



UK Contact Centre Verticals: Insurance

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UK Contact Centre Vertical Markets: Insurance

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CONTENTS

Contents	3
List of Tables	4
UK Insurance Contact Centres: Executive Summary	5
Introduction.....	6
Market Sizing	9
Structure.....	9
Growth.....	14
Sector Drivers & Issues	15
Sector Background.....	15
The Effects of Brexit.....	16
The Use and Effect of Omnichannel.....	18
Inbound & Outbound Activity.....	19
Technology	21
Human Resources	24
Salaries.....	24
Agent Attrition	25
Agent Absence	26
Operational Benchmarking.....	27
Agent Activity.....	27
Call Duration	28
Speed to Answer	29
The Future of the UK Insurance Contact Centre Industry.....	30
About ContactBabel.....	31

LIST OF TABLES

Figure 1: Insurance contact centres and agent positions, 2010-2017.....	9
Figure 2: Average Insurance contact centre size, 2010-2017.....	10
Figure 3: Insurance contact centres by size, 2011/13/15/17	11
Figure 4: Insurance agent positions by size, 2011/13/15/17	12
Figure 5: Insurance contact centre jobs by size, 2011/13/15/17	13
Figure 6: Insurance – agent positions and contact centre forecasts, 2017-21	14
Figure 7: Inbound interactions by type, 2012-2017 (Insurance sector)	18
Figure 8: Insurance - number and proportion of outbound agent positions, 2010-17	19
Figure 9: Outbound call types: Insurance	20
Figure 10: Insurance contact centres: use of technology, 2017	21
Figure 11: Insurance contact centres: use of technology, 2017 & 2019	23
Figure 12: Average Insurance agent salaries, 2010-17.....	24
Figure 13: Average Insurance annual agent attrition rates, 2010-17.....	25
Figure 14: Average Insurance agent absence rates, 2010-17.....	26
Figure 15: Insurance contact centres: talk time, 2010-17.....	27
Figure 16: Insurance contact centres: call duration, 2010-17	28
Figure 17: Insurance contact centres: average speed to answer, 2010-17	29

UK INSURANCE CONTACT CENTRES: EXECUTIVE SUMMARY

The after-effects of the economic downturn hit the wider financial sector especially hard, with the number of insurance contact centres contracting as cost-cutting forced closures and consolidation across the finance industry.

However, the number of agent positions continued to grow as customer demand for service was still present, and alternate self-service channels were still undeveloped and relatively unsuited to the insurance business, so live agent support is still very much required. There is a need for personalised communication within this sector, which – in common with any contract-based commoditised service – risks high annual customer attrition rates.

The insurance sector has embraced email as a cost-effective outbound channel as a delivery mechanism for paperwork, which then also serves to reduce the number of inbound calls as customers are more likely to have the information they need at hand. The email channel now accounts for 15% of inbound interactions.

In terms of outbound live communication, there has been a definite movement away from sales-focused calls, towards proactive outbound service notifications about ongoing issues, and call-backs related to these.

Looking at technology use, as expected in an industry with so many regulations to comply with, interaction recording is used by all of the insurance survey respondents in 2017, with MIS and DTMF IVR (usually for routing) also very popular.

The greatest expectation of technology growth – and expectation should not be confused with what the reality is likely to be – comes from web chat, email management, gamification and interaction analytics. The latter is useful for compliance – key to insurance operations – as well as providing potential business and operational benefits, with analytics being generally more useful in larger operations with many customers and interactions, which is the case for many insurance companies. Automated speech recognition – enabling voice biometrics – is also said to be of great potential interest to insurers.

Insurance agents tend to get paid around the contact centre industry average, and attrition and absence rates are usually higher than average.

Insurance call durations tend to be considerably higher than a typical contact centre call, and speed to answer is usually lower than the industry average.



Genesys® powers 25 billion of the world's best customer experiences each year. Our success comes from connecting employee and customer conversations on any channel, every day.

Over 10,000 companies in 100+ countries trust our #1 customer experience platform to drive great business outcomes and create lasting relationships.

Combining the best of technology and human ingenuity, we build solutions that mirror natural communication and work the way you think.

Our industry-leading solutions foster true omnichannel engagement, performing equally well across all channels, on-premise and in the cloud.

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INTRODUCTION

“UK Contact Centre Verticals: Insurance” looks at the structure, growth, technology, HR and commercial issues found in contact centres within the UK insurance sector.

It contains data from multiple large-scale surveys of hundreds of contact centres carried out since 2010, and is the definitive study of this vertical market’s customer contact operations.

The “UK Contact Centre Vertical Market” series of reports are free of charge to readers. Research and analysis costs are borne by sponsors – contact centre and customer experience solution providers - whose advertisements, case studies and thought leadership pieces are included within these reports.

Solutions providers have **not** had influence over editorial content or analyst opinion, and readers can be assured of objectivity throughout. Any vendor views are clearly marked as such within the report.

Please note that statistics within this report refer to the UK industry, unless stated otherwise. There is a version of this report available for download from www.contactbabel.com with equivalent US statistics.

To comply with the usual protocol of market analysis, years are reported as year-end (i.e. the 2017 figures refer to the end of 2017) unless stated otherwise.

Build a new world of possibilities for your customer support team

Imagine a new world where contact centres run so smoothly that customers are satisfied after every interaction and employees are excited to go to work each day.

Focus on three key areas of opportunity and make this your contact centre reality.

Engage your customers the right way, each time

Customers take different paths to arrive at the same place with your business. This means you not only need to recognise each customer, you need know where they've been and predict where they're going. Connect the full customer and employee journeys by turning calls, messages, emails and other communications into one seamless conversation. Then your employees can engage customers at the right moment – in the right way.

Empower your employees to do their best

Give your contact centre employees the tools and insights they need to optimise each customer interaction. Provide deeper understanding, faster resolutions and better experiences for your employees and customers through automation that's powered by artificial intelligence, collaboration and motivational tools. By providing a better work-life balance, true job satisfaction and all-around great employee experiences, you'll enjoy a bigger return on your contact centre investment.

Embrace tools for change

With the right technology, you can use the rapid pace of change as a competitive advantage – not a hindrance. You need a customer experience platform that will evolve with your business. That means you need a platform that allows seamless connections to your data, processes and systems – even homegrown solutions. Look to software that lets you access the latest innovations in AI as well as an open app marketplace so you can embrace change and stand out from the competition.

Make this world a reality in your contact centre with the Genesys Cloud™ platform. It's the easy, all-in-one solution that will meet the needs of your customers, employees and business.

Start building a better (contact centre) world at genesys.com/cx-blueprint.

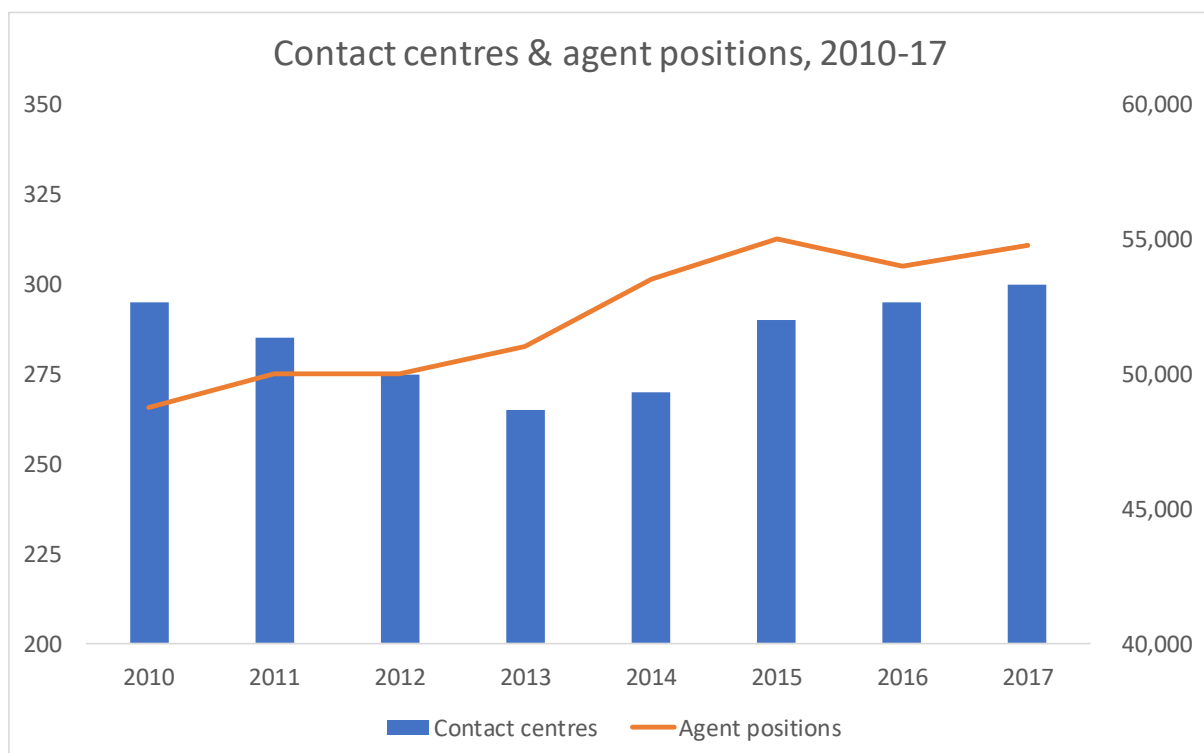


MARKET SIZING
STRUCTURE

The after-effects of the economic downturn hit the wider financial sector especially hard, with the number of insurance contact centres contracting as cost-cutting forced closures and consolidation across the finance industry.

