Findings from the

CCAM Industry Research Report 2022

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Introduction

Raymond Devadass

President,

Contact Centre Association of Malaysia

First and foremost, I would like to thank COPC for working with us on producing the CCAM Industry Research Report 2022. I would also like to thank all the organisations that have taken the time to participate in the creation of this report. Each, and every one of you has played a vital role in ensuring the quality of the data provided.

As we move forward with all the possibilities afforded by our government's support in the digital economy, studies such as these become increasingly important for us to maintain the quality of our services. They not only highlight our areas of success as an industry, but also show us where we need to improve as we emerge as major players in the global market.

The rapid pace of technological advancement and the changing nature of consumerism has had a great impact on how our industry has evolved. We have moved away from being single channel contact centres to being multi-channel resolution centres. Our CX Experts are continuously asked to upskill and adopt new technology, while maintaining a high degree of empathy when dealing with the different customer needs. In the last two years, our players have adapted quickly as we moved from an onsite working model to a work from home model to the current hybrid model. I believe there will be yet more changes for this industry to come.

In the last couple of years, this industry has proven to be extremely resilient and adaptive in the face of great challenges. Moving into the next phase, I look forward to seeing how this industry will continue to contribute to the Malaysian economy and continue to provide jobs for the people, among other things. I also look forward to working closely with COPC and our other stakeholders as we move forward together.

Onwards and upwards!

Introduction

Dr. Shreekant Vijaykar

Director of Asia Operations, Asia Pacific Region

COPC Inc.

First, I would like to congratulate CCAM for commissioning this timely and relevant piece of research for the Malaysian CX industry, and COPC Inc.'s CX Research team for this rigorous study. The changing landscape of the industry, especially in the context of the last couple of years, makes this study crucial. We acknowledge the time and inputs provided by some of you, the 135+ industry leaders who participated in the study, to make this research happen. We had a good representation from about 13+ businesses, including outsourcers, banking and FIs, telcos, technology providers, airlines, entertainment, healthcare, transportation, etc., and from people in all cohorts of age groups and organizational levels. I am delighted with the response we received for this first-of-its-kind study in the country.

The report you have in front of you has many important findings, distributed in key themes of strategy, use of technology, understanding and managing customer experience, focus on employee engagement, and the changing nature of work for Malaysian contact centre industry. For example, you will read:

- How there is a change in customer expectations, in terms of service and quality, self-service technology solutions, timeliness, and use of different channels
- How there is a change in the workplace, and industry is adopting Work-At-Home (WAH) practices, with 93% people saying they have some amount of WAH, but 49% saying that the numbers of WAH employees might come down in the next few months
- How companies have higher focus post-COVID on employee care and experience, with 47% saying that they provide support for psychological well-being of employees

Interestingly, channel preferences of consumers have changed in the last couple of years, and even though phone and email continue to dominate, there is a 2.5x increase in preference for Webchat. Yet, multiple contacts continue to remain the single biggest driver of poor customer experience, and how there is a need to focus on the process design to reduce these channel hops.

Changes in customer experience, changes in workplaces, and changes in attitudes towards employee engagement, all lead to a need of structured, ongoing efforts, and this report provides some guidance on what can be expected in near future, and what Malaysian contact centre providers can do to make the most of the opportunities currently available in the global market. I hope you will enjoy the information in this report, and it might help you drive higher levels of performance.

Research Overview

Corporate Research : Methodology

01

A structured quantitative questionnaire was used to collect inputs from corporate respondents.

02

CCAM and COPC Inc. shared the questionnaire with executives engaged in contact centre roles across Malaysia

03

The survey was live from February 15, 2022, to May 31, 2022. Respondents represent frontline staff from across Malaysia

Corporate Research : Research Overview

This research was conducted by COPC Inc.'s CX Research team in partnership with CCAM

137

Unique respondents

Inputs gathered on key topics of interest across businesses focused on delivering exceptional customer care.

- Strategy
- Customer Experience
- Employees

Corporate Research : Industries

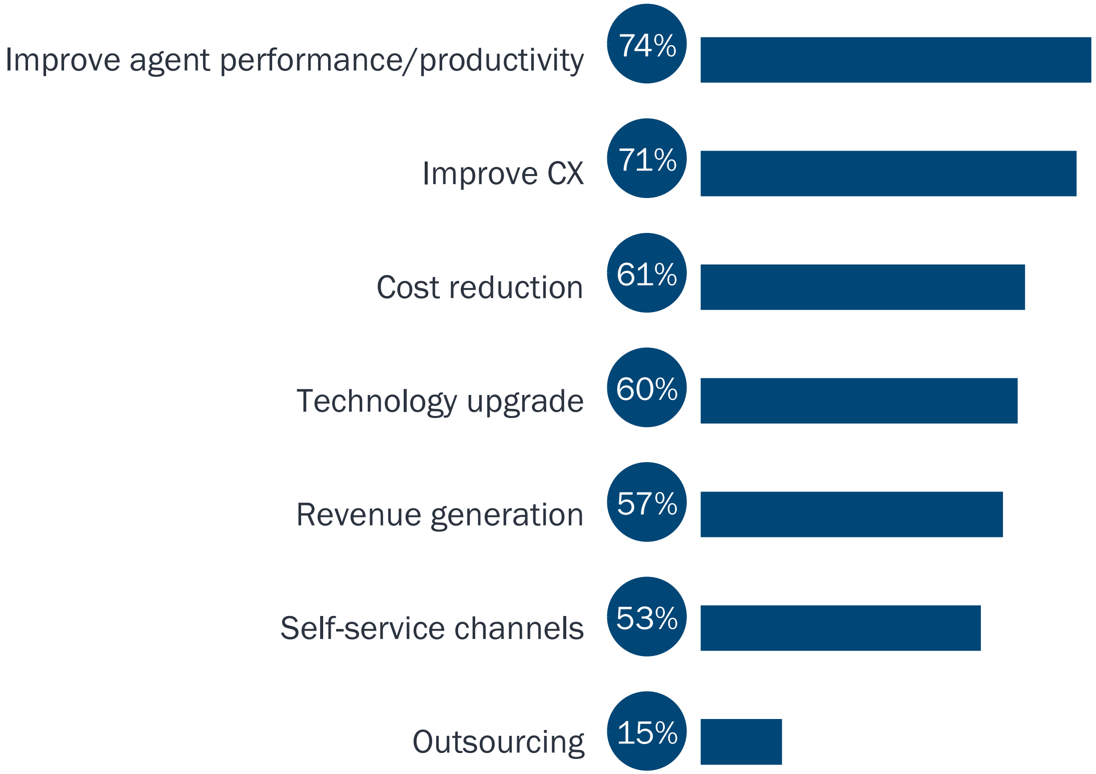
Respondents from over than 13 industries participated in the survey.

Outsourcing	Banking + Financial Services	Technology	Telecommunications	Others *(Airlines, Entertainment, Hospital/ Healthcare, Insurance, Transportation, etc.)*
52%	12%	7%	7%	22%

Strategy

Objectives

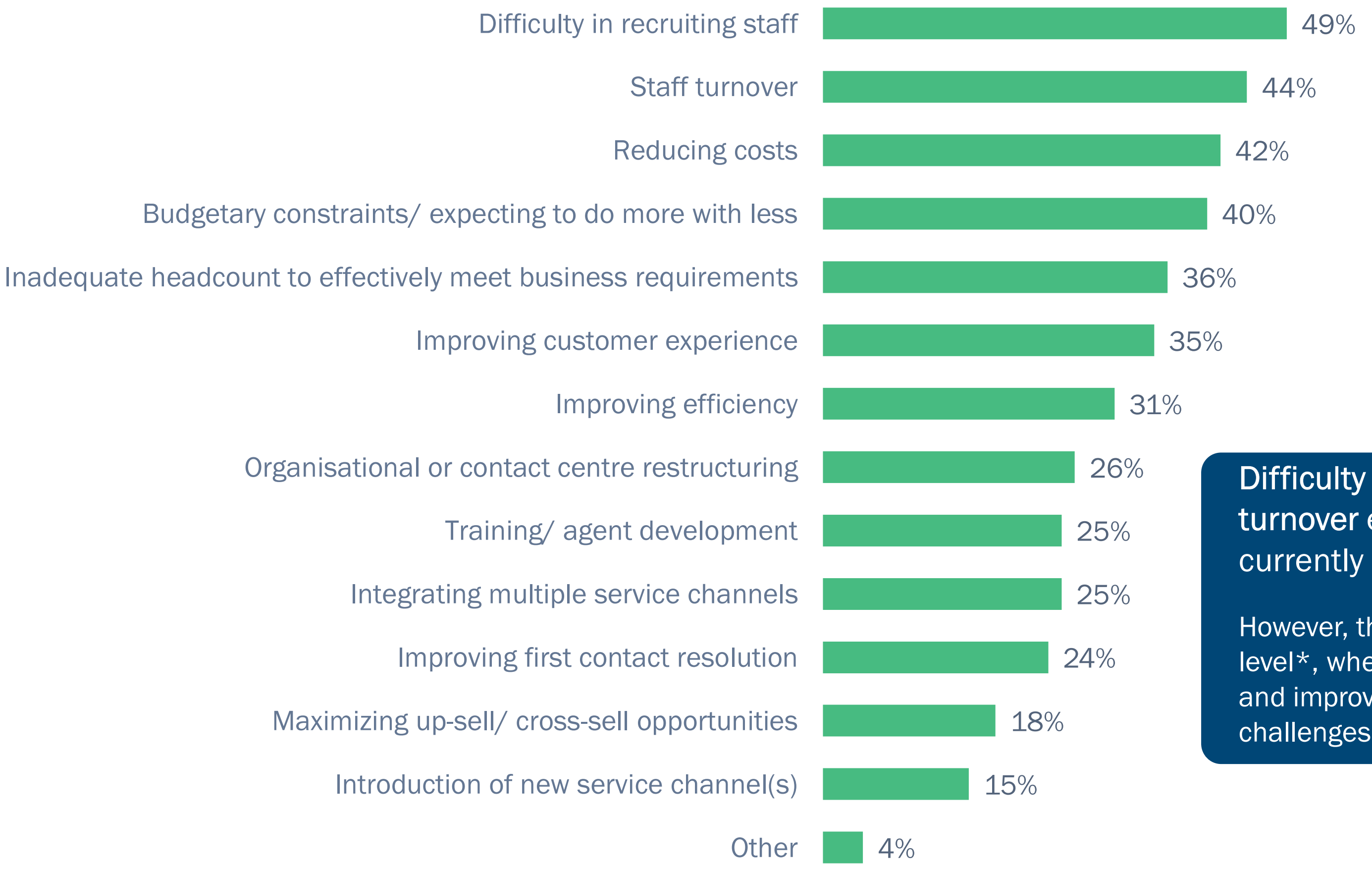
Which of the following strategic objectives are you focused on over the next 24 months?



Improving Agent Performance/Productivity and **Improving CX** is the top priority amongst organizations over the next 24 months.

Challenges

Which of the following challenges is your organization facing?



Difficulty in recruiting staff and **Staff turnover** emerge as the top challenges currently for Malaysian organizations

However, these differ from those seen at global level*, wherein improving customer experience and improving efficiency are seen as top challenges

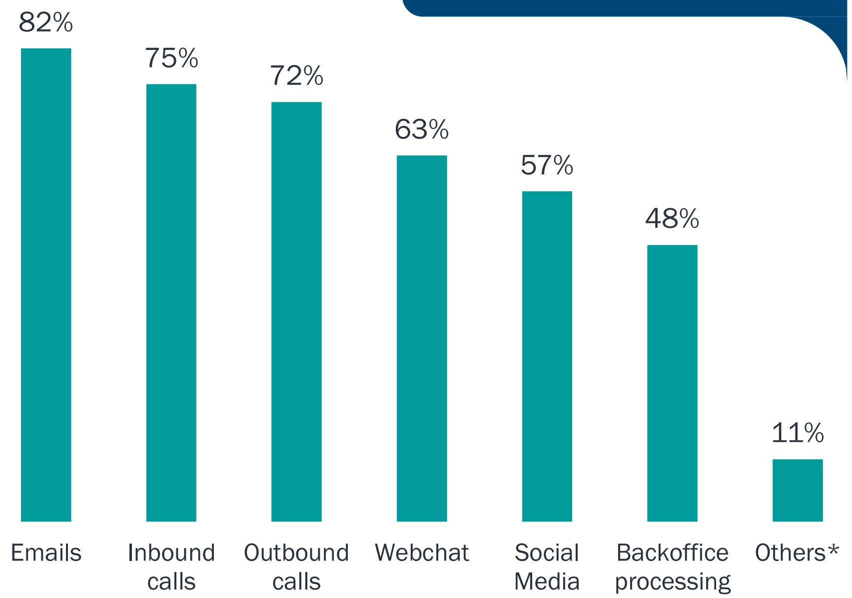
Other: Unplanned leave due to COVID-19, incompetent technical support, re-location of office.

**Source of data for Global view: COPC Global Benchmarking Series 2022 – CX Understanding and Strategy Report*

Outsourcers (OSP) – Channels and Type of Transactions

Which channels do you provide support in?

Emails, Inbound calls and Outbound calls are the top 3 channels that outsourcers are providing support for



*Others : WhatsApp, website forms, e-commerce, etc

Which transaction types do you provide support in?

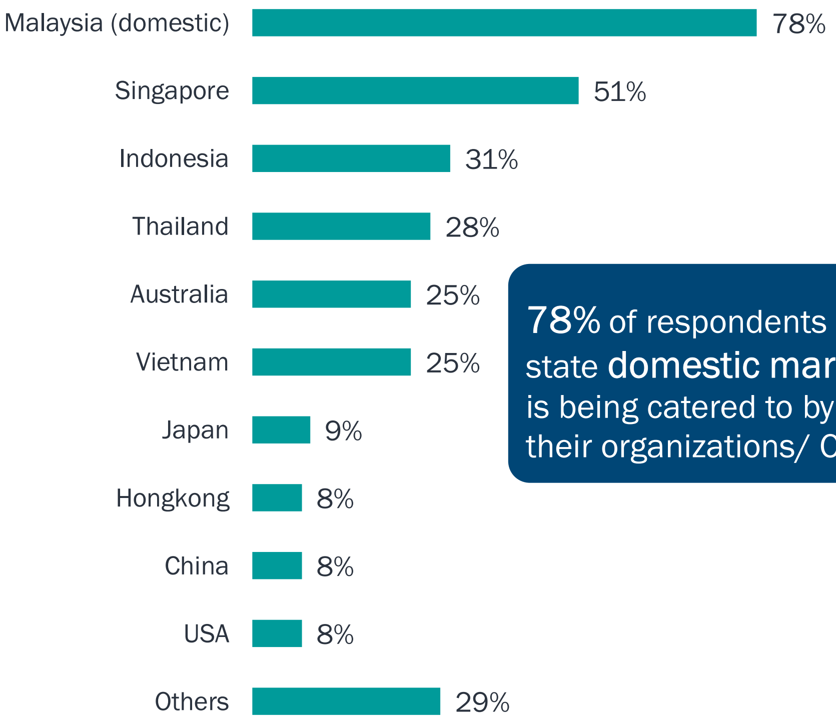
71% General Customer Service	62% Technical support	60% Pre-sales / sales enquiries	58% Complaints / product returns
55% Accounts enquiries / billing issues	26% Shipping issues	12% Debt recovery	12% Others**

General Customer Service, Technical Support and Pre-sales/sales enquiries are the most common transaction types that outsourcers provide support for

**Others : Resource management, data entry, content moderation, hospital/ airline booking, etc.

Outsourcers (OSP) – Countries and Languages supported

Which countries do you provide support for from Malaysia?



78% of respondents state **domestic market** is being catered to by their organizations/ OSPs

Others : Global, APAC countries,, New Zealand, Sri Lanka, Taiwan, UK, Korea, Europe, Brunei, Myanmar, Cambodia,

Which languages do you support?

95% English	78% Bahasa Malaysia	77% Mandarin	49% Cantonese
35% Bahasa Indonesia	29% Thai	9% Japanese	8% Korean

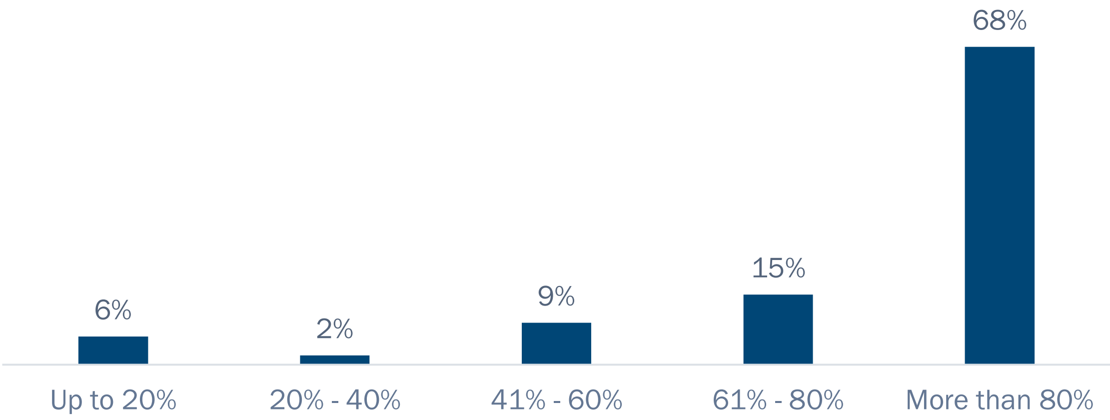
20% Others*

English, Bahasa Malaysia and Mandarin are the top 3 languages supported by outsourcers

**Others : Tamil, Hindi, Bengali, Vietnamese, Spanish, Russian, German, Portuguese, Tagalog, etc.*

Outsourcers (OSP) – Employees from within Malaysia

What proportion (%) of your frontline staff is from within Malaysia?



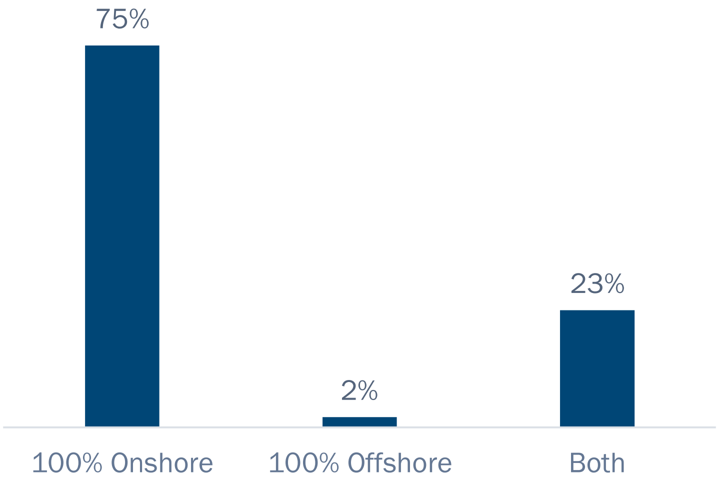
68% of the respondents state in their organizations more than 80% of the staff is from within Malaysia

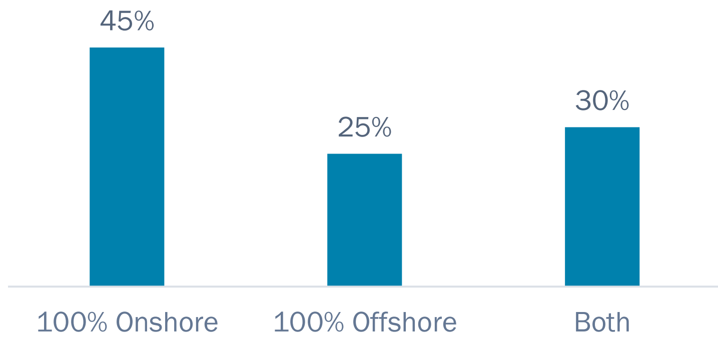
Client Strategy - In-house Contact Centre Operations

Which of the following best describes your operations?

