

ESTUDO DE CARACTERIZAÇÃO E BENCHMARKING

ATIVIDADE DE CONTACT CENTERS

2019



an NTT DATA Company



Characterization and Benchmarking Study

Contact Centers' Activity

2019

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Preface

For 14 years, APCC promotes the Study of Characterization and Benchmarking of Contact Centers Activity in Portugal. This 2019 edition marks a reinforcement of the representativeness of the study, bringing together the responses of 143 operations, in which almost 40% of the estimated total of employees, connected to this industry, are working.

Now supported by everis, the study, continues to ensure the highest reliability and confidentiality of the collected data, available to all members and, through the APCC website, to all interested, this information of strategic importance for decisions that the players of the sector intend to assume.

No critical changes have been introduced in the structure of the study, however, we have now eight chapters:

- Characterization
- Operational Performance;
- Human Resources;
- Policies and Benefits;
- Resort to Outsourcing;
- Technology
- Continuous Improvement;
- Financial Data.

Methodological note

The study was carried out based on an online questionnaire answered by 143 service lines from different sectors of activity. In addition, interviews were conducted to companies representing different sectors of activity with the main objective of enriching the analysis of the data collected from the answers to the questionnaires. The interviews addressed the main challenges of Contact Centers in the last 10 years and industry trends, namely technological investment and training of employees. The study maintains the structure of previous years, with greater focus on the profile, policies and benefits of employees as well as in the technological component of the service lines. These changes aim to make the results as reliable as possible and to reflect in detail the Contact Center Sector in Portugal. This study is intended to continue to be regarded as a tool for analysis and aid in decision-making for the organizations in this sector. Similarly, to previous editions, the information collected is presented according to 3 Dimensions: global analysis, analysis by economic sector and lastly, Contact Center service line analysis. We highlight the attempt to present the averages referring to the previous year so that it is possible to compare the obtained results, but it should be noted that when plotting analogies with homologous periods one should take into account the number of lines of attendance in the studies conducted, which in 2017 had been 89. Lastly, on behalf of the APCC and everis, we leave our sincere thanks to all the organizations that participated in this study and their representatives for their commitment and cooperation with this initiative.

Executive Summary 2019

Introduction and Framing of the Characterization and Benchmarking Study

The Portuguese Association of Contact Centers (APCC), in partnership with everis, performs this year the 14th edition of the Characterization and Benchmarking Study. The study aims to analyze the evolution of the main indicators of the Contact Centers Sector and to present behaviors and trends at national level. We highlight the vital participation of 143 service lines (increase of 37% compared to 2017), which ensures a significant representativeness of the sector in Portugal, and reflects the importance that the study has acquired as a way of characterizing and analyzing the evolution of the industry, compared to previous years, and is also considered as a decision support tool. In view of the technological investment carried out in the Contact Center service sector, this year we focus our approach on analyzing the evolution of performance indicators in order to ascertain the return on the investment obtained.

Evolution of Contact Center Activity in Portugal in the last 10 years

Over the past 10 years, Contact Center companies have sought to capture and retain their customers by investing in continuous training and retention of talents, and by the investment in technological solutions. The market has become increasingly saturated and competitive, causing increased rotativity. Customers are becoming increasingly demanding, making it even more difficult to meet their needs and promote a lasting relationship. They essentially require access to real-time information, faster and more efficient service. During the last decade there was also the launch of digital application stores and the creation of fully digital startups, compromising the existing industry and driving customers away from companies with traditional business models, further intensifying competition. Consequently, customer service – and more broadly their journey – has become a key competitive tool to capture and retain customers. Through the interviews made to companies representing several sectors of activity, it was also possible to determine that despite the high investment in technology the desired results are only achieved if the employees have the know-how and motivation needed to use the new tools and perform an increasingly complex service of excellence.

Current situation of the Contact Center industry

Despite the strong investment in technology verified in the last 10 years, 2018 maintained the trend, confirming the high propensity of Contact Center companies to invest in disruptive tools, with the main objective of increasing the quality of the service provided. In 2018 there was an increase of 68% in the use of a dialer for outbound and 45% in the use of self-care tools for customers, as technological solutions used by Contact Centers, face the previous year. On the other hand, some solutions such as Robotic Process Automation (RPA), Chatbots and Visual IVR, are no longer the preferred choices of Contact Centers, 40%, 40% and 49% to 30%, 14% and 5% respectively. Nevertheless, it is remarkable that 57% of respondents who do not currently invest in RPA, intend to do so in the future. Additionally, we highlight that 81% of the Contact Centers currently invest in Customer Experience Projects, which validates with

the successive focus of companies in improving the customer experience. This year, we also highlight a strong investment in human resources as a most important asset and responsible for the quality of the service provided to the customer. The percentage of employees with an effective link went from 32% to 49%, and now is 41% the incidence of term contracts. The use of temporary work or green receipts is at 7% and 3% respectively. In 2018 the average value of the remuneration of the Operators increased 3.5%, compared to 2017, from €769 to €796. The sectors in which the higher average remunerations were found were Banks and other Financial Services (€912), Telecommunications (€845) and Travel Assistance (€830). For their part, the lower average amounts occurred in Health (€612), Mail and Express Distribution (€700) and Utilities (€708). These average values only consider basic remuneration and not variable components. As has been observed in the case of remuneration of the Operators, also in the case of Supervisors there was an increase in the average monthly remuneration between 2017 and 2018, from €971 to €1,045 (increase of 7.7%). The sectors with the highest averages are Banks and other Financial Institutions (€1,163), Travel Assistance (€1,130) and Commerce (€1,055). The lower average amounts occur in Health (€697), Utilities (€860) and Tourism (€990). Regarding the Contact Center business model, in 2018 it was found that it remains solidly based on an Outsourcing regime (78% in 2018, when in 2017 were 53%), sustained in a strategy of reduction of costs and access to resources with specific competences needed to effectively implement day-to-day tasks. In line with this strategy, we have verified changes in the remuneration models and incentives of service providers / Outsourcing. From 2017 to 2018, remuneration models were no longer used based on "net resolved request" and were used with much lower frequency remuneration "by quality objectives". The remuneration models most mentioned in 2018 were "per call attended" (41%) and "per hour" (38%).

As a result of the bet on technological investment, retention of operators and increased quality control of the service, it is possible to determine the improvement of some operational performance indicators in the Contact Centers, In particular:

- There is a reduction in the average duration of calls in 2018, compared to 2017 (from 4.7 to 4.3 minutes);
- Successful sales percentage in inbound calls increased considerably, from 7% to 19%;

As for the resolution rate at the first contact, there was a favorable increase from 84% to 87%, compared to the year 2017. This indicator may have boosted customer satisfaction, which increased from 75% to 79%.

On the other hand, the recent investment in technological tools has not yet provided the expected operational efficiency increase in certain indicators, with a slight deterioration of some, namely:

- In 2018, the average waiting time to be serviced by the Contact Center shows a markedly negative evolution, compared to 2017, with an increase of 32 to 64 seconds;
- Faced with 2017, it is apparent that the average on hold time in the universe of respondents increased from 38 seconds to 49 seconds;
- The success of inbound retention calls was lower in 2018 (58%) than in 2017 (68%), being still a significant value;

- The success in outbound retention calls had a significant breakdown, from 61% to 33%, from 2017 to 2018. The most positive performance was verified in Utilities (51%) and the least promising in Commerce (15%).

In view of what has been presented and considering an optimistic future vision where there is a progressive awareness on the evolution of digital solutions, the trend will be that there is an adjustment and subsequent consolidation of the performance indicators presented previously. That is, some results will only be achieved in the medium-long term, after stabilization of new methodologies, training of Operators adjusted to new work tools, and establishment of innovation culture in the organization.

Conclusion

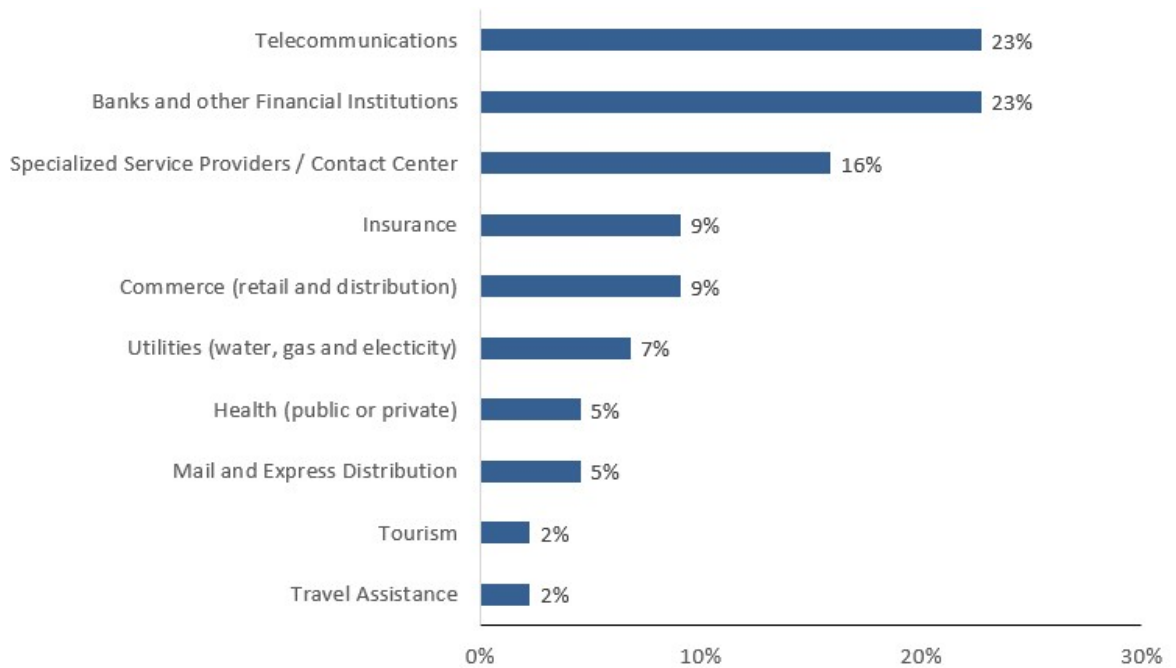
This year it was possible to verify that the focus of Contact Centers was essentially on investment of technological tools, adopting a more active posture in the management of the relationship and experience of customers, in an increasingly digital world. Companies with a technological profile are grasping this opportunity to shape the customer's own concept of experience, with the use of technology and innovation.

1. Characterization

QUESTION: Which economy sector incorporates the company's activity?

COMMENT: The characterization and Benchmarking Study of 2018 was answered mainly by companies in the Telecommunications sector (23%), Banks and other Financial Institutions (23%), Specialized Service Providers /Contact Center (16%), Insurance (9%) and Commerce (Retail and Distribution) (9%).

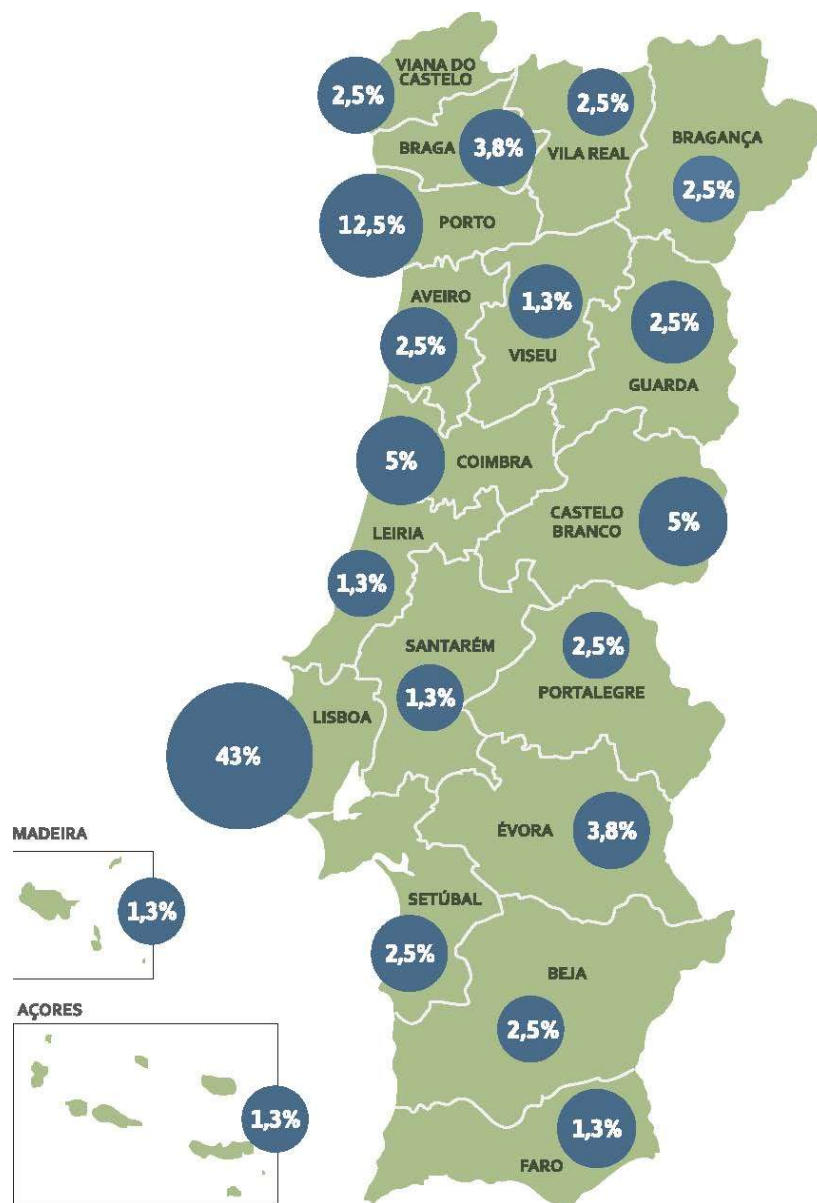
FIGURE 1
SECTOR OF ACTIVITY (N = 143)



QUESTION: In which district is the Contact Center located?

COMMENT: The 143 respondent operations continue to be mostly in Lisbon, although in a smaller percentage than in 2017 (43% instead of 47%), with growth in most of the remaining districts. Respondents are in all districts and autonomous regions, especially Porto (12.5%), Coimbra (5%), Castelo Branco (5%), Braga (3.8%) and Évora (3.8%).

FIGURE 2
DISTRIBUTION OF CENTERS BY LOCATION (N = 143)



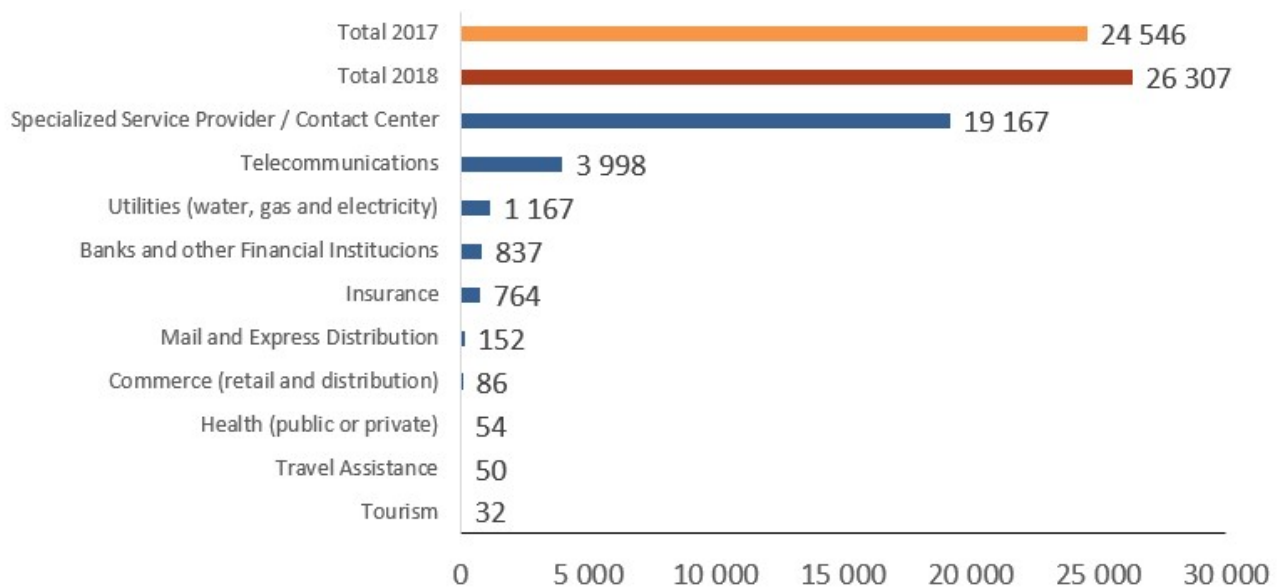
Study

QUESTION: What is the number of service positions in the Contact Center?

COMMENT: In 2018, the number of attendance positions of the sample (26,307) exceeds that of last year in 7%, maintaining as predominant the Specialized Service Providers /Contact Center (19,167) and Telecommunications (3,998).

FIGURE 3

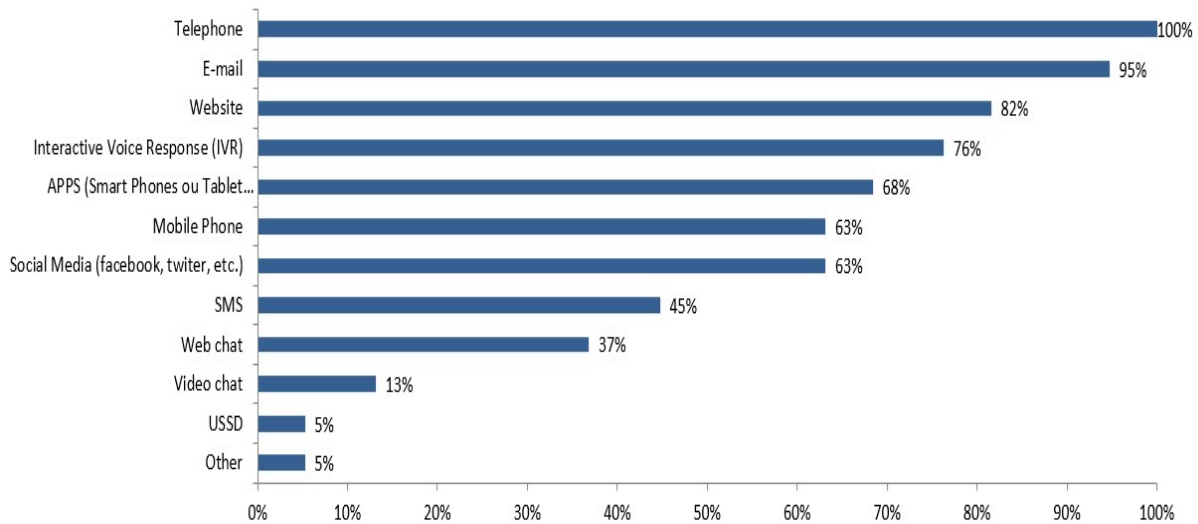
NUMBER OF ATTENDANCE POSITIONS IN THE CONTACT CENTER (N = 143)



QUESTION: Which channels are made available to the customers?

COMMENT: The means of contact between the customer and the Contact Center are increasingly varied, however only the telephone channel is available by all participants in the study (100%). The use of the email channel is made by 95% of the Contact Centers, followed by the website with 82% of respondents.

FIGURE 4
CHANNELS MADE AVAILABLE TO CUSTOMERS? (N = 143)



QUESTIONS: What are the total human resources allocated to Contact Center operations? What is the human resource ratio operating in Contact Center?

COMMENT: Despite the significant growth in the number of respondent operations, the total number of collaborators (37,583) is 3.1% lower than recorded in 2017. This reduction occurs only among Operators (33,031), and growth has been recorded in both the number of Supervisors (2,606) and the Support Staff (1,946). Both Operators by Supervisor and Operators' ratios by Support Staff present significant reductions, compared to 2017 (9% and 17%, respectively).

FIGURE 5
TOTAL HUMAN RESOURCES OF OPERATIONS UNDER STUDY (N = 143)

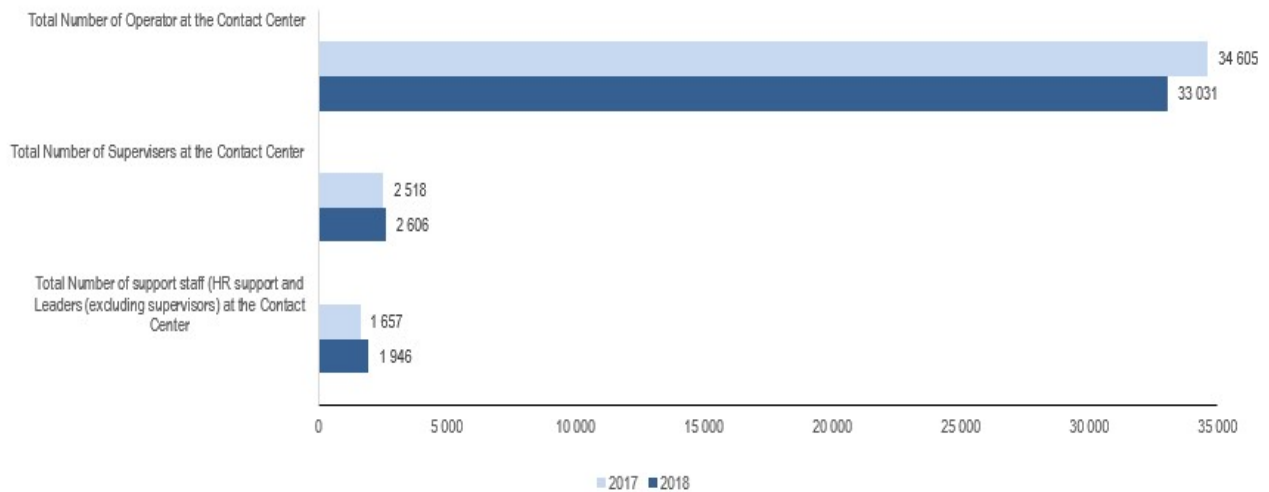
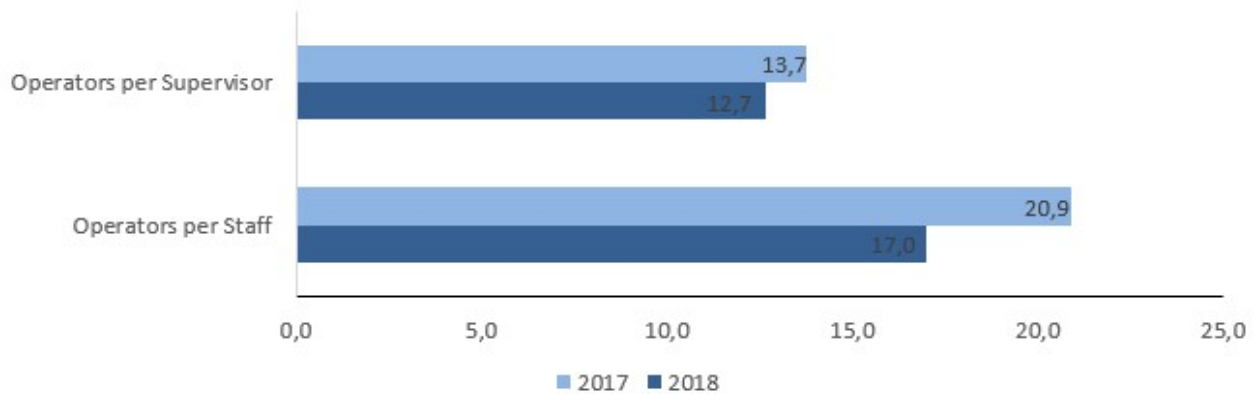


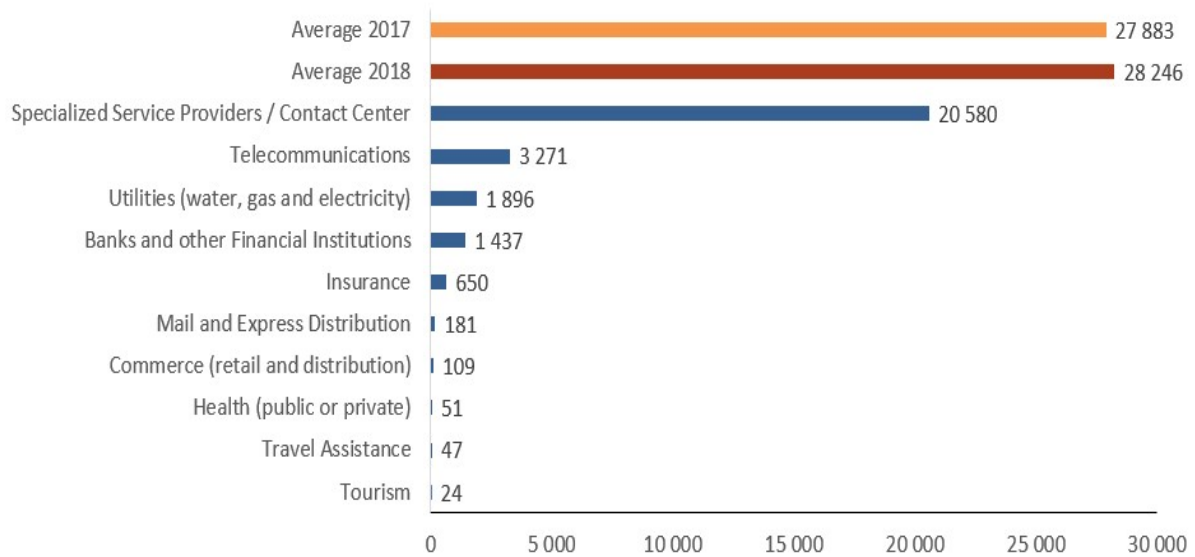
FIGURE 6
HUMAN RESOURCES RATIO OF OPERATIONS UNDER STUDY (N = 143)



QUESTION: What is the average number of Full Time Equivalents, in 2018, allocated to Inbound and Outbound?

COMMENT: Compared to the previous year, the number of FTEs went from 27,883 to 28,246 representing an increase of about 1%, contrasting with the reduction of the number of collaborators of 3.1%, which allows the conclusion that the reduction of the total number was accompanied by the average workload increase.

FIGURE 7
NUMBER OF FULL TIME EQUIVALENTS (N = 142)

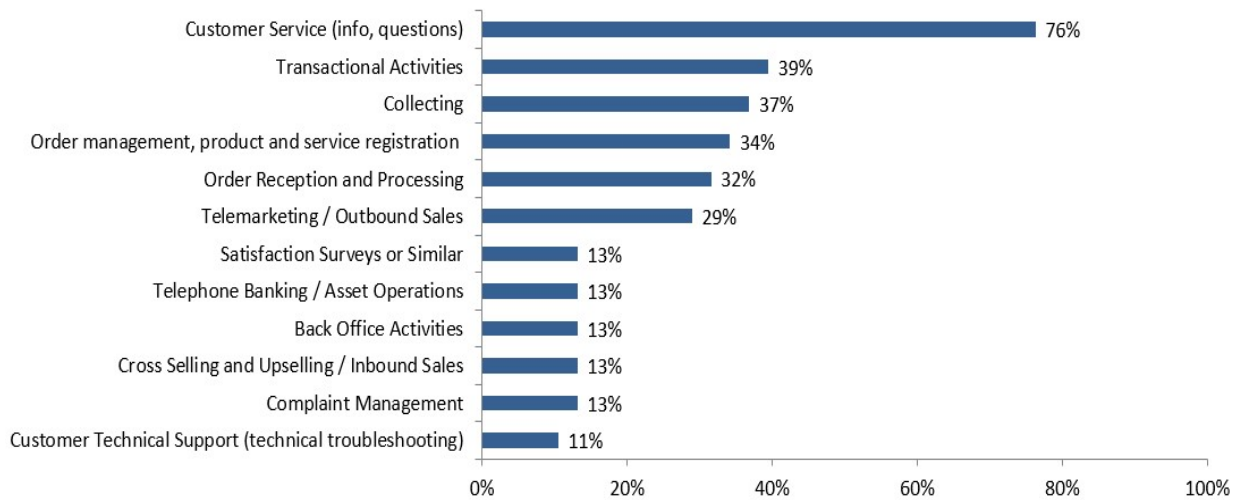


QUESTION: What are the main functions of the Contact Center?

COMMENT: The functions most mentioned by the respondent operations were customer service (76%), transactional activities (39%) and collections (37%). It deserves special note that the telemarketing / outbound sales function has been identified in 29% of the replies, when in 2017 it was 10%.

FIGURE 8

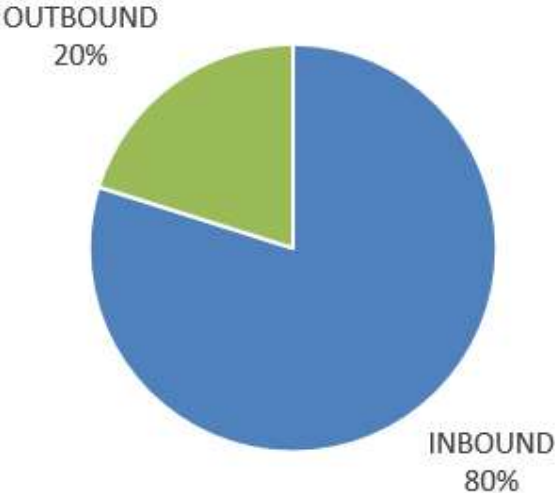
WHAT ARE THE MAIN FUNCTIONS OF THE CONTACT CENTER? (N = 143)



2. Operational Performance

QUESTION: What is the distribution of contacts by nature of interaction (inbound vs. outbound)?
COMMENT: In the group of 2018 respondents the weight of inbound contacts (80%) is much higher than recorded in 2017 (69%).

FIGURE 9
INBOUND VS. OUTBOUND CONTACTS (N = 142)

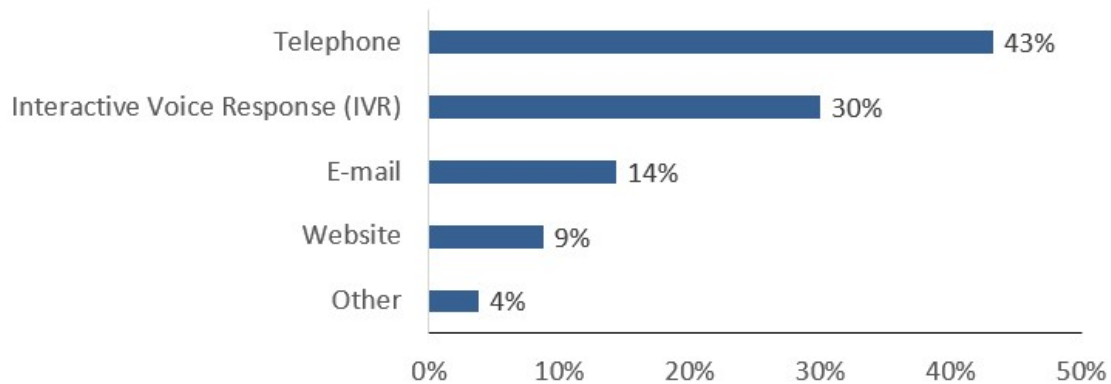


QUESTION: What is the average number of contacts, of inbound nature, per channel, per day?

COMMENT: In the universe of Inbound contacts, only 43% correspond to calls, a significant reduction compared to the value of 2017 (66%). The remaining contacts are carried out via IVR (30%), e-mail (14%) and website (9%). Only 4% correspond to other channels.

FIGURE 10

DISTRIBUTION OF INBOUND CONTACTS (N = 141)

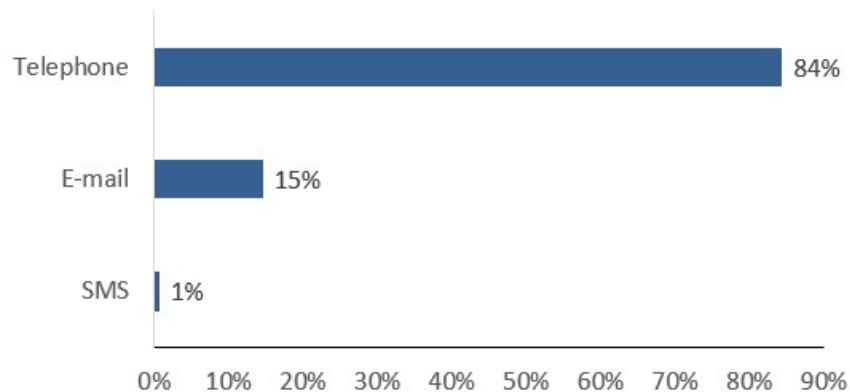


QUESTION: What is the average number of outbound contacts per channel per day?

COMMENT: The weight of the telephone channel in outbound is 84%, making 99% if we also consider the email channel.

FIGURE 11

DISTRIBUTION OF OUTBOUND CONTACTS (N = 133)

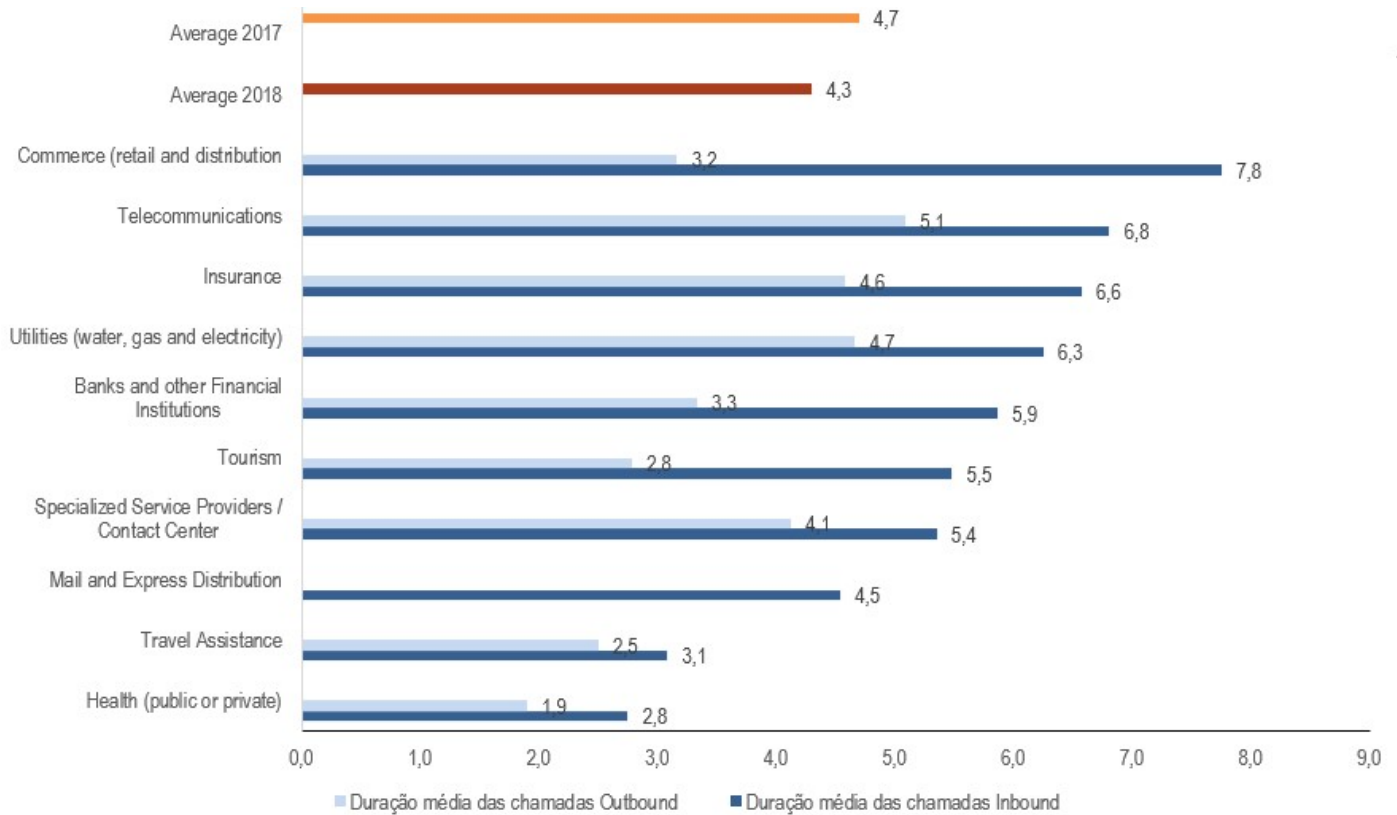


QUESTION: What is the average duration of calls, by inbound and outbound?

COMMENT: There is a reduction in the average duration of calls in 2018, compared to 2017 (from 4.7 to 4.3 minutes). The sectors in which the duration of inbound calls is higher are Commerce (7.8 minutes), Telecommunications (6.8 minutes) and Insurance (6.6 minutes). The smaller durations in inbound calls are in Health (2.8 minutes) and Travel Assistance (3.1 minutes). As for outbound calls, the higher durations are in the Telecommunications sectors (5.1 minutes), Utilities (4.7 minutes) and Insurance (4.6 minutes). The smaller durations in outbound calls are in the Health sectors (1.9 minutes), Travel Assistance (2.6 minutes) and Tourism (2.8 minutes).

FIGURE 12

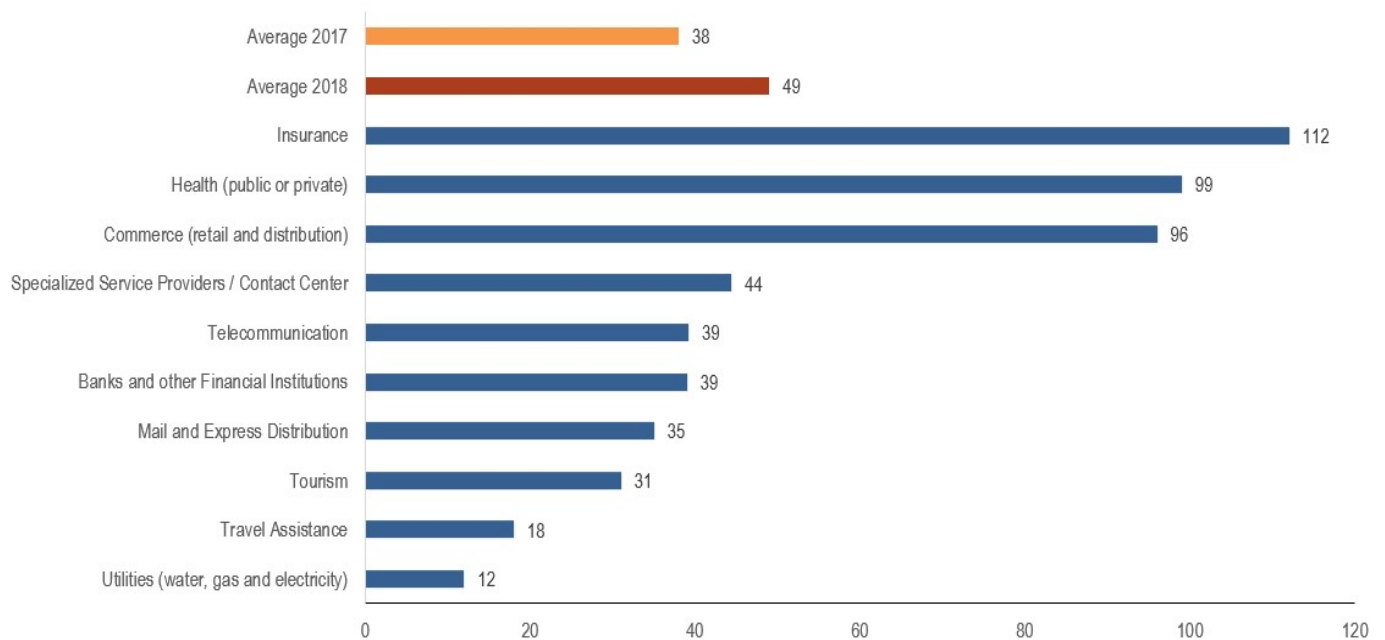
AVERAGE HANDLING TIME (MINUTES) (N = 136)



QUESTION: What is the average pause time (on hold)?

COMMENT: In the set of respondents it is shown that the shorter times of on hold time are in the Utilities Sectors (12 seconds), Travel Assistance (18 seconds) and Tourism (31 seconds). The sectors with higher values are Insurance (112 seconds), Health (99 seconds) and Commerce (96 seconds). Faced with 2017, it is apparent that the average on hold time in the respondent universe increased from 38 seconds to 49 seconds.

FIGURE 13
AVERAGE TIME “ON HOLD” (SECONDS) (N = 108)



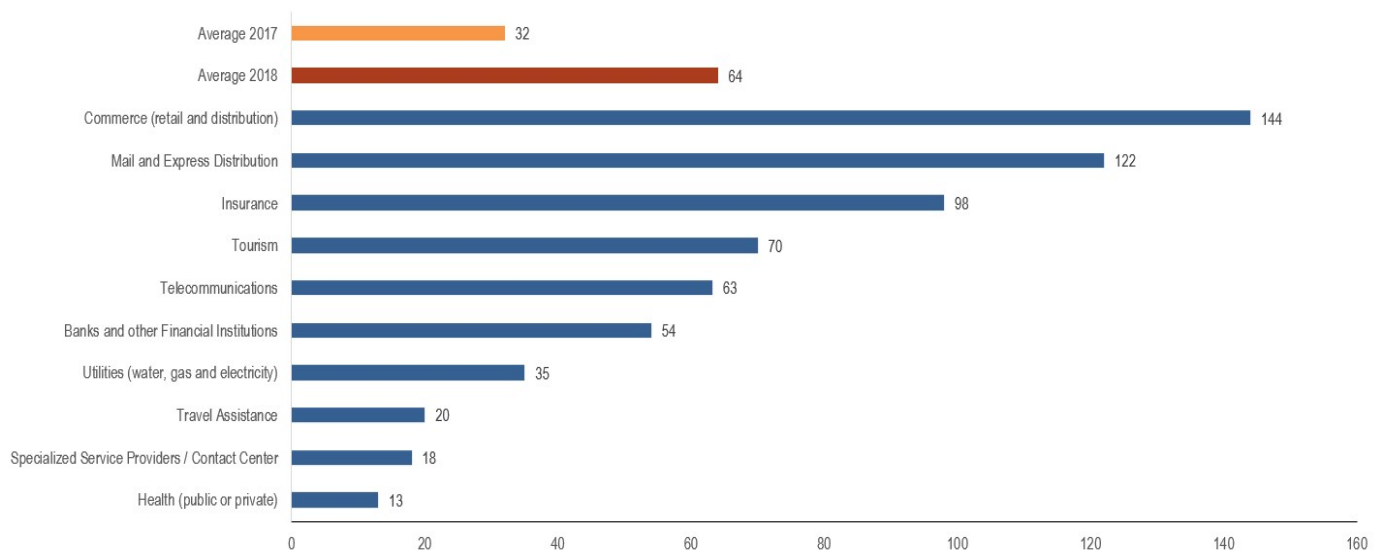
QUESTION: What is the average waiting time to be serviced by the Contact Center?

COMMENT: In 2018, the behavior of this variable has a strongly negative evolution, with an increase of 32 to 64 seconds in the average waiting time to be serviced by the Contact Center. The sectors that contributed most to this growth were Commerce (144 seconds), Mail and Express Eistribution (122 seconds) and Insurance (98 seconds). The lowest values are in Health (13 seconds), Specialized Service Providers (18 seconds) and Travel Assistance (20 seconds).

FIGURE 14

AVERAGE WAITING TIME TO BE ATTENDED BY THE CONTACT CENTER

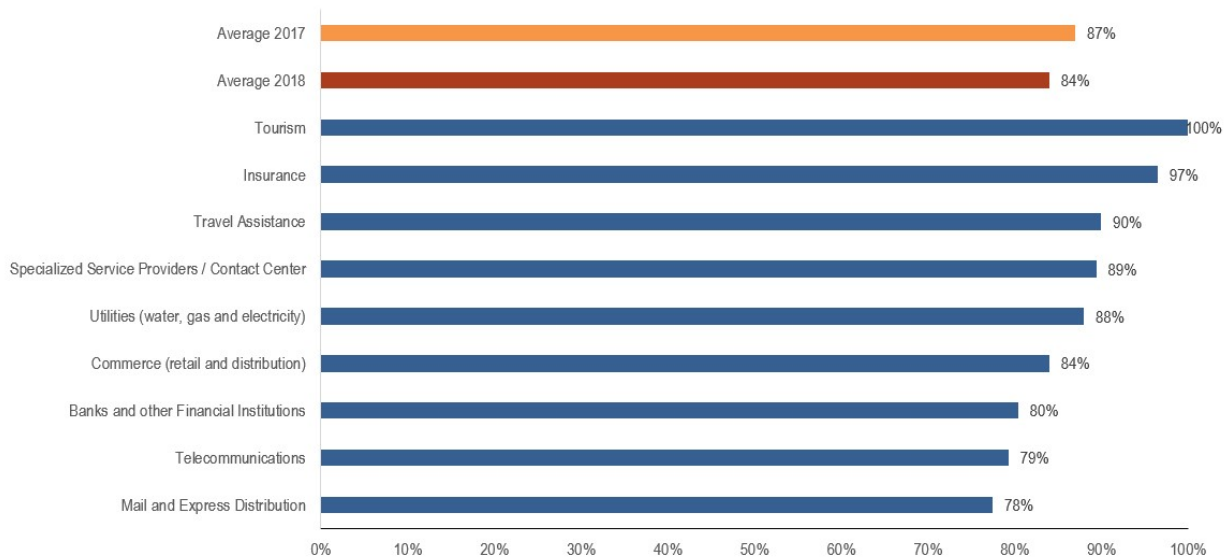
(seconds) (N = 135)



QUESTION: What is the resolution rate at the first contact?

COMMENT: Compared to 2017, the resolution rate at the first contact reverted from 87% to 84%. The sectors in which lower values were found were the Mail and Express Distribution (78%) Telecommunications (79%). The best performances in 2018 occurred in the Tourism sectors (100%) and Insurance (97%).

FIGURE 15
FIRST CONTACT RESOLUTION RATE (N = 97)



QUESTION: What is the average time to resolve requests, excluding complaints, per channel?

COMMENT: The average time of resolution of requests, excluding complaints, presented a positive evolution, having passed from 21.4 hours in 2017 to 19.8 hours in 2018. The sectors with the best performances were the Mail and Express Distribution (0.1 hours) and Tourism (0.2 hours). The sectors that presented higher values were the Utilities (81.6 hours) and the Banks and other Financial Institutions (49.3 hours). As for the channels used, the lowest values are in the Web chat and Video chat (0.2 days) and the highest values in Apps (2.8 days) and email (1.3 days).

FIGURE 16

AVERAGE REQUEST RESOLUTION TIME (HOURS) (N = 44)

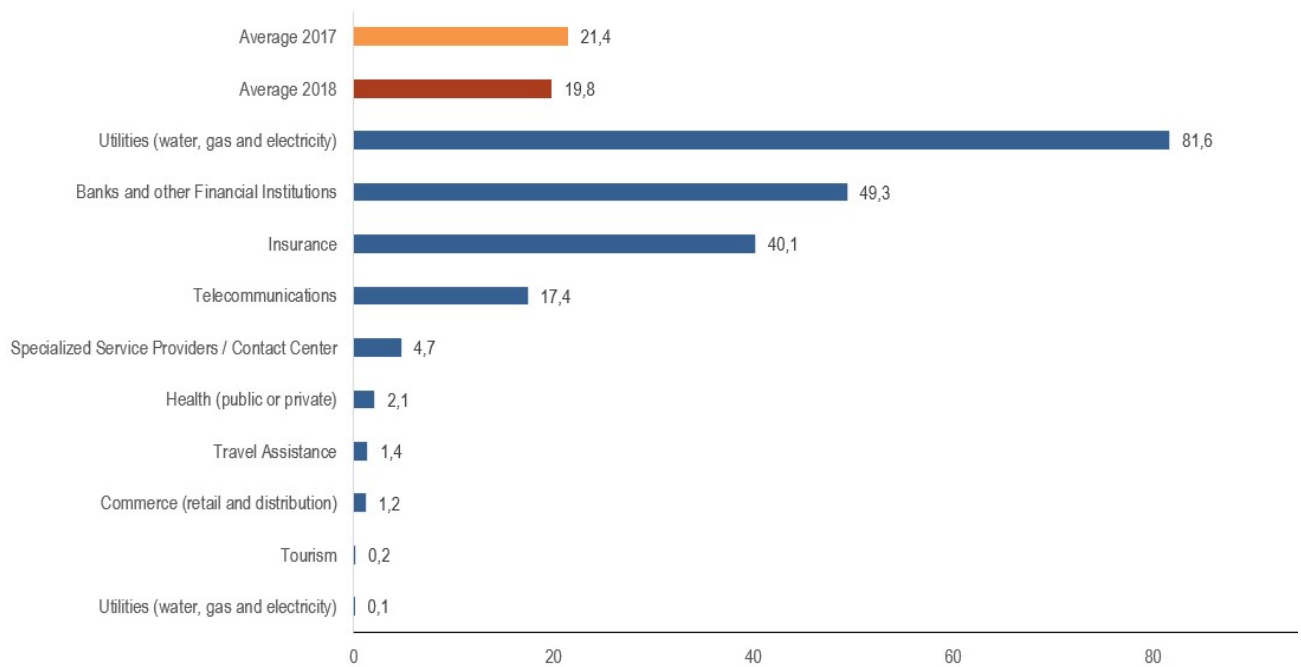
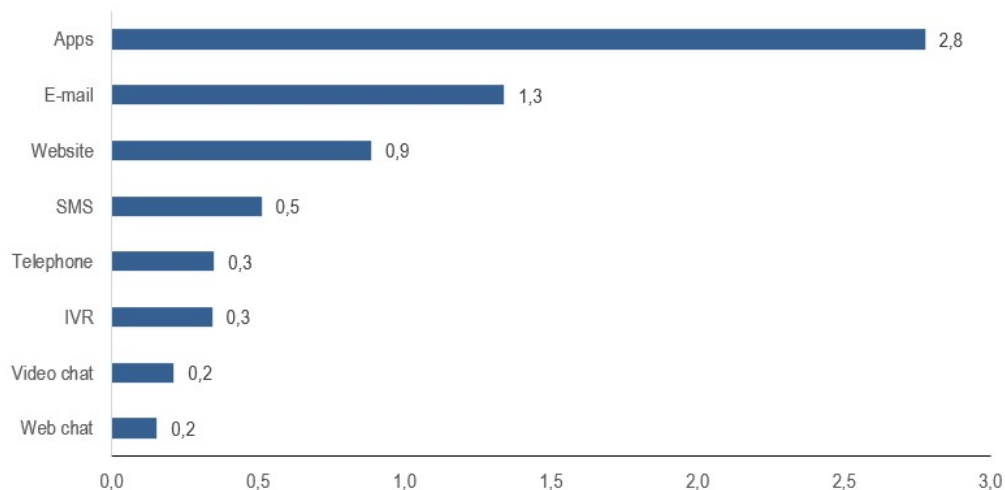


FIGURE 17

AVERAGE REQUEST RESOLUTION TIME, PER CHANNEL (DAYS) (N = 44)



QUESTION: What is the average time to resolve complaints, per channel?

COMMENT: The evolution of this indicator, from 2017 to 2018, was clearly favorable, with a reduction of 2 days to 1.4 days. The sector that contributed the most to this reduction was the Specialized Service Providers, with 0.2 days and the highest value occurred in the Utilities, with 4.1 days. The performance of the main channels (phone and email) is similar.

FIGURE 18
AVERAGE COMPLAINT RESOLUTION TIME (DAYS) (N = 41)

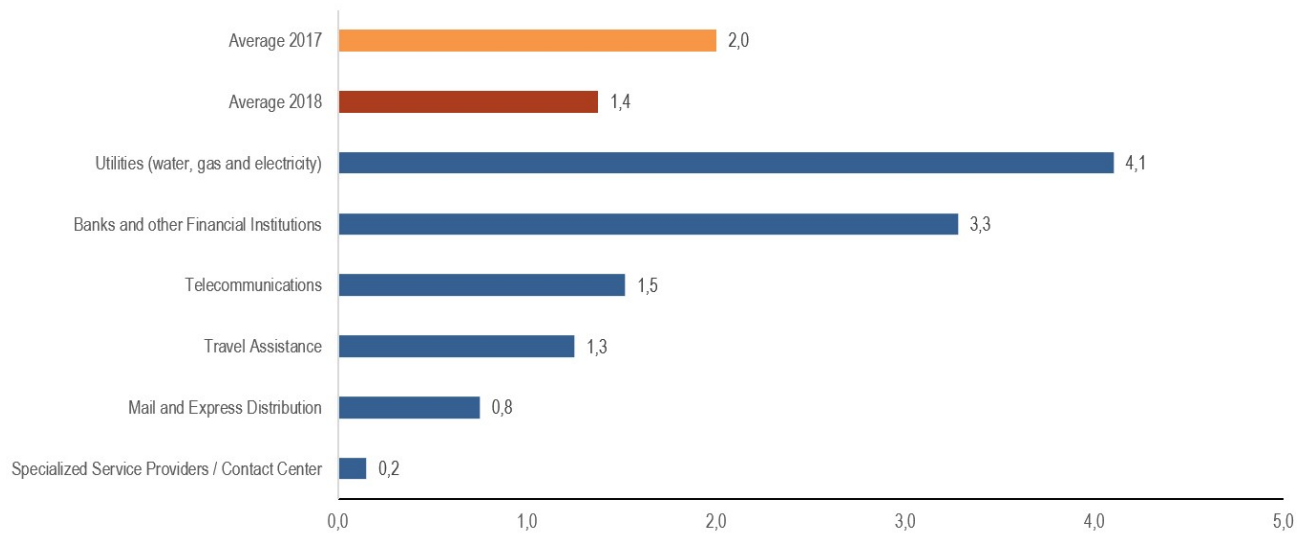
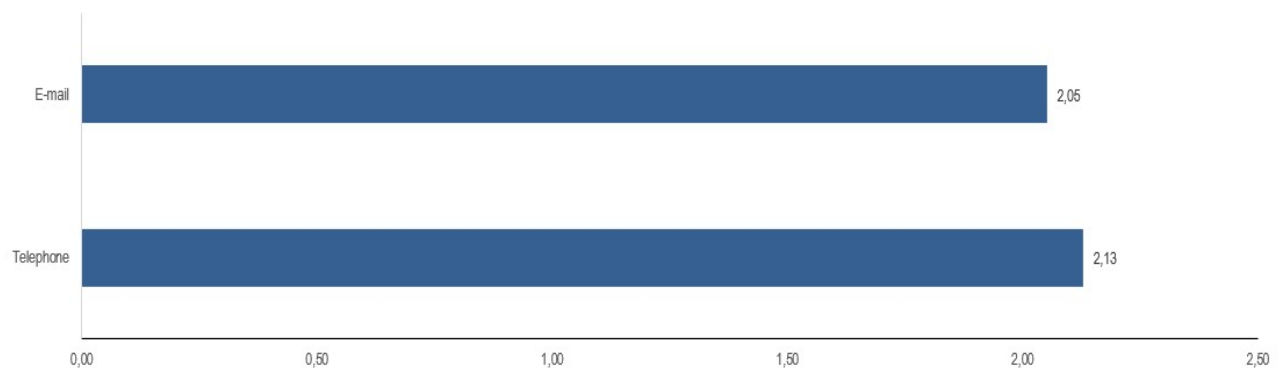


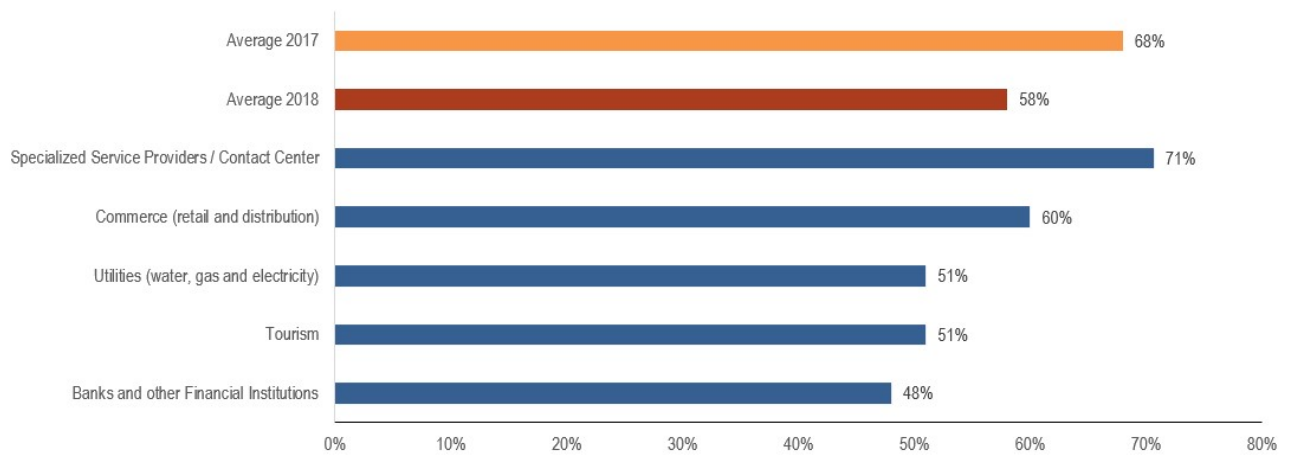
FIGURE 19
AVERAGE COMPLAINT RESOLUTION TIME, PER CHANNEL (DAYS) (N = 41)



QUESTION: What is the success rate of inbound retention calls?

COMMENT: The success of inbound retention calls was lower in 2018 (58%) than in 2017 (68%), but still a significant value. The best performance occurred among the Specialized Service Providers (71%) and the lowest value in Banks and other Financial Institutions (48%).

FIGURE 20
SUCCESS RATE OF INBOUND RETENTION CALLS (N = 10)

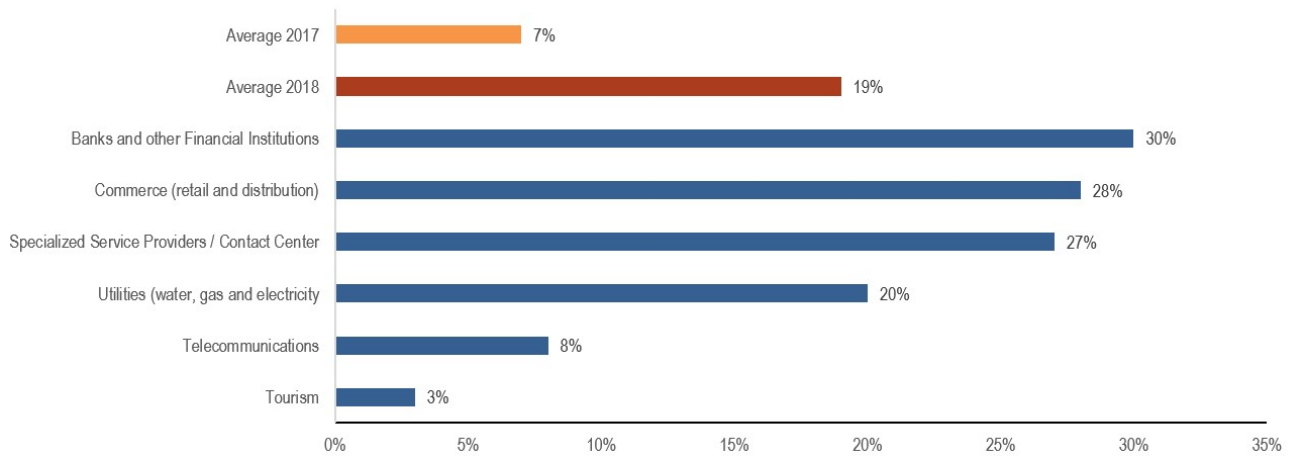


QUESTION: What is the percentage of successful "sales" in outbound calls?

COMMENT: Success in sales operations or similar in outbound calls increased greatly from 2017 (7%) to 2018 (19%). The sectors in which performance was most relevant were the Banks and other Financial Institutions (30%), Commerce (28%) and Specialized Service Providers (27%). The sectors with lower success rates were Telecommunications (8%) and Tourism (3%).

FIGURE 21

SUCCESS PERCENTAGEN OF "SALES" ON ONBOUND CALLS (N = 17)

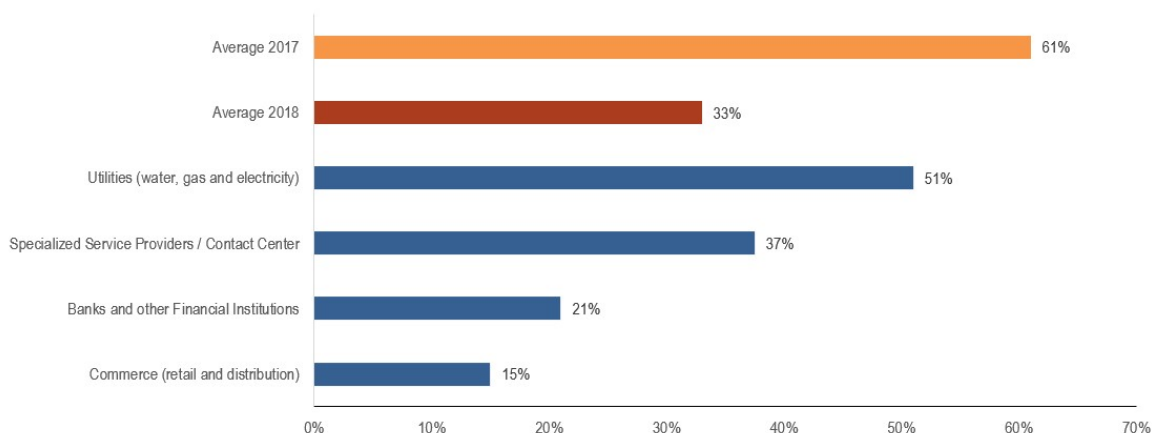


QUESTION: What is the success rate of outbound retention calls?

COMMENT: Success in outbound retention calls had a significant breakdown, from 61% to 33%, from 2017 to 2018. The most positive performance was verified in the Utilities sector (51%) and the least favorable in the Commerce sector (15%).

FIGURE 22

SUCCESS RATE OF ONBOUND RETENTION CALