



# Restoring connections

*How telecommunications providers can reboot the customer experience*

IBM Institute for Business Value

## Executive Report

Telecommunications

### **IBM's unique capabilities for the telecommunications industry**

IBM has more than 22,000 subject matter experts working in the Telecommunications industry, delivering solutions to more than 200 major communications service providers across the globe. IBM's telecommunications capabilities are backed by an extensive global network of telecom solution labs, research labs and innovation centers to support its offerings in the area of analytics, cloud, mobility, network optimization, digital transformation and global integration. IBM continues to invest significantly in key acquisitions to add expertise and capabilities that enable its clients in the telecommunications space.

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## Rebooting telecommunications

*Few industries have commoditized themselves more than telecommunications. Communications service providers (CSPs) risk becoming mere utilities and, at the same time, face the disintermediation of the customer relationship. Today's consumers have a plethora of product and service choices, including those offered by over-the-top (OTT) providers, whose popularity continues. How can CSPs escape commoditization and differentiate themselves? We believe the next competitive battle will be won by CSPs that can deliver an exceptional customer experience and build brand loyalty through innovative, compelling services tailored to customers' needs.*

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## Executive summary

Commoditization is a serious threat to the telecommunications industry. Most CSPs offer similar services at rates designed to win what has become a price war. As a result, many face decreasing margins and difficulty sustaining differentiation based on prices or products alone. On top of commoditization, CSPs also face competition from OTT providers and an increasingly knowledgeable and demanding customer base. With access to growing amounts of data from an ever-increasing number of sources and devices, today's empowered, savvy consumers know what they want and expect to get it.

Indeed, digital technologies have changed consumer behaviors and expectations. In addition to quality products and services, consumers now expect quality experiences. As a result, there's been an even greater shift toward a consumer experience economy in which the development, pricing and delivery of products and services are done with an "experience" in mind.<sup>1</sup> The value has moved away from the product or service itself and toward the customer's experiences with it. These experiences represent a distinct economic offering, and one that consumers increasingly desire.

As leading-edge businesses respond by explicitly designing and promoting the experiences consumers seek, it's clear that the next competitive battleground involves experiences.<sup>2</sup> It's also clear that more and more companies are taking note and changing practices. The 2013 IBM Global C-Suite Study revealed that outperforming companies – those that surpass their industry peers in terms of revenue growth and profitability – are 29 percent more likely to have a strong focus on improving the customer experience.<sup>3</sup>



**Only 30 percent** of telecommunications executives believe they have a high level of customer understanding.



**44 percent** of consumers consider their provider's omnichannel experience good or excellent.



**More than half** of consumers consider their providers average to poor in a host of basic areas.

In confronting this new shift in value, CSPs face some challenges. The primary hurdle involves their existing customer experience reputation. Generally, telecommunications is not considered a role model industry for positive customer experiences; no CSPs were cited as leaders on any customer experience scorecards we consulted. This reputation has affected customer loyalty. According to our most recent telecommunications consumer study, only 16 percent of consumers are real advocates for their provider. More alarming is the fact that almost half are antagonists, who harbor negative opinions and possibly bad mouth the provider.<sup>4</sup>

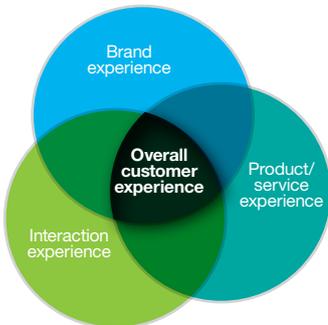
It's time for CSPs to turn the tide. In the new customer experience economy, telecommunications needs to move away from an "inside-looking-out" orientation focused on products, sales and the organization. Based on our research, we believe the industry should move toward adopting an "outside-looking-in" orientation, where everything is focused on and built around the customer perspective.<sup>5</sup> By doing so, CSPs can begin to reset the telecommunications customer experience and build brand loyalty through innovative, compelling, personalized services based on deep customer insights.

## The telecommunications customer experience

So, what constitutes a quality customer experience? Essentially, customers' experiences with the brand, experiences with the product or service, and interactions with the provider must all be delivered in a way that meets or exceeds expectations (see Figure 1). The combination of these three attributes creates the overall customer experience, which reflects the degree of connection between customers and the provider. The customer experience lifecycle begins the moment the consumer becomes aware of the company (brand awareness) and continues as each touch point or interaction contributes to the overall customer experience.

