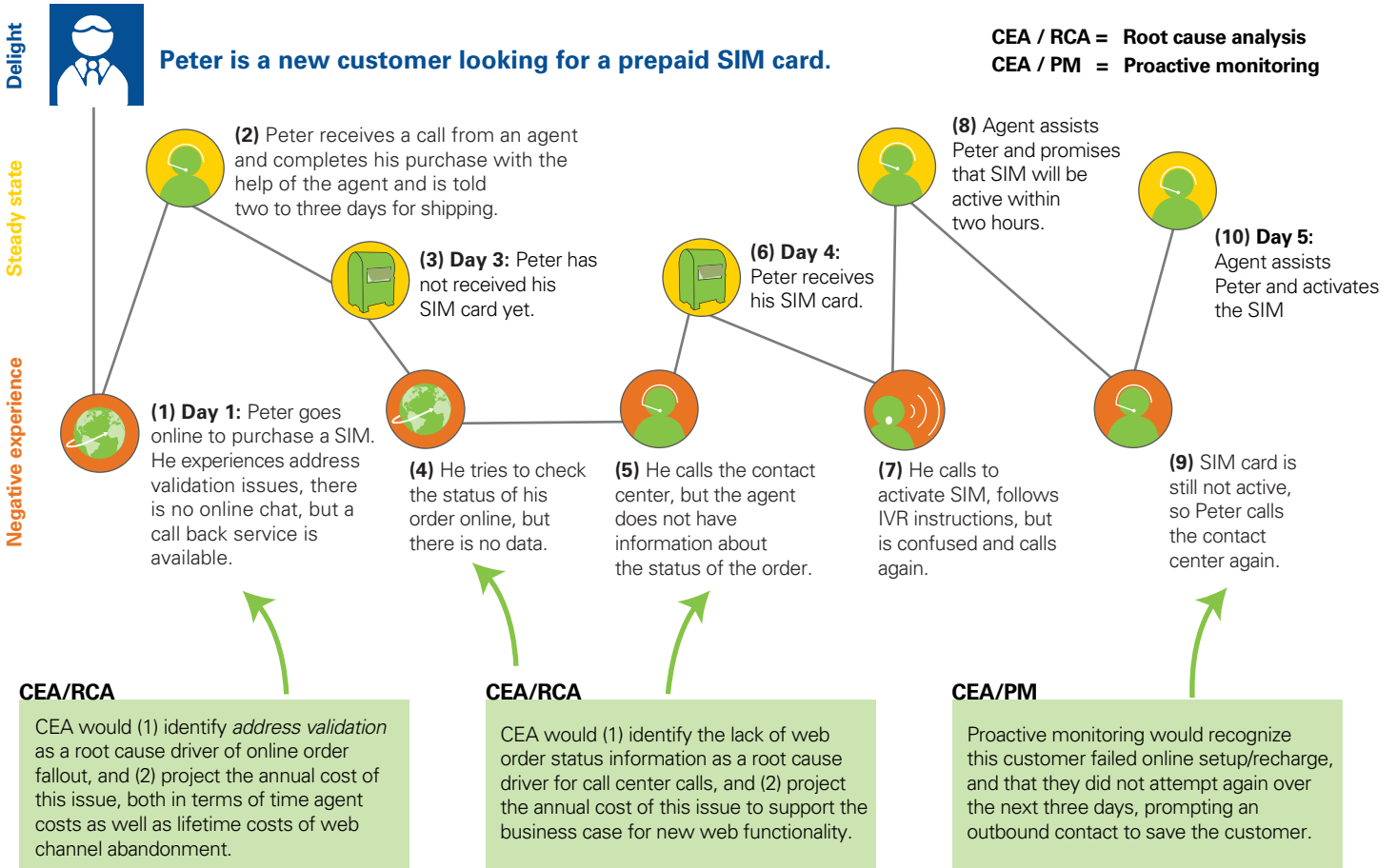
The table above (Figure 14) describes some real examples that occurred in the field and that had negative impacts on trust, and often adversely affected the mystery shopper's rating of the customer experience. We also observed how operators embedded better practices to prevent these problems from occurring.

