



Service Excellence Cockpit Guide 2017



Dear readers

We are glad to present to you the third report on the Service Excellence Cockpit. The driving force is **the constant striving for better customer satisfaction and higher quality in the customer service**. This year again clearly more participants have taken part in the survey, including a number of new participants from Germany, Austria, Spain and other European countries.

In a society like ours, characterized by measurement and competition, objective performance indicators are an important guidance. With figures everybody can compare, about figures everybody can discuss, argue, rectify or counter argue. This is one benefit. The other and maybe more important objective is to provide an instrument which service centers can use to improve their operations. For example through comparisons or measurements of the own maturity in core areas, for the purposes of quality assurance and further professionalization. An added value is the possibility of making cross-comparisons with other industries or similar service centers.

Because service centers have to develop constantly along the expectations of the customers and the strategical orientation of the company, the Service Excellence Cockpit is developing as well. Besides various smaller adjustments, we have created the functionality of the mark segment last year, together with our group of experts. From this year on, subscribers can compare themselves not only with a peer group (where they themselves are a part of) and the whole market, but they can take a look at specific market segments like country, industry, etc. as well.

For Joseph Jossen of the Swiss Federal Railroads «does the constant benchmarking with other service centers assure that we do not miss the market trend?. For that the Service Excellence Cockpit suits very well as our indicator.»

Francesco Canzano, Enpuls, complements: „the Cockpit provides valuable input for the development of our new service strategy. Our Management highly values the objectiveness of the information“.

And Raphael Raetzo of Billag sums it up: „The cockpit greatly supported me to prepare and illustrate important principles for the management board, fact based and coherent. “

The **objective of the Service Excellence Cockpit** remains to make **customer service measurable and comparable**, and thus to create the basis to continuously improve the quality in the service center. Because we are convinced that customer service becomes **more and more the determining competitive advantage** in our world of the interchangeable products and services.

The cockpit is available in several languages and, because it is web-based, easily accessible through stationary and mobile devices.

With this report we are happy to present you a summary of the relevant market data of the service center market.

With excellent greetings



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1 The Service Excellence Cockpit

1.1 The Importance of Customer Service and Benchmarking

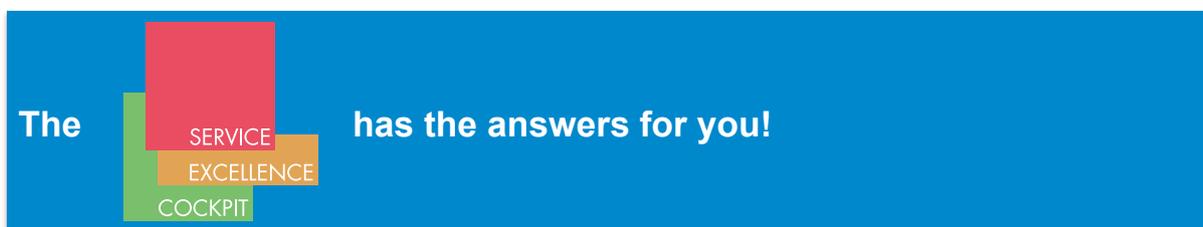
Companies differentiate themselves from the competition through extraordinary services. However, it is demanding to plan, manage and execute the interaction between customer and company in such a way that the customer is satisfied with the services at the end. At the same time the importance of customer services increases for the strategic success of a company which is increasingly seen as the most important differentiating factor.



Figure 1: Customer service is the most important competitive advantage (Source: Economist, survey of 500 global business leaders)

It is not easy to measure services and even more difficult to compare these. This is where the service excellence cockpit can help you. It provides information on the state and the positioning of your customer service, so answers to questions like:

- How satisfied are your customers?
- Are you better than your competitors?
- How efficient are you compared to other service centers?
- Where can you improve your service center?
- What are the trends in the market?
- To what extent have these trends already been implemented?

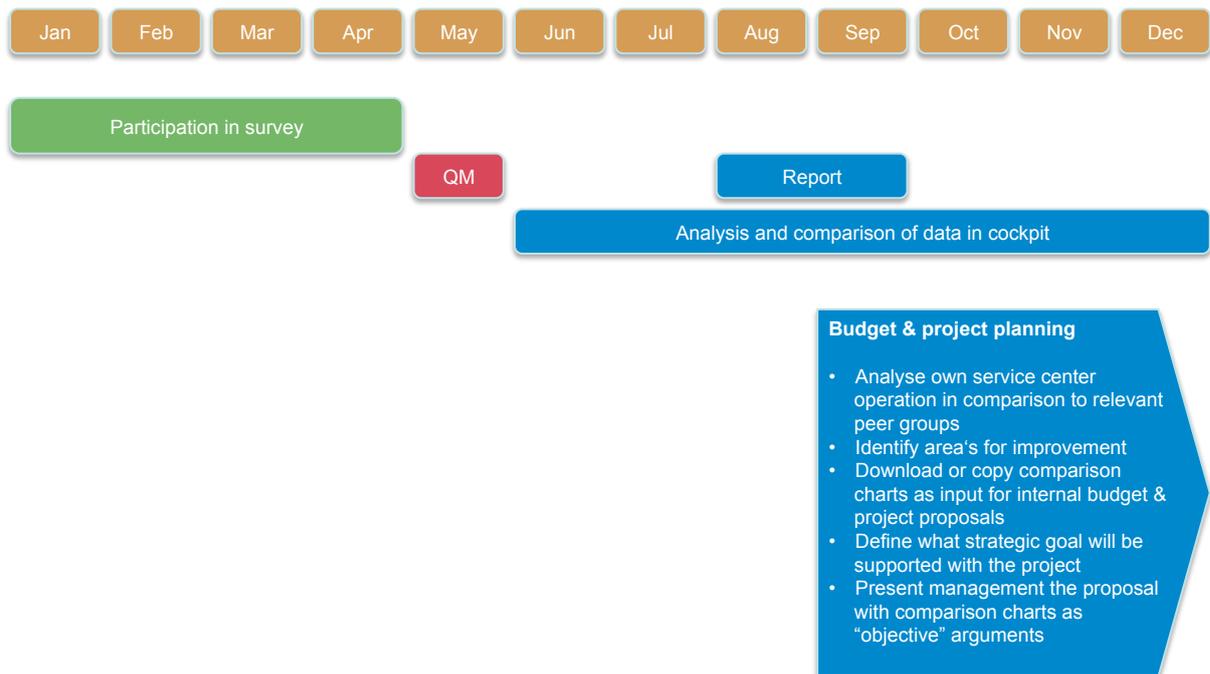


1.2 The Service Excellence cockpit as strategic management tool

The "Service Excellence Cockpit" is a management tool for Service Center and Operations Manager, which helps you

- to make your customer service measurable and comparable,
- recognize the potential for optimization in your service center and
- to take measures to improve your service center.

The findings from the cockpit can be used for the annual planning process.



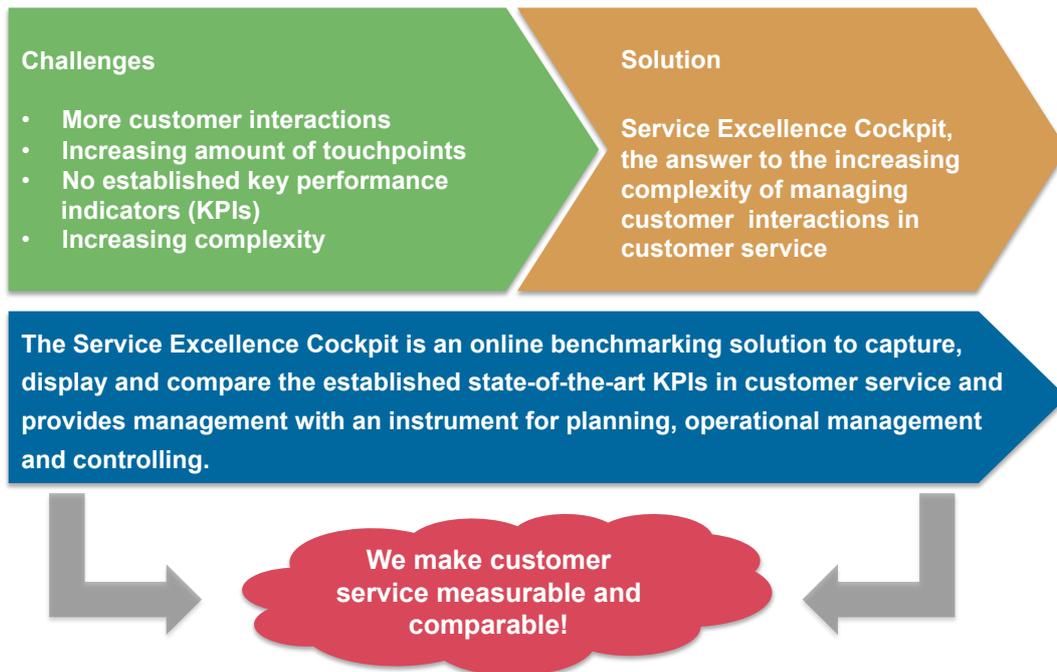
Each subscriber to the Service Excellence Cockpit will get its individual indicators and can see where their own Service Center still has potential for optimization, how the customer and employee satisfaction can be increased or how to increase cost efficiency.