We do not outsource any of our operation 67%

33% We outsource some of our operation



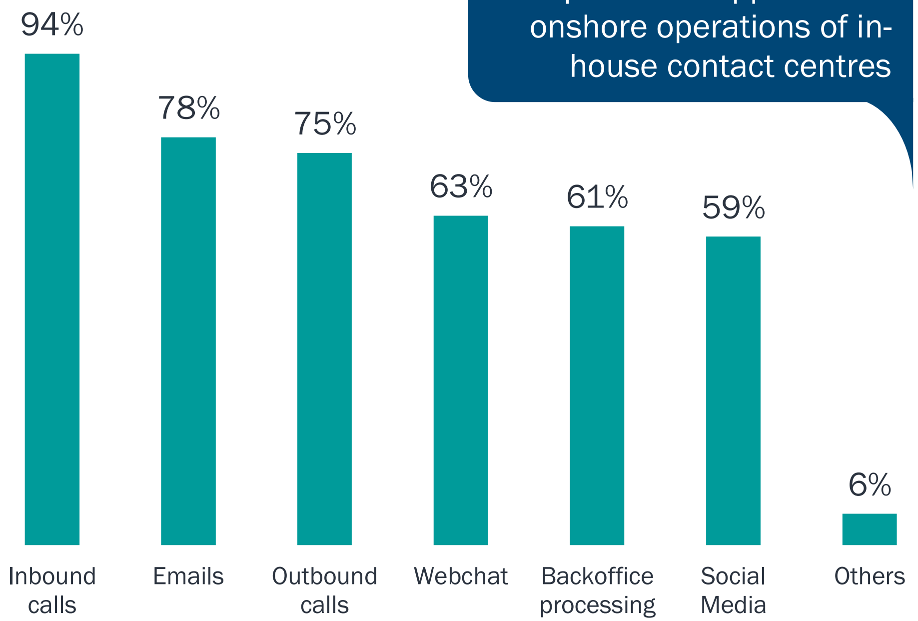


67% of respondents stated their organizations do not outsource their contact centre operations – with majority of their operations being onshore

Onshoring – Channels and Type of Transactions

Which channels do you provide support in?

Inbound calls, Emails and Outbound calls are the top 3 channels that are provided support for in onshore operations of in-house contact centres



Others : WhatsApp, digital, etc

Which transaction types do you provide support in?

86% General Customer Service	65% Accounts Enquiries / Billing Issues	57% Technical Support	57% Complaints / product returns
49% Presales / Sales Enquiries	31% Debt recovery	18% Shipping issues	12% Others*

General Customer Service, Account Enquiries/ billing issues and Technical Support are the most common transaction types that in-house contact centres provide support for

Others : Telesales, content review, etc.

Why do clients outsource? - Outsourcers (OSPs) vs Client

Rank the following in order of importance in terms of why you think clients outsource
(OSP VIEW)

Rank the following in order of importance in terms of why your organization outsources?
(CLIENT VIEW)

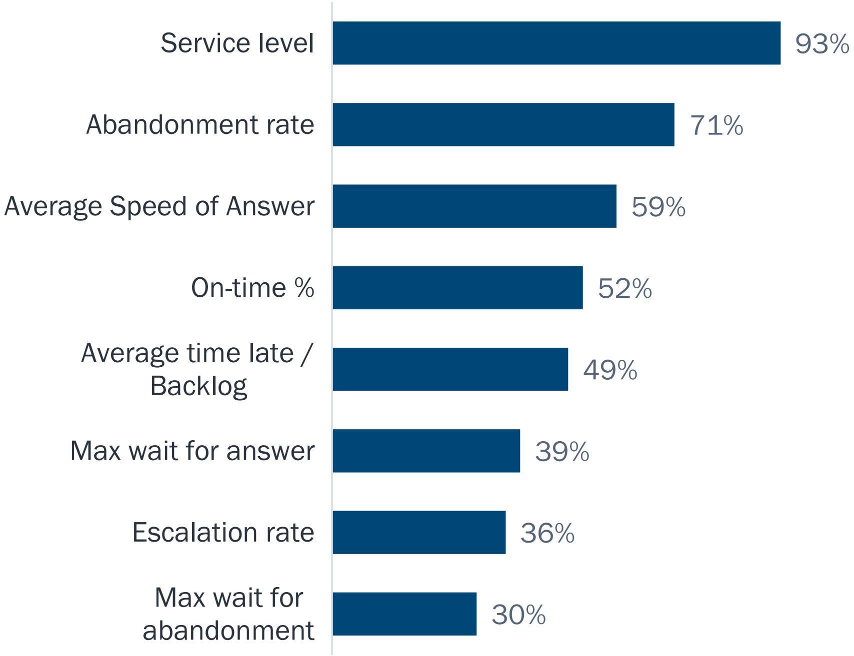
OSP VIEW		CLIENT VIEW
#1	Cost reduction	#2
#2	Performance management (outsourcers are experts in contact centres)	#5
#3	Multi language support	#6
#4	Technology capability	#3
#5	Flexibility to ramp up or down quickly	#1
#6	Out of hours support	#4

While OSPs feel that 'Cost reduction' is the top reason why clients outsource, this view is not shared by clients who stated 'flexibility to ramp up or down quickly' as the top reason.

Key Metrics – Service & Quality

Which of the following service/speed metrics do you actively measure and report as a KPI?

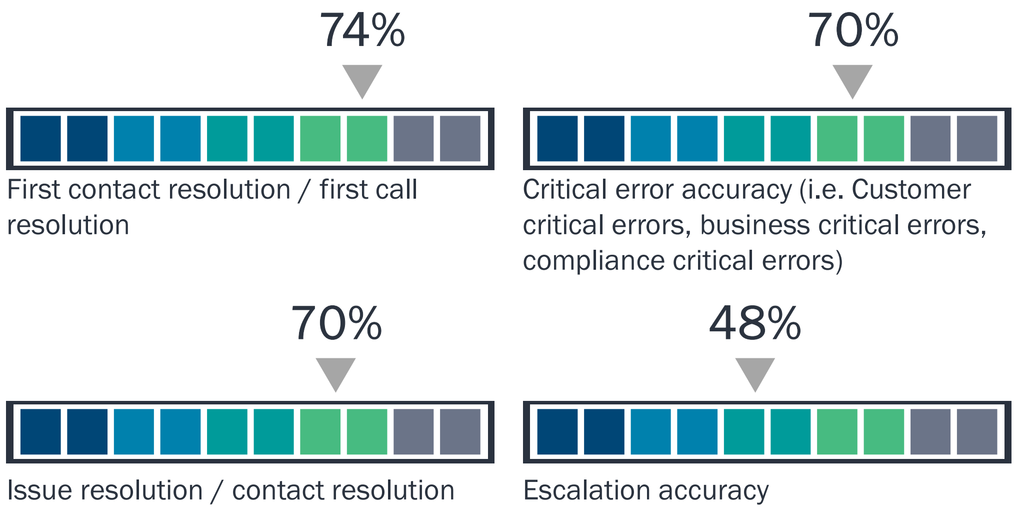
(Select all that apply)



Service level is the top metric to be measured and reported as KPI, followed by abandonment rate

Which of the following quality/accuracy metrics do you actively measure and report as a KPI?

(Select all that apply)



3/4th of respondents track first contact resolution as a key quality metric.

Key Metrics – Efficiency & Support

Which of the following efficiency / costs metrics do you actively measure and report as a KPI? *(Select all that apply)*

85%	Average Handle Time
60%	Average Talk Time
56%	Frontline Occupancy
50%	Cost per transaction (e.g. email, call etc.)
49%	Frontline Utilisation
46%	Average Wrap/ACW Time
42%	Average Hold Time
36%	Cost per customers (e.g. person, subscription, policy)

AHT is the most tracked efficiency/ cost metric

Which of the following support metrics do you actively measure and report as a KPI? *(Select all that apply)*

79%	Adherence*
61%	Frontline staff Attrition
59%	Frontline Absenteeism (UPL)
59%	Training Quality
40%	Recruitment Quality
32%	Recruitment On Time
28%	Team Leader Absenteeism
27%	Team Leader Attrition

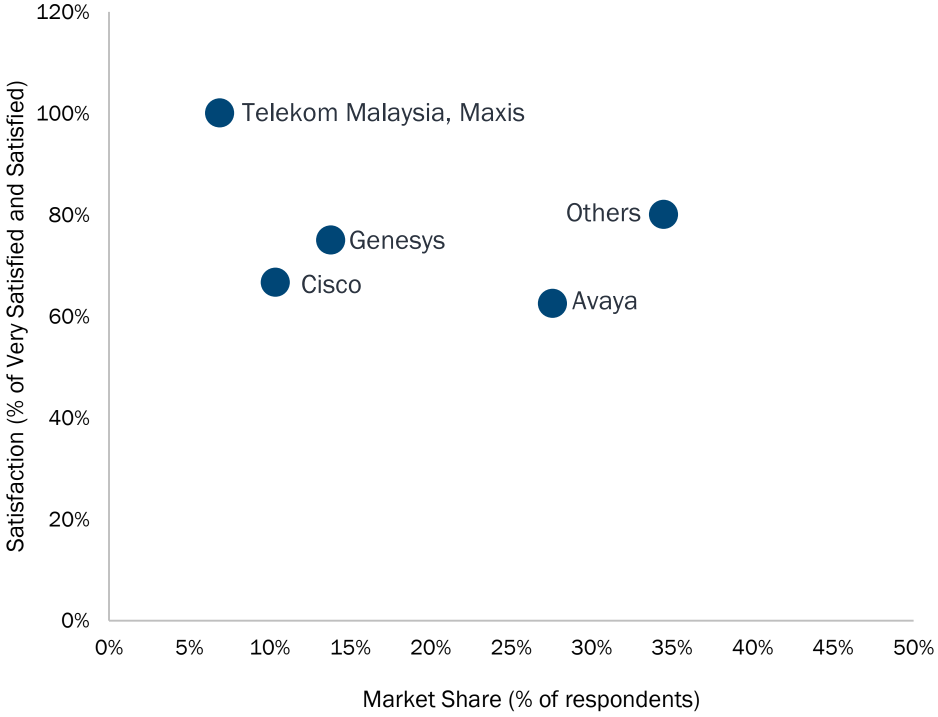
Adherence and Frontline Attrition are the most tracked support metric

* E.g. schedule adherence, schedule attainment, or schedule conformance

Technology Platforms

Satisfaction and Penetration Across Key Technology Brands
- Telephony and Internal Communication -

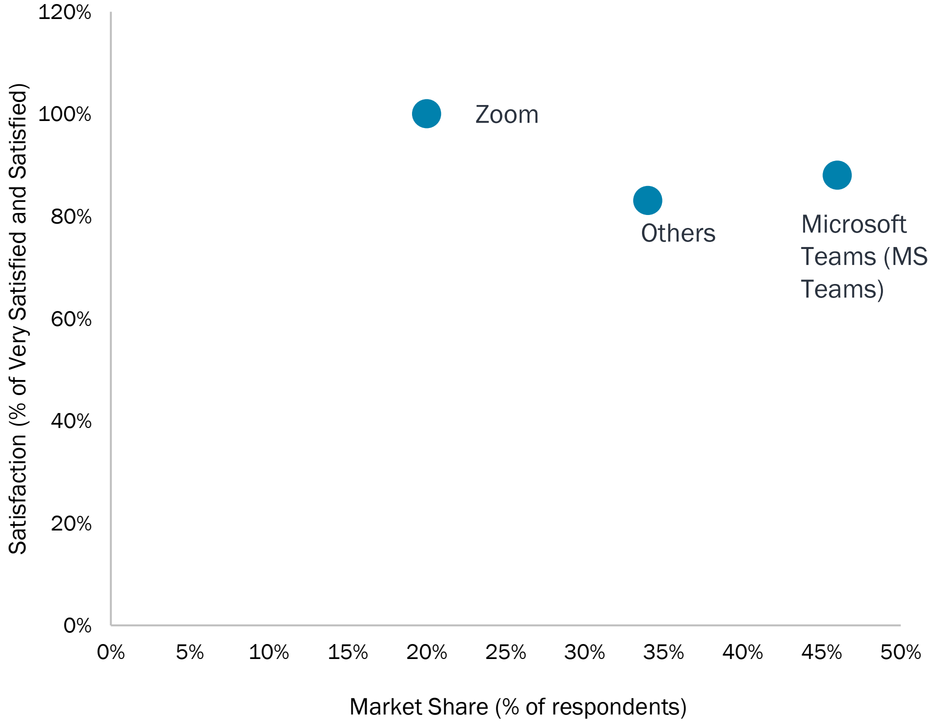
Primary telephony platform: satisfaction vs. market share



Avaya enjoys a relatively higher market share while Genesys has higher satisfaction among respondents

**Others: British Telecom, Amazon Connect, Aspect, Digi, Nice*

Primary internal communication solution : satisfaction vs. market share

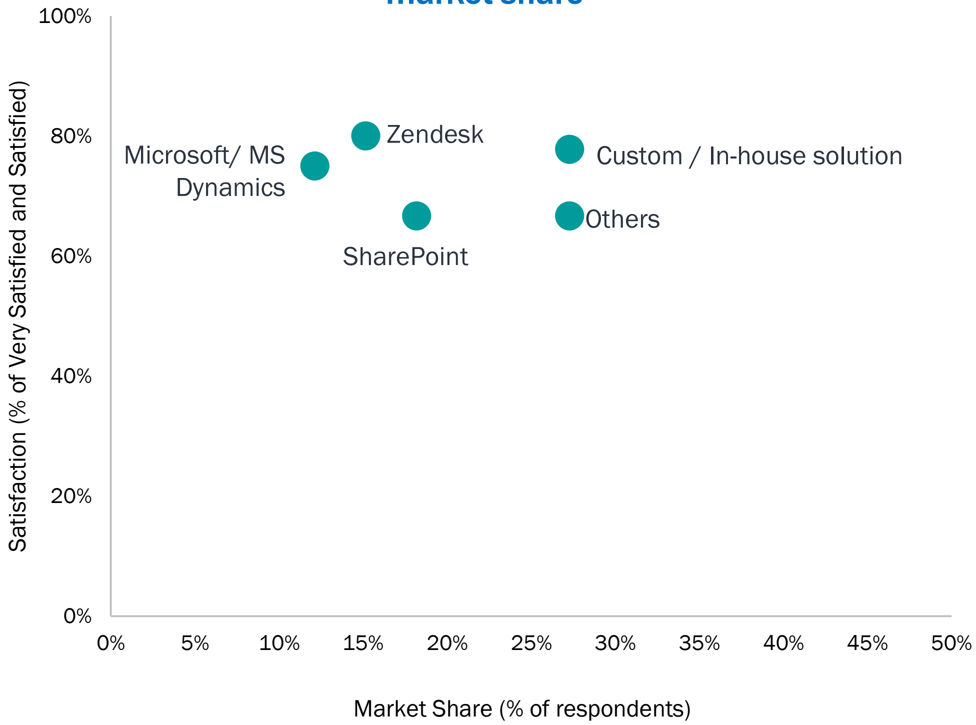


Microsoft Teams (MS Teams) leads in penetration, but satisfaction is higher for Zoom.

**Others: Webex, mix of platforms*

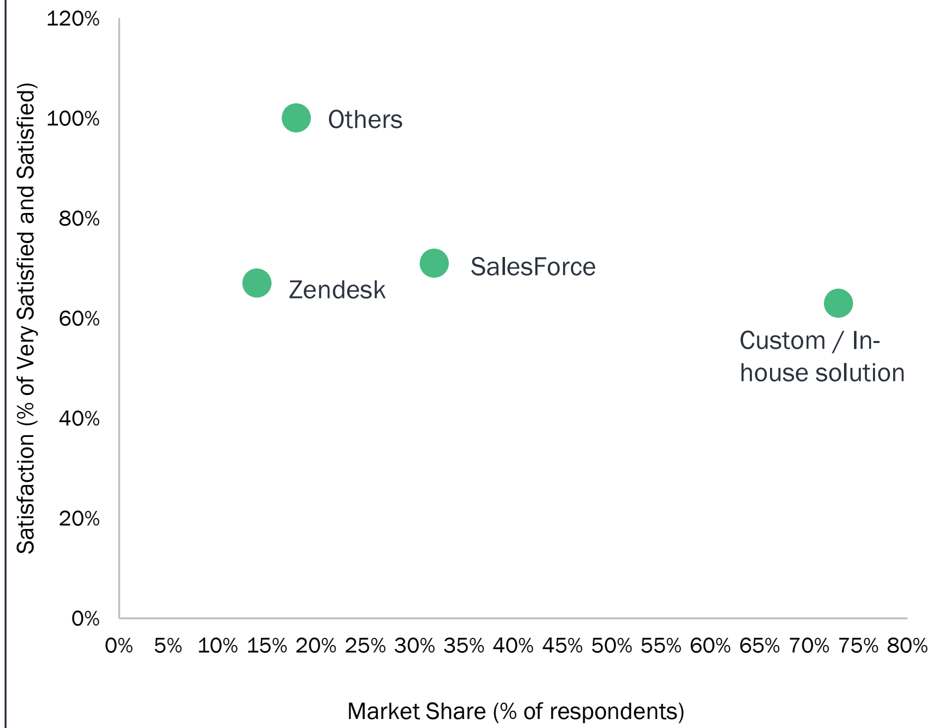
Satisfaction and Penetration Across Key Technology Brands - Knowledge Management and CRM platforms-

Primary knowledge management solution : satisfaction vs. market share



Most organizations seem to rely on customized / in-house solutions and are satisfied with these solutions.