Make use of customer experience data

Customers today make use of all channels (retail, online and contact center) intermittently. While certain customer segments have their preferred channel (e.g. contact center vs. online for the elderly) the world has changed and today's customers expect the same options and level of service in all channels. Traditionally, telcos are able to measure and collect robust data for each channel independently. Contact center key performance indicators (KPIs) (such as Average HandleTime or First Call Resolution) are available, tracked and, initiatives are put in place for improvements to that

channel. However the ability to track a full customer journey or the ability to monitor the cross-channel interactions is often lacking. Cross-channel customer experience analytics uses customer interaction logs to build complex models of true customer experiences. It tracks the customer journey patterns and volumes as customers move in and out of various channels (retail, online and contact center). Cross-channel analytic models can be leveraged using semi-structured and structured data feeds to reconstruct the customer experience, step-by-step: what was said in the IVR; which agents were talked to; which web pages were clicked on; what field were

Figure 15: Leveraging customer experience analytics (CEAs); a real example from our study



Source: In search of a better customer experience, KPMG International, 2013.

they in when they gave up and called the contact center.

For example, in the case of the online address validation failure mentioned earlier, customer experience analytics (CEAs) would have helped to identify the root cause of the issue, which was online address validation (not an issue in the contact center). Through the use of a tool the telco could project the annual cost in terms of volumes of customers who leave the web site

at the address page and then call the contact center within a certain time. By measuring total agent time required to resolve the issue and the long-term costs of customers abandoning the web as a communication channel, CEAs enables a business case to be derived rather quickly. In addition, it helps to prioritize which initiatives to implement (based on the biggest bang for the buck of each initiative's business case).

The graphic above illustrates a real example from our study. CEAs could help to prevent these types of scenarios with proactive monitoring, as well as help identify the true root cause of any issues in the customer's journey. Standalone channel (e.g. contact center) KPIs and customer feedback and metrics would not tell the full story of the customer journey.

Conclusion and key takeaways

In an increasingly competitive telco industry it is important to provide the best-in-class customer experience to add and retain customers. If a telco is not performing this task, its competitor will. It was difficult to identify one organization that stood out above all others in all areas of the customer experience. Many excelled in specific areas – such as innovation, or a better customer experience in specific channels. However, the quest for overall excellent customer service is still a challenge and there is genuine competitive advantage to the company that manages to achieve this.

Key takeaways

Improving the customer experience is a long journey

Implement broad programs and tactical initiatives to enhance customer experience stemming from a customer-centric culture. This will differentiate your product in a highly competitive market.

Provide consistency across all channels and customer touch points, so customers can continue to move in and out of all your channels seamlessly (retail, online and contact center).

Strive for single-contact resolution across all channels and have the ability through cross-channel analytics to measure where this fails, and how often.

Customer wait times in stores and contact centers are sometimes unavoidable. However, setting wait time expectations (using a concierge or a call back) can mitigate potential negative impacts.