 <p>Daniel Hügli Luzerner Kantonalbank</p> <p>„In some cases we were able to confirm past decisions. On the other hand, it gave us a basis for discussion at some organizational issues“.</p>	 <p>Raphael Raetzo Billag AG</p> <p>„With the outcome of the cockpit I was able to represent important decision bases to our management in an understandable way and based on facts.“</p>
 <p>Christoph Grisiger Nationale Suisse</p> <p>„Even the time for completing the survey was well spent. We instantly got the well structured highlights for the management of our service center.“</p>	 <p>Oliver Egli Ringier AG</p> <p>„With the results from the cockpit we could obtain tangible input for the process of ongoing improvement in our company“.</p>

1.3 The Benefits of Service Excellence cockpits

With the Service Excellence Cockpit we give the responsible Operation and Service Center Managers a powerful tool for planning, managing and controlling their service centers at hand. Compared to the standard studies the cockpit provides concrete analyses and recommendations for the own Service Center, besides next positioning.

We want to support you, to differentiate yourselves through excellent customer service.



Benefits for Service Center and Operations Managers

The "Service Excellence Cockpit" is a **management tool** for service centers and Operations Manager, which helps them

- to make their customer service measurable and comparable
- to identify the potential for optimization in its service centers and
- foresight to take measures to improve.

You can already benefit by **participating in the survey**. You receive free of charge:

- A checklist whether the own Indicators are really complete (based on EN 15838)
- a personal report as pdf, with all the details of the current status in your own service Center
- The management summary of market results

You will experience **full benefit** with the acquisition of benchmarking products:

- Objective "mirror" of your own service operation
 - compared to the market and the relevant competitors
 - over the years (trend analysis)
- Documentation of own performance towards your management and your employees
- Specific inputs for the strategic planning and recommendations for improvements

Benefits for Service Providers

By offering your customers the service excellence cockpit, you are committed to transparency and can position yourself among your customers and the market as a high-quality and innovative service provider.

Together with your business partner, you capture the main strategic indicators of the Service Center and analyze them in comparison with valuable industry data. You can derive for your customers and yourself potentials for improvement and fields of action and support the internal and external communication with it.

- Generating statistical data in your market / at your customers
- Comparison of the consolidated company data with the data of the total market in its own Peer Group (the condition is that enough participants participate to the survey).
- Use of information for public relations, publications, events, etc
- Ability to make special offers to customers

Benefits for Consultants

The Service Excellence cockpit offers consultants also a good opportunity to differentiate themselves with an extensive added value. Consultants can help your customers already in the data collection and thus establish a long-term cooperation for further development of the service center.

- Average time savings of 3 days during the analysis of the customer
- The business case concerning improvement measures can relatively quickly be prepared for decision makers at the customer
- Establishing a common language with the client
- Interpreting the KPI's of your customers, compared with more than 120 contact centers

The subscription is being acquired by the customer.

Benefits for associations

The Service Excellence cockpit allows associations to capture valuable industry data and thus to support its public relations. In addition, you can offer your members an attractive added value for increasing their quality of service.

- Generating statistical data in its market / their members
- Comparison of the association with the data of the total market in its own peer group (This requires at least 20 participants to take part in the survey).
- Use of information for public relations, publications, events, etc. Example
 - In 2014 the Swiss Association Callnet.ch came to the conclusion that members invested above average in training. This has been repeatedly published and the association offered workshops on education and training.
- Ability to make special offers for members of the association



Figure 2: Screenshot Service excellence Cockpit with multi-year comparison

Useful information

- The content is based on the European quality standard for service centers (EN 15838)
- The cockpit is continuously being developed based on customer feedback and country-specific expert groups
- In 2016, already 150 service centers in different industries use the Service Excellence Cockpit Users emphasize the strategic value and appreciate the objectivity of market information
- The current prices can be found on our website.
- The association receives the license for the first year free of charge

1.4 The usability of the Service Excellence Cockpits

Your time for completing the survey and the analysis of the evaluations is not only good invested but it also has to be fun. Therefore we explicitly emphasize the Service Excellence Cockpit to be user friendly.