**Figure 1**

*The overall customer experience reflects the degree of connection between customers and the provider*



Source: IBM Institute for Business Value analysis.

### Customer experience

- Experience with the brand: To what extent does the company provide differential value to the customer through its brand.
- Experience with the product/service: To what extent do the products and services offered by the provider resolve the customer's specific needs.
- Experience relating to interactions: To what extent are the various interactions customers have with the company over the various channels easy, consistent and enjoyable.

*“Being at or above par in terms of price and quality only gets you into the game. A distinctive customer experience wins the game.”*

**Telecommunications Chief Marketing Officer, Spain**

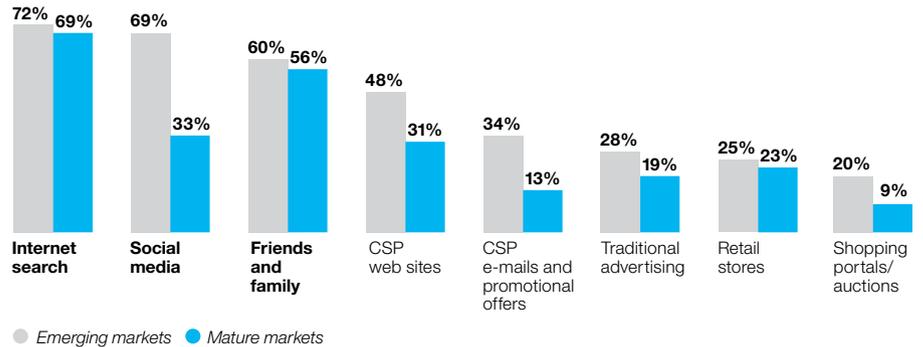
### Disintermediation of the customer relationship

Since the customer experience begins with the customer's initial introduction to the brand, we were interested in how consumers gain information about telecommunications providers, products and services. According to our 2014 IBM Global Telecommunications Consumer Survey, the number one source for information for both emerging and mature market consumers is the Internet (see Figure 2). Consumers today also increasingly rely on other customers, with social media and recommendations from friends and family rounding out the top three sources.

**Figure 2**

*Consumers are turning to each other and the Internet for information about communications service providers*

#### Sources of information on CSPs and their products/services



Source: 2014 IBM Global Telecommunications Consumer Survey.

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Interestingly, while consumers are sharing more and more information with each other, their relationship with providers is becoming more distant. In fact, we found that consumers are more likely to communicate both negative and positive experiences with others than with their providers.

### **Shifting CSP priorities**

In researching the industry's take on managing the customer experience, we discovered that telecommunications executives are rebalancing their priorities to reflect the growing importance of the customer experience. According to our C-suite study, they plan to spend less of their personal time on IT systems and operations, and more time improving the customer experience. We also discovered that telecommunications executives realize they face challenges in improving the customer experience. According to a recent survey of European executives, one of the biggest challenges they foresee is delivering a consistent customer experience across channels.<sup>6</sup>

Consistently delivering a seamless experience across channels requires an omnichannel approach that includes an integrated digital-physical strategy. Although only half of the CSPs in our C-suite study have an integrated digital-physical strategy, increasing numbers of CSPs have made omnichannel a top priority.

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*“The omnichannel experience is where we can reconnect with customers, provided we can transform our multi-layered and siloed organization into a harmonic ecosystem.”*

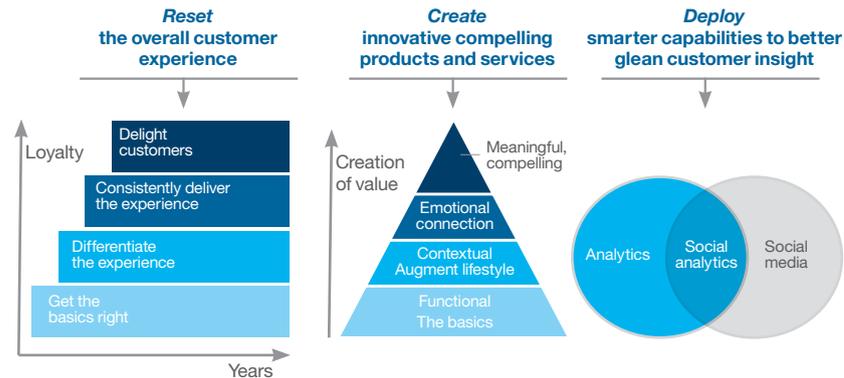
**Telecommunications Chief Marketing Officer**, United States