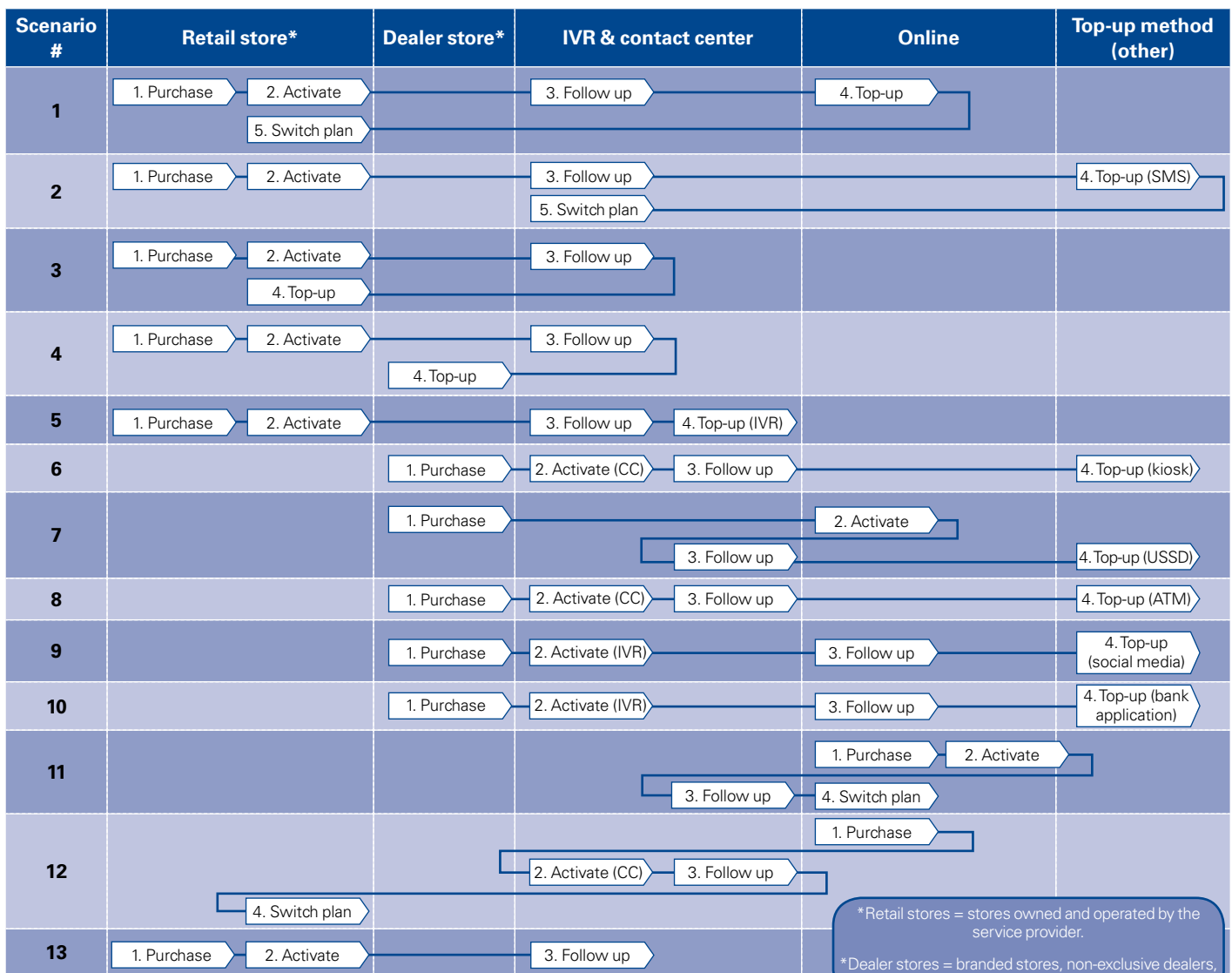
Online processes must be simplified to give the customer more control through self-help options.

About the survey – methodology

KPMG firms sought to assess and compare telcos' success in their attempts to optimize how customers experience their services through various channels: retail, online and IVR/contact center. For each SIM purchased a complete customer 'journey' was taken: from purchase through activation, top-up, follow-up and switching of the prepaid plan as well as migrating the mobile number to a different service provider.

Different routes were taken to ensure that a wide range of purchase, support and top-up options were available for each SIM sampled.

- Some SIMs were purchased in the service provider's own retail outlet, others from a variety of other retail outlets and some were purchased online.
- Activations were made in the store at the time of purchase, online or via the contact center.
- Top-up channels sampled included retail store, contact center/IVR, retail kiosk, ATM, Facebook, banking application and SMS.



Source: In search of a better customer experience, KPMG International, 2013.

In total, mystery shoppers followed 13 predefined scenarios for each telco/ MVNO whose prepaid offerings were sampled. Our mystery shoppers were then asked to rate their experiences, and the product itself, against a range of parameters and to add their comments.