Primary CRM platform : satisfaction vs. market share



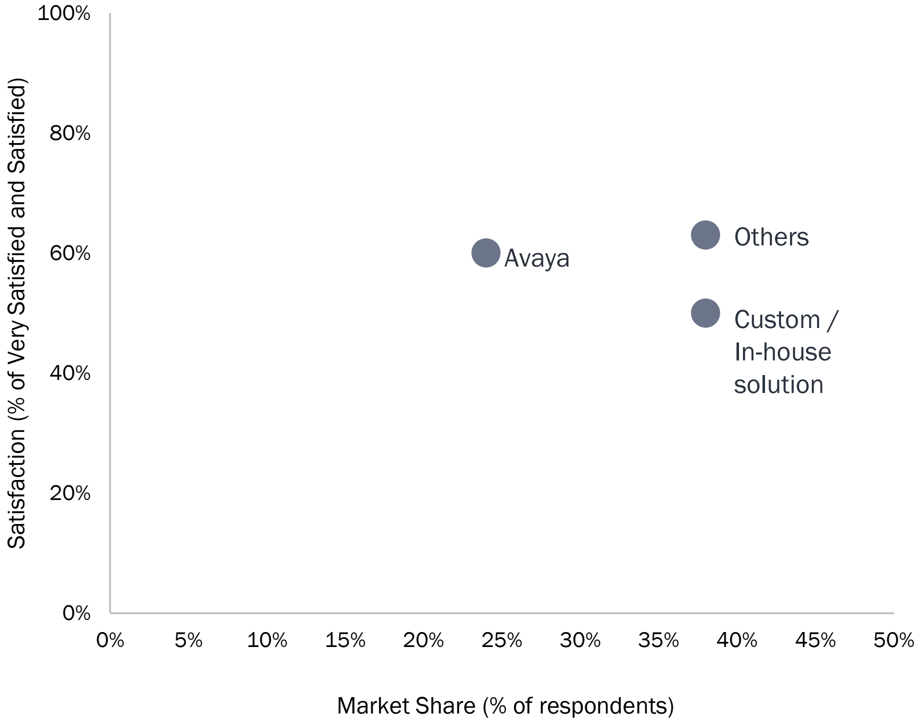
Although the utilization of Salesforce is lower than the custom/ in-house solutions, satisfaction is high

*Others: Verint, GetGuru, Outlook, NICE, SalesForce

*Others: Microsoft Dynamics, Oracle, SAP, Claritas

Satisfaction and Penetration Across Key Technology Brands
- Workforce Management (WFM) and Quality Assurance (QA) tools -

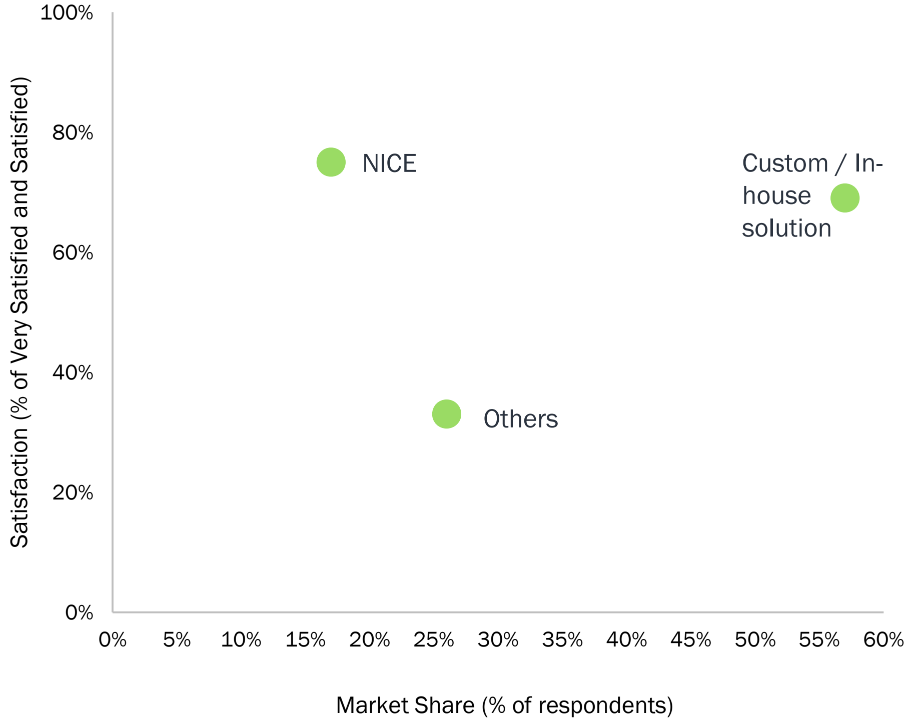
Primary WFM tool: satisfaction vs. market share



While utilization of custom/ in-house solutions is highest, the satisfaction is low for these internal solutions

Others: Spreadsheet, Teleopti, Cention, Verint

Primary QA software/tool : satisfaction vs. market share

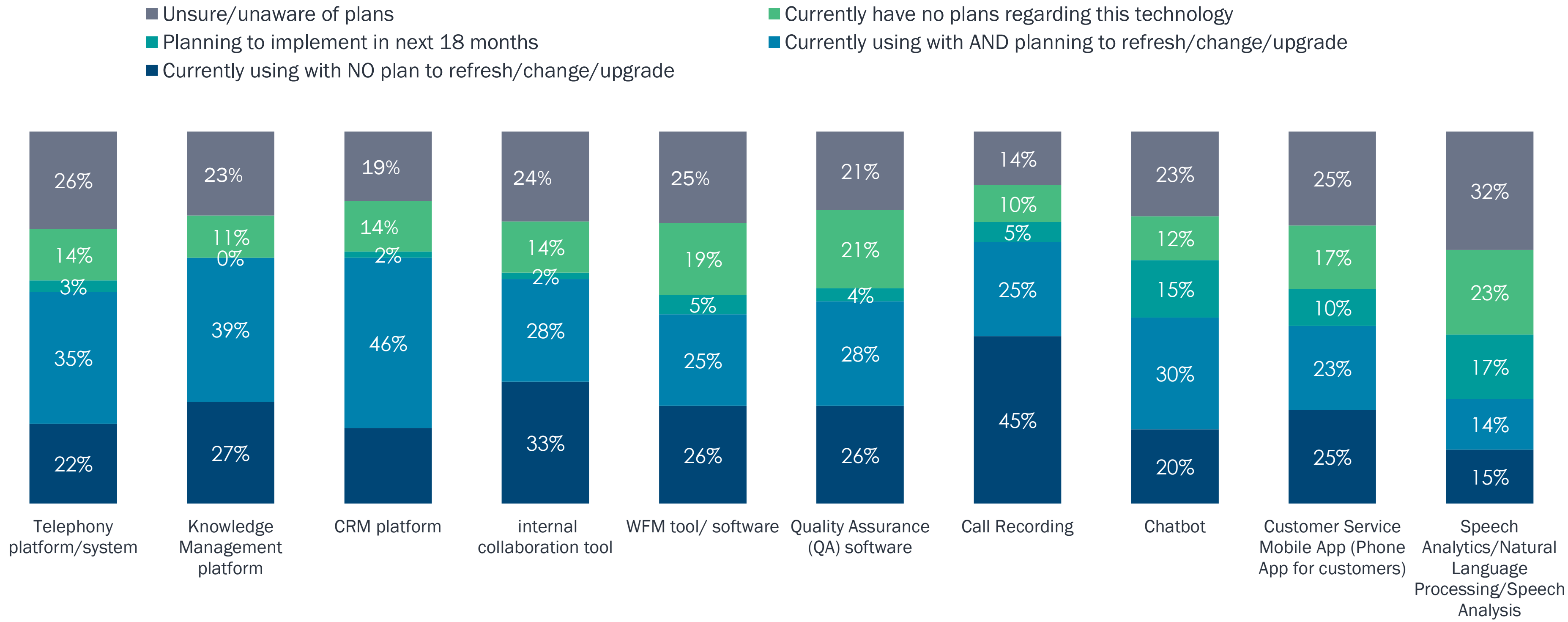


Again, in-house solutions seem to be most used in organizations, though satisfaction is relatively low for these solutions.

Others: Verint, Manual, Outlook and more

Technology – Plans for Future Usage / Implementation

Please describe the level of technology adoption for the platform/ tool/ software in your organization



Chatbots and Speech Analytics are two areas that higher proportion of respondents stated their organizations plan to implement or upgrade over the next 18 months

Managing and measuring Customer Experience (CX)

Channels – Offered

Which of the following channels does your organization offer?

7%
Only Self-Service Technologies

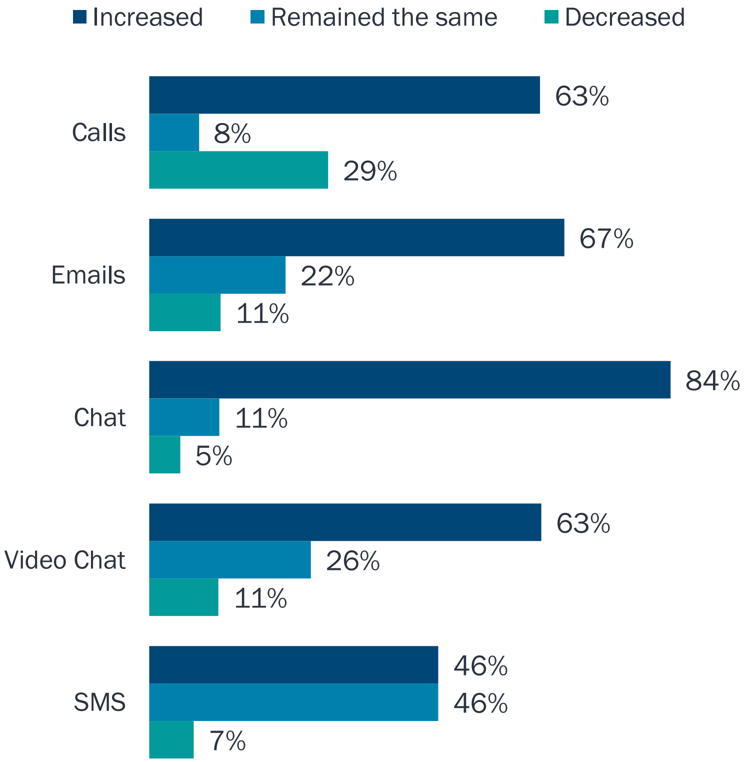
26%
Only Human-Assisted Channels

67%
Both

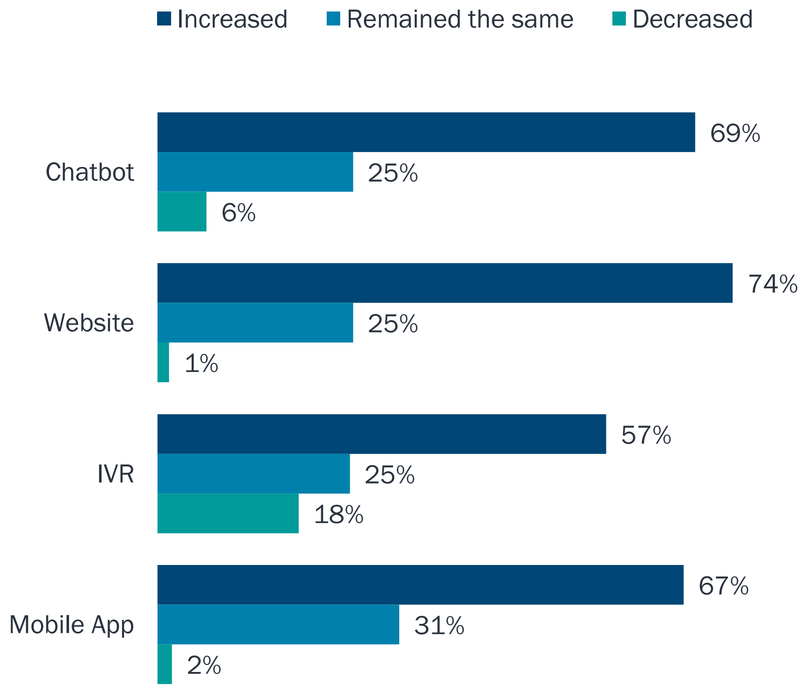
A majority of organizations provide support in both Human-Assisted and Self-Service channels

Channels – Volume Growth (Over the Last 12 Months)

Human-Assisted Channels



Self-Service Technologies

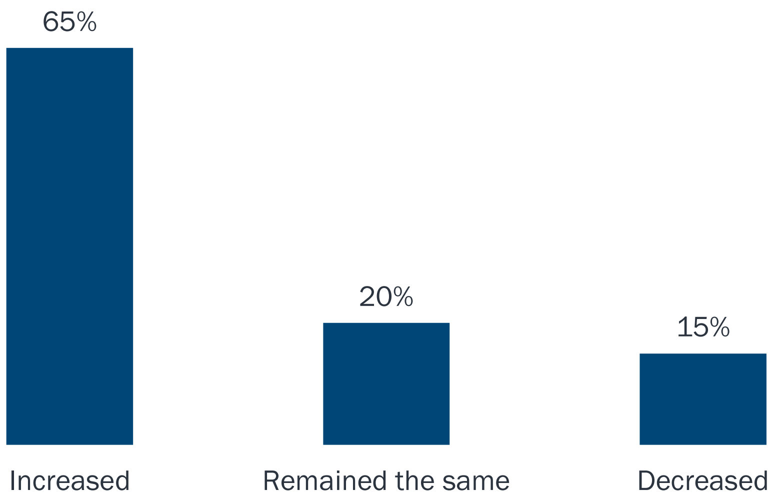


For majority of the channels, there has been an increase in business volume over last 12 months

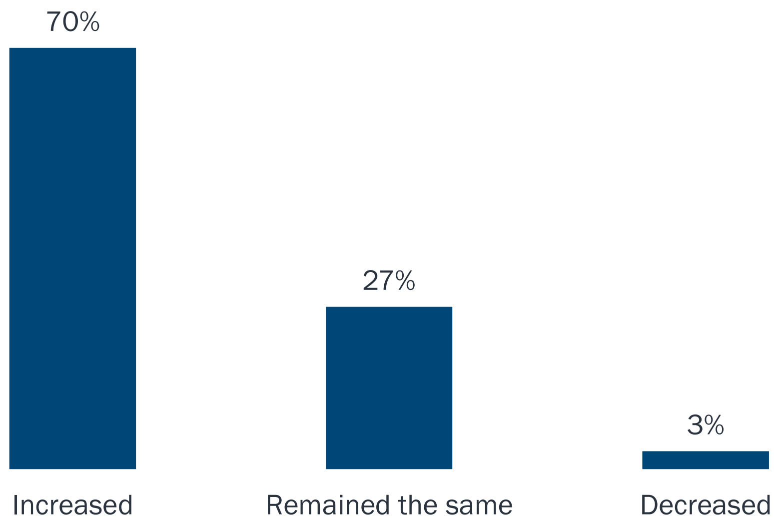
Channels – Impact of pandemic on volume

How has the pandemic impacted the volumes for:

Human-Assisted Channels



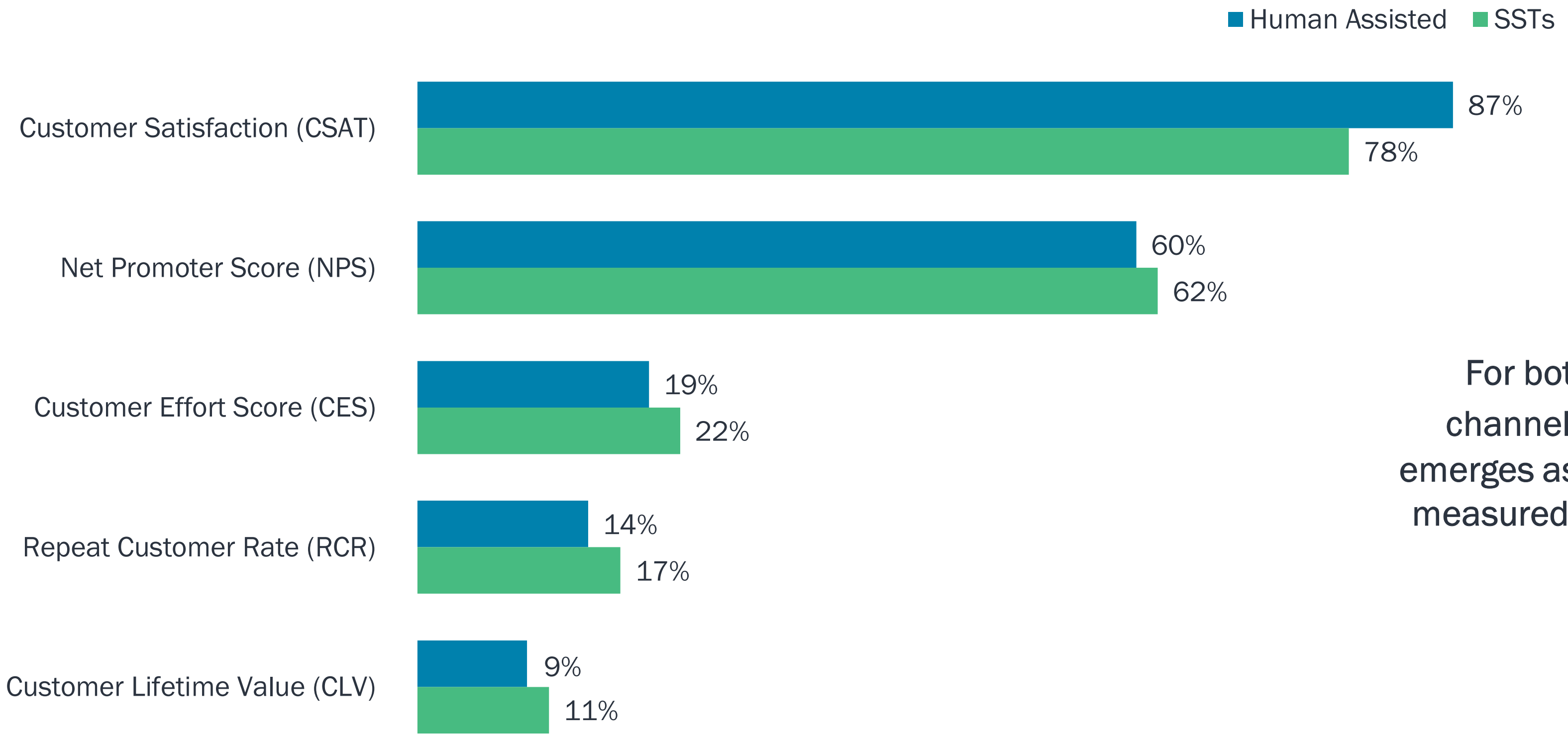
Self-Service Technologies



Pandemic has caused an increase in the volumes across human-assisted channels and self-service technologies.

Key Metrics – Human Assisted Channels vs Self Service Technologies

Which of the following customer experience metrics do you actively measure and report as a KPI for human-assisted / self-service technologies (SSTs) based channels?



For both human-assisted channels and SSTs, CSAT emerges as the most actively measured and reported KPI.