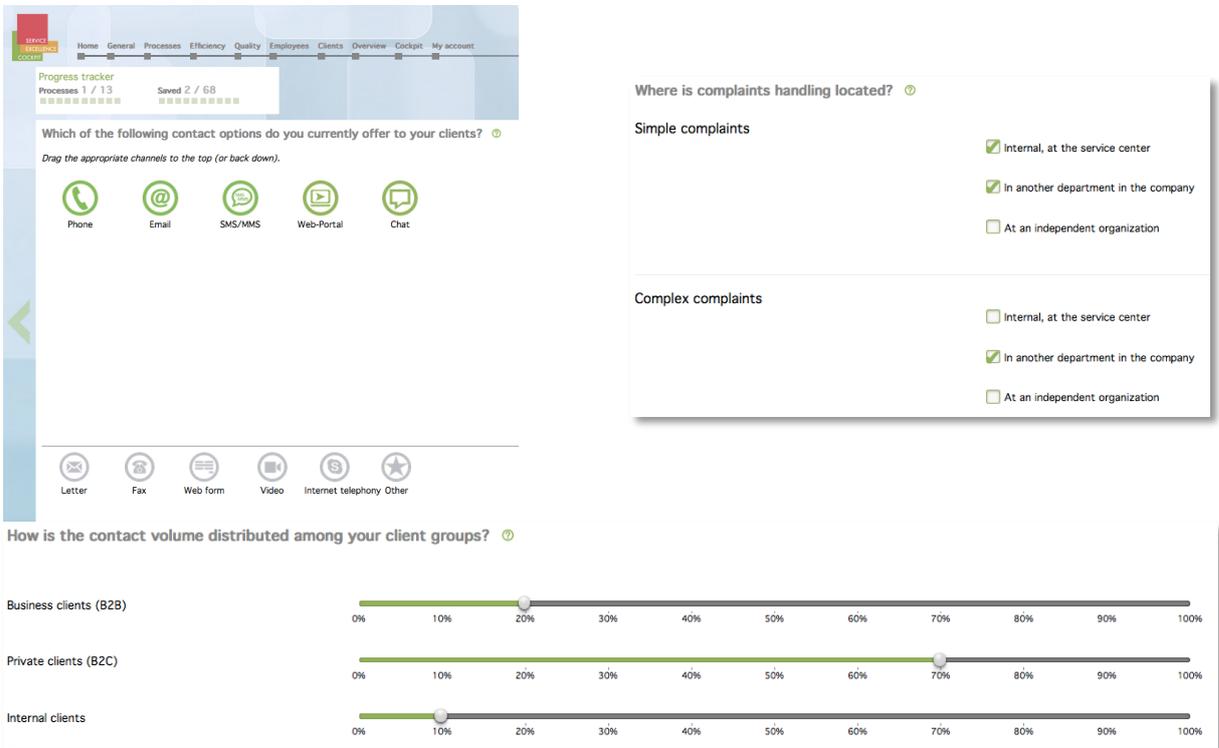


Figure 3: Examples of the survey

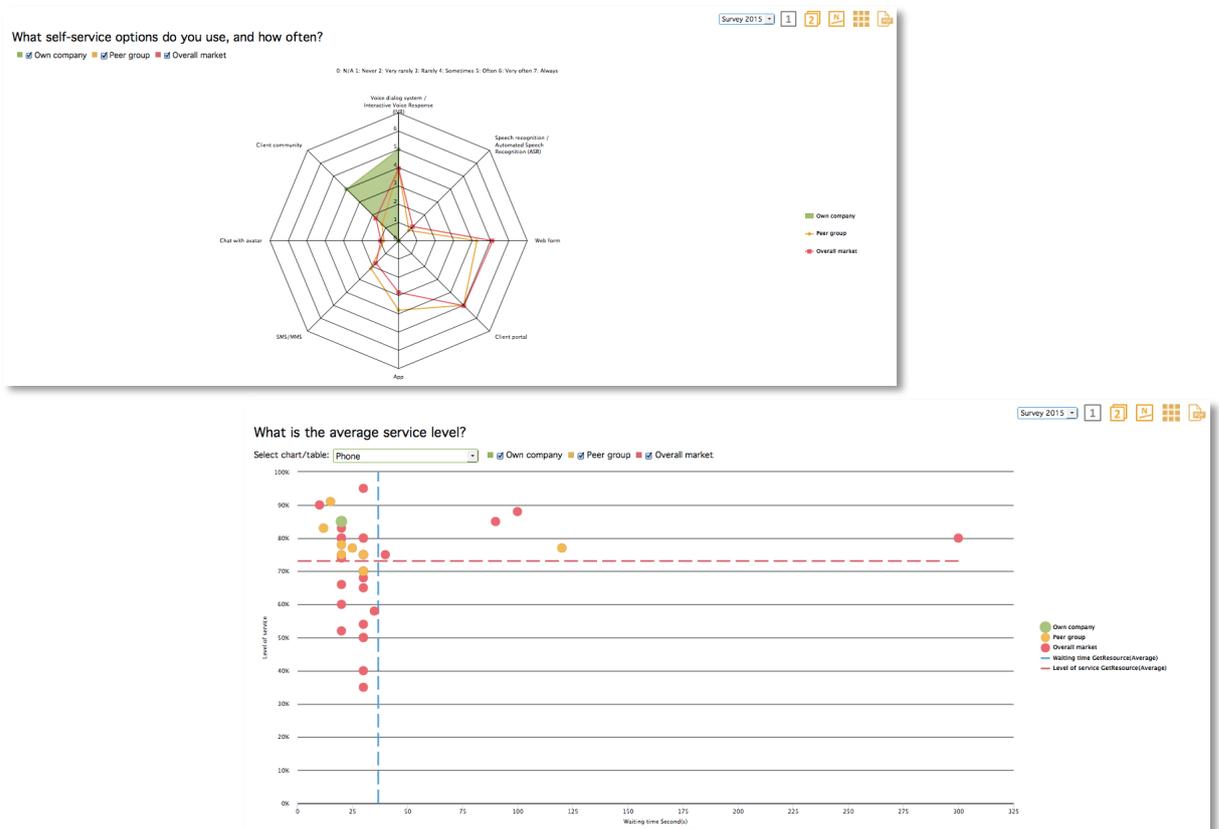


Figure 4: Examples of the cockpit

2 Management Summary - Market Report 2016

Companies differentiate themselves with exceptional services from the competition. However, it is challenging to design the interactions between customer and company in a way that the customer is satisfied at the end with the services. As shown by the Service Excellence Cockpit, general criteria, processes, efficiency, quality and employees of service centers are playing a decisive role.

This year's report is based on information provided by 150 service centers in Switzerland, Germany, Austria, Spain, Luxembourg and Poland and includes the following sectors:

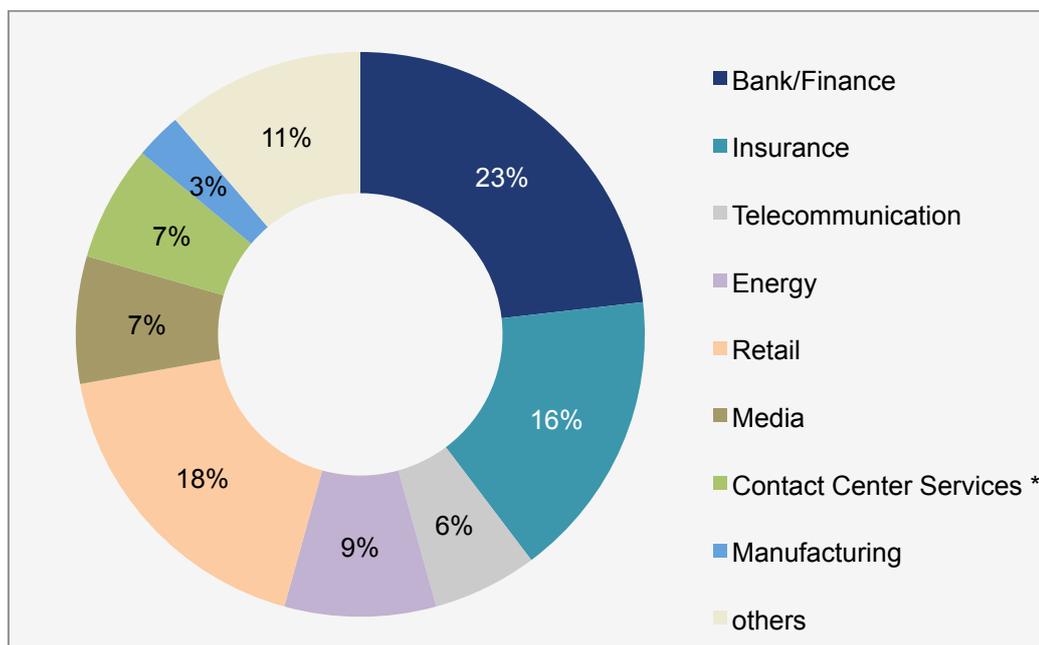


Figure 5: Breakdown of survey participants (n=150)

The most significant findings are the following:

Strategic importance of service centers

The results of the Service Excellence Cockpit 2016 show it clearly: After the top managements nearly completely lost focus on the customer service between the years 2008 and 2011, two-thirds of the companies that participated in the survey assume that in the year 2020 it will be considered strategically “very important”. Nearly 60 percent of those questioned assume that customer service in their company will become strategically more important within the next five years.

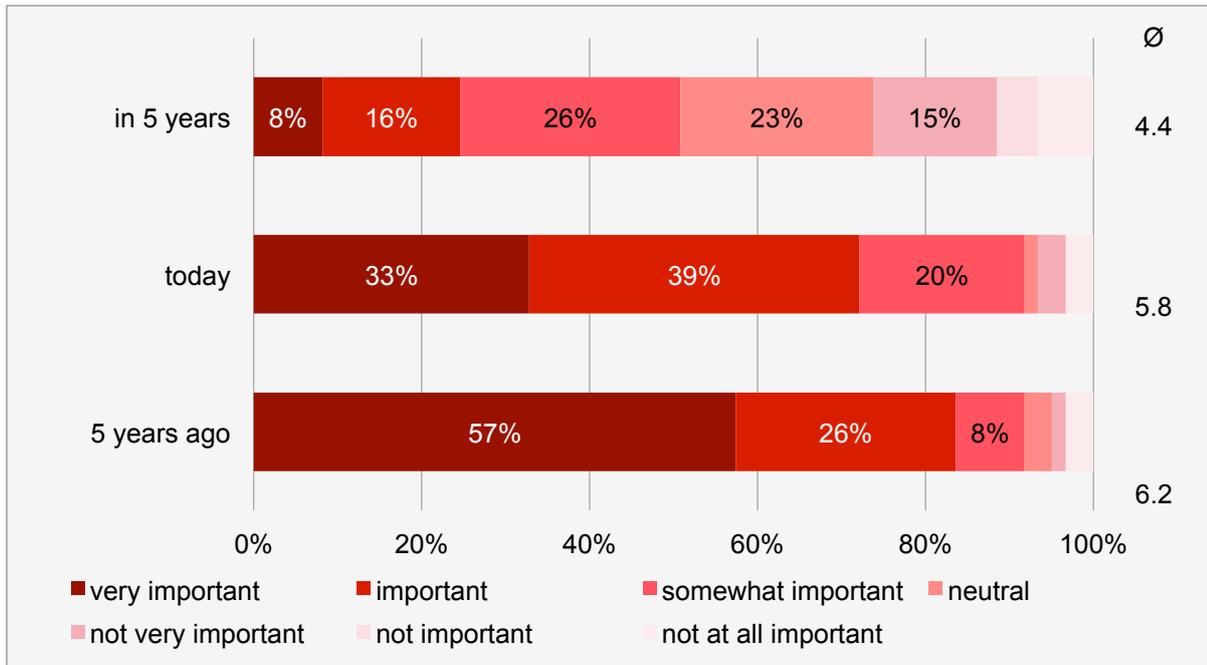


Figure 6: Strategic importance of service centers from the perspective of the service center management in 2016