However, the number of agent positions continued to grow, albeit slightly, as customer demand for service was still present, and alternate self-service channels were still undeveloped and relatively unsuited to the insurance business. Recent years have seen the number of insurance operations climb above its 2010 level, with agent position figures being around 12% higher than 2010.

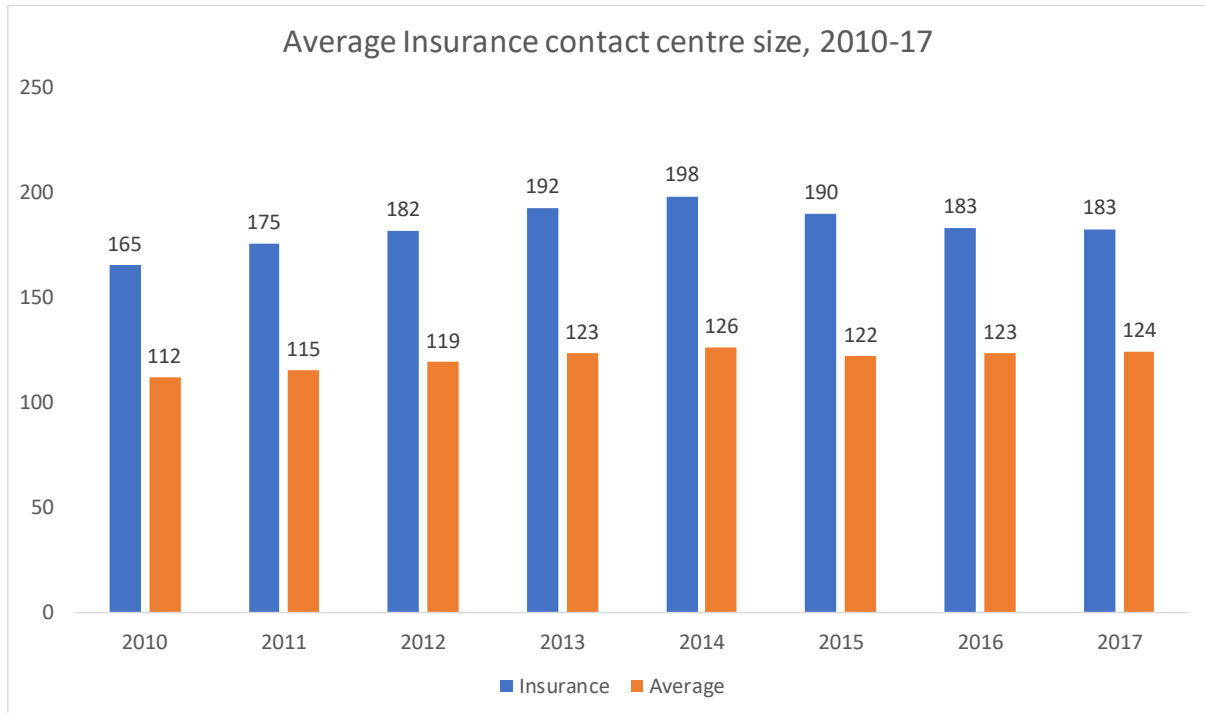
Figure 1: Insurance contact centres and agent positions, 2010-2017



Year	Insurance contact centres	Insurance agent positions
2010	295	48,750
2011	285	50,000
2012	275	50,000
2013	265	51,000
2014	270	53,500
2015	290	55,000
2016	295	54,000
2017	300	54,750

Insurance contact centres tend to be around 50% larger than the UK average, and have remained fairly steady at around 180-190 agent positions for the past few years.

Figure 2: Average Insurance contact centre size, 2010-2017

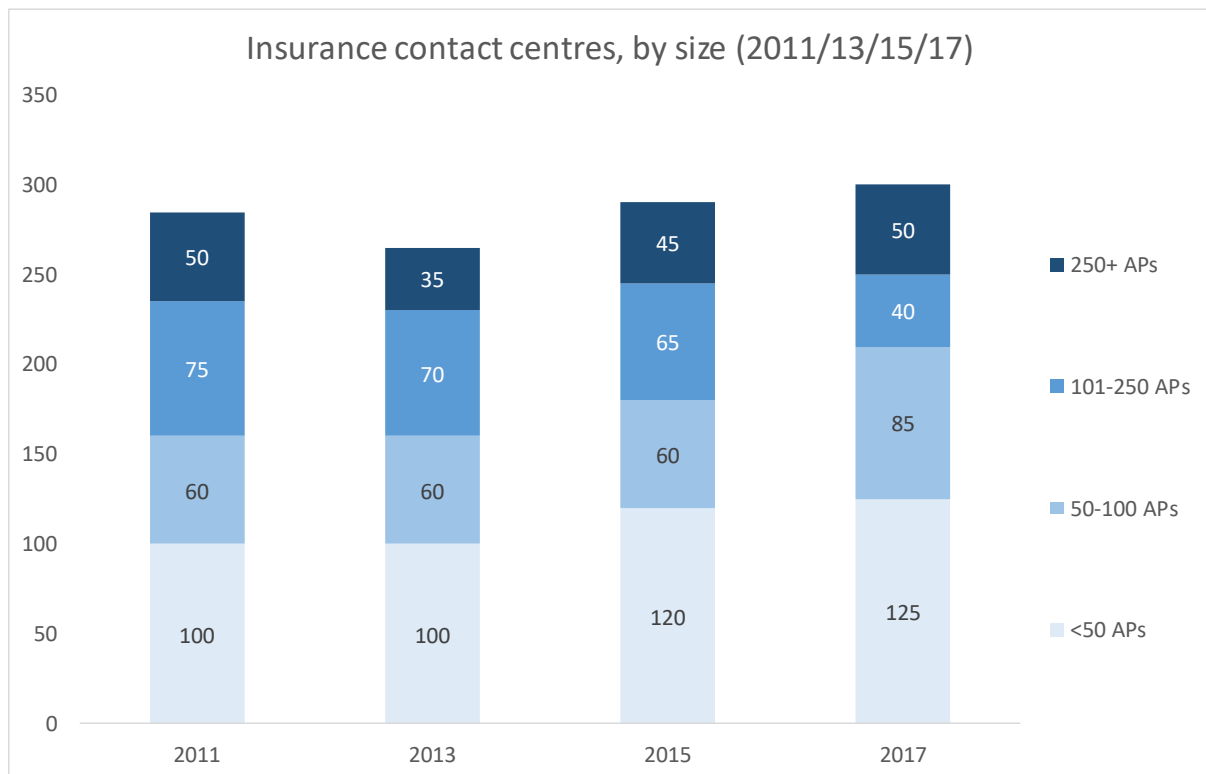


The insurance sector is a major player in the UK contact centre industry, both as a result of the number of operations within the sector as well as the relatively large average size of typical insurance contact centres.

Contact centres of over 250 seats are relatively rare in the UK (there are around 500-600 in total), so it can be seen that the insurance sector accounts for a significant proportion of these operations, with several being amongst the largest contact centres in the country.

As time has passed, the number of mid/large contact centres (101-250 seats) has grown as smaller alternate insurers have grown. New entrants to the market (including specialist insurers and B2B suppliers) mean that new contact centres have continued to emerge and some have grown into mid-sized operations.

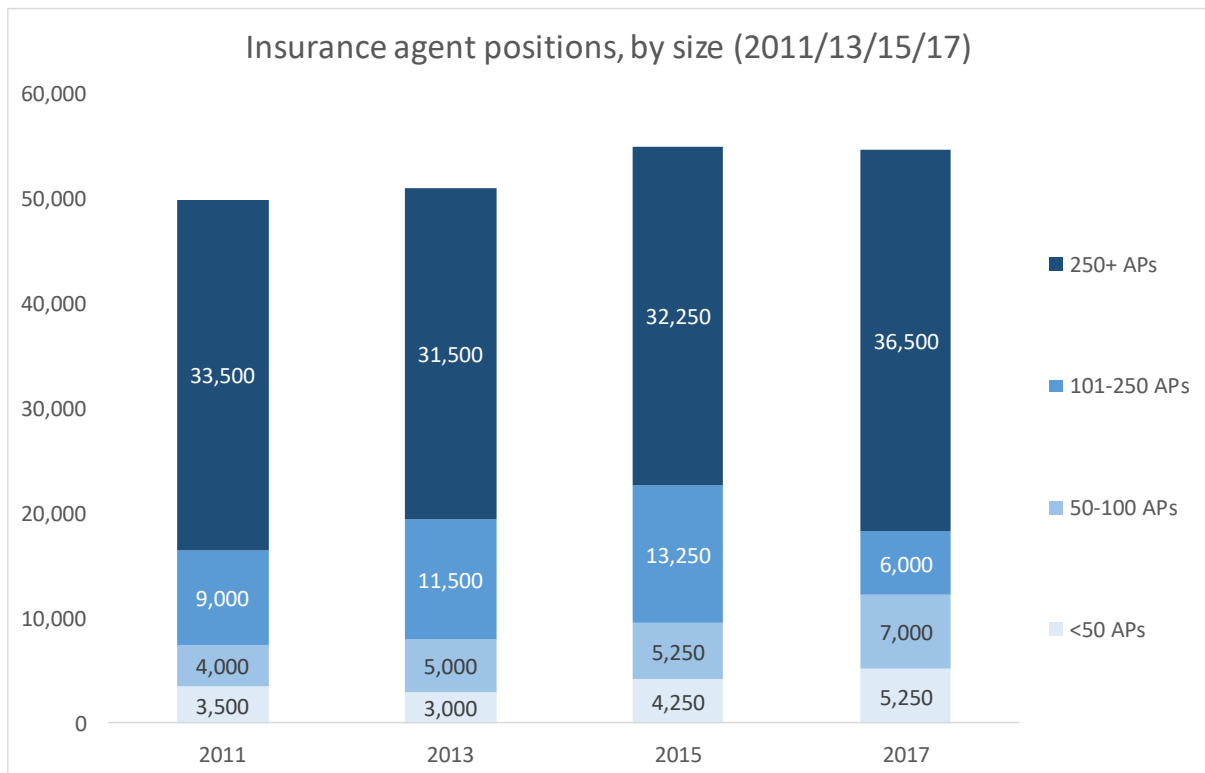
Figure 3: Insurance contact centres by size, 2011/13/15/17



The importance of the insurance sector to the UK contact centre industry can be seen in the chart below, which shows the number of agent positions in each size band.

