

## Telecom Call Centers: Mystery Shopper Study Shows Room to Improve Across Countries

*For telecom providers, global research highlights the opportunity to differentiate themselves from competitors by improving the quality of their service.*

In a recent study of service performance in the telecommunications sector, the U.S. ranked the highest in overall performance of telecom call centers in seven countries (64 percent), closely followed by the U.K. (63 percent) and Indonesia (60 percent). However, the low performance rankings displayed by all of the countries in the study reveal much room for improvement.

In the second installment of ICMI's Global Service Index (GSI) Report, a mystery shopper-based assessment of call center service practices across selected countries, we present the results of our study on the telecommunications sector. Developed and executed by OmniTouch International, an ICMI Global Partner headquartered in Singapore, the GSI focuses on a different industry sector each quarter. Other sectors include banks, consumer electronics and hospitality. The results can be used to identify country, regional and global trends on an ongoing basis, and to document individual company performance standards within each selected country.

It's important to note that this study is not about assessing agent performance, which is, itself, the result of many interrelated processes and activities. Rather, it is about assessing how well organizations manage an environment in which agents can perform well via such management activities as: appropriate staffing, provision of workflow, training and coaching practices, and design of organizational strategy.

**FOR QUESTIONS OR FURTHER INFORMATION ABOUT ICMI'S GLOBAL SERVICE INDEX REPORT, PLEASE CONTACT:**



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### **GSI RESEARCH METHODOLOGY AND PARAMETERS**

A total of 310 mystery shopper calls, representing nearly 800 minutes of talking time, were made to leading telecommunications firms across seven countries between January and February 2008. Thirty-one top providers were contacted: five major firms were identified for the U.S., U.K. India and Australia; four top companies were contacted in China and Indonesia; and three major providers in Singapore. Ten calls were placed to each provider.

All calls were initiated by local citizens within each country. Three levels of evaluation were used to ensure that a local perspective was incorporated against calibration at a global standard level: 1) by the local mystery shopper who made the call; 2) by the local quality control inside the country; and 3) by OmniTouch’s centralized Quality control Panel.

All 310 calls were made using the same scenario to ensure comparability of results: a nonexisting customer calling to inquire about a new mobile subscription. In all cases, the scenario was opened to allow the call center agent the opportunity to demonstrate his or her skill and expertise in call handling.

**KEY PERFORMANCE CATEGORIES**

The GSI analyzes two key categories of performance: accessibility and agent performance.

**Accessibility**

Accessibility reflects the ability to reach the call center and to reach the agent. The attributes reflect various technology options, such as the use or nonuse of an IVR and how delay announcements and music-on-hold services are structured. It also considers whether there is adequate technology in place, such as having enough phone lines for callers to get through.

Worldwide, the average waiting time was 155 seconds across all calls. However, there was substantial intercountry variation, and, further, within countries there was substantial variation from provider to provider.

Following are the accessibility

**Figure 1. Overall Service Performance by Country**

Country	Overall Performance	Courtesy	Engagement	Revenue Generation
U.S.	64%	61%	65%	68%
U.K.	63%	27%	84%	76%
Indonesia	60%	84%	61%	6%
Australia	52%	27%	67%	58%
India	46%	49%	52%	27%
Singapore	45%	33%	68%	10%
China	44%	34%	64%	18%

**Figure 2. Courtesy Performance by Country**

Country	Overall Performance	Greeting	Get Caller's Name	Restate Inquiry	Closing
Indonesia	84%	98%	90%	78%	73%
U.S.	61%	96%	66%	28%	54%
India	49%	54%	57%	58%	28%
China	34%	50%	0	78%	8%
Singapore	33%	97%	13%	17%	7%
Australia	27%	74%	20%	12%	2%
U.K.	27%	80%	20%	6%	0

findings for each country:

**AUSTRALIA.** There seemed to be a substantial difference in customer experience among those calling two of the providers, which answered in less than one minute, two others, at less than seven minutes, and one provider for which average wait times clustered at 45 minutes.

**CHINA.** China presented another highly skewed sample with the vast majority of calls occurring in a timely manner of less than two minutes. However, there was an interesting outlier of calls that had a much longer wait time of eight minutes.