The use of Net Promotor Scores is spreading in Service Centers

The strikingly development towards a more strategic awareness of the customer service is confirmed by a widespread use of Net Promoter Scores as a strategic indicator for customer satisfaction. Already 40 percent of those questioned use the NPS and further 13 percent are planning to introduce it.

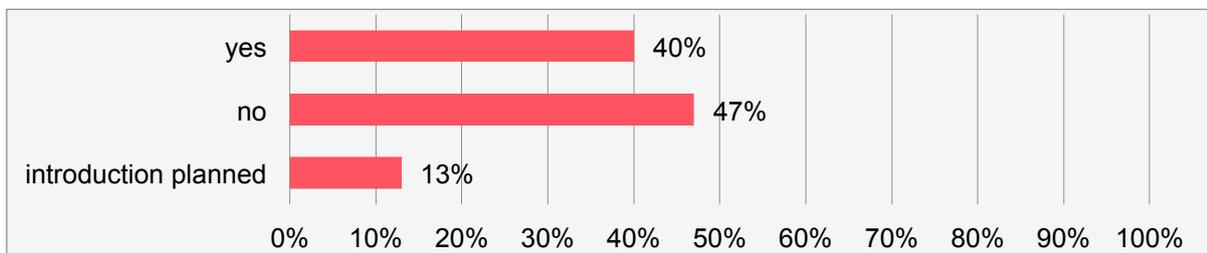


Figure 7: Use of the Net Promotor Scores in Service Centers

Omnichannel – the expansion of online channels continues

The results continue to show a clear trend towards offering online contact channels. You can take chat as an example for this trend. Already in the year 2014 about one-third of the companies was planning to introduce chat as a communication channel for customer service. Today, this share has increased to 50 percent and about one-fourth of the respondents already implemented chat. Corresponding developments are visible for web-portals and video, which in the last year more often got tested and implemented.

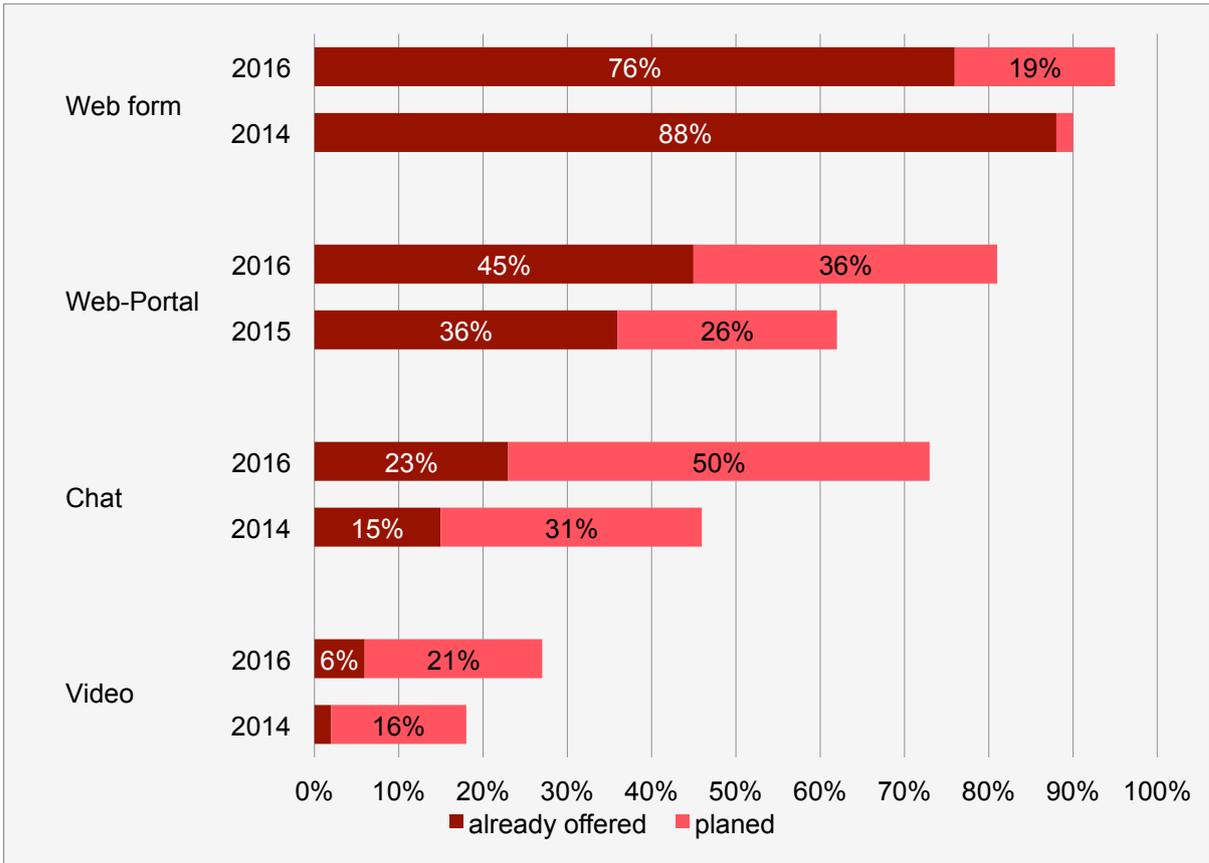


Figure 8: Which contact channels are you planning to offer your clients, year-to-year comparison

Self-Service is conducive to customer satisfaction and efficiency

The use of Self-Services is an expression of the rising expectations of many customers: they expect a permanent availability, fast response to service requests, and independent execution of activities. More than two-thirds of the companies are setting to self-services, with the primary aims to increase customer satisfaction and to save resources by increasing the efficiency. Compared to the last year's results the share of service centers offering Apps and Web forms has increased. The same, although still on a low level, applies for speech recognition. We are following attentively whether and how fast a trend towards biometric application will be established.