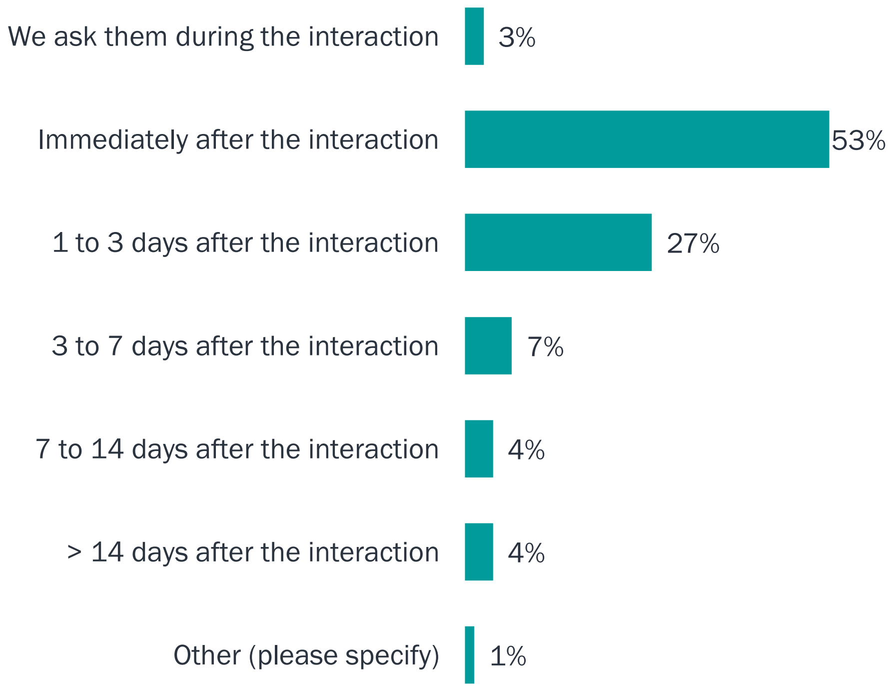
Measuring VoC – Surveys to Collect Feedback Types and Timing

Which of the following survey types does your organization use to collect feedback from customers?

Interaction survey (i.e. a survey triggered by a customer making a phone call, sending an email, etc.)	77%
Service Journey survey (i.e. a survey triggered by a customer completing a claim, completing an application process, completing a tech support issue, etc.)	44%
Relationship survey (i.e. a survey sent to customers regardless of if they have interacted with us)	23%
Others	3%
We do not conduct any survey to collect feedback	7%

Interaction surveys are the most popular method of collecting feedback among organizations.

How long after an interaction (e.g. call, email, etc.) do you survey customers about their experience?

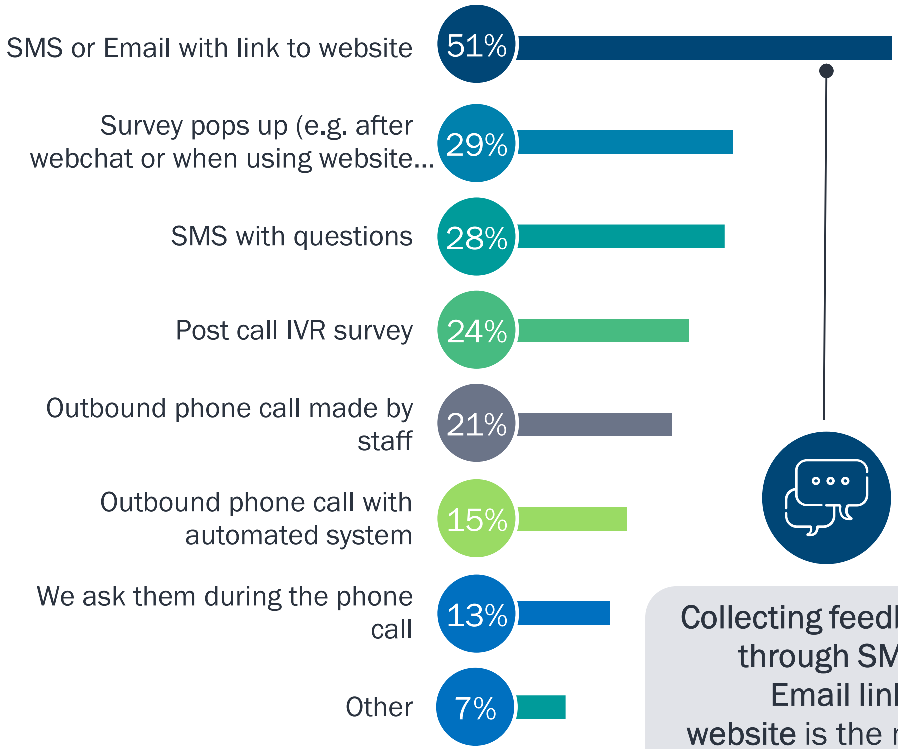


53% of the respondents stated they collect the feedback immediately after the interaction, while 27% of respondents stated customers are surveyed within 1 to 7 days after the interaction

Measuring VoC – Surveys to Collect Feedback Method and Number of Questions

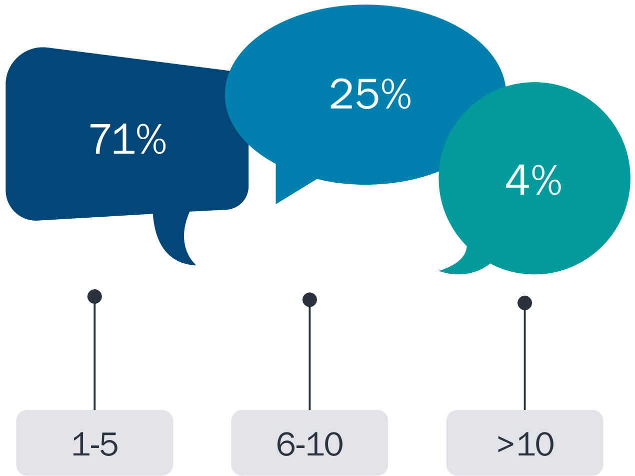
How do you collect feedback from your customers?

(Select all that apply)



Collecting feedback through SMS or Email links to **website** is the most popular method of collecting feedback from customers.

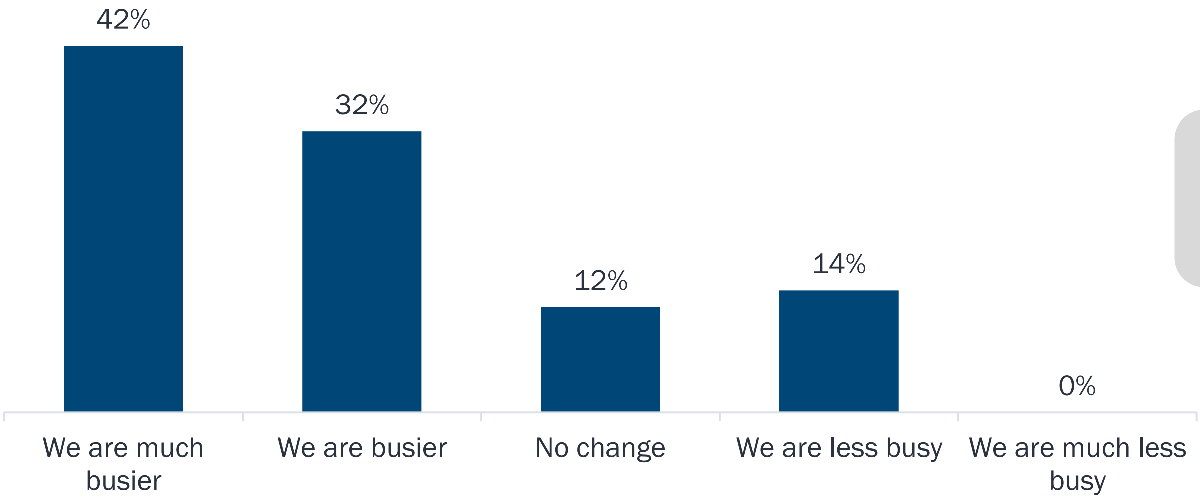
Approximately how many questions do you ask in the survey you administer to collect customer feedback?



96% of the respondents that they keep the **survey length within 10 questions** – keeping the surveys short and also contributing to higher participation rates.

Understanding CX – Change in customer demand

How has COVID-19 affected customer demand for your centre?



74% of respondents state COVID-19 has affected customer demand and their centres have been busier.

Understanding of Expectations and Experiences of Malaysian Customers

Understanding CX – What Matters to the Customers?

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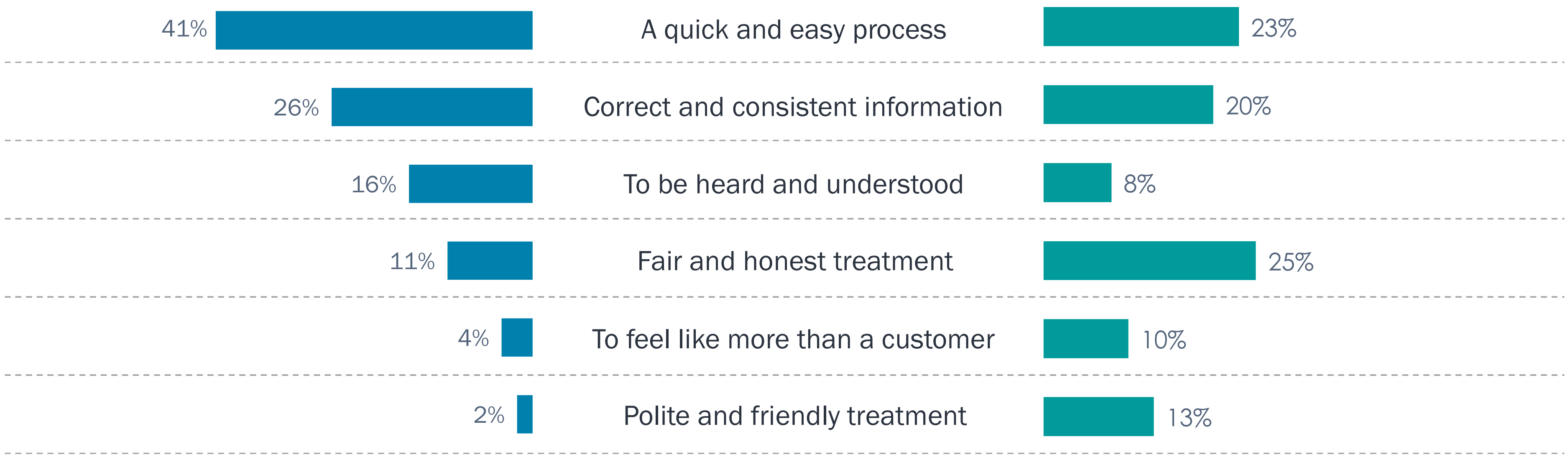
Thinking generally about customers, aside from getting their issue resolved satisfactorily, what is most important to your CUSTOMERS when dealing with an organization to resolve a customer service issue? (CORPORATE VIEW)

Aside from getting your issue resolved satisfactorily, what is most important to you when dealing with an organization to resolve a customer service issue? (CONSUMER VIEW)



Organizations underestimate the importance of 'fair and honest treatment' to customers. While 25% of consumers stated it was most important for them while dealing with organizations, only 11% of organizations identified this as vital.

Source of data for Consumer view: CCAM consumer report 2021

Understanding CX – Why Customers Avoid Taking Action on Customer Service Issues?

Thinking generally about customers, what is the most common reason why customers avoid taking action on a customer service issue? (CORPORATE VIEW)

Within the past 12 months, have you avoided taking action on a customer service issue for any of the following reasons? (CONSUMER VIEW)

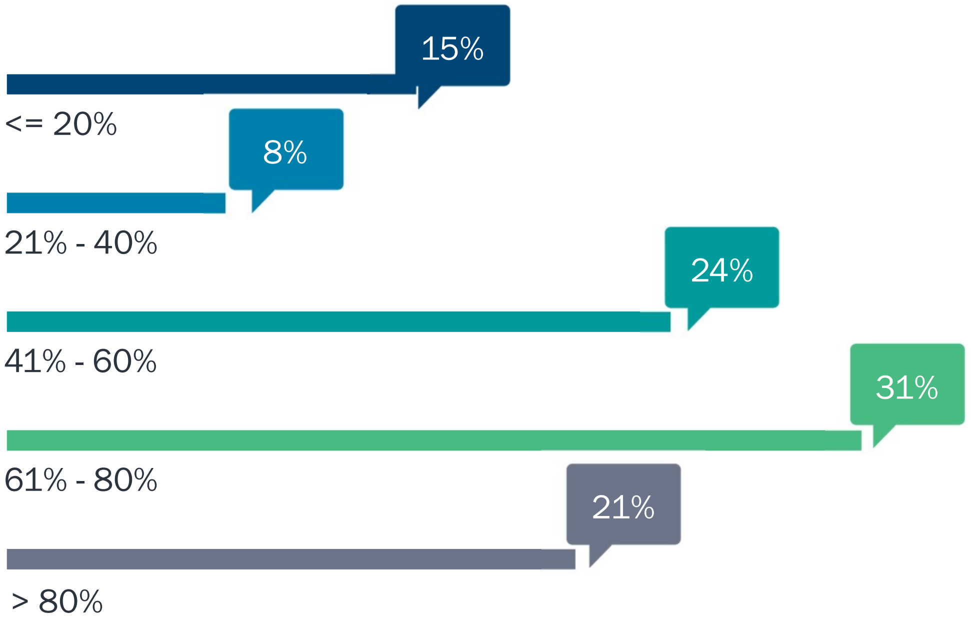
Corporate view	Reason	Consumer view
#1	Inconvenient / No time	#1
#2	Bad previous experience / hassle	#3
#3	Thought issue was unresolvable	#2
#4	Didn't know how to contact organization	#4

Organizations' understanding of reasons why customers avoid taking action are in line with the reasons stated by customers – with inconvenience or lack of time being the top reason

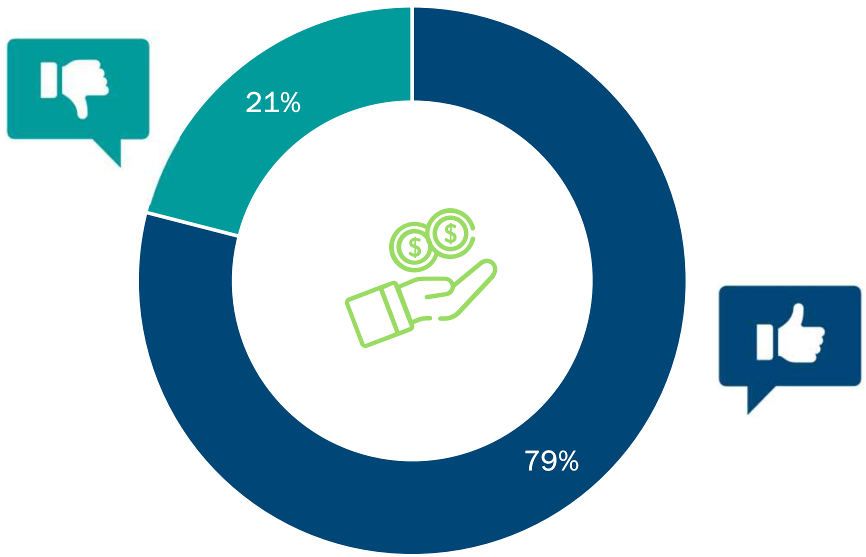
Source of data for Consumer view: CCAM consumer report 2021

Understanding CX – Willingness to Pay Extra for World Class Service

Thinking generally about customers, what proportion of customers do you think would you be willing to pay a little more for a product or service if they knew they would receive world-class customer service as a result? (CORPORATE VIEW)



Would you be willing to pay a little more for a product or service if you knew you would receive world-class customer service as a result? (CONSUMER VIEW)



Corporates underestimate the proportion of consumers that are willing to pay a little more for a product or service to get world-class services – while 52% of the corporate respondents believed that more than 60% of their customers would be willing to pay more for better customer service, 79% of the consumers stated that they are willing to pay a little more for world-class services.

Source of data for Consumer view: CCAM consumer report 2021

Understanding CX – Use of Multiple Channels

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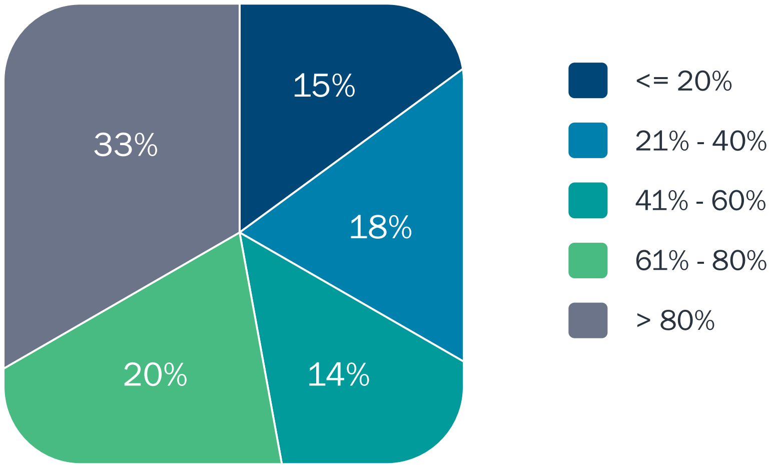
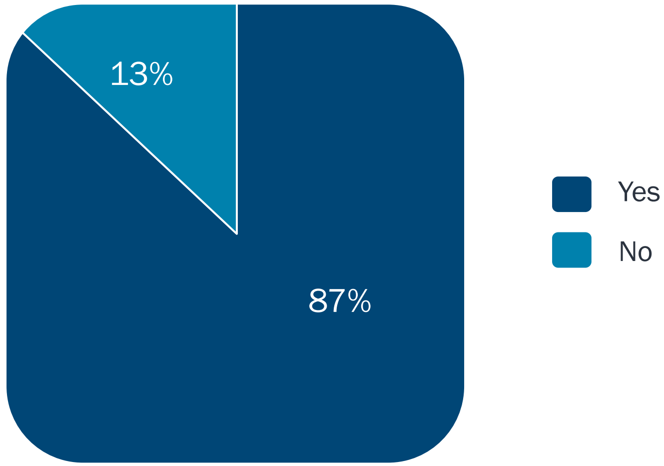
What proportion of your customers do you believe need to use multiple channels (like phone, email and social media) to resolve a single customer service issue? (CORPORATE VIEW)



Did you have to use multiple channels (like phone, email and social media) to resolve this single customer service issue? (CONSUMER VIEW)

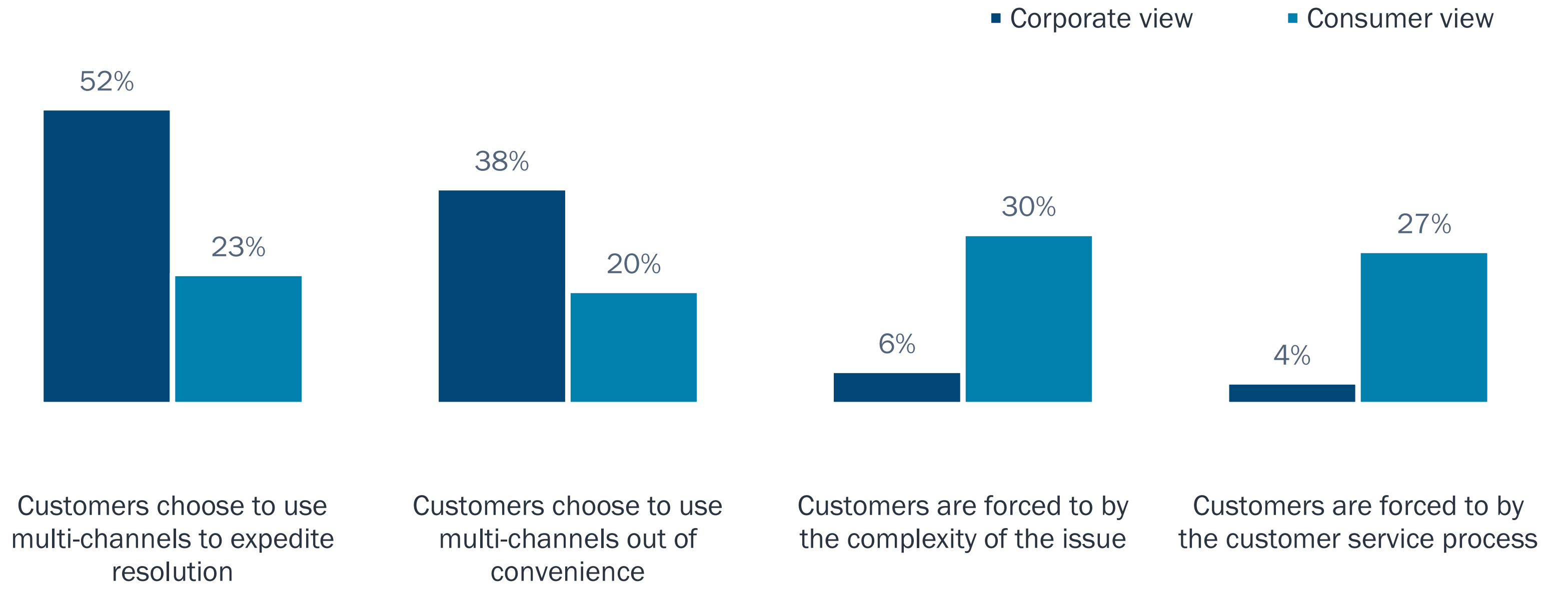


Only 33% of corporate respondents believe that more than 80% of their customers need to use multiple channels to resolve a single customer care issue. On the other hand, 87% of consumers stated they had to use multiple channels to resolve their single customer care issue.