With around 390,000 agent positions in the UK’s 250+ seat category, the insurance sector accounts for close to 10% of these, and some are amongst the largest contact centres in the country.

Figure 4: Insurance agent positions by size, 2011/13/15/17

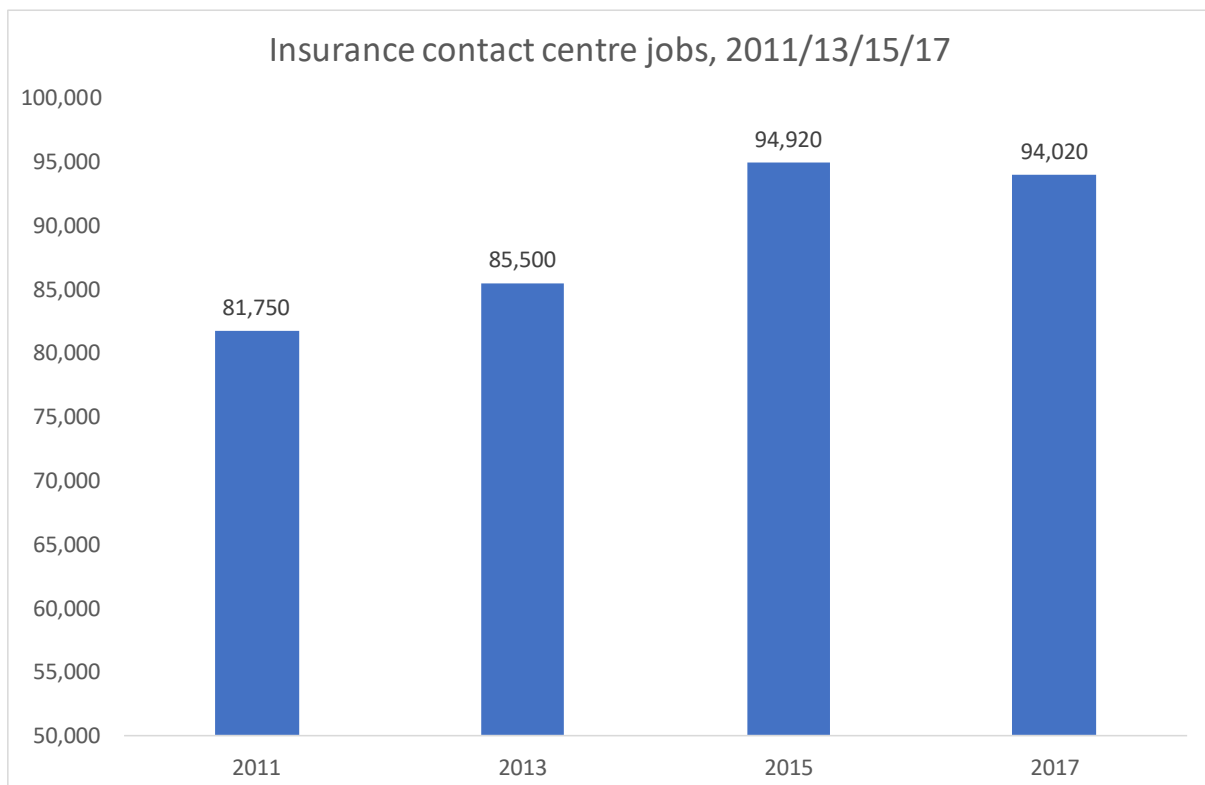


There has been major growth in jobs associated with insurance contact centres since 2011, after a drop in 2008 and 2009.

Online self-service is relatively unused by many insurance customers, so live agent support is still very much required, although there has been a move to email in the past few years. As will be considered later, the effects of Brexit on the sector and its customers is unlikely to be positive in the short-to-medium term, with a lot of uncertainty on how business with the EU will be possible.

However, as things stand, the sector currently employs over 12,000 more people than it did in 2011.

Figure 5: Insurance contact centre jobs by size, 2011/13/15/17



GROWTH

Insurance contact centres have seen a rise in agent positions of more than 12% since 2010, although the number of operations is similar, having dropped, then risen again.

We expect the increased uptake of email and the growing use of price comparison sites to have a slight negative effect on agent position figures, and that the effects of Brexit will put commercial pressure on international finance organisations to reduce UK headcount and move some operations into the EU, with a general defensive movement in the sector as a whole to cut costs and consolidate operations.

Figure 6: Insurance – agent positions and contact centre forecasts, 2017-21

	2017	2021	Insurance CAGR	Average CAGR
Agent positions	54,750	51,500	-1.5%	-0.9%
Contact centres	300	285	-1.3%	-1.4%

SECTOR DRIVERS & ISSUES

SECTOR BACKGROUND

Up until recently, general financial services organisations (including insurance, banking, credit card and debt collection operations) had run the most contact centres of any business sector in the UK, and this wider vertical market still employs the most agents.

Recent years have seen considerable cost-cutting and consolidation across insurance back offices and to a lesser extent, within contact centres, as more customers move to web self-service and with the increased use of insurance comparison websites. After concerns amongst insurers that changes to the Ogden rate (which calculates the compensation due to victims of personal injuries) would result in significantly higher costs, the initial reality is that this alarm was over-stated. 2017 saw increases in profits (and premiums) for the majority of large UK insurers.

Generally, there are increasing levels of technological investment being seen in this sector, and the complex nature of some of the work may be less suited to online self-service, with a large proportion of insurance customers wanting to speak with human agents for reassurance and clarity, as the claims process may involve lengthy and high-emotion interactions. There is a need for personalised communication within this sector, which – in common with any contract-based commoditised service – risks high annual customer attrition rates.

Many of the largest contact centre operations are still within this vertical market, and several suppliers of contact centre solutions have estimated that the wider finance sector (including insurance) provides up to one-third of their total revenues, with insurance accounting for 30-40% of this.

There has been strong pressure to consider consolidation and rationalisation in order to cut costs driven by reduced profits, increased competition, higher costs of compliance and the use of cost-comparison websites. The overall number of agent positions dipped in recent years, but has now recovered. The insurance sector does not initially encourage a high proportion of initial inbound interactions from existing customers to be via non-voice channels, as many transactions require identification and authentication, for which social media or web chat were not seen as suitable vehicles.

However, the insurance sector has embraced email as a cost-effective outbound channel as a delivery mechanism for paperwork, which then also serves to reduce the number of inbound calls as customers are more likely to have the information they need at hand.

THE EFFECTS OF BREXIT

By definition, predicting the future leaves analysts open to the risk of getting things seriously wrong, and the uncertainty of what the UK will look like after Brexit makes this even more difficult to forecast. Along with the wider movement to self-service and businesses' stated expectations of a continued drop in voice traffic, it can be judged that Brexit is likely to affect general UK contact centre growth, with the only question being by how much.

At the time of writing, the UK government are still unable to share a realistic vision of what a non-EU UK might look like, making predictions of how businesses might look in five years' time even more prone to error. However, we have attempted to suggest how the effects of Brexit may impact upon the UK's insurance sector, and in particular how businesses' and customers' decisions and sentiments will affect customer communication channels in this vertical market.

Future reports will re-evaluate the most likely outcome, but these current predictions should be treated with even more caution than usual. We have used the following assumptions about how Brexit will affect UK businesses and consumers in the next five years:

The Office for Budget Responsibility¹ has once again lowered expected growth, forecasting growth of 1.4% in 2018 (down from its previous estimate of 1.6%), by 1.3% in 2019 and 2020, then by 1.5% in 2021. It expects "that the negotiation of new trading arrangements with the EU and others slows the pace of import and export growth for the next 10 years", meaning that:

1. uncertainty for firms that will lead to some investment being postponed or cancelled
2. the continued weakness of the pound will squeeze households' real incomes by pushing up import prices
3. the depreciation of sterling will boost net trade in the short term
4. exiting the EU will reduce growth in exports and imports during the transition to a less trade-intensive economy
5. exiting the EU will be associated with lower net migration than would otherwise have been the case.

In our opinion, points 1 and 2 are the most obviously-relevant for the contact centre industry, both of which are negative in terms of long-term employment, productivity improvements, consumer sentiment and disposable income.