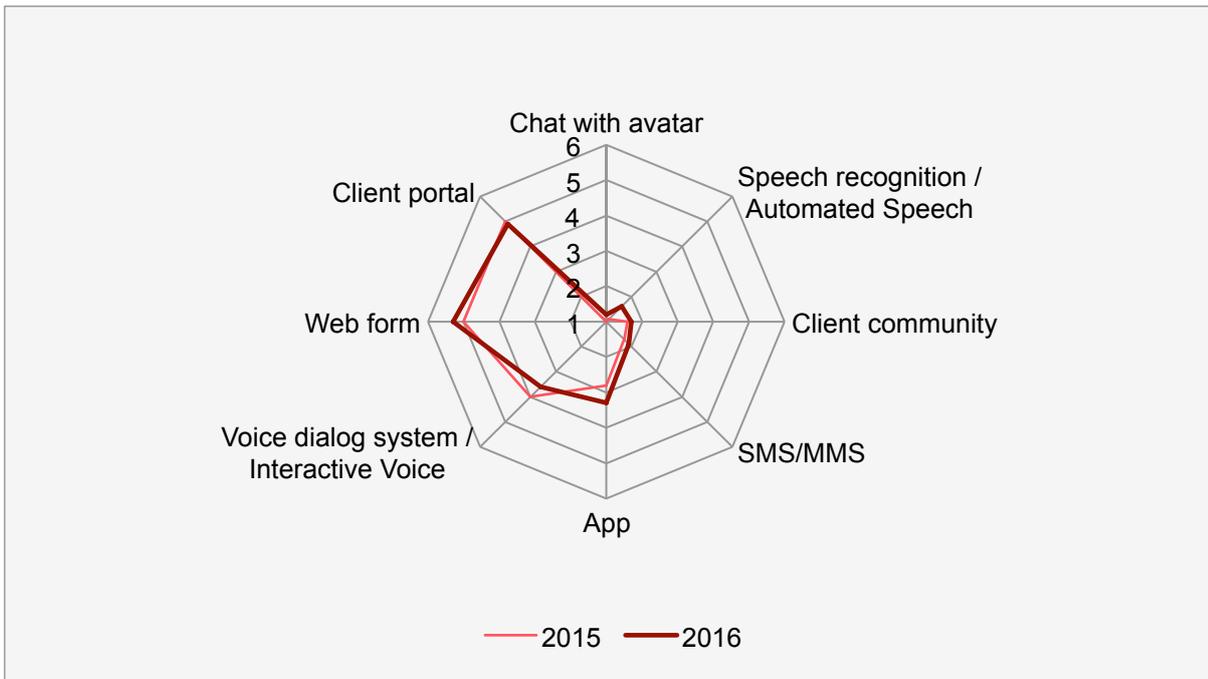


Figure 9: Use of Self-Services, year-to-year comparison 2015 and 2016

Outsourcing called into question?

Outsourcing of service centers is an often discussed topic particularly because of the importance of customer dialog. Access to more capacity and cost savings are the main reasons for an outsourcing. On the other hand, there are valid arguments against an outsourcing: The lack of customer proximity in this strategically important area for example. Additionally, for a large part of those questioned is the service center a core function of the company and an outsourcing makes therefore little sense.

A comparison by country shows interesting results as well. Whereas in Switzerland only one-fourth of those questioned outsource their service center, the situation in Germany is quite different and 35 percent of the companies decided to outsource the service center. Remarkably is in addition that in accordance with the survey 6 percent of the German companies had previously outsourced the customer service, but not anymore. All in all, and because of the increased strategic importance of customer service there is a critical consideration of outsourcing ascertainable.

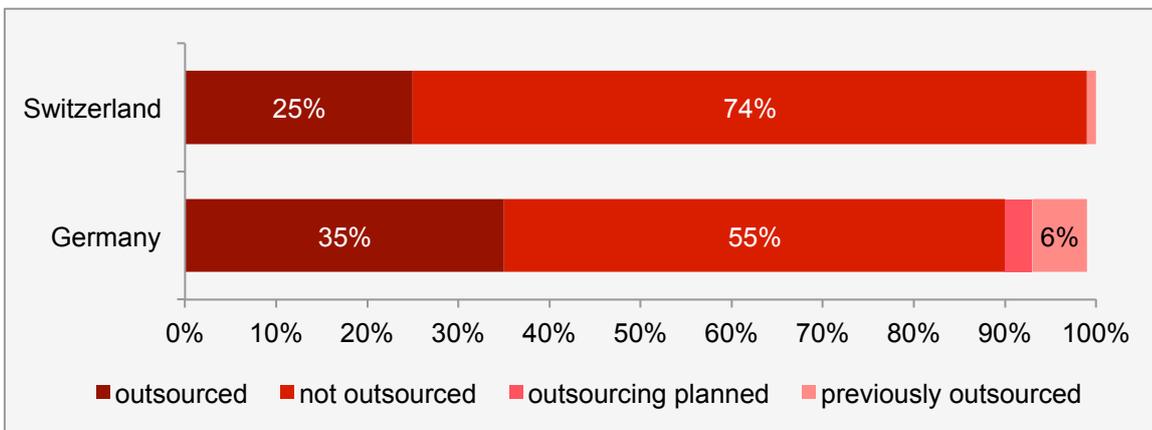


Figure 10: Outsourcing, country-by-country comparison Switzerland - Germany 2016

Complaint management gets more professional

“Where people work, mistakes happen.” A good handle of complaints can result more and more in a competitive advantage. The increasing strategic awareness of customer service is recognizable in the complaint management too. As a result 70 percent of the companies define a response time for complaints and supervise it as well. This leaves a reliable impression for the customer and leads to an increased customer satisfaction which results in the best case in a higher customer loyalty. The defined response time on average is 4.8 days.

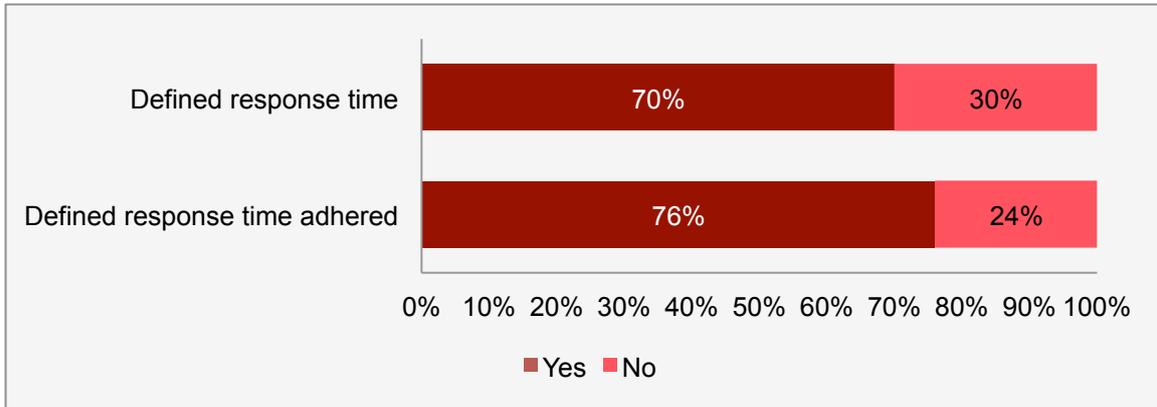


Figure 11: Complaint Management 2016

3 Frequently Asked Questions (FAQ)

3.1 General

How is the comparability of responses ensured if different methods for calculating KPIs are being applied?

We provide the underlying definition in the help text on each issue and are using the recognized standards based on the current definitions (like EN 15 838).

How is it ensured that the participating companies are giving truthful information?

Firstly, we appeal to the individual responsibility of the participants and have the cockpit adjusted so that a participant sees no evaluations, where he himself has not given any details. On the other hand, the system makes certain plausibility checks, e.g. when the service level in the telephone channel has been entered in days rather than seconds or minutes. Such obvious incorrect entries will be deleted.

How is my data protected?

The collection, storage and use of data is done in accordance with the Swiss data protection law. Crystal Benchmark stores the data with the purpose of evaluating and to publish them in an aggregated and anonymous form. The information is strictly confidential and is not used for marketing purposes. Crystal benchmark will not forward data to third parties, except in an aggregated and anonymous form to industry associations and (IT Provider) service partners who need the data in the context of order processing.

Why doesn't the language change in certain views?

Maybe that's a problem of your browser cache; please empty the cache.

3.2 Survey

Can I use the free version and only later in the year decide on a cockpit subscription?

Participation in the survey is free. If you enter your data, a cockpit subscription can be purchased at any time later. If no own data has been entered, the possibility remains to purchase the Market Report.

What good is it to me if I participate only in the survey?

Participation in the survey already provides you the following added value:

- a check of if your current set of KPI's is complete
- a documentation of your current performance on the base of the established state-of-the-art set of KPI's (based on the European Norm EN 15838)
- first feedback as to the state of your service operation
- the management summary of the market report
- the option to upgrade for the benchmarking product in the Service Excellence Cockpit

Is it also possible to enter values during the year, e.g. monthly?

That's not possible at the moment. We will analyse the need and possibly realize it in a future release.

3.3 Cockpit and benchmarking

Are the market values also displayed in time course?