**INDIA.** Wait times in India appeared to be very short, with a

majority coming in at under 10 seconds, tailing off to a maximum of three minutes.

**INDONESIA.** Indonesian call centers performed similarly to Indian centers in that wait times were very short and, even at the maximum, were less than three minutes.

**SINGAPORE.** In the Singapore telecom market, we also saw very fast response rates, with the majority of wait times under 25 seconds.

**U.K.** Wait times were consistently short in the U.K. — less than 50 seconds.

**U.S.** The U.S. had a consistent performance at four minutes or less, which was higher than some

**Figure 3. Engagement Performance by Country**

Country	Overall Performance	Use Caller's Name	Attentive Interest	Call Control	Solution	First-Call Resolution	Role Model
U.K.	84%	90%	90%	73%	94%	93%	70%
Singapore	68%	100%	100%	40%	83%	63%	48%
Australia	67%	80%	86%	69%	67%	59%	51%
U.S.	65%	58%	82%	68%	71%	63%	45%
China	64%	n/a	100%	43%	74%	70%	34%
Indonesia	61%	81%	78%	53%	69%	51%	36%
India	52%	81%	58%	53%	53%	46%	37%

**Figure 4. Revenue Generation Performance by Country**

Country	Overall Performance	Ask for Business	Upsell/Cross-sell	Quality of Upsell
U.K.	76%	80%	80%	65%
U.S.	68%	68%	60%	80%
Australia	58%	26%	68%	91%
India	27%	28%	18%	67%
China	18%	15%	13%	80%
Singapore	10%	0	10%	100%
Indonesia	6%	13%	0	n/a

of the other countries. There were two other clumps in the data — one at around 16 minutes and another at 42 minutes.

With respect to the usage of IVR systems, whether push button or speech recognition-based, there were a variety of approaches used across the centers to route callers.

**Overall Service Quality**

Overall service quality reflects how well the call center and individual agents are managed and, thus, how well the agents perform during the call. The attributes reflect various levels of skills and engagement

exhibited by the agent during the call; it should not be interpreted as an individual agent evaluation.

To allow for depth of analysis, GSI service quality results are reported as overall performance (which aggregates all attributes), as well as by three subcategories, namely:

**COURTESY STANDARDS:** basic foundational skills, such as greetings, getting the customer’s name, restating the inquiry and the closing.

**ENGAGEMENT STANDARDS:** finesse-based skills, such as probing, establishing rapport by using the customer’s name and demonstrating attentive interest, controlling the

call, providing complete and appropriate solutions on the first call, and providing a positive service encounter that is a positive role model for the customer contact industry.

**REVENUE-GENERATION STANDARDS:** upselling/cross-selling processes and the quality of upselling/cross-selling.

**TELECOM CALL CENTER PERFORMANCE FINDINGS**

In the telecommunications sector, U.S. contact centers ranked highest in overall performance at 64 percent. However, the across-the-board low rankings represent a weak performance overall, revealing that all countries in the study have much room to improve.

In the U.S., U.K. and Australia, the level of service quality among each country’s providers was fairly consistent, indicating an opportunity for these providers to significantly differentiate themselves in this category.

In Singapore and China, some telecom providers performed significantly better than others in terms of service delivery, although all providers showed significant room for improvement.

In Indian and Indonesian telecom call centers, there was marked diversity in service delivery, ranging from an overall low of 32 percent to a high of 71 percent in India, and a range of 40 percent to 72 percent in Indonesia. Consumers in these markets need to select the right provider to obtain superior service.

Following are the GSI findings for telecom call center performance across the key performance subcategories.

### **Courtesy**

Call centers in Indonesia performed the best when it came to overall courtesy (84 percent). It also ranked first in each courtesy attribute compared to the other countries. Given the high level of standardization and courtesy expected in the national culture, the result is not surprising and is further reflected by Indonesia's high overall courtesy performance in the bank sector GSI (70 percent), which was conducted in the fourth quarter of 2007 (see [Bank Call Centers: India Leads in Agent Performance](#)).

Although U.S. call centers ranked second in overall courtesy performance, at 61 percent, they trailed Indonesian centers by a significant margin.