The low value of the pound will help exporting businesses in the short-term (at least, those which do not have to import raw materials or components), for example, the services industries, but this is unlikely to provide much of a boost for contact centres (for example, UK-based outsourcers doing work for overseas companies and charging in sterling would be cheaper to use than previously, but these are quite rare).

¹ <http://budgetresponsibility.org.uk/efo/economic-fiscal-outlook-november-2017/>

A reduction in trade (point 4) is likely to have a negative effect on businesses and consumers, and point 5 (a somewhat lower level of immigration) is unlikely to impact upon most contact centres, apart from those offering European language services to their customers. However, this may impact those contact centres which use substantial amounts of EU student labour, as UK universities are likely to become less attractive for such students.

Brexit has potentially significant repercussions for the UK insurance sector, depending on the final agreements reached with the European Union. Currently, “passporting” allows banks and insurance companies to operate across the EU provided that they have a UK base, meaning that non-EU banks (for example from Switzerland or America) can use the UK as a gateway to the whole of the EU. Without an agreement to continue this practice (which at the time of writing in April 2018 is thought to be unlikely), non-EU financial services companies will have to open EU-based operations in order to access this market, meaning that the insurance sector will be smaller and weaker as a result.

There is also the possibility that UK and EU regulations diverge over time (e.g. Solvency II, which harmonises EU insurance regulations, for which future changes may need to be mirrored exactly, without any input into the decision-making process), adding cost and complexity. Cross-border data transfer will also complicate matters, assuming that the EU considers the UK’s data protection to be adequate: again, only an exact mirroring of current and future EU regulations would seem to make this realistic, but may not be politically acceptable.

Controls on immigration will make the UK a less attractive place to work, even if skilled non-UK insurance workers are still permitted to do so.

The uncertainty around the future may mean that there is a rise in the demand for redundancy insurance and trade credit insurance, and there may also be a requirement for greater health insurance if the reciprocal healthcare coverage given by the E111 and EHIC regime is not continued.

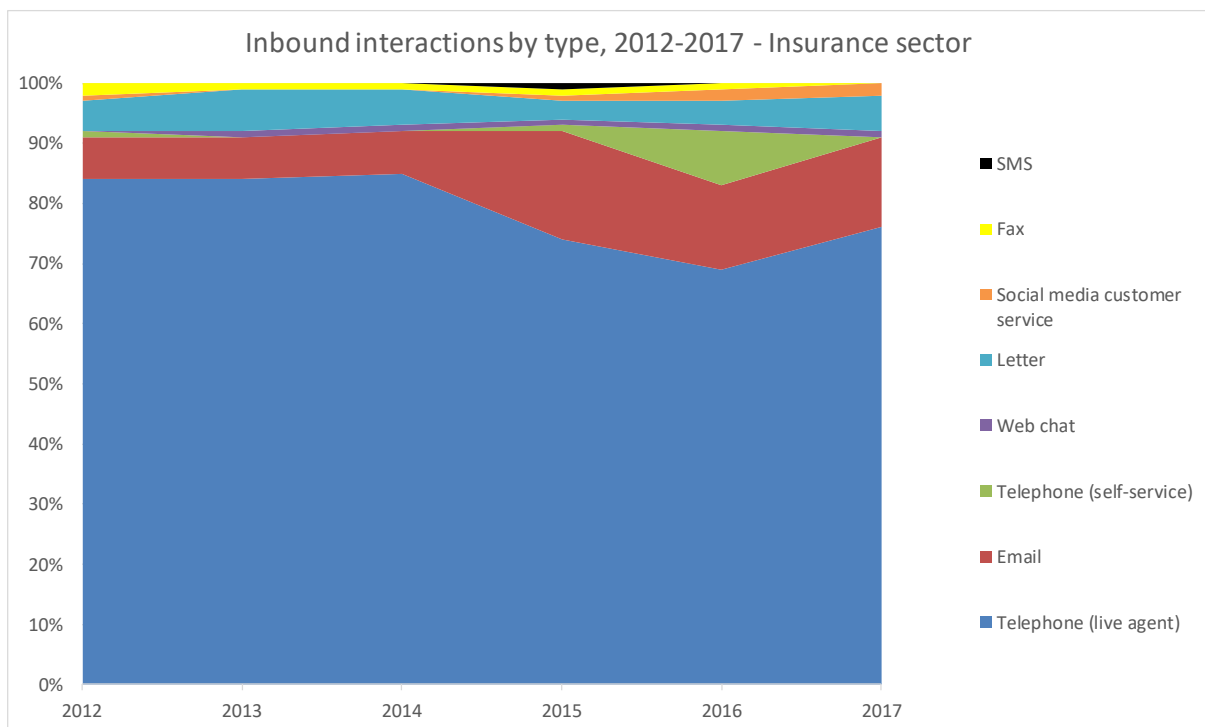
THE USE AND EFFECT OF OMNICHANNEL

The chart below shows inbound interactions for the insurance sector.

Telephony is significantly more important than for most other vertical markets, however, email has at least doubled in importance since 2014, and letters are also a significant means of customer communication in many operations. 2016's high self-service figure looks to be a statistical anomaly.

As with the banking sector, new digital media such as web chat and social media are less important on average.

Figure 7: Inbound interactions by type, 2012-2017 (Insurance sector)

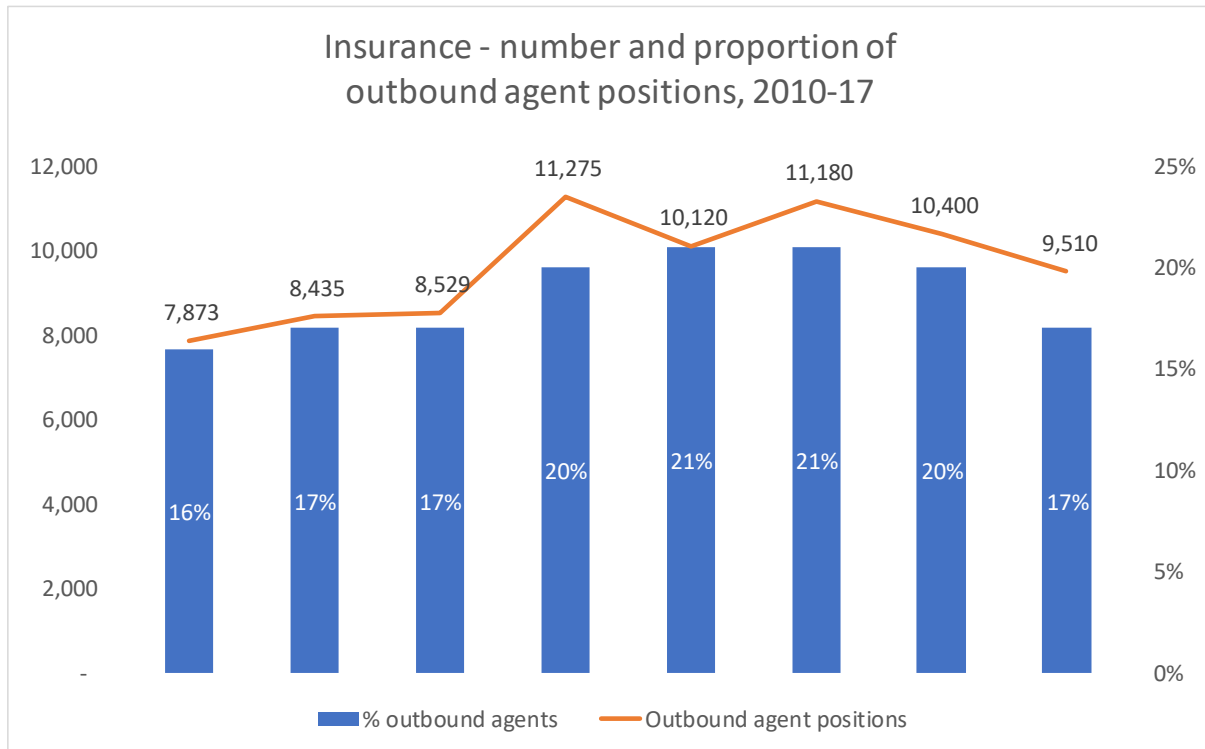


Year	2012	2013	2014	2015	2016	2017
Telephone (live agent)	84%	84%	85%	74%	69%	76%
Email	7%	7%	7%	18%	14%	15%
Telephone (self-service)	1%	0%	0%	1%	9%	0%
Web chat	0%	1%	1%	1%	1%	1%
Letter	5%	7%	6%	3%	4%	6%
Social media customer service	1%	0%	0%	1%	2%	2%
Fax	2%	1%	1%	1%	1%	0%
SMS	0%	0%	0%	1%	0%	0%