Source of data for Consumer view: CCAM consumer report 2021

Understanding CX – Reasons for Using Multiple Channels

Why do you think customers use multiple channels to resolve single customer care issues? (CORPORATE VIEW)
Why did the process take you across multiple channels? (CONSUMER VIEW)



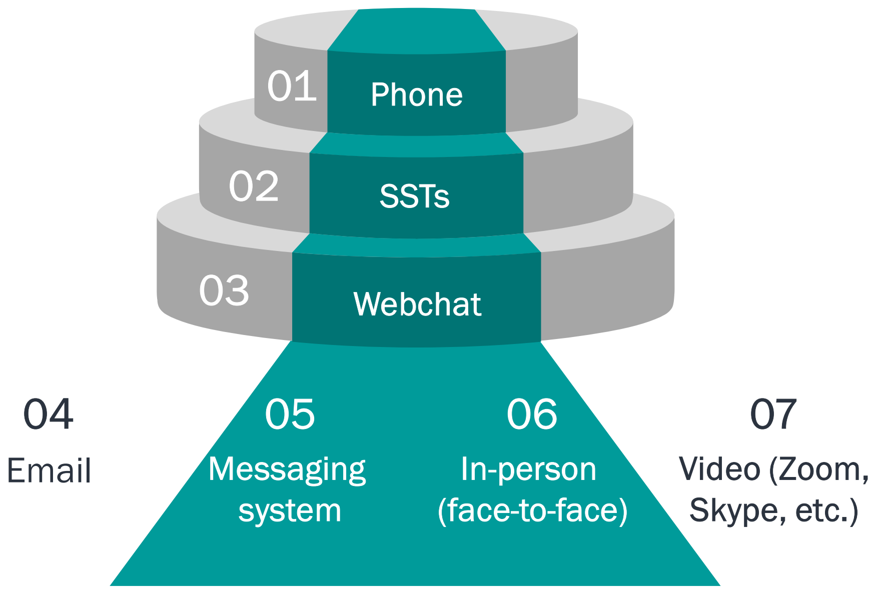
The corporate view is largely that the customers change channels because they 'choose to' (90% of corporate respondents stating so).
However, the consumer perspective is that they change channels because they are 'forced to' by either the complexity of the issue or the customer service process (57% of customers)

Source of data for Consumer view: CCAM consumer report 2021

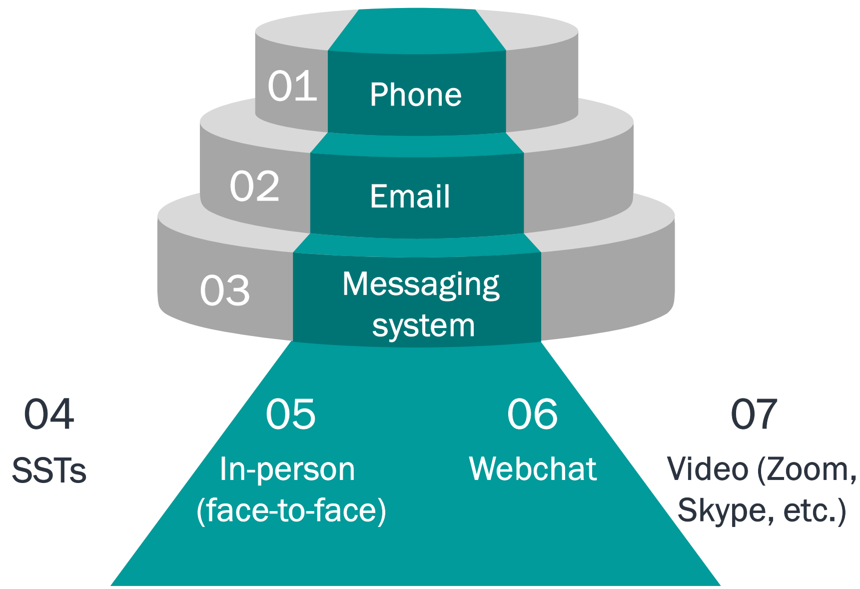
Understanding CX – Most Popular Channels

Thinking generally about customers, rank the following channels from 1 (most popular among customers) to 7 (least popular among customers). (CORPORATE VIEW)

(Closer to 0, the more popular the channel)



If you knew that your customer service issue would be resolved regardless of the contact channel, which would be your preferred contact method (CONSUMER VIEW)

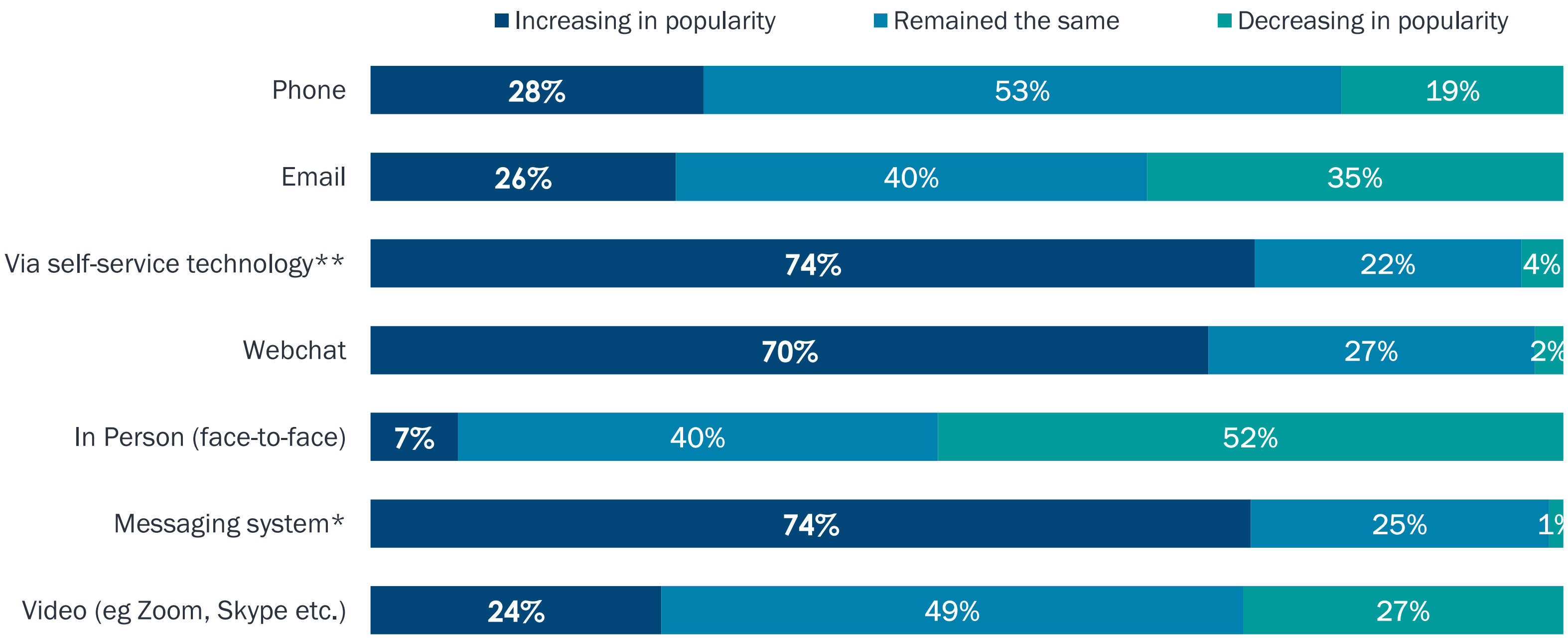


The organization view SST as the 2nd most popular channel. However, consumers place it 4th, after phone, email and messaging system.

Source of data for Consumer view: CCAM consumer report 2021

Understanding CX – Changing Channel Popularity

Thinking generally about customers and based on your perception, for each of the following channels are they increasing or decreasing in popularity for customers? (CORPORATE VIEW)



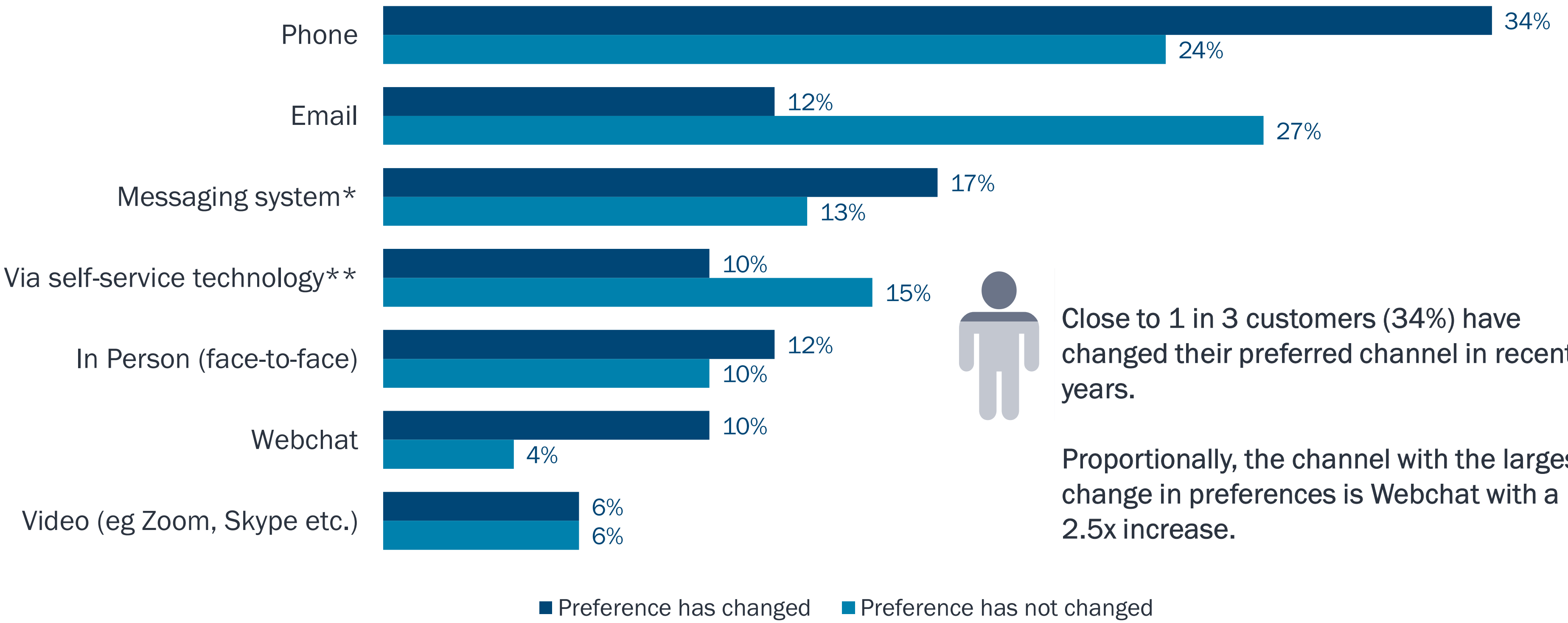
Larger proportion of organizations believe self-service solutions are becoming increasingly popular – which is in contrast to preference shown by consumers towards SSTs.

* E.g., Facebook Messenger, WeChat, WhatsApp etc. ** E.g., mobile app, online self-service, chatbot etc.

Understanding CX – Changing Channel Preferences

If you knew that your customer service issue would be resolved regardless of contact channel, which would be your preferred contact method? Has your preferred contact method changed in recent years?

(CONSUMER VIEW)



Close to 1 in 3 customers (34%) have changed their preferred channel in recent years.

Proportionally, the channel with the largest change in preferences is Webchat with a 2.5x increase.

* E.g., Facebook Messenger, WeChat, WhatsApp etc. ** E.g., mobile app, online self-service, chatbot etc.

Source of data for Consumer view: CCAM consumer report 2021

Understanding CX – What Matters to the Customers?

Thinking generally about customers, aside from getting their issue resolved satisfactorily, what is most important to your CUSTOMERS when dealing with an organization to resolve a customer service issue? (CORPORATE VIEW)

What do you feel organizations should do differently to help customers avoid having to contact customer service to resolve an issue? (CONSUMER VIEW)

Organizations believe that consumers need more self-service solutions. On the other hand, consumers feel that improving quality of services and products should be foremost for organizations

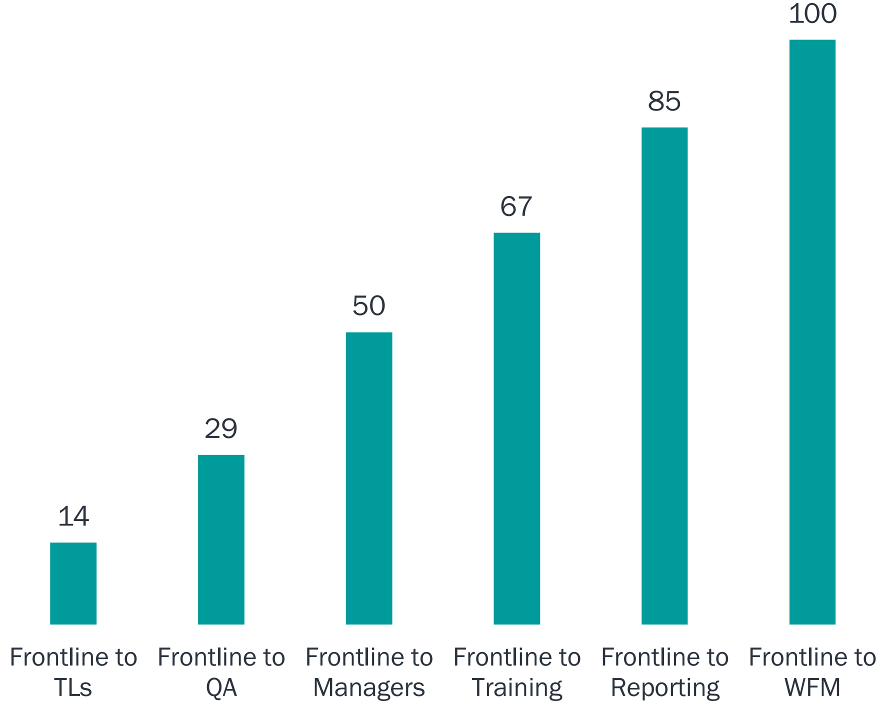
Source of data for Consumer view: CCAM consumer report 2021

Employee Engagement at Malaysian Contact Centres

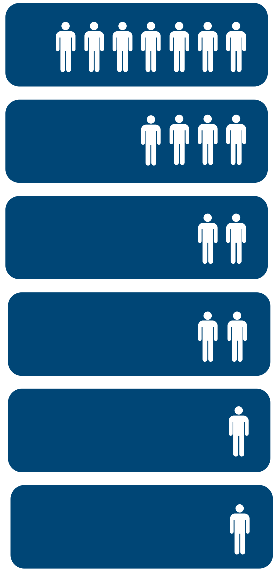
(Experience, Feedback and Well-being)

Spans and Layers

Ratio of frontline staff to other roles (median)



On average, a 100-seat contact centre in Malaysia will have:



7 Team Leaders (TLs)

3 Quality Assurance staff

2 Managers (1 level up from TLs)

2 Trainers

1 Business Analyst (Reporting)

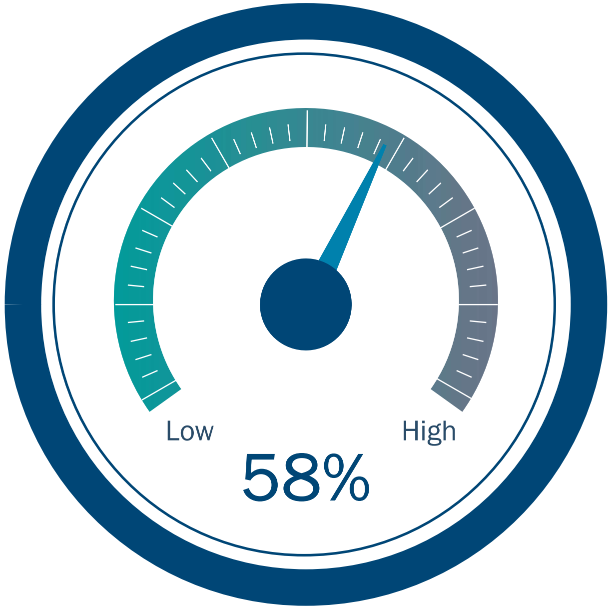
1 WFM staff

To phrase this differently, for every 100 frontline staff on average, there are 16 staff members in overhead roles.