All values, if entered, are also shown in the time comparison: the company itself, the peer group and the overall market.

Why are no prior-year figures shown in certain charts?

We develop the Service Excellence Cockpit continually, also based on valuable input from our users. So we add some questions or response options each year. For example, at the question "What opening hours do you offer in your Service Centre?" more precise response options are available as of 2016.

When looking at the multi-year comparison, there are some significant changes in peer groups or market data, how is that possible?

In the last years, the number of participants in the Service Excellence cockpit has doubled. Many service centres are from abroad and there are new service centres for specialized customer concerns. We recommend you to limit the desired comparison as accurately as possible by the selections of the peer groups.

The total of the graphic "How many employees are hired with the following level of employment" does not equal 100%?

The total of 100% is being calculated over all categories of employees (employees, supervisors, team leaders, management)

In the two-year comparison, the points of the comparison year are displayed on a horizontal level.

Unfortunately, this is an error which appears in all bar graphs with only one dimension. With "mouse rollover" you can see which values underlie. We are sorry for this inconvenience!

The cockpit is very detailed, it is difficult to interpret the results. What can I do if I cannot find my way around?

You can order a management presentation (extra charge) and together with specialised consultants you will be able to analyse and discuss the results.

Is the cockpit providing the opportunity to capture costs aspects in terms of employees?

The cockpit offers various approaches for detecting cost aspects. By using the average salary and the conversion of total working time in productive customer-oriented time you can determine the cost per employee hour. Also interesting are the unit costs. The average processing time and the number of contacts are being offered. You can put the whole in relation to the number of customers.

3.4 Participants and Peergroups

Is it known who the participants in the survey and my peer group are?

Since 2015, the participants may decide to disclose their company name. Again, the principle applies that only those who disclose its name also sees the other participants.

How are the peer groups formed?

There are different ways to form a peer group, this can be selected in "My Account / Settings". Multiple selection is possible. In this case, the intersection will be selected. Note: peer groups with less than 4 participants are not displayed for data protection reasons.

What peer groups are available (as per 01.2017)?

Peer group	cluster
Country	According to participants, currently Switzerland Germany Austria Spain
Industry	Banking and Financial Services Insurances, Health Insurers Trading Energy supply Information and Communication Transport and postal services Manufacturing / production of goods Other economic services Other services
Services	General customer service Assistance and claims Helpdesk Outbound / campaigns
Type of business	B2B Business B2C Business Mixed Internal customers
Type of Service Center	Inhouse service center Service provider for third parties
Company Size (number of employees in Service Center)	1-10 11-20 21-50 51-100 >100
Number of contacts per month	1-5'000 5'001 - 20'000 20'001-50'000 50'001-100'000 >100'000
Share of outsourcing (share of total costs)	No outsourcing 1-10% >10%
Company group	Internal benchmarking, only for recipients of a business license

4 Operating instructions

4.1 Registration

Open your web browser and copy this link:

<https://app.service-excellence-cockpit.org/>

You are now in the login screen of the Service Excellence Cockpit. Register with

- your e-mail
- password (please mark your password)

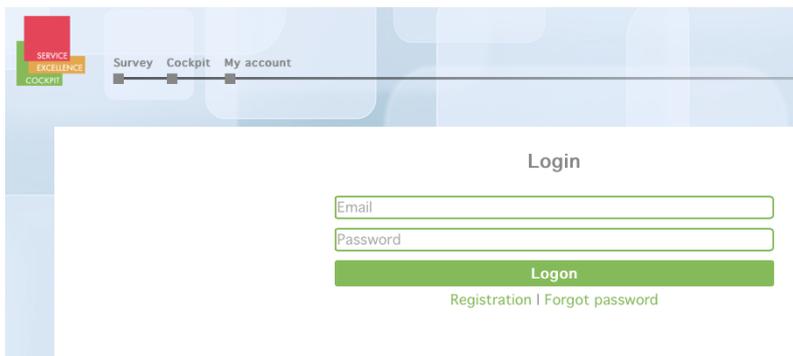


Figure 12: Log-in

To register, select "Registration".

You are now in the registration form and must complete all required fields.

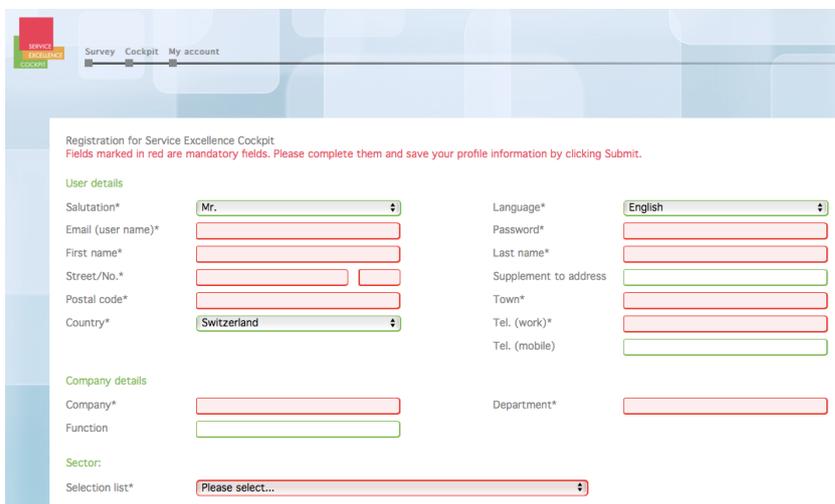


Figure 13: Registration

In addition, you can select whether you would like to:

- have a free participation in the survey
- order a Cockpit Product (market or peer)
- have information about the need of a company license
- subscribe to the newsletter

Select "Survey"

After you have pressed "**Submit**", you are able to log into the Service Excellence Cockpit.

4.2 Login - My Account

You can log in with your email address and password at any time.

Select from the menu "My Account".

User profile

Here you can check and amend your personal data in "user profile".

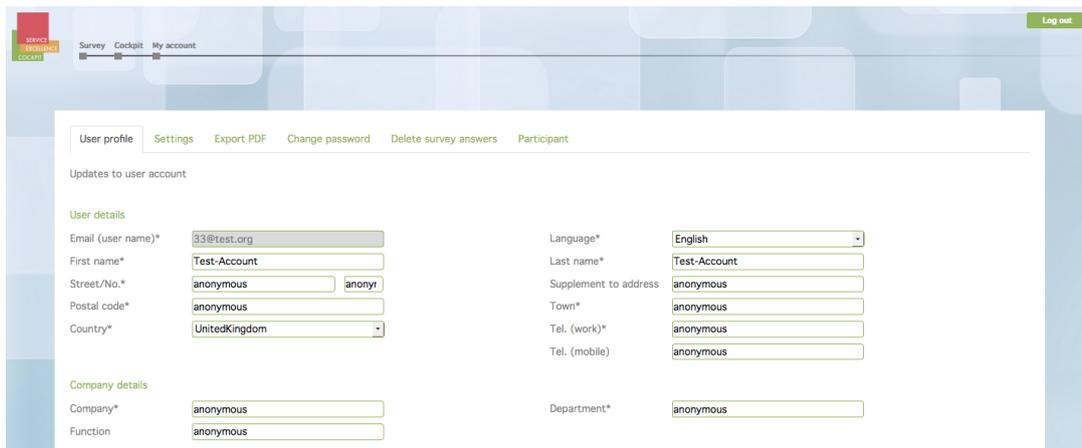


Figure 14: User profile

In addition, you can select whether you would like to:

- order a Cockpit Product (market or peer)
- have information about the need of a company license
- subscribe to the newsletter

Settings

In "Settings" you can change viewing options in the cockpit, such as:

- data which are displayed
- percentages or absolute numbers (only in presentations where both are possible)
- representations in graph or table view
- color Scheme

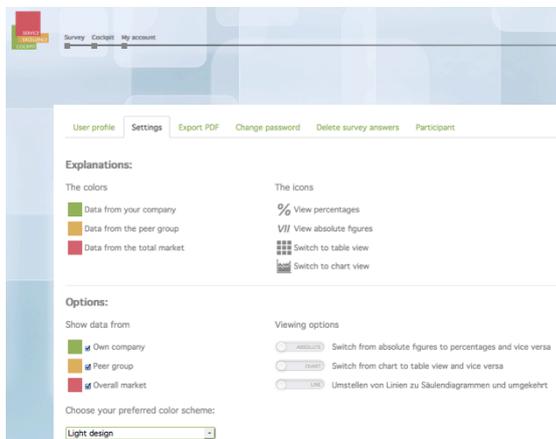


Figure 15: Settings

There is also the selection of peer groups that are represented in the cockpit when you have ordered a Cockpit peer subscription.

- Company size ?
- Sector ?
- Country ?
- Client type ?
- Number of contacts ?
- Intra Company ?
- Transaction type ?
- Outsourcing Level ?

Figure 16: selection of peer groups

You can select one or more peer groups. In this case, the intersection is selected. It should be noted that peer groups with less than 4 participants are not displayed for privacy reasons.

PDF Export

If you have a cockpit subscription, you can export the entire report with your data, peer groups and market results as a PDF document in "PDF export".

For this purpose, you can upload the logo of your company. The logo is then integrated in the PDF document.

You can also export individual dimensions such processes, efficiency, etc.

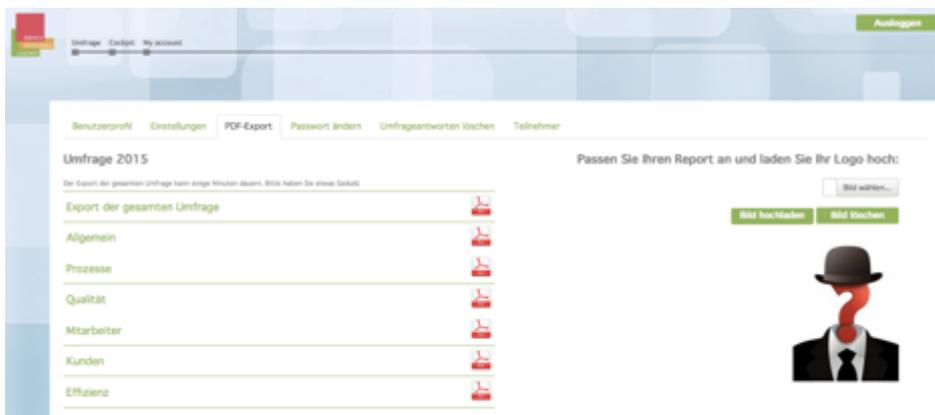


Figure 17: pdf export

We recommend you to change your password regularly.

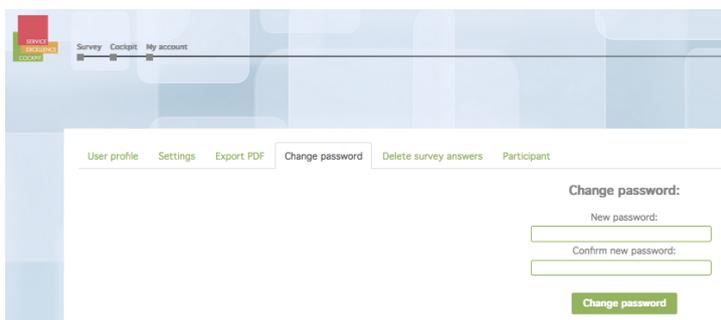


Figure 18: Change password

Important: If you have forgotten your password, you can select "Forgot Password" in the login screen. Once you have entered your email address a new password will be delivered immediately.

Delete Survey answers

Through the option "Delete Survey Answers" you can delete all entries which you recorded in the survey at any time.

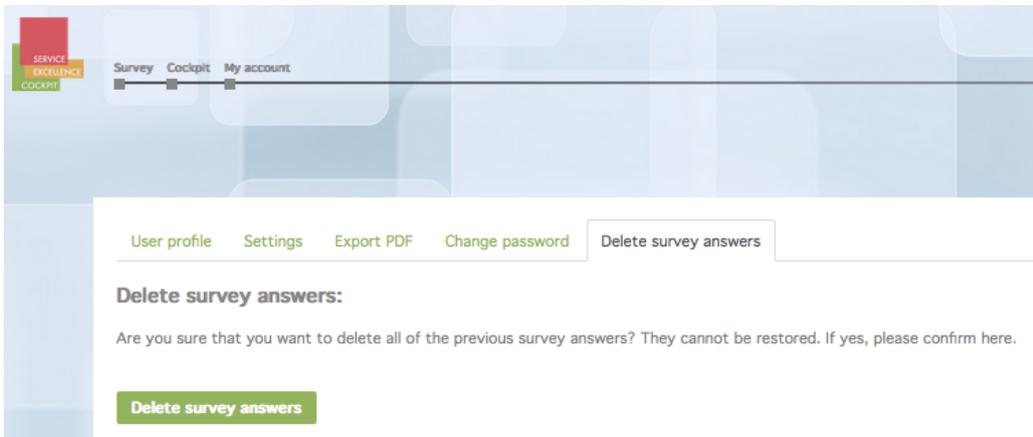


Figure 19: delete survey answers

Participants

If you have disclosed your company name after the survey, you can check under "participants", which other participants have disclosed their company name as well.

If you have not activated your company name yet, you are still able to do so by selecting the link "Release".

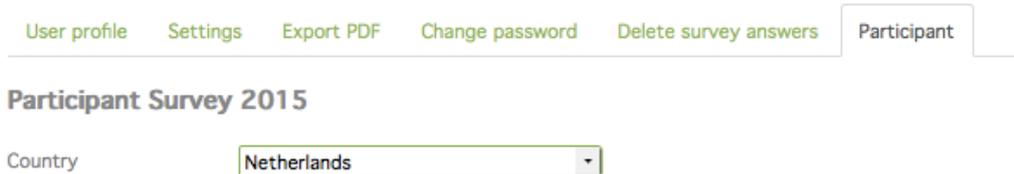


Figure 20: show participants

4.3 Privacy

The collection, storage and use of data is done in accordance with the Swiss Data protection law. Crystal Benchmark stores the data with the purpose of evaluating and to publish in an aggregated and anonymous form. The data is treated strictly confidential and not used for marketing purposes. Crystal benchmark does not share information with third parties except in an aggregated and anonymous form to industry associations and (IT provider) Service partners who need the data in the context of order processing.

4.4 Survey

After you have stored your access information and if necessary changed the password, select the "survey" option from the menu.

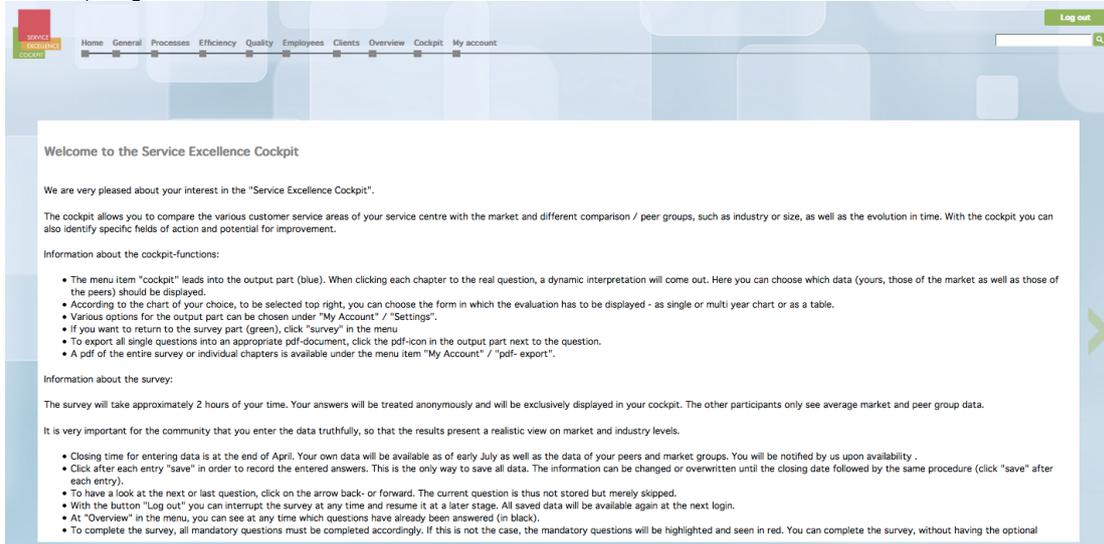
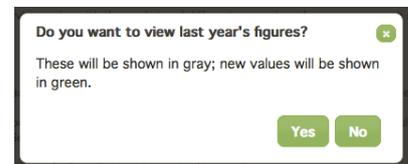


Figure 21: Survey

Now you are on the welcome page for the survey and you can fill out the selected indicators.

4.5 Previous data

If you have ever filled out a survey last year, the previous year's data can be shown automatically. The responses in the survey which have not changed can be saved immediately by pressing "save".



4.6 Navigation

You can fill out the survey by means of the green arrow right and left of the issues and "browse" through the entire survey or select the relevant dimension directly from the menu.

Important: to save entered answers, click "save" after each entry, only then the entries will be adopted

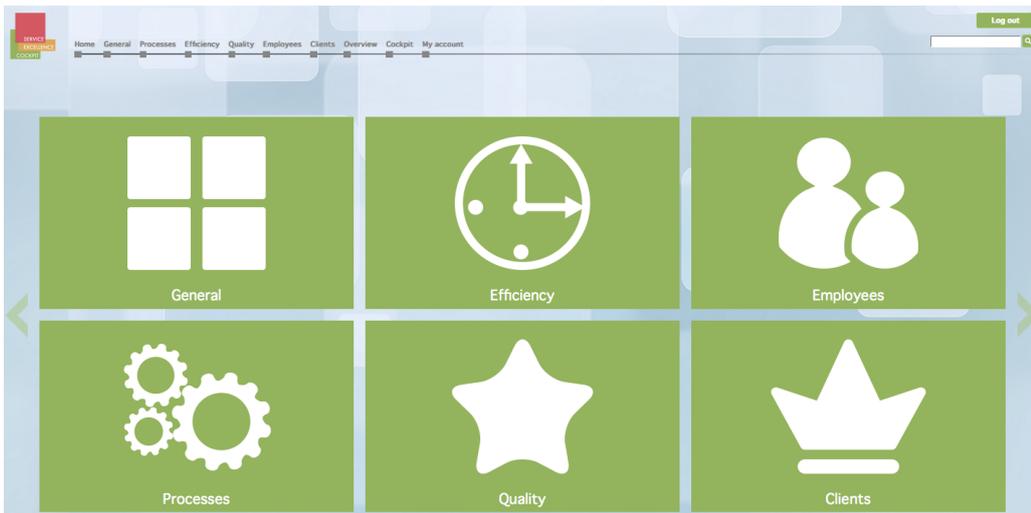


Figure 22: Navigation survey with icons

4.7 Close survey

After you have answered all questions the survey may be closed.

Through the option "Overview" it can be seen at any time, which questions have been answered (in black). To complete the survey, all mandatory questions must be filled out accordingly. If this is not the case, the required questions to be answered are highlighted in red. You can complete the survey without having answered the optional questions (blue font). In the cockpit only those optional questions are visible that you have answered.

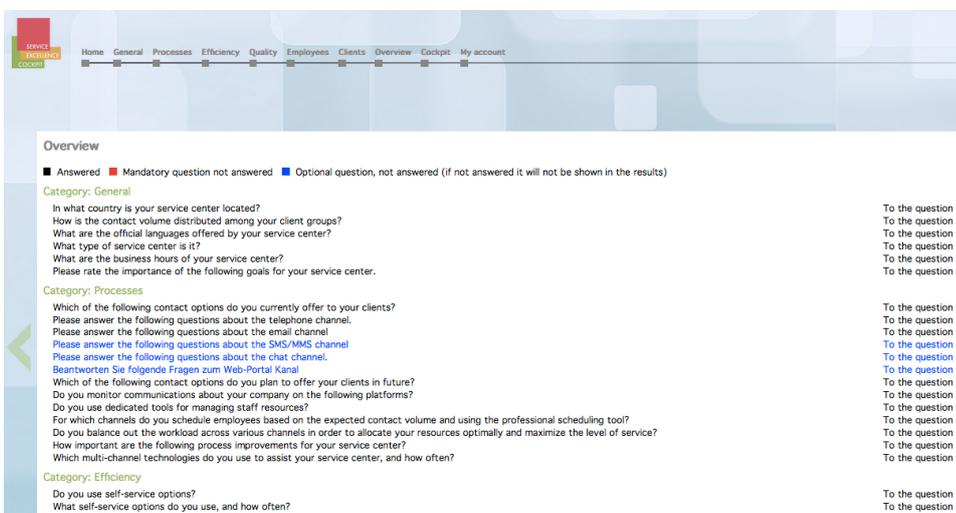


Figure 23: Close and save Survey

4.8 Export Survey

In addition, you can export all questions with the answers as a PDF-document when selecting „Show me all my answers “.

4.9 Cockpit

If you have a cockpit subscription, you will receive a message to unlock the cockpit as of the end of June. Select the option "Cockpit".

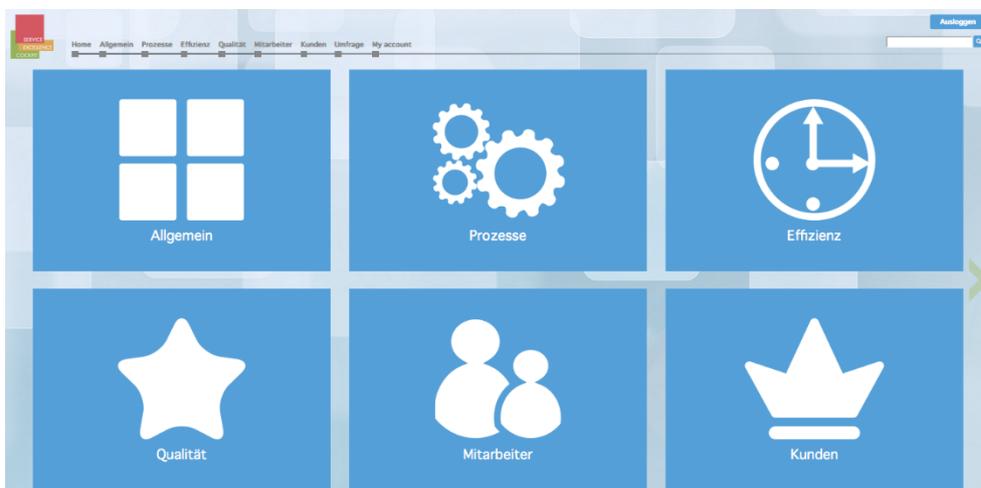


Figure 24: Navigation cockpit with icons

You can scroll through the benchmarking charts by means of the green arrow right and left of the issues and "browse" through the entire cockpit or select directly from the menu the relevant dimension and charts.

By selecting a relevant question, a dynamic chart will appear. Here you can choose which data (yours, that of the markets or of the peers) should be displayed. Only the charts are being displayed which you have filled out in the survey.

4.10 Display options

Depending on the chart you have selected on top right, you can choose the form in which the chart has to be displayed - as a chart or table, and whether you want to export the chart as a PDF. If you have already captured prior-year figures in the cockpit different icons allow themselves to make multi-annual comparisons. There are three variants:

- Select another year
- Select 2-year and select the corresponding years
- Select multi-year comparison and select the desired KPI



5 Contacts

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6 Content survey 2017

Service Excellence Cockpit covers below topics, based on the European Norm EN 15838.

General



KPIs for location, languages, type of service, office hours and aims

Quality



KPIs for certificates, process und quality management

Processes / Technology



KPIs for used channels for each process, with volumes. Toolsupport for staff scheduling and load balancing, IVR, language recognition etc.

Employee



KPIs on the number and structure of employees, employment contract, salary, recruitment, education, development, fluctuation, employee assessment and employee satisfaction

Efficiency



KPIs for Service Level, First Contact Resolution, use of Self Service, costs and outsourcing

Clients



KPIs for customer satisfaction and complaint management