INBOUND & OUTBOUND ACTIVITY

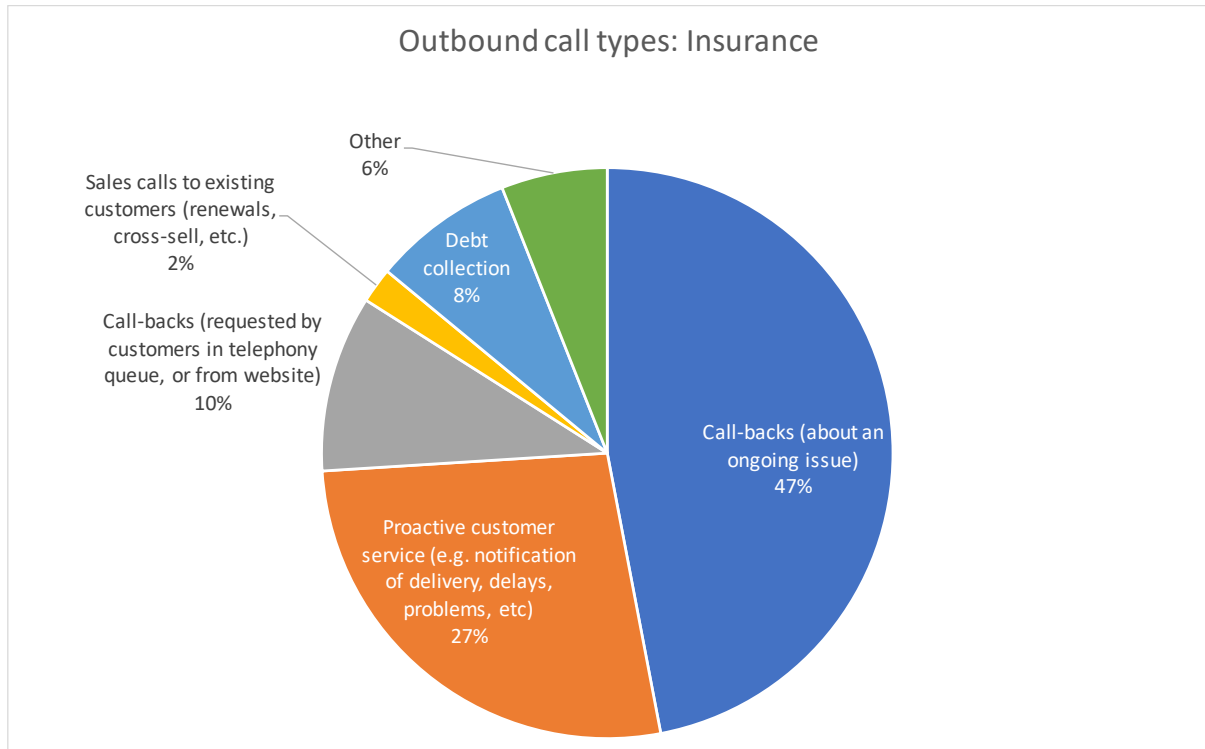
Despite the regulations around cold calling, insurance outbound activity has been very steady since 2010, staying close to 20% of all contact centre activity, and being equivalent to around 10,000 agent positions.

Figure 8: Insurance - number and proportion of outbound agent positions, 2010-17



There has been a definite movement away from sales-focused calls, towards proactive outbound service notifications about ongoing issues, and call-backs related to these.

Figure 9: Outbound call types: Insurance

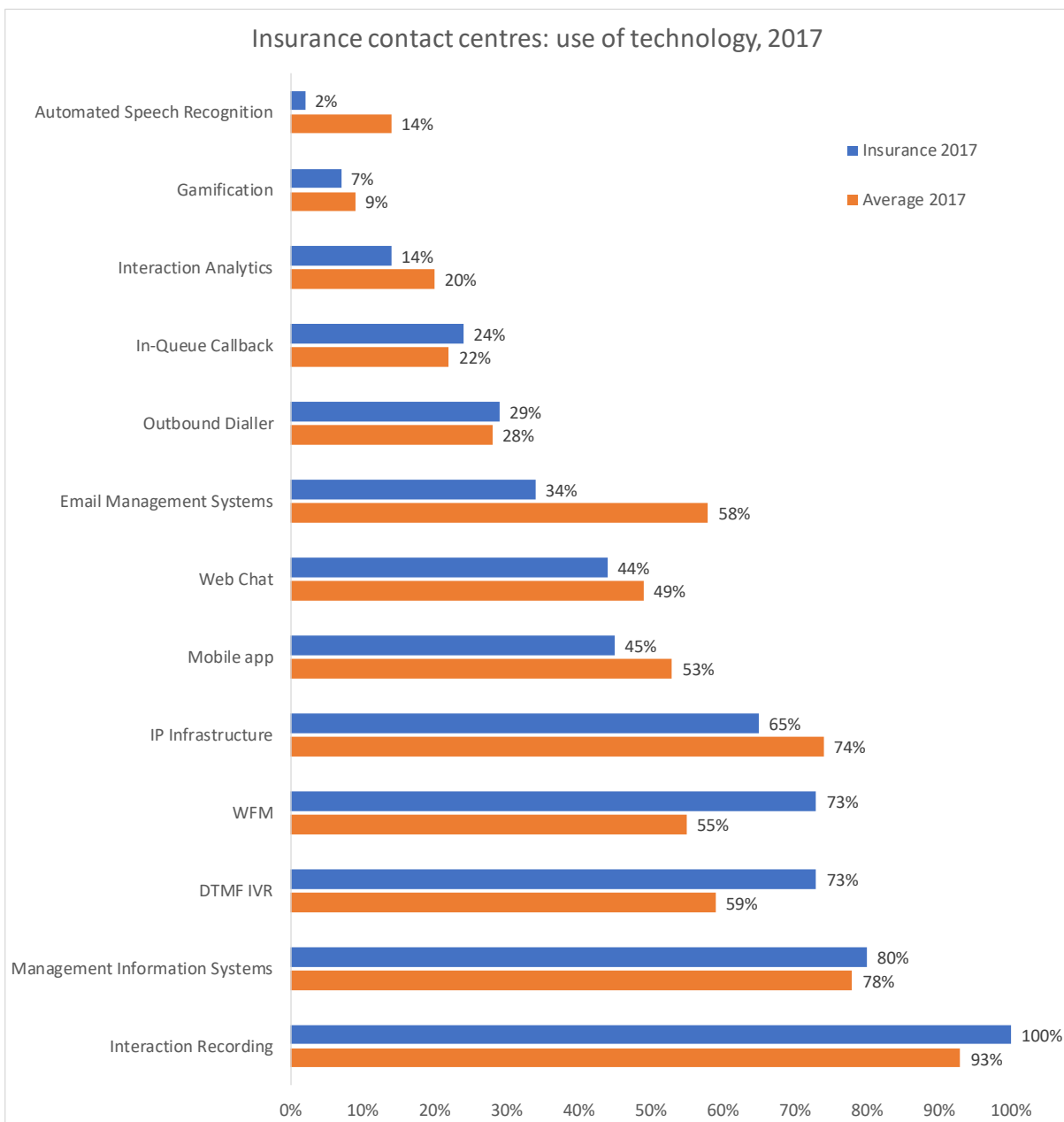


TECHNOLOGY

As expected in an industry with so many regulations to comply with, interaction recording is used by all of the insurance survey respondents in 2017, with MIS and DTMF IVR (usually for routing) also very popular. Cloud-based solutions are used by 30% of respondents.

Insurance contact centres are behind the industry average with their use of web chat and email, with these only being used very recently by many of the larger insurers due to concerns over suitability in a secure environment. Insurance operations have been very high users of call recording for many years, although the implementation rate for analytics is currently lower than might be expected.

Figure 10: Insurance contact centres: use of technology, 2017





Learn from industry disruptors to create great CX

Customer experience is a driving differentiator in insurance and having the right CX can set you apart from an increasingly flooded market.

Like a lot of other industries, insurance customers' expectations have risen massively in recent years. However, unlike other industries, insurance customers are extremely fickle and can jump to one of your competitors at any moment.

25% of UK customers have changed either motor or home insurance provider in the past year and 36% will do so in the next 12 months.

In an industry with notoriously tight margins, a sudden loss of customers could prove devastating to your business. The best way to avoid is through great CX, and to follow the example set by the industry's disruptors.

Insurance, like many other parts of the service sector, has been shaken-up by digital-driven 'insurtech' firms that are tapping into customers' need for a seamless, simple and pleasant customer service that can be accessed 24/7 at no inconvenience.

By choosing to not compete on price but instead put a premium on CX, insurtech firms are posing a serious threat to the industry's biggest companies in the same way fintech firms are challenging the big banks.

A big part of their success is by making the user journey as easy as possible. Traditionally, many insurers saw each customer touchpoint as a discrete and exclusive event. Insurtech firms increasingly see them, as all customers do, as part of a journey that meets a specific need.

According to a 2017 survey, customers who feel engaged and receive a good service are willing to tolerate price increases by as much as 15%. Insurtech firms build their success on personalised answers to customers' queries within minutes, sometimes seconds of that query being put to them. Customers can also access their services on multiple devices.

You can improve your CX and buck the industry trend of hemorrhaging customers by giving your contact centre agents the tools they need to provide great customer service. Traditionally, the telephone was the insurance industry's biggest weapon. That shouldn't be the case anymore, but 57% of insurance companies still rely on the phone for their customer service and only two-thirds of customers who get in touch via a digital channel see their issue resolved.