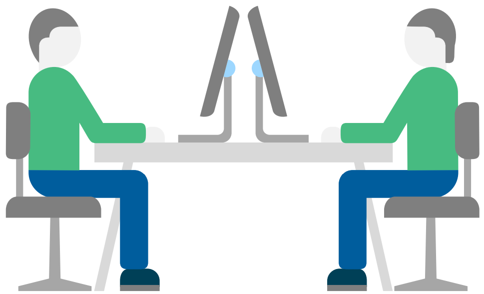
It is important to note there is variation in ratios. For example, some centres run at 1 TL to 5 frontline staff while another one runs at 1 TL to 80 frontline staff

Employee Experience – Satisfaction and Retention (Frontline Staff)

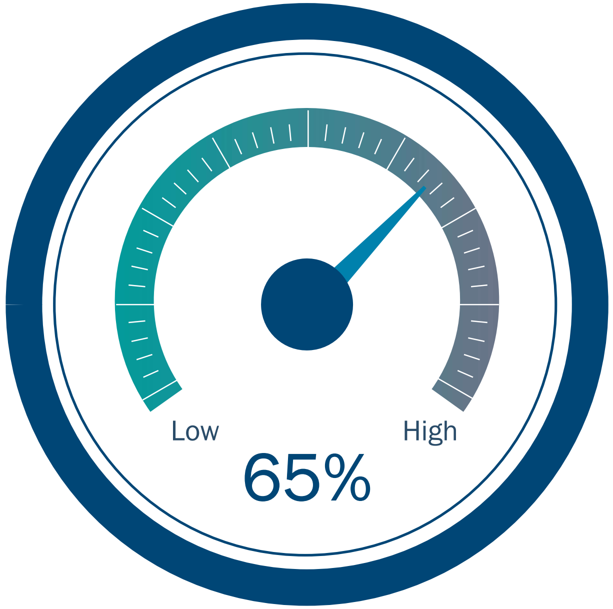
Overall, I feel satisfied with my current job.



% indicates Top 2 Box % (Very satisfied + Satisfied)



I am very likely to continue working with my current organization over the next 12 months.



% indicates Top 2 Box % (Highly likely +Likely)

While 58% of staff are satisfied with their current job, 65% of the employees stated that they are highly likely/ likely to continue with their current organizations.

Source of data : Employee Engagement Benchmarks, 2021 (Malaysia)

Absenteeism – Unplanned Leave

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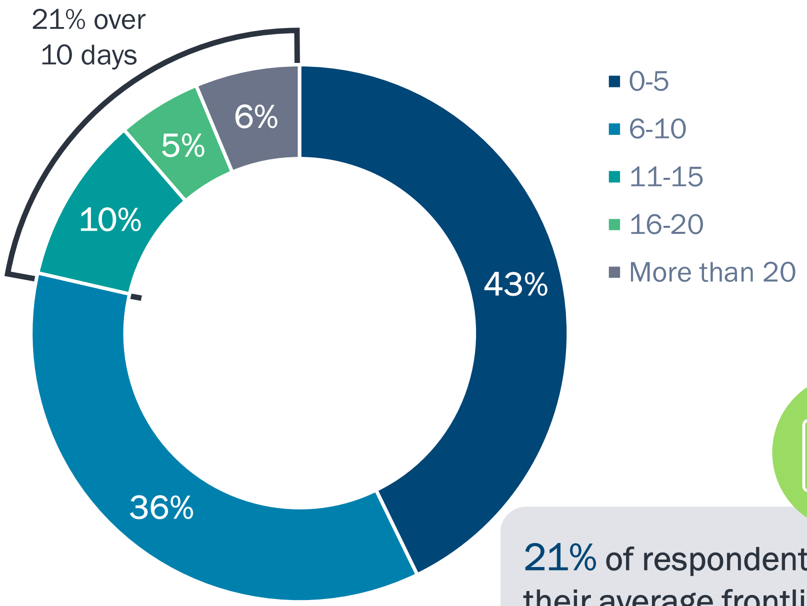
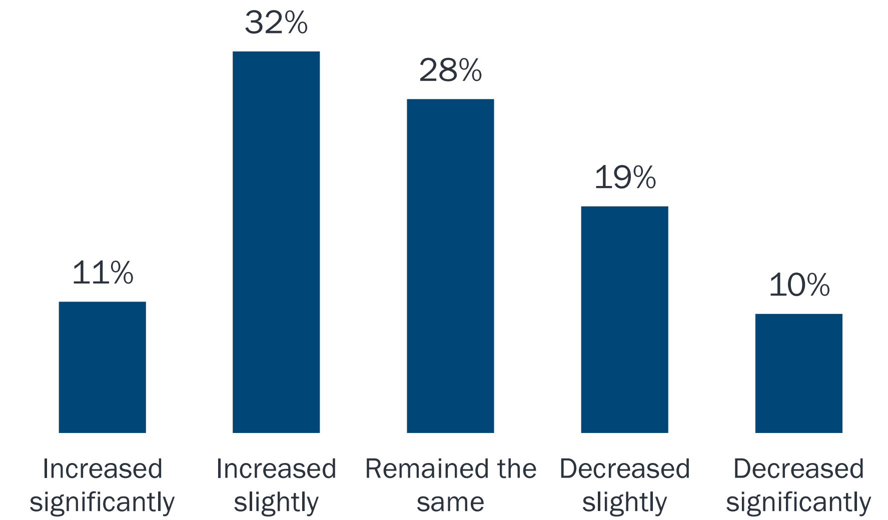
Per person, what is your average frontline unscheduled leave (absenteeism / UPL) over the last 12 months? (in number of days)



21% of respondents stated their average frontline unscheduled leave over the last 12 months was more than 10 days.

Over the last 12 months, how has the unscheduled leave (absenteeism / UPL) for the frontline staff changed?



43% of the respondents stated their organizations have witnessed an increase in the trend of unscheduled leave over the past 12 months.

Absenteeism – Unplanned Leave

How do frontline staff report that they are unable to come to work?

39% Must make non-phone contact (e.g. email, SMS or WhatsApp)	35% Must phone their team leader	20% Must phone an "on duty" team leader	3% Must phone someone else	3% Others *(multiple channels, calling WFM hotline)*

39% of respondents stated frontline staff member needs to inform through email or any other non-phone (call) method when they take leave.

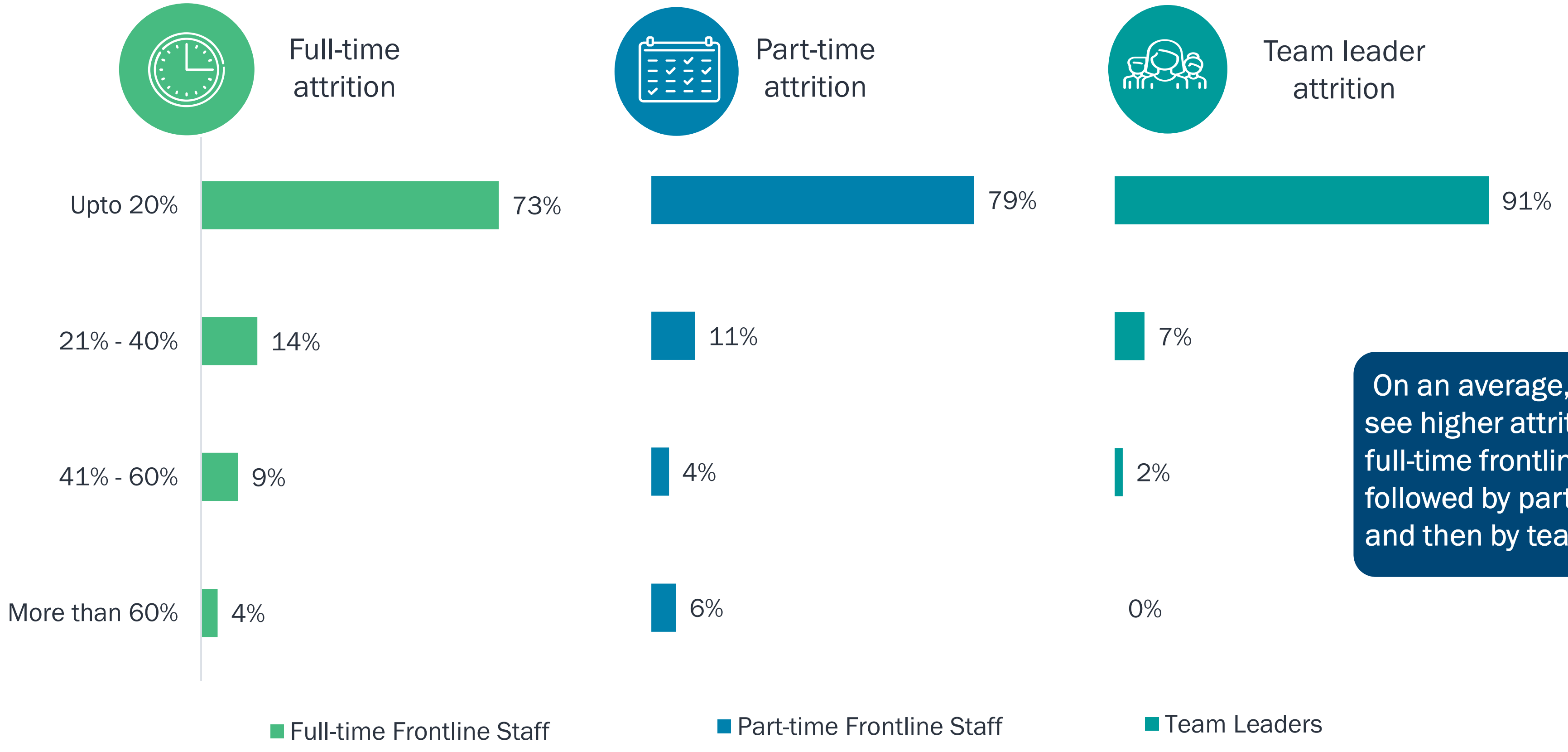
When do they need to provide a medical certificate ?

91%	4%	4%	1%
Everytime they are sick (regardless of length of leave)	If they are sick for 2 or more concurrent days	If they are sick for 3 or more concurrent days	They are not required to provide a medical certificate

Majority of respondents stated if a frontline staff member is sick (regardless of length of leave), they must provide a medical certificate.

Attrition – % of Staff to be Replaced Each Year Full-time, Part-time and Team Leaders

On average, what proportion (%) of full-time frontline / part-time frontline / team leaders leave each year and need to be replaced?

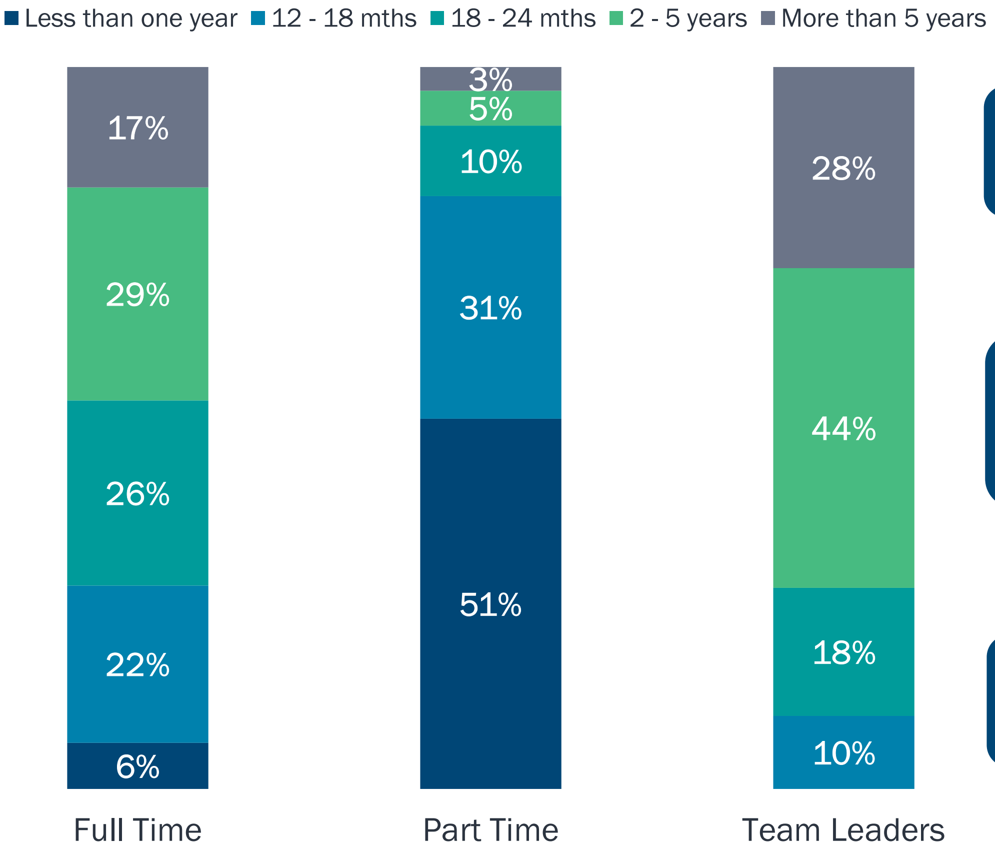


On an average, centres see higher attrition among full-time frontline staff followed by part-time staff and then by team leaders

* Note: this could be internal (e.g. promoted or changed teams) or external (e.g. found new role with another organization)

Tenure Expectations

On average, how long do full-time frontline / part-time frontline / team leaders staff stay in their role?



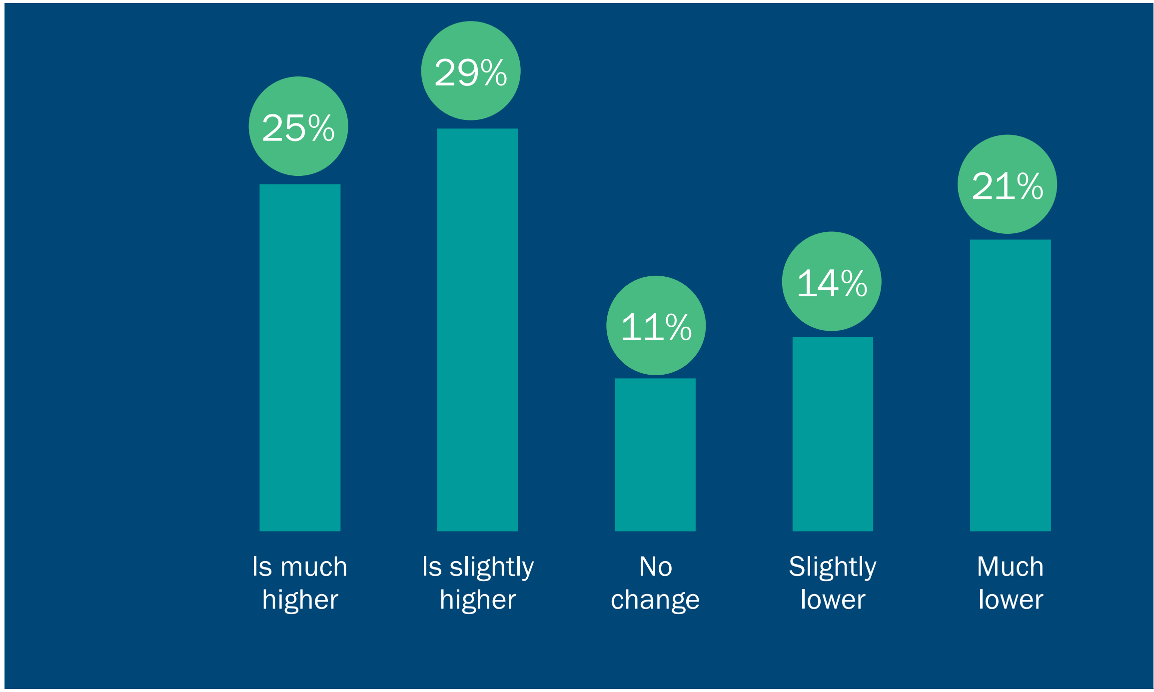
46% expect full-time staff to stay for more than 2 years

Only 8% expect part-time staff to stay for more than 2 years. 51% expect part-time staff to stay less than a year

72% expect team leaders to stay for more than 2 years

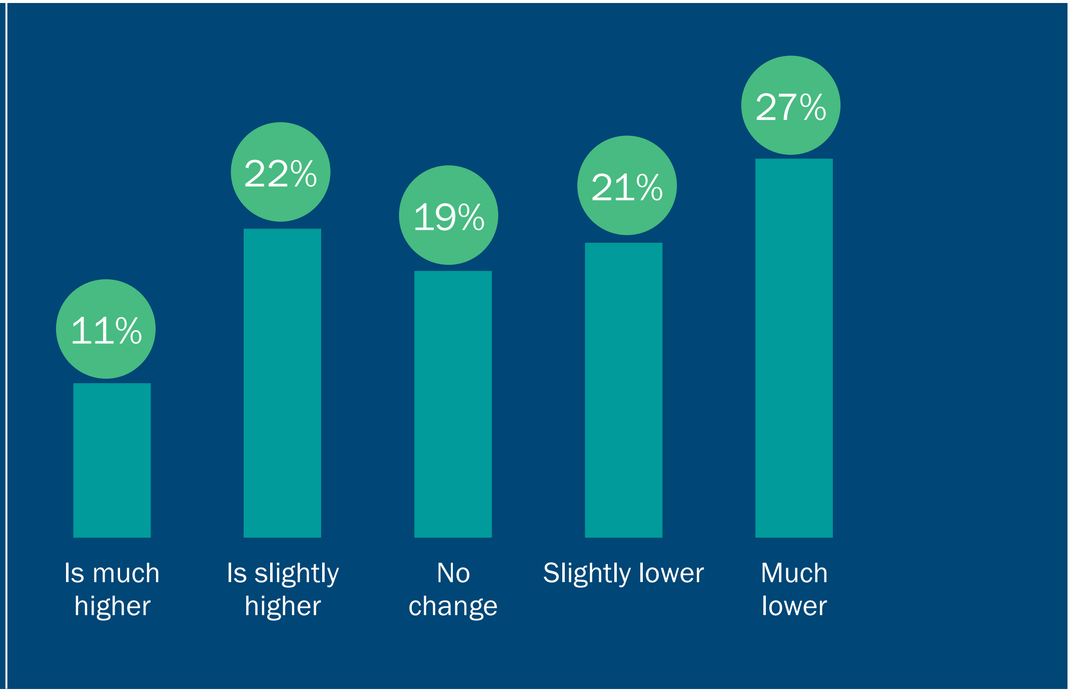
Absenteeism and Attrition – Impact of COVID-19

How has COVID-19 impacted absenteeism?



54% of the respondents stated COVID-19 has led to increased absenteeism

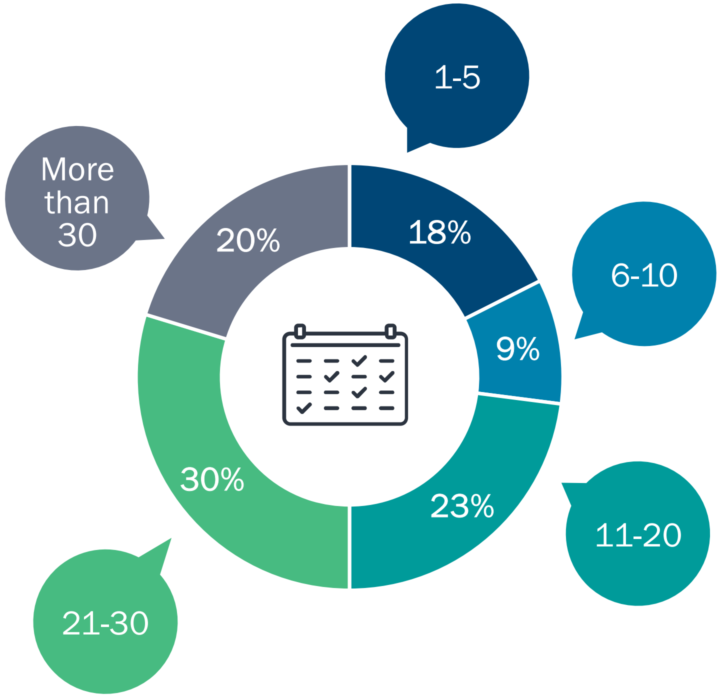
How has COVID-19 impacted attrition?



In contrast, 48% of the respondents stated that COVID-19 has seen decreased attrition

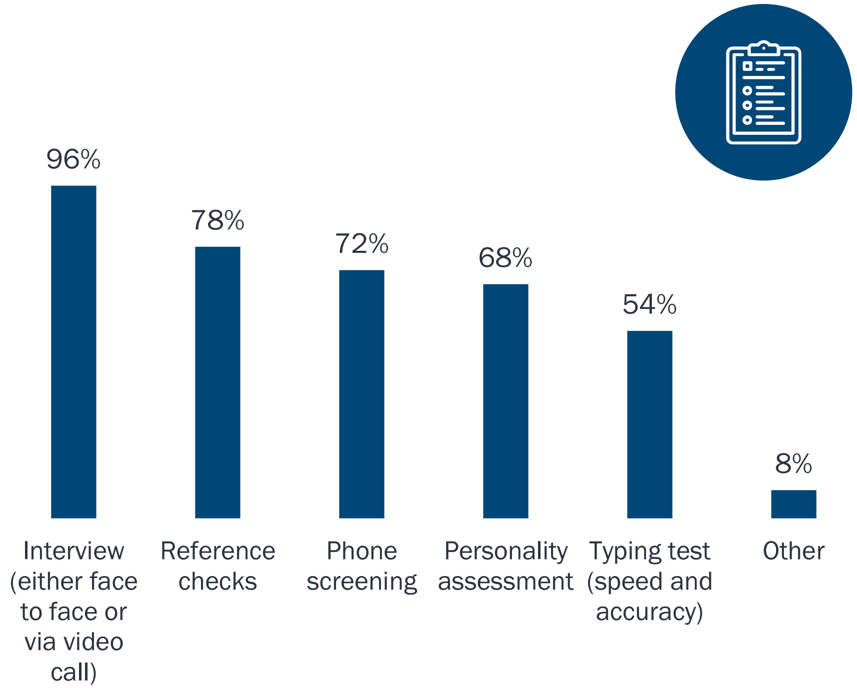
On-boarding – Recruitment

Starting when the position is requested, on average, how long does it take to hire a frontline staff member (working days)?



50% of respondents stated their organizations take more than three weeks on average to hire a frontline staff member.

What steps are involved in assessing potential frontline staff? *(Select all that apply)*

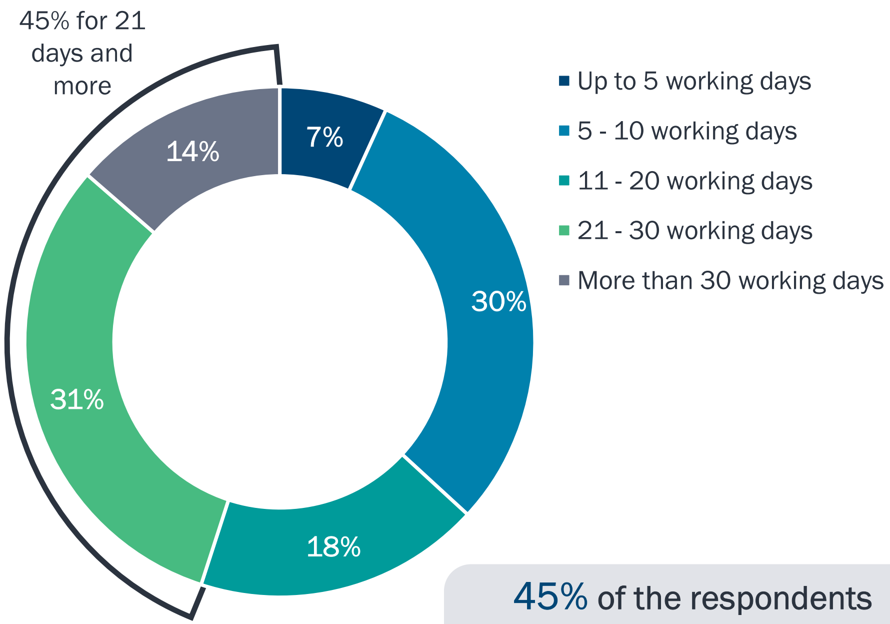


Interviews, reference checks and phone screenings of candidates emerge as common steps across organizations.

Other: *Experience, technical / written/ language assessment, etc

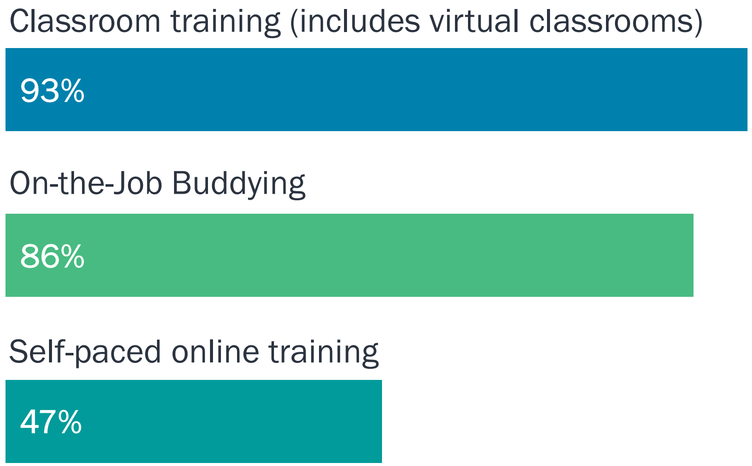
On-boarding – Training

On average, how long is frontline new hire training (working days)?



45% of the respondents stated their organizations take more than three weeks (21 days and more) on average to train new frontline staff.

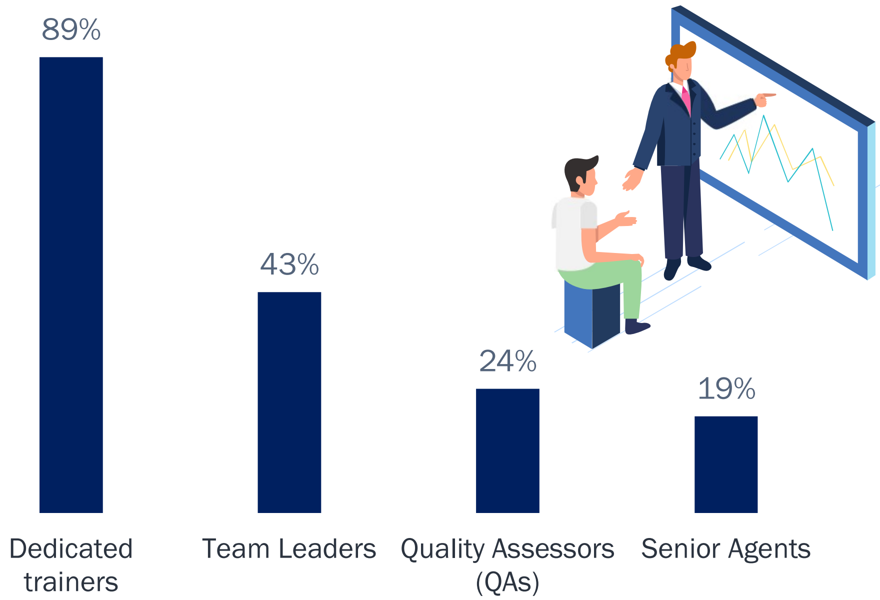
What settings or methodologies are included in frontline new hire training? *(Select all that apply)*



45% of organizations use all 3 methodologies to train new hires and 38% utilise at least 2. Only 18% use a single methodology.

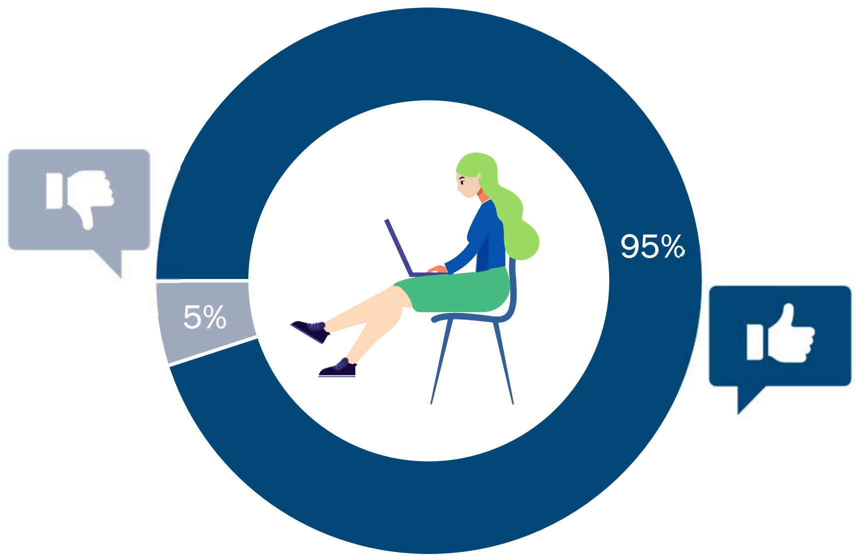
On-boarding – Training

Who conducts new hire training?



Majority of the respondents stated there are dedicated trainers to conduct the training for new hires.

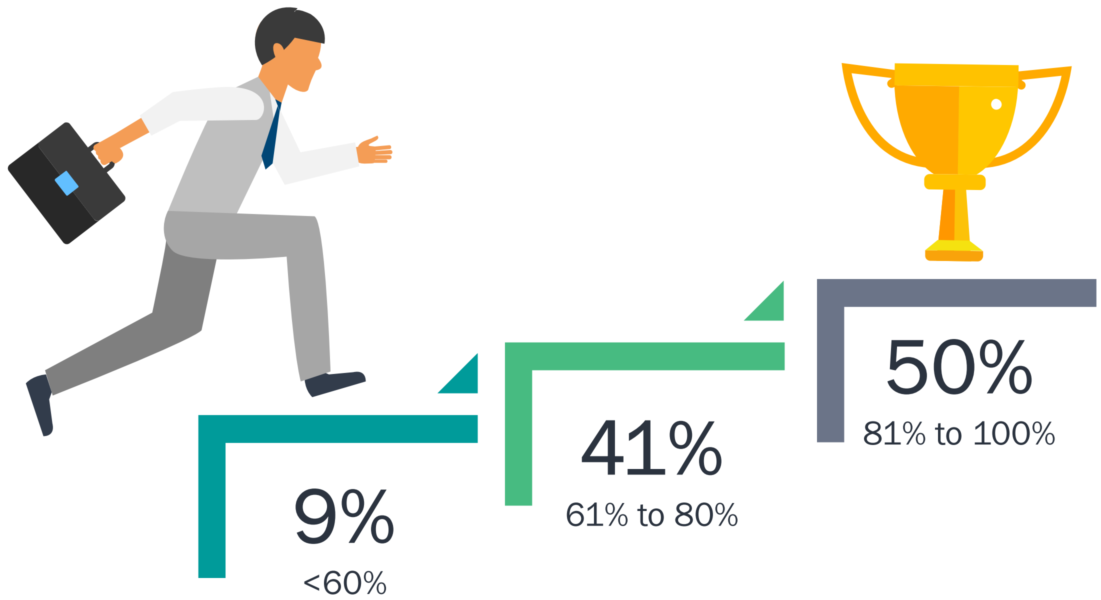
Is there a formal assessment that new frontline staff MUST pass prior to going-live?

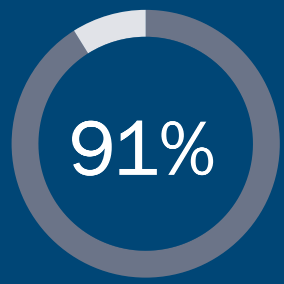


95% of the respondents state there is a formal assessment in their organizations that the new frontline staff must pass prior to going-live

On-boarding – Training

Please estimate what proportion (%) of frontline staff feel that the onboarding training sets them up for success in their role?





of the respondents stated more than 60% of their frontline staff feel that the onboarding training sets them up for success in their role.

Frontline Staff – Frequency of Structured Reviews

How often do frontline staff / you receive a structured review of their performance relative to their targets with their manager (e.g. a one-on-one)? Organization vs. Employee View

Organization		Employee View
0%	They / I do not get formal reviews of their performance	5%
1%	Less often than once a quarter	18%
10%	At least once a quarter	24%
59%	At least once a month	16%
10%	At least once a fortnight (every 2 weeks)	13%
20%	At least once a week	24%
89%		53%

89%

of respondents stated they conduct structured reviews at least monthly vs the employee view of only

53%

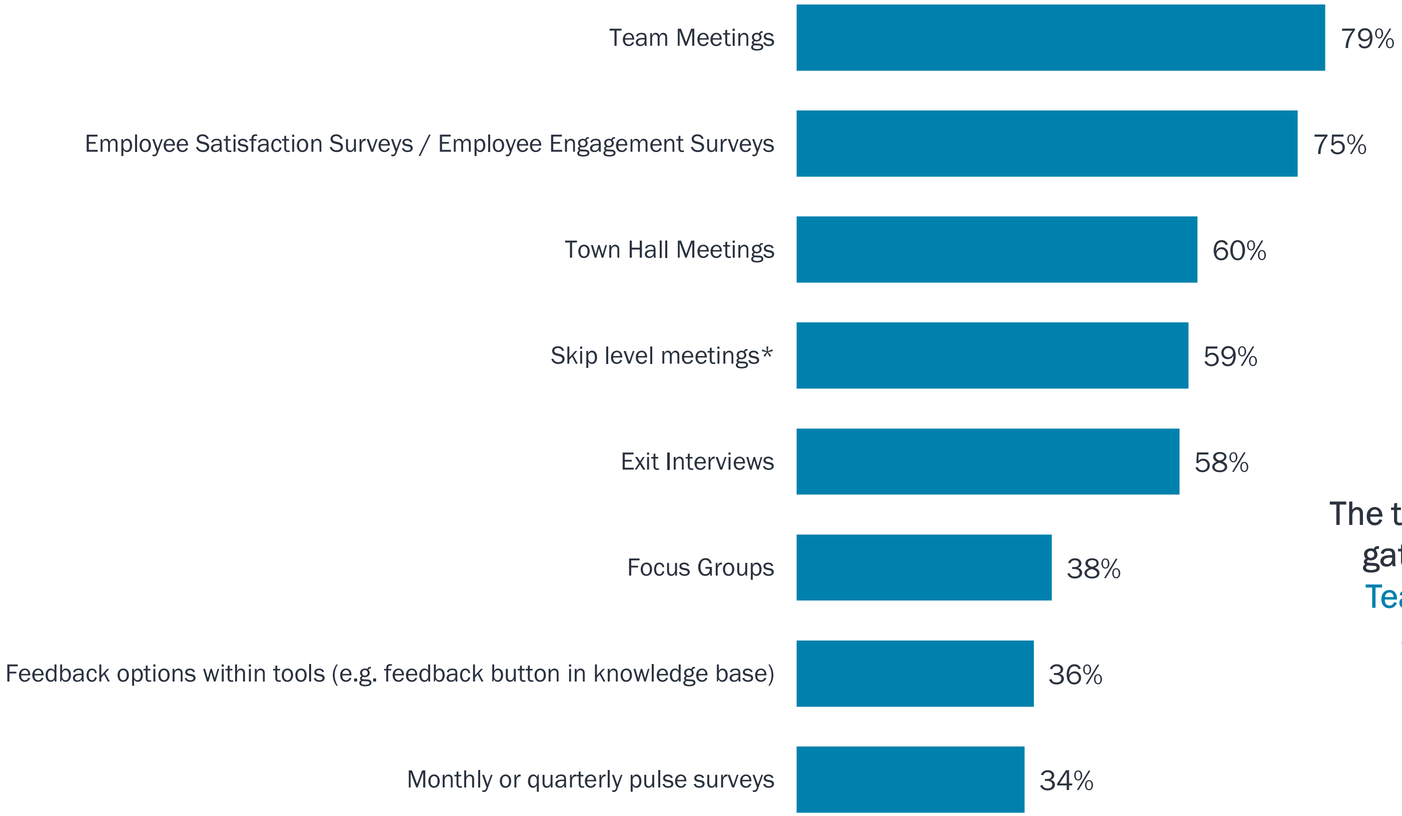
of the frontline staff in Malaysia receive a structured review every month.

COPC inc.'s Employee Engagement benchmarks* clearly indicate a strong correlation between the frequency of structured reviews and employee satisfaction – hence this is an important area for attention.

**Source of data : Employee Engagement Benchmarks, 2021 (Malaysia)*

Feedback channels

What channels do you have in place to gather feedback from employees? (select all)



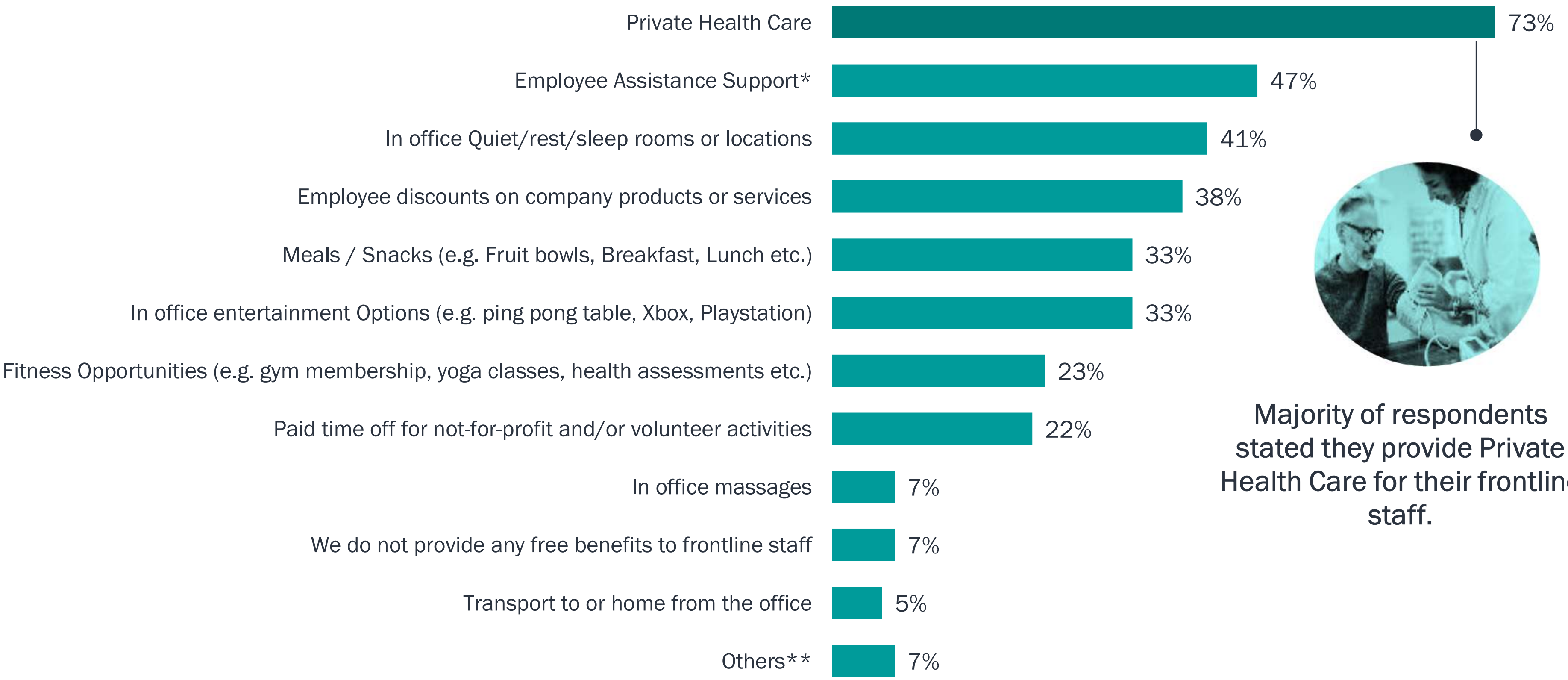
The two most common channels to gather employee feedback are Team Meetings and Employee Surveys at 79% and 75% respectively

*Skip level meetings (e.g. frontline staff meeting with their Team Leaser's manager)

Employee Benefits

What employee benefits do you provide for FREE to your frontline staff?

(Select all that apply)



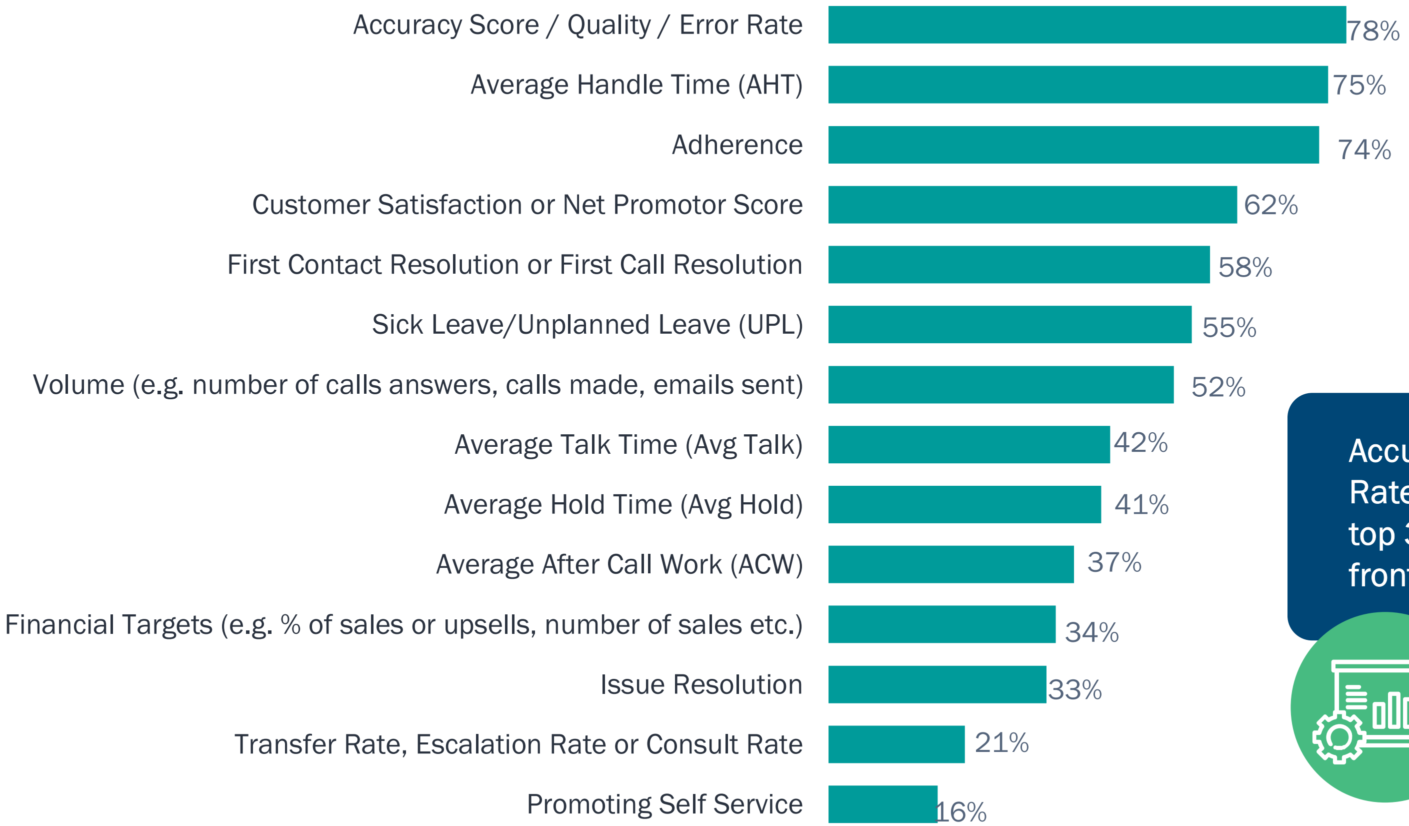
Majority of respondents stated they provide Private Health Care for their frontline staff.

*Employee Assistance Support (e.g. confidential support for depression, stress, substance abuse etc.)

****Others: Medical cards, mobile devices, mobile phone allowances, transport to home for late-night shifts*

Frontline Staff – KPIs

Which metrics are key performance indicators (KPIs) for frontline staff? *(Select all that apply)*



Accuracy Score / Quality / Error Rate, AHT and Adherence are the top 3 KPIs being utilized for frontline staff

Work-At-Home (WAH) - current state and future for Malaysian Contact Centres

WAH – Adoption

Do you have work at home (WAH) contact centre employees?

Yes 93% | No 7%

Currently, what roles / functions in your contact centre are able to work at home?

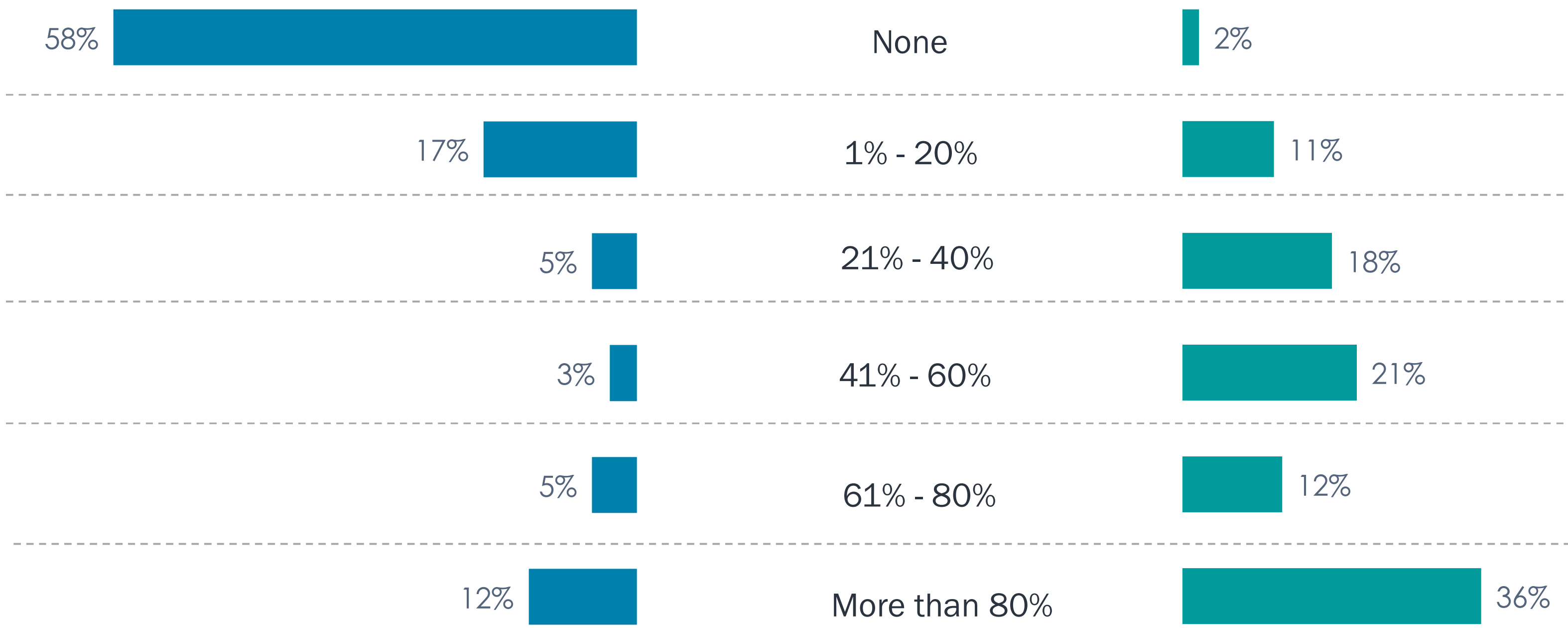
Frontline Staff	Quality Management	Workforce Management	Reporting & Analytics	Frontline Management	Training & Staff Development	Recruiting & Hiring
77%	75%	75%	72%	71%	69%	63%

93% of the respondents stated they have work at home employees - 77% of these stated their frontline staff are able to work at home

Understanding CX – What Matters to the Customers?

What proportion (%) of your frontline staff worked at home before COVID - 19?

What proportion (%) of your frontline staff works at home currently?



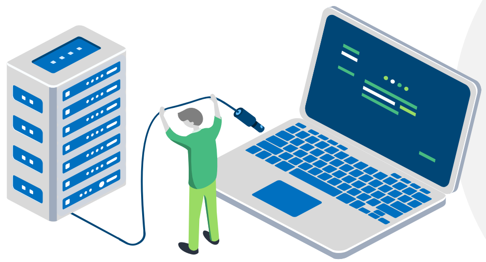
There has been a big shift in the proportion of WAH frontline staff from pre-pandemic days to now – with only 2% of the respondents stating they have no WAH frontline staff, down from 58% during pre-pandemic times. Proportion of more than 80% of the frontline working at home saw a 3x increase – from 12% in pre-pandemic times to 36% currently.

WAH – Challenges

Rank the challenges with work-at-home

#1 → #2 → #3 → #4 → #5 → #6 → #7

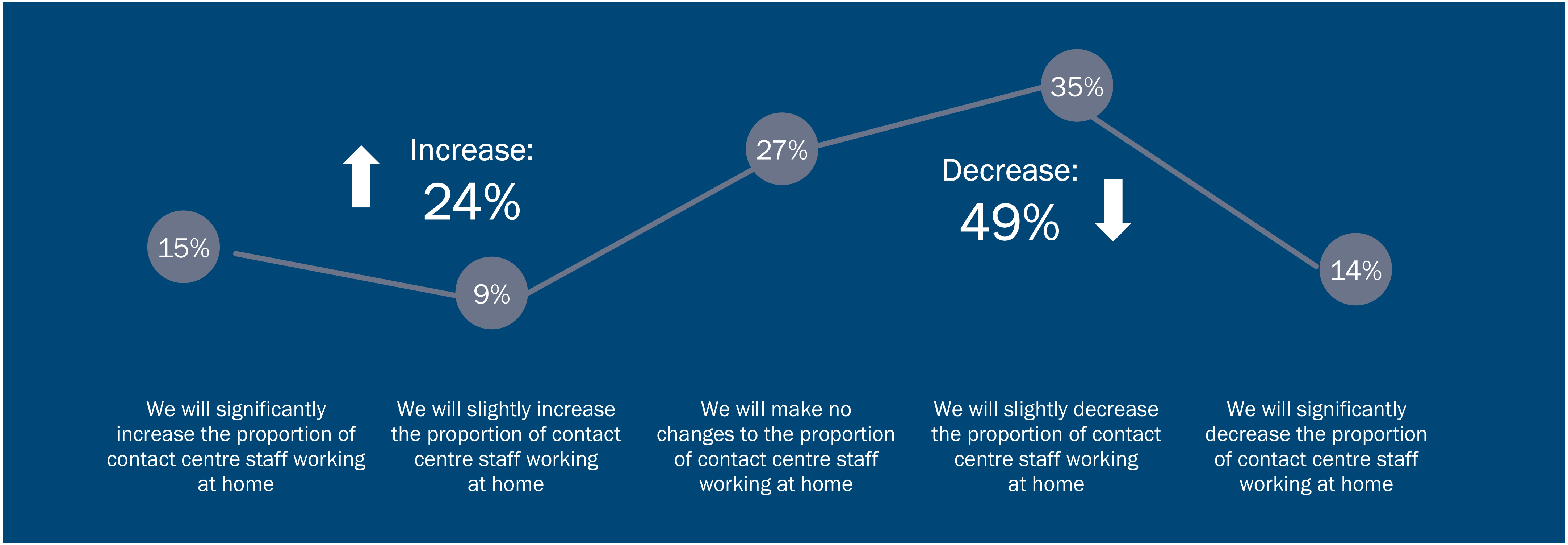
1. **Technology Limitation** (internet, CRM, remote access etc.)
2. **Privacy Concerns, Govt. Regulation, or Contract Requirements**
3. **Staff Management** (coaching, feedback, performance management)
4. **Staff not having appropriate workspace**
5. **Quality Management** (Effective QA process)
6. **Physical limitation** (E.g. need access to physical access to resources)
7. **Willingness of staff to Work-At-Home**



Technology-related issues were highlighted as the greatest concern by respondents in operating WAH staff

WAH – Future

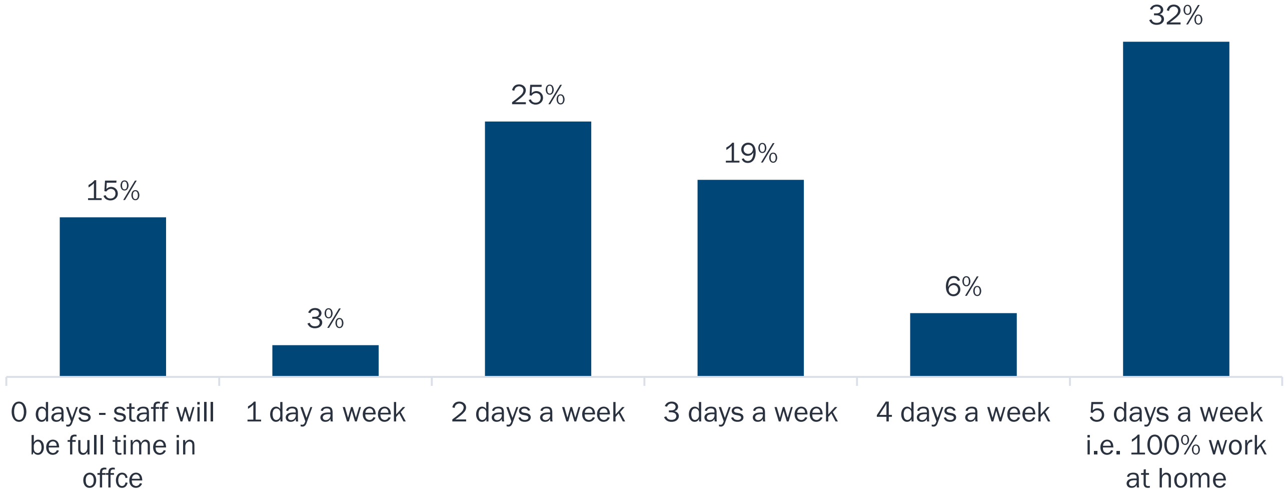
In the next six months, what is most likely?



49% respondents state their organization will decrease the proportion of their WAH staff over the next six months.

WAH Intentions Post-COVID-19?

Post COVID-19, on average, how many days a week do you expect frontline staff to work at home?



38% expect frontline staff to WAH 4 or more days post-pandemic

WAH – What Organizations Intend to do Post-COVID-19?

Post COVID-19, do you expect you will ONLY hire frontline staff that live near a corporate office (i.e., have the ability to come into an office), or will you also hire frontline staff that live far from a corporate office (i.e., cannot physically come to an office)?

11%

We will ONLY hire frontline staff that live near one of our offices.

Unsure

9%

80%

We will hire BOTH staff who are nearby one of our offices AND staff who live far from a corporate office.

80% of organizations do not see employee location as an impediment to hiring.

Conclusion

Conclusion

Organizations' perception of their customers' experience is often disconnected from reality. This is evident in differing views seen on aspects that matter to customers, customer willingness to pay more for excellent services, frequency of using multiple channels and reason to do so, etc.

As much as the pandemic affected customer interaction, there was an impact on contact centres as well – by way of increased customer demand, channel traffic and increase in WAH.

However, organizations feel that proportion of WAH employees will decrease over next few months.

Organizations seem to overestimate the customers' desire to use SSTs over human-assisted channels.

However, as seen from the data, human-assisted channels continue to be higher on customers' preference.

What comes next will depend on what we do now...

Customer experience (CX)

It is essential for organizations to align with the customer needs since improving CX is among the top objectives of organizations.

Making the interactions convenient, fair and honest will influence CX.

Developing processes to help reduce channel hops will further enhance the customer relationship

Employee experience (EX)

With employee recruitment and retention being top challenges for organizations, it becomes imperative to focus on employee engagement at work.

Right onboarding, effective training and regular feedback are key to identifying, developing and enhancing employee skills at work.

Importance to voice of employees, long-term development and overall well-being can help better the employee experience.

Work-at-home (WAH)

It is clear WAH hybrid model is here to stay for some time, even though organizations feel that proportion of WAH will reduce over next few months.

Organizations may need to rework roles, processes and policies to accommodate a continuing WAH arrangement, that allows for good flexibility at work.

New-age solutions need to be considered to address challenges of technology limitations, security concerns, staff management, etc.

THANK YOU

copc CCAM

MAKING CONNECTIONS