In all they were asked to answer 266 questions for each scenario. The results were then compared across regions, operators and countries.

We would like to thank all those who have given their valuable time to

participate in this mystery shopping study. In particular, our thanks to Ryan McCumber and Andrew Wong from Australia for coordinating and leading the global study, as well as all of the resources from the 25 countries who participated.

Overview of information sought on the customer experience

Retail experience (44 questions)

- Initial impressions and greetings (use of queue management systems)
- Average wait times before being serviced
- Level of prepaid products, marketing/electronic material visibly displayed
- Explanation of plans being offered (are they easy to understand?)
- Sales consultant soft skills and ability to service customer enquiries
- Sales closure (activation, provide mobile number etc.)

Contact center & IVR experience (39 questions)

- How user-friendly is the IVR, average call duration, experience on hold
- Transactions/processes that can be performed in the IVR
- Availability and use of voice recognition technology
- Series of standard questions asked (International data roaming, changing tariffs, switching plans, porting, etc.)
- How easy is it to understand the contact center agent
- Contact center agents' soft skills and ability to service customer enquiries

Online experience (36 questions)

- Ease of finding the prepaid link from homepage
- The number of screens, fields and clicks for online purchases and transactions
- Complexity of plans available for selection
- Option to select a personalized number
- Average time to perform purchase or transactions
- Payment experience with methods and denominations accepted
- Availability of 'chat' and ability to service customer enquiries
- Shipping options and meeting expectations of delivery
- Ability to find answers online to standard questions (international call rates, roaming etc.)

Product experience (20 questions)

- Services available (3G/4G) and differences from postpaid product
- Communication channels used for prepaid SIM
- Availability of prepaid smart phones
- Expiry dates of prepaid SIM from purchase, first call and after top-ups
- SIM packs provided with SIM cards (ease of understanding)
- Availability of top-up methods (IVR, SMS, bank apps, ATM, social media)
- Complexity of plans
- Number portability

Global scores comparison between countries in the three retail categories

1 Pre-sale			2 Sale			3 Closing		
Ranking	Country	Average score (%)	Ranking	Country	Average score (%)	Ranking	Country	Average score (%)
1	Singapore	84.3%	1	China	82.9%	1	UAE	91.8%
2	China	80.8%	2	New Zealand	82.0%	2	US	90.0%
3	Brunei	77.1%	3	Indonesia	79.8%	3	Australia	85.5%
4	Indonesia	76.5%	4	Philippines	79.5%	4	Spain	83.7%
5	Thailand	75.5%	5	Singapore	78.0%	5	China	83.3%
6	Philippines	67.1%	6	Portugal	76.9%	6	Indonesia	82.5%
7	Spain	66.3%	7	UK	75.9%	7	India	82.0%
8	India	62.1%	8	India	74.9%	8	Germany	81.6%
9	Vietnam	59.4%	9	US	74.8%	9	New Zealand	80.7%
10	Mexico	58.9%	10	Malaysia	74.3%	10	Malaysia	80.5%
11	New Zealand	57.5%	11	Spain	74.0%	11	Mexico	79.7%
12	UAE	56.4%	12	UAE	73.4%	12	Portugal	79.7%
13	France	54.7%	13	Australia	71.9%	13	Philippines	78.8%
14	Canada	53.4%	14	Canada	71.4%	14	Poland	76.6%
15	UK	52.9%	15	Thailand	70.8%	15	UK	76.0%
16	Malaysia	51.8%	16	France	70.8%	16	South Africa	75.8%
17	Brazil	51.7%	17	Kenya	70.6%	17	Thailand	72.9%
18	Portugal	50.1%	18	Vietnam	70.6%	18	France	72.8%
19	Kenya	47.9%	19	Poland	69.7%	19	Vietnam	72.1%
20	Nigeria	47.8%	20	Mexico	69.6%	20	Canada	70.6%
21	Germany	47.5%	21	Brazil	67.8%	21	Kenya	68.8%
22	US	47.1%	22	Germany	66.7%	22	Nigeria	66.7%
23	Poland	45.7%	23	South Africa	65.4%	23	Brunei	60.0%
24	Australia	45.6%	24	Brunei	64.0%	24	Singapore	56.7%
25	South Africa	42.5%	25	Nigeria	54.5%	25	Brazil	51.3%