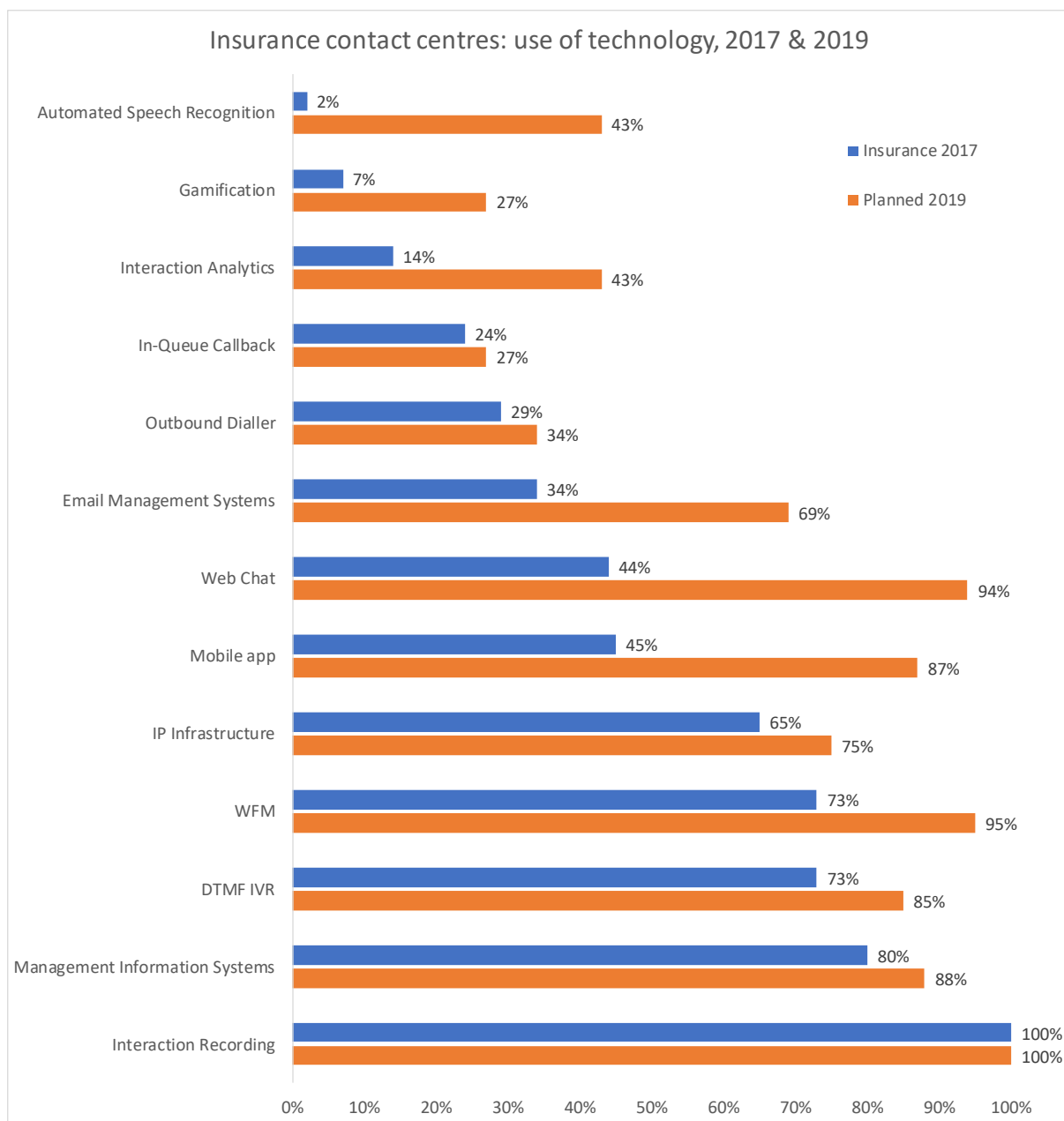
The best way to boost your CX is to connect policy holders, agents and brokers and closely monitor all online activity. Last year, a report by Aviva said that a continual cycle of data collection and customer feedback could increase customer advocacy by at least 30%.

This involves breaking down traditionally well-defined silos and creating a common vision across all the whole company. Delivering great CX involves a lot more than just developing an app or hiring more call centre agents. It involves huge investment and relentless improvements across all customer channels and business functions to create a seamless omnichannel experience.

The greatest expectation of technology growth – and expectation should not be confused with what the reality is likely to be – comes from web chat, email management, gamification and interaction analytics. The latter is useful for compliance – key to insurance operations – as well as providing potential business and operational benefits, with analytics being generally more useful in larger operations with many customers and interactions, which is the case for many insurance companies.

Automated speech recognition is a real stand-out, with the current implementation rate of 2% expected by survey respondents to be 43% within 2 years. While this is very unlikely to be matched by reality, the interest in this technology (which can be used for voice biometric purposes as well as just simple auto-attendant/routing) should be noted.

Figure 11: Insurance contact centres: use of technology, 2017 & 2019



HUMAN RESOURCES

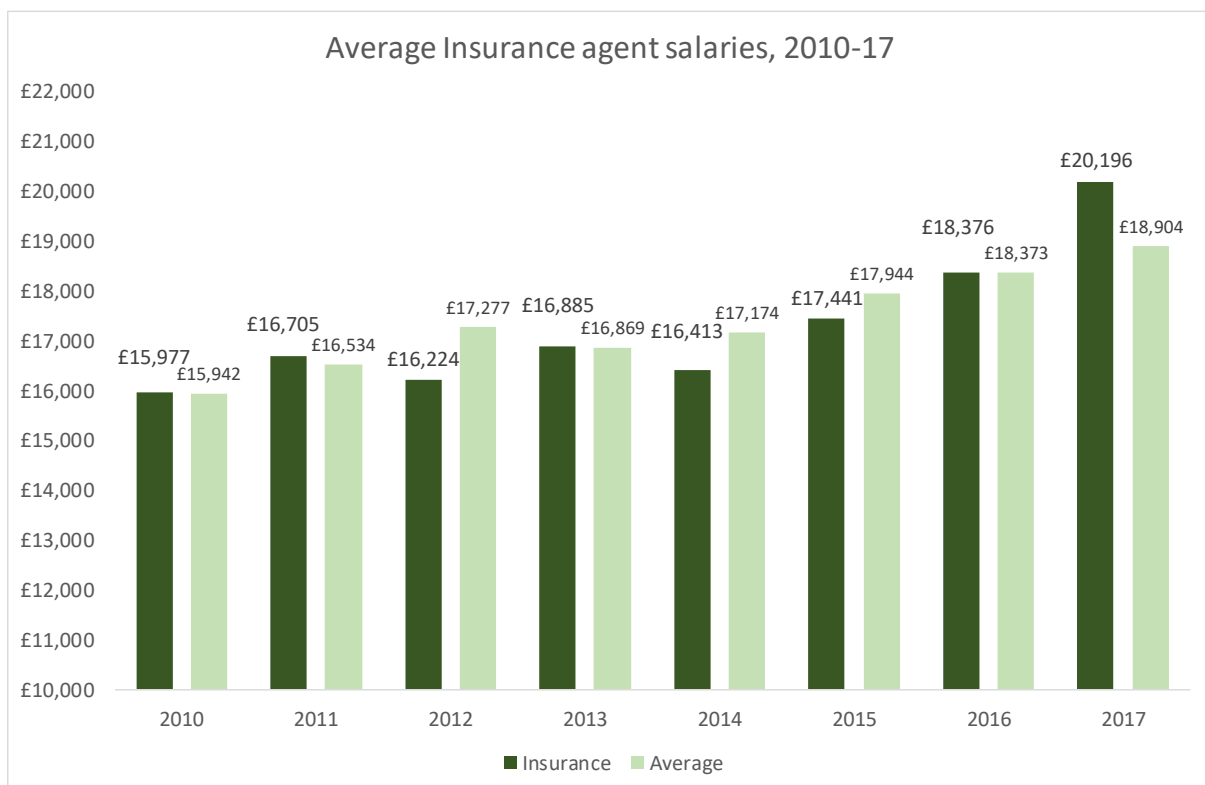
SALARIES

The salary figures below are calculated by adding together the average salary paid to new agents and to experienced agents, and dividing by two.

In 2017, insurance agents were reported to be paid more than £2,000 higher than the industry average, but most previous years have seen salaries on a par with the average, at their highest. It is likely that the 2017 is a one-off.

Due to the easier customer requests being handled by web self-service or by having the information to hand in an email, calls generally are getting longer and more complex, meaning that agents require greater skills and knowledge (supported by technology), which will place upward pressure on salaries.