### Toward a better experience

CSPs need to transform the customer experience by forging deeper connections with their customers. They should start at the top of their organizations with a commitment from all C-suite members and continue driving the customer experience vision relentlessly down throughout the organization, embedding it into the structure, processes, measures and incentives. Customer experience must become a core tenet of the organization's culture. As part of this overall transformation, CSPs should focus specifically on three key strategies: 1) Reset the overall customer experience; 2) Create innovative, compelling products and services; and 3) Deploy smarter capabilities to better glean customer insight (see Figure 3).

**Figure 3**

*CSPs should focus on resetting the customer experience, building compelling products and services, and deploying smarter capabilities*



Source: IBM Institute for Business Value analysis.

## Resetting the customer experience

Customers with positive experiences naturally are more likely to talk positively about the company, providing word-of-mouth advertising for the provider. Almost half of the consumers in our survey believe a CSP's word-of-mouth reputation is important when considering the purchase of products or services. So, it is imperative to reset the customer experience.

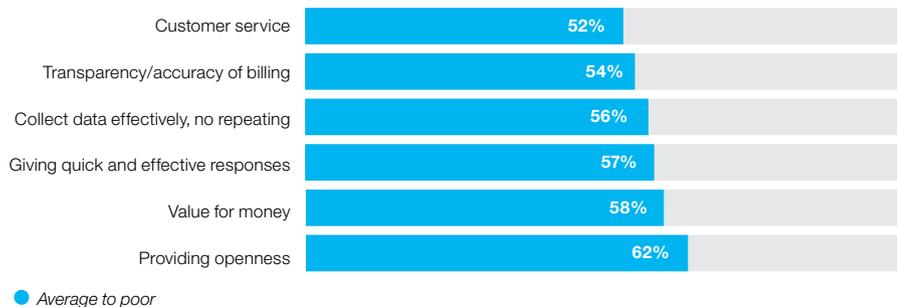
### Get the basics right

The first step toward customer loyalty starts with simply getting the basics right. According to consumers we surveyed, CSPs need to focus strongly on these areas. More than half consider their providers "average to poor" in a host of basic areas, including customer service, billing, gathering information and customer interaction (see Figure 4). It is difficult for CSPs to build trust and loyalty if customers are not experiencing consistent quality in their basic services.

**Figure 4**

*The consumer survey reveals that there is still a long way to go to get the fundamentals right*

#### Customer dissatisfaction with regard to the fundamentals



Source: 2014 IBM Global Telecommunications Consumer Survey.

*“It is difficult to build trust if operators are not able to provide assurances about the quality of even very basic services.”*

**Telecommunications Chief Executive Officer, Brazil**

### **Making deliberate choices**

A strong brand can help keep a company's products and services from turning into commodities. Many companies have built strong brands by making deliberate choices and focusing on what makes them "special." As an example, consider BMW:

- Enduring idea: Exhilaration
- Differentiated by: German engineering
- Experienced through: Performance vehicles
- Serving: The adventuresome driver

### **Differentiate the experience**

In addition to focusing on the basics, CSPs need to determine how to differentiate themselves in a commoditized environment. We suggest providers differentiate a type and quality of customer experience by establishing an enduring idea they believe in, determining what differentiates the organization, defining how this differentiation is primarily experienced and clearly identifying who they serve. Following these steps will help build the core of fandom and advocacy. CSPs can learn from other industries. To build brand success, a company needs to tie its enduring idea to its business strategy so it can successfully deliver the experience day in and day out.

### **Consistently deliver the experience**

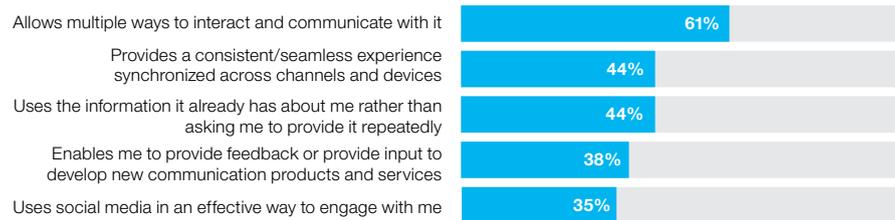
Customers increasingly use multiple touch points and expect an integrated, seamless experience when doing so. A successful omnichannel approach integrates information and processes, allowing customers to move easily across different channels when and how they choose.

Our survey revealed that customers increasingly prefer to empower themselves via self service, which represents a good opportunity for CSPs to increase satisfaction and decrease costs. We also learned that almost two-thirds of consumers are pleased with the variety of communication channels offered by their CSP. However, they are less pleased with the consistency across those channels and don't believe CSPs are effectively using social (see Figure 5).

**Figure 5**

*Customers are more pleased with the variety of channels than they are with the consistency across channels*

#### How good is your CSP at interacting with you?



● Good to excellent

Source: 2014 IBM Global Telecommunications Consumer Survey.

#### Delight customers

Delighting customers involves surprising them by over delivering – and never over promising – on an experience that forms an emotional engagement. In addition to rewarding loyalty, companies that reach this level effectively seek customer opinions, proactively aim for improvements, enable customization, personalize services, provide consistent and compelling services, and resolve issues quickly and fairly. CSPs have their work cut out for them in these areas, where well over half of consumers rated them average to poor (see Figure 6).

*“Our key task is to delight our customers with an element of surprise and in such a way that they recommend us to their friends.”*

**Telecommunications Chief Marketing Officer, Malaysia**

### Elevating the customer experience<sup>7</sup>

As part of its goal to differentiate itself around the customer experience, AT&T developed a six-step process called the AT&T Retail experience:

1. **Greet and approach:** Store customers are greeted within ten feet and ten seconds of entering the door.
2. **Build value:** Employees ask customers specific questions to understand the purpose of their visit.
3. **Offer solutions:** AT&T is in the business of selling solutions, not products. An employee's goal is to understand the customer's needs and offer solutions to meet those needs.
4. **Gain agreement:** Employees strive to make sure customers walk out with the solutions they were seeking by following the prior steps and asking the right questions.
5. **Walk out working:** This step is about education. Customers should leave with their problems solved, which might require setting up their e-mail in the store or showing them how to text a picture.
6. **Thank and depart:** AT&T employees thank customers and walk them toward the door, just as they might guests in their home.

**Figure 6**

*CSPs face challenges in "delighting" customers*

**How do you rate your provider with regard to the following aspects?**



● Average to poor

Source: 2014 IBM Global Telecommunications Consumer Survey.

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## Create compelling products and services

In a competitive industry, it is vital to design innovative products and services that not only are functional, but also contextual in terms of enhancing the user's lifestyle. Further, these products or services should exceed consumers' expectations to create emotional, meaningful connections, which leave users craving more. CSPs in general have struggled in terms of innovation, with OTT providers many times a step ahead. We suggest CSPs foster an environment that:

- Enables a structured innovation approach using a variety of tools ranging from social suggestion boxes to social innovation platforms and online brainstorming sessions
- Leverages the internal "wisdom of crowds" by facilitating employee innovation
- Attracts an extensive network of partners with new perspectives and complimentary competencies
- Allows innovation beyond products by focusing on all aspects of the business model and customer experience
- Includes the customer's voice by encouraging ideas and feedback.

We believe the customer's voice, in particular, is important. Consumers do not want to be passive recipients of what CSPs believe they want. CSPs should include customers as crucial partners in creating innovative products and services. According to an Economist Intelligence Unit report, business leaders believe customers will replace research and development as the main source of product and service ideas by 2020.<sup>8</sup>

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*"The successful telcos of the future will weave creativity into their DNA."*

**Telecommunications Chief Executive Officer, Ireland**

### Tapping customer innovation<sup>10</sup>

Seeking to better meet customer needs and build loyalty for its Orange brand, European communications service provider Everything Everywhere (EE) went directly to customers for answers. For more than six weeks, the company partnered with customers and experts outside of its own field to explore, co-create and refine ideas. This collaboration revealed a key insight: When customers lose their phones, it's the loss of personal connections they most regret (texts, photos, etc.).

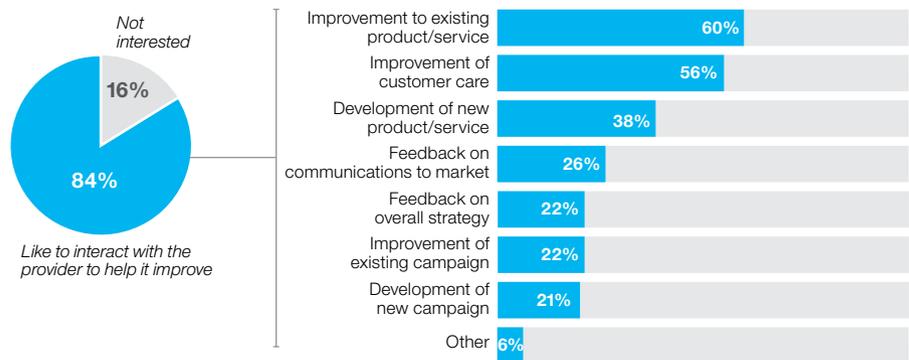
Based on this insight, Orange launched the Clone Phone, a service that delivers a replica of a customer's phone – loaded with personal content, including photos, videos, contacts and calendars – after a loss. In the first six months, more than 250,000 consumers signed up. By tapping customer innovation, EE was able to directly respond to a customer need, drive brand affinity and create a new revenue stream.

Our C-suite study supports the connection between customer collaboration and success, with outperformers 54 percent more likely to collaborate with customers than underperformers.<sup>9</sup> Telecommunications executives apparently plan to capitalize on this connection: While only 38 percent from our C-suite study collaborate extensively with customers today, 88 percent expect to in the next three to five years. Based on our consumer survey, finding customers to participate should not be a problem, as 84 percent are willing to provide feedback or engage with providers regarding improvements (see Figure 7).

**Figure 7**

*Most customers are willing to provide feedback or engage with providers regarding improvements*

**Topics on which customers are willing to provide feedback or to engage**



Source: 2014 IBM Global Telecommunications Consumer Survey.

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## Deploy smarter capabilities

CSPs realize they need to deepen their customer knowledge: Only 30 percent of telecommunications executives from the C-suite study believe they have a high level of customer understanding today – though 84 percent expect to in three to five years. To successfully increase this understanding, providers need to listen to customers and collect the right information, which only 42 percent of consumers believe CSPs do today. To find the nuggets of information buried in mounds of data and facilitate communication with customers, CSPs should focus on smarter capabilities in the areas of big data and analytics, social media and social analytics.

### **Gaining customer insight through big data**

Customers generally appreciate being understood and individually valued. With big data and analytics capabilities, CSPs can build a 360-degree view of the subscriber that includes interests, habits and future needs, which can be used to create high-quality personalized communications and experiences. By integrating intelligence from areas such as service assurance, retail stores, online transactions, campaigns and call centers, CSPs can intelligently optimize each customer touch point.

In addition, big data and analytics solutions enable real-time information analysis, particularly important in telecommunications. Location-based services, smarter network operations, intelligent marketing campaigns, and next-best actions for sales and services require a more contextual real-time view of information. Predictive analytics can use historical data to help anticipate customer needs, offer prescriptive recommendations, predict up-selling potential and identify customers likely to churn. And network performance monitoring solutions can help more quickly discover network failures and address capacity/performance issues before the customer experience is affected.

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*“Our target is extreme personalization of offerings: Get to know who the customer is, what he does and across which channels.”*

**Telecommunications Chief Marketing Officer, France**

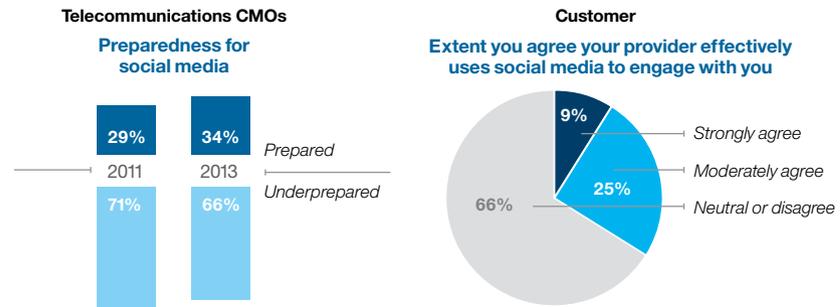
### Engaging via social media

As customers spend more time on social media, they are developing habits CSPs need to understand. Indeed, according to our C-suite study, telecommunications executives' number one priority for managing the shift toward emerging technologies is to position social media as a key customer engagement channel. However, two-thirds feel underprepared to activate social media strategies. And two-thirds of consumers indicate their providers are not using social media in an effective way (see Figure 8).

Social engagement with existing and potential subscribers can reap significant benefits for CSPs by stimulating intensive customer engagement and relationship building, fostering brand strength and helping build trust.<sup>11</sup> To tap this potential, CSPs should integrate social media into a comprehensive multichannel strategy aimed at improving the customer experience and increasing loyalty.

**Figure 8**

*Most CSPs are underprepared to implement social media strategies*



Sources: 2013 IBM Global C-Suite Study; 2014 IBM Global Telecommunications Consumer Survey.

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### **Detecting sentiment and influencers using social analytics**

Social analytics, including social network analytics and social media analytics, can deliver important insights, such as how consumers feel or what issues are being discussed about a brand, product or service. Specifically, social network analytics are useful in identifying proximities and relationships between people, groups, organizations and related systems. They are also helpful in revealing the strength of relationships and information flow within groups, as well as identifying group influencers.

Social media analytics extract data from social media sources where customers chat and post opinions. This allows providers to monitor consumer sentiments and quickly detect issues, providing insights that can help increase revenues, reduce costs and protect the brand.

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### **Turning the tides through social media analytics**

U.K. provider O2 deploys a platform to monitor and analyze, in real time, all social media activity related to the brand in the United Kingdom. The platform supports O2's social media activity, which includes a dedicated real-time response team, and monitors social media, as well any user-generated news content. Trends revealed through analysis assist with product development and innovation.<sup>12</sup>

In July 2012, the platform helped the company respond quickly to negative chatter when it experienced widespread network problems. As hundreds of thousands of customers were affected and user anger was boiling over, many customers expressed their dissatisfaction on Twitter. O2, however, calmed the storm by using Twitter to deliver fast, professional customer responses and bolstered their brand image by adding humor and personality to their tweets.<sup>13</sup>

## Recommended actions

Becoming a successful customer experience company requires strong executive leadership that passionately drives the vision and embeds it into structure, processes, measures and incentives, making customer experience a core tenet of the organization's culture. To begin this journey, we suggest the following actions:

### **Reset the customer experience**

- Make sure the fundamentals are mastered.
- Define how you want to stand out in the crowded market and differentiate the experience accordingly.
- Create a dynamic and seamless omnichannel experience, including self-service, social and mobile channels.
- Develop a “mobile first” strategy that allows customers to contact you anytime from anywhere.
- Delight customers by positively surprising them with an experience that forms an emotional connection.

### **Create compelling products and services**

- Focus on describing future customer needs and what is required to meet these needs.
- Include the entire organization, partners and – above all – customers as stakeholders in creating new products and services.
- Adopt a new pace of innovation, such as development cycles of days or weeks rather than months or years.
- Develop breakthrough, disruptive or enduring business models.
- Invest in educating and aligning people; hire new digital skills when needed.

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### **Deploy smarter capabilities**

- Invest in analytics and other capabilities to help generate intelligence about customers, as well as provide insights on which the company can act.
- Design the social channels and platforms that customers want.
- Deploy social network-focused analytics to identify influencers and mine social media to access customers' honest views, values and expectations.

### **Change the culture**

- Lead from the top; the companies that have made the most progress have driven the customer experience from the top.
- Build customer-centric measures into the performance measurement and compensation of every executive; for a few CSPs from our study, up to 40 percent of compensation of all executives is directly linked to customer measures, such as Net Promoter Score or likelihood to recommend.
- Destroy silos; CSPs that have made the most progress look at processes through the customer's point-of-view and ruthlessly force change across internal organization and reporting structures.

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**For more information**

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## Are you ready to restore connections?

In the age of experience, CSPs are forced to re-examine their products, services and operations from the customer’s perspective. To help trigger transformation, consider these questions:

- Is the entire C-level management team committed to a renewed focus on the customer experience?
- What are the key elements of your customer experience strategy and how are those elements anchored in your organization?
- Are you able to deliver a unified experience across all channels?
- Do you know the factors that drive value and the perception of a memorable customer experience?
- In what way do you tune into the voice of your customer to anticipate future needs and create a richer customer experience?

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