Overall retail scores as percentage

Ranking	Country	Average score (%)	Ranking	Country	Average score (%)	Ranking	Country	Average score (%)
1	China	82.29%	10	Portugal	68.49%	19	Canada	65.24%
2	Indonesia	79.23%	11	US	68.45%	20	Germany	63.12%
3	Singapore	76.03%	12	UK	68.25%	21	Poland	63.02%
4	Philippines	75.24%	13	Malaysia	68.00%	22	Kenya	62.68%
5	New Zealand	73.59%	14	Mexico	67.94%	23	South Africa	59.76%
6	Spain	73.27%	15	Brunei	67.62%	24	Brazil	59.30%
7	Thailand	72.78%	16	Vietnam	67.14%	25	Nigeria	54.60%
8	India	72.00%	17	France	65.81%			
9	UAE	71.24%	18	Australia	65.71%			

Source: In search of a better customer experience, KPMG International, 2013.

In search of a better customer experience 33

The global scores comparison between countries in the two IVR & contact center categories

1 IVR & wait time			2 Assistance of agent		
Ranking	Country	Average score (%)	Ranking	Country	Average score (%)
1	Poland	82.5%	1	China	96.03%
2	Portugal	82.0%	2	Portugal	90.75%
3	Mexico	80.8%	3	Vietnam	90.63%
4	China	79.3%	4	Indonesia	90.62%
5	Indonesia	77.1%	5	Philippines	89.58%
6	Brunei	75.4%	6	Mexico	87.87%
7	India	72.7%	7	Poland	86.91%
8	Singapore	71.7%	8	New Zealand	86.90%
9	Kenya	71.4%	9	South Africa	86.67%
10	Germany	67.3%	10	Australia	85.16%
11	New Zealand	65.2%	11	UK	85.05%
12	Nigeria	65.2%	12	Singapore	84.67%
13	Spain	63.5%	13	Nigeria	84.15%
14	Thailand	63.3%	14	US	84.15%
15	Malaysia	62.5%	15	India	82.56%
16	Vietnam	62.5%	16	Malaysia	82.00%
17	UK	61.0%	17	UAE	81.84%
18	Brazil	58.2%	18	Spain	79.95%
19	US	57.7%	19	Germany	79.04%
20	UAE	56.9%	20	Thailand	78.33%
21	Philippines	54.4%	21	Canada	76.41%
22	Australia	53.0%	22	Kenya	71.94%
23	South Africa	52.2%	23	Brazil	71.56%
24	France	39.9%	24	Brunei	68.92%
25	Canada	31.3%	25	France	62.27%

Overall IVR and contact center scores as percentage

Ranking	Country	Average score (%)	Ranking	Country	Average score (%)	Ranking	Country	Average score (%)
1	China	87.47%	10	India	74.39%	19	Australia	69.91%
2	Portugal	86.44%	11	South Africa	74.22%	20	UAE	69.13%
3	Poland	83.58%	12	UK	74.01%	21	Kenya	68.97%
4	Mexico	82.33%	13	Germany	72.78%	22	Brazil	64.69%
5	Indonesia	81.26%	14	Philippines	72.00%	23	Malaysia	64.17%
6	Vietnam	79.33%	15	Spain	71.93%	24	Canada	54.26%
7	Nigeria	76.52%	16	Thailand	71.52%	25	France	41.42%
8	New Zealand	75.73%	17	Singapore	71.48%			
9	Brunei	74.89%	18	US	71.29%			

Source: In search of a better customer experience, KPMG International, 2013.

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