Call centers in the U.S. achieved a high score for greetings, which included a significant amount of advertising. This approach is unique to the U.S. and indicates a revenue generation culture in a significantly competitive market. The U.S. centers performed poorly at inquiry reconfirmation (28 percent), as agents immediately moved into the questioning and solution phases rather than reconfirming the caller's inquiry. This may represent a high

reliance on the caller's IVR choice selection to clearly indicate the reason for the contact.

On the opposite end of the spectrum, call centers in the U.K. ranked the lowest in overall courtesy performance (27 percent). It was the lowest-performing country in all courtesy attributes except greeting, where it placed fourth at 80 percent. One contributor to the low overall performance ranking was due to the lack of scores across U.K. call centers for the call closing attribute. The U.K. agents were not rude or curt; on the contrary, they were friendly, though casual in their closing. However, while agents tended to thank customers for the call, they failed to offer additional assistance or state their company's name in the closing.

### **Engagement**

Although it ranked last in basic courtesy skills, when it comes to the finesse-based skills, the U.K. performed the best at engaging the customer through more complex social processes. In overall engagement performance, U.K. call centers ranked 84 percent, well above Singapore, the second highest performing country at 68 percent.

In U.K. centers, agents performed well at using the customer's name during the call (90 percent), along with portraying attentive interest in the caller (90 percent), solid provision of a solution (94 percent) and the ability to deliver a resolution on the first call (93 percent). It's interesting to note that U.K. call centers deliver these strong engagement values while meeting relatively fast answering speeds. Thus, a linkage between answering speeds and value creation during the interaction has clearly been

identified and planned.

Engagement standards for the U.K. telecom industry ranked significantly higher than the country's banking industry (53 percent, overall performance) from the GSI 2007 fourth-quarter results.

U.S. call centers came in fourth in engagement performance (65 percent), performing very poorly at role-model behavior (45 percent). A common observation was that agents sounded monotonous, scripted and robotic — with the exception of one center that had an exceptionally high performance in this attribute.

The lowest-ranking country in engagement performance was India at 52 percent. Aside from a reasonable use of the customer's name (81 percent), there was an extremely weak performance across all other engagement standards. It has been remarked in the mainstream press that the Indian telecom industry is one of the fastest growing in terms of increasing subscriber base. However, while calls are answered quickly, the level of engagement is low — and this may reflect the fact that callers are "signing up" even without the perks of superior service.

In 24 percent of the interactions with Indian telecom centers, callers commented that the agents were not comfortable with English, and seemed to be fumbling trying to converse. In 20 percent of the interactions it was noted that the agents greeted and started the conversations in Hindi, a key regional language in India, and then proceeded to speak in English following the caller's lead, even when the caller had requested the English option in the IVR.

**Revenue Generation**

U.K. telecom call centers ranked highest overall in revenue generation performance (76 percent), followed by U.S. centers (68 percent).

The U.K. centers offered an extremely consistent performance in terms of asking the caller to pursue a “sign-up” status, as well as offering an upsell or additional incentive for signing up. However, the quality of the upsell in U.K. centers showed definite room for improvement (65 percent), compared with high performances in

Singapore (100 percent), Australia (91 percent), U.S. (80 percent) and China (80 percent).

U.S. centers trailed the U.K. at 68 percent in overall revenue generation performance. Although the U.S. scored relatively low at asking for the business (68 percent) and offering the upsell (60 percent), the quality of the upsell delivery was significantly higher at 80 percent. In U.S. telecom centers, agents who are comfortable enough to ask for the upsell tend to be excellent at the quality of their offer. These agents could represent internal bench-

marks of service for their respective centers for this attribute.

Telecom call centers in Indonesia ranked lowest in revenue generation performance at 6 percent. For these call centers, it was noted that there were no upsells offered at all, with an extremely low percentage of asking the caller for their business (13 percent). At the same time, the speed of answer for Indonesian telecom centers is extremely fast, which may reflect a focus on keeping wait time and handling time short rather than generating revenue. ●

## Mystery Shopper Programs and Reports

To learn about developing a mystery shopper program to improve your company’s touchpoint performance, or for more information about *ICMI’s Global Service Index Report*, including the opportunity to purchase a detailed report by company, please contact us.

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