Figure 12: Average Insurance agent salaries, 2010-17

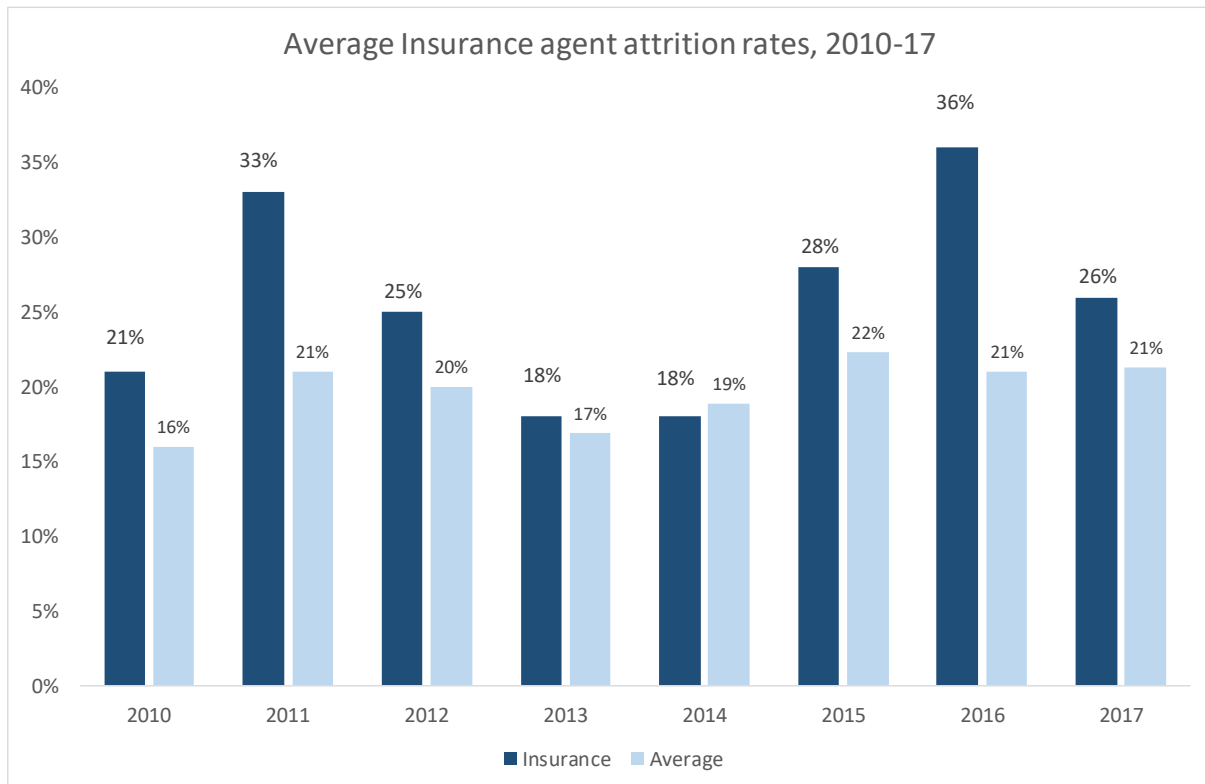


AGENT ATTRITION

Insurance agent attrition rates show little pattern, jumping to 36% in 2016, and then dropping to a more typical 26% in 2017, more likely as a result of the specific respondents answering the survey in each year, rather than any structural changes in this sector of the contact centre industry.

However, most years have seen insurance agent attrition significantly higher than the industry average.

Figure 13: Average Insurance annual agent attrition rates, 2010-17

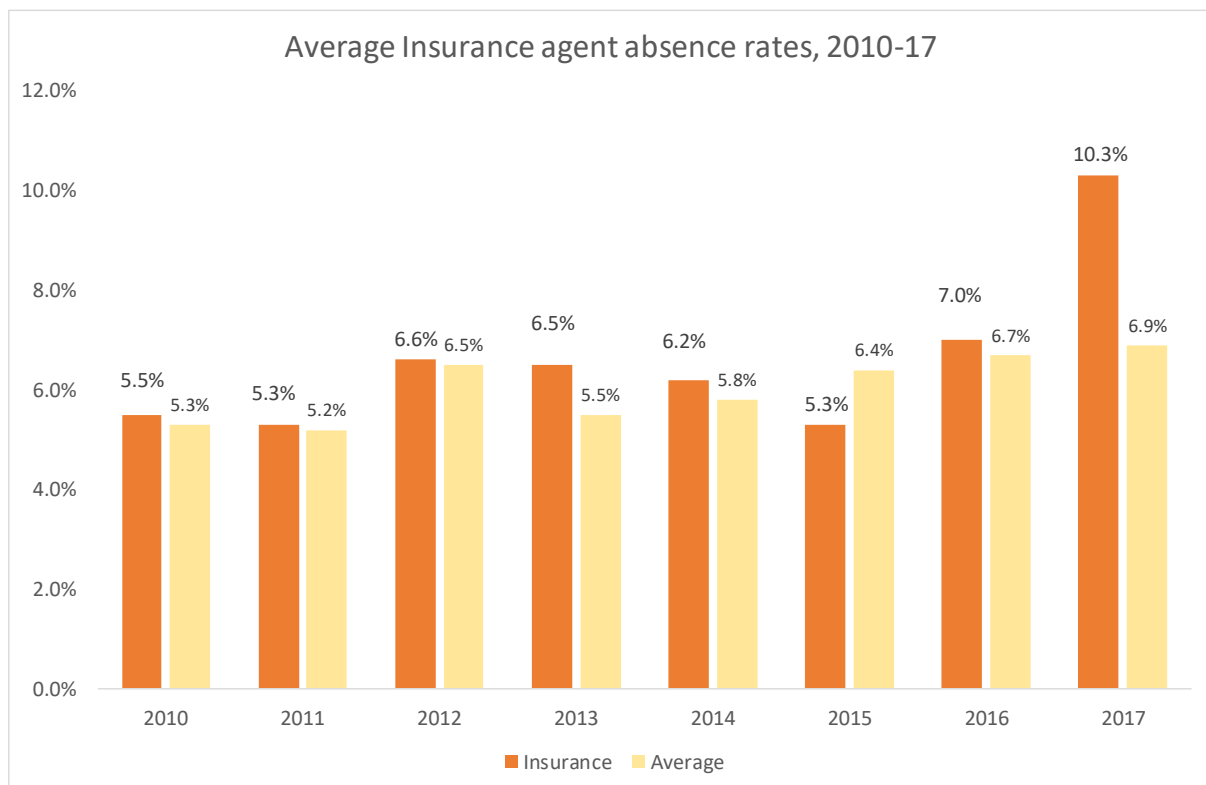


AGENT ABSENCE

For 2010-16, insurance agent absence rates were similar to the industry average, with only 2013 and 2015 deviating much. As one of these instances was higher than average, and one lower, there is not much of a pattern.

It is too early to say whether the very high absence figure in 2017 is a structural change, or a statistical anomaly.

Figure 14: Average Insurance agent absence rates, 2010-17

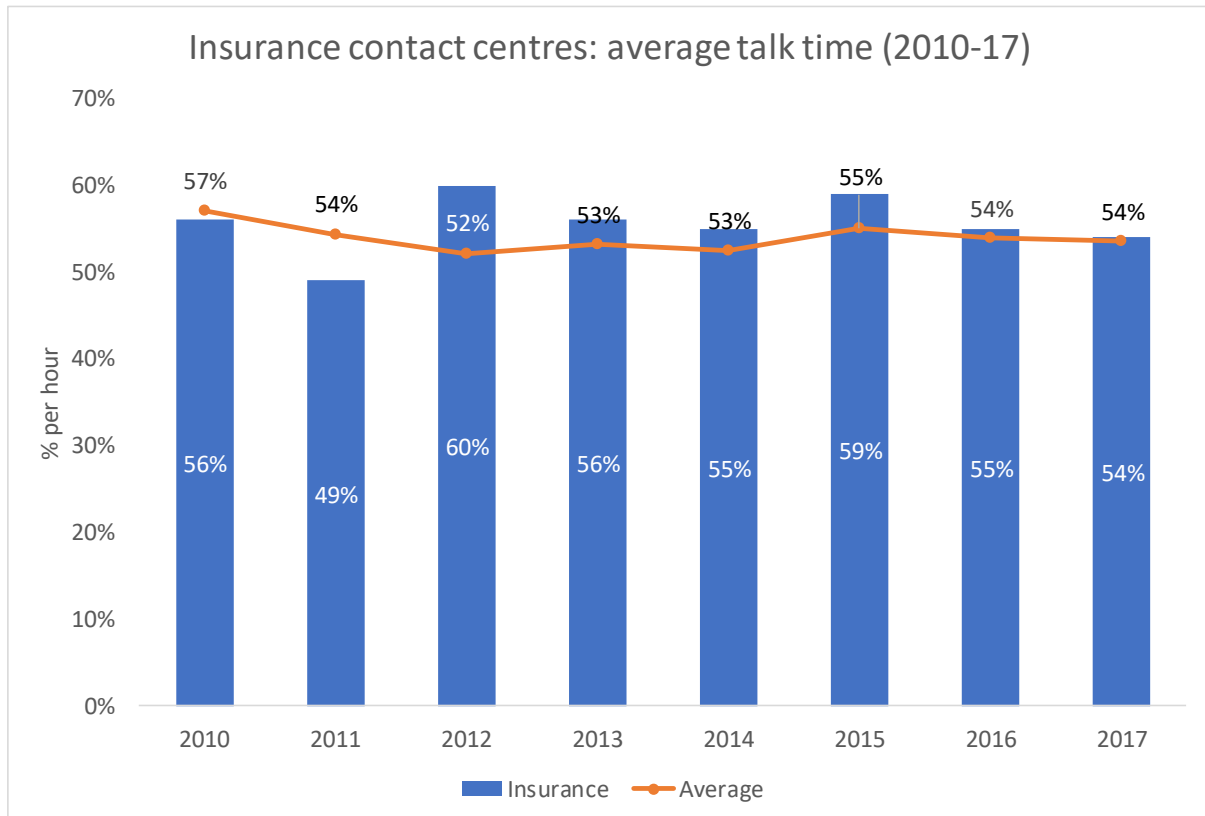


OPERATIONAL BENCHMARKING

AGENT ACTIVITY

The proportion of agent time spent talking to customers has remained very slightly higher than the industry-wide level since 2012.

Figure 15: Insurance contact centres: talk time, 2010-17

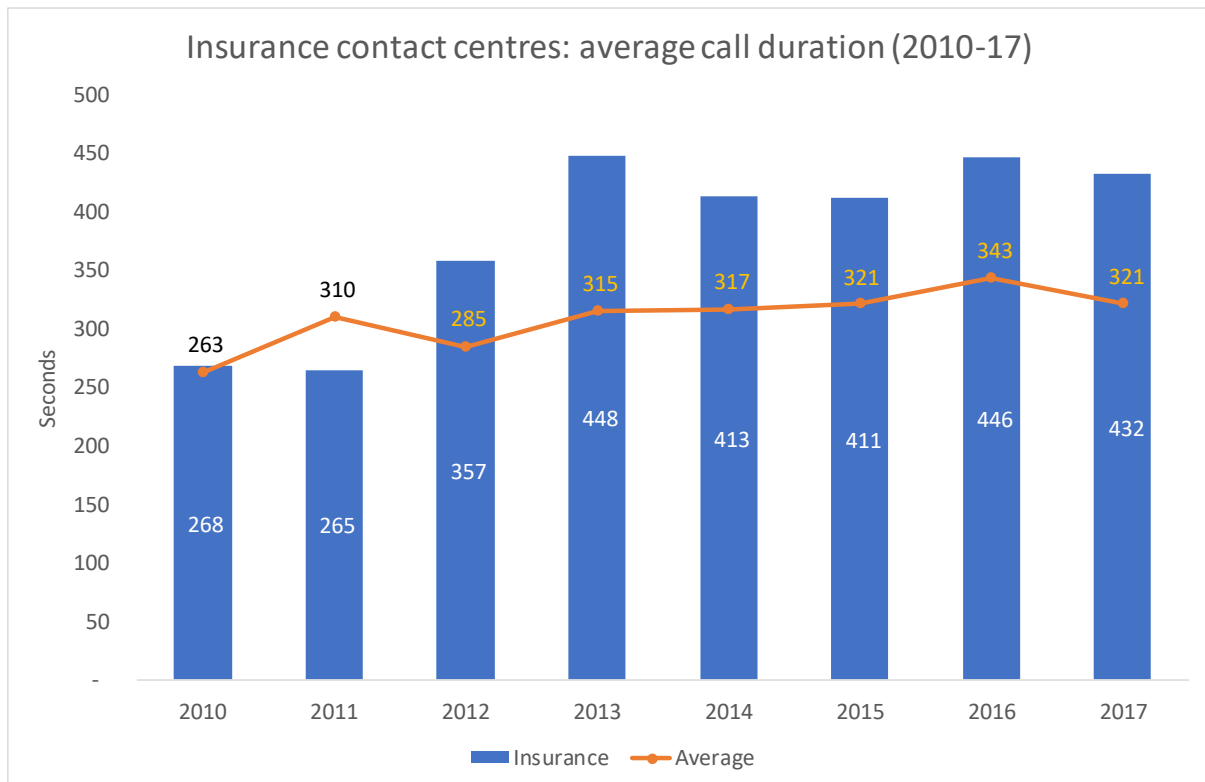


CALL DURATION

Average insurance call lengths are consistently higher than the UK average. The length of insurance calls has risen since 2011, being over seven minutes in length for each of the past five years.

This is in line with the UK contact centre industry as a whole, which is seeing greater use of self-service to handle simple queries or interactions, leaving live voice calls to more complex issues, and also for customers who are less comfortable with automation and self-service, and who may also take longer on a call.

Figure 16: Insurance contact centres: call duration, 2010-17

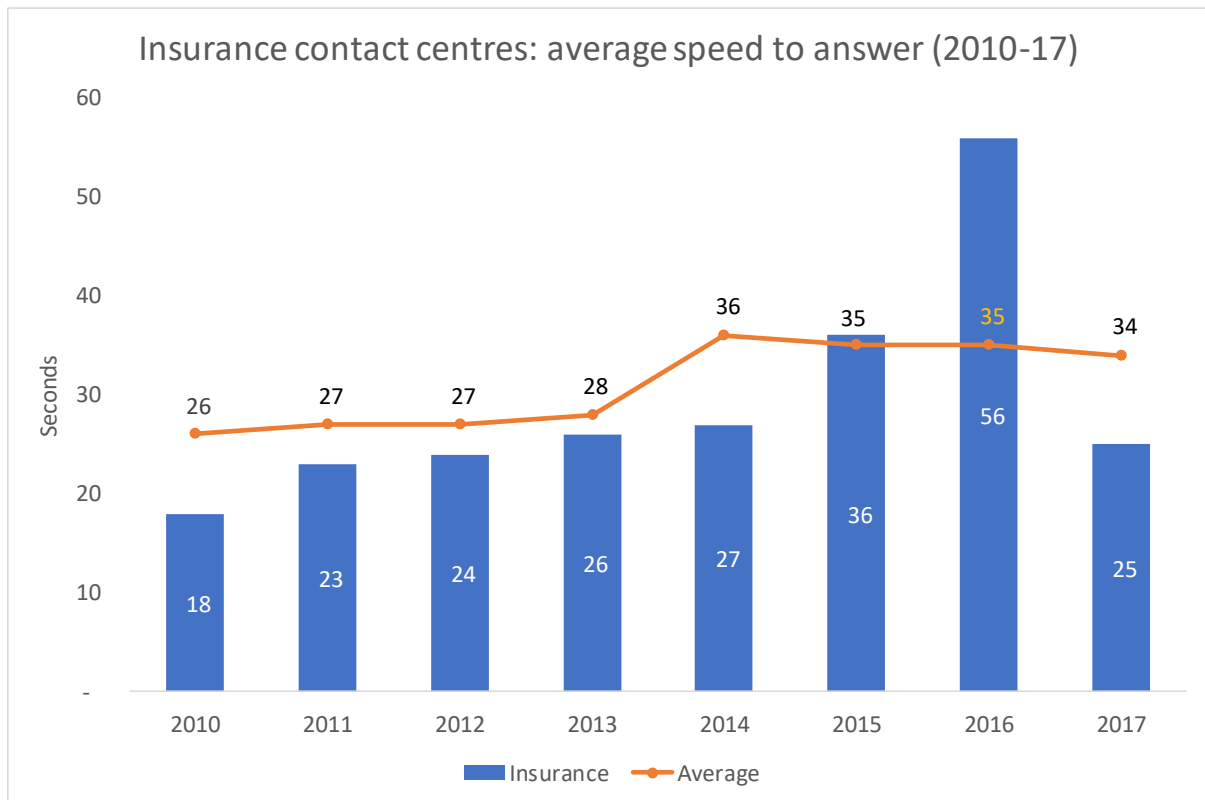


SPEED TO ANSWER

Insurance contact centres have historically had a considerably lower average speed to answer than the UK contact centre industry as a whole, being lower than average from 2010 to 2014. Speed to answer rose in 2016 and especially 2016, but 2017's low figure seems to have re-established the historical average.

Speed to answer is still one of the most important factors to customers calling a contact centre, so a quick answer is beneficial to the customer experience as a whole.

Figure 17: Insurance contact centres: average speed to answer, 2010-17



THE FUTURE OF THE UK INSURANCE CONTACT CENTRE INDUSTRY

While the demand for insurance products should remain steady after Brexit (for domestic-focused operations at least), businesses may look to implement consolidation and cost-cutting exercises in order to maintain profitability in an industry which will become more competitive as improved profits attract new entrants.

In a contract-based, commoditised industry, the preferred strategy for increasing repeat sales and growing the number of products per customer will often be based on superior customer experience (rather than quality or price), and we would expect insurers to look to improve their contactability, speed of response and interaction effectiveness through new digital channels, a unified agent desktop which supports real-time cross-selling, proactive outbound service and superior customer analytics.

After a slow uptake, there is a major opportunity for digital communication in insurance contact centres, as customer acceptance and confidence in the technology continues to increase, although the complex nature of some interactions will mean that the human touch will remain very important. It is also likely that voice biometrics and other customer identity verification techniques will make their way into the mainstream, which will have an impact upon reducing call lengths and therefore require fewer agents to handle the same number of calls.

Contact centres are still a far more cost-effective way of provide services than the High Street/physical broker model, and the complex and confidential nature of many insurance interactions will mean that customers will still have a strong demand for the voice channel. However, the continued uptake of price comparison websites will mean that the generally high level of insurance profit margins will be squeezed as competition increases, which is likely given the strong financial results that many UK insurers reported in 2017.

Insurance contact centres in general have a good handle upon key operational metrics such as speed to answer and talk time, although the nature of the business means that average call duration is likely to remain high. The sector has higher-than-average agent attrition and absence rates compared to the industry as a whole, and this may be linked with the typical insurance agent salary level, which is generally no higher than the UK average for contact centre agents.

ABOUT CONTACTBABEL

ContactBabel is the contact centre industry expert. If you have a question about how the industry works, or where it's heading, the chances are we have the answer.

The coverage provided by our massive and ongoing primary research projects is matched by our experience analysing the contact centre industry. We understand how technology, people and process best fit together, and how they will work collectively in the future.

We help the biggest and most successful vendors develop their contact centre strategies and talk to the right prospects. We have shown the UK government how the global contact centre industry will develop and change. We help contact centres compare themselves to their closest competitors so they can understand what they are doing well and what needs to improve.

If you have a question about your company's place in the contact centre industry, perhaps we can help you.

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Sources:

- The UK Contact Centre Decision-Makers' Guides (2010-17)
- UK Contact Centres: The State of the Industry (2010-18)
- The UK Contact Centre HR & Operational Benchmarking Reports (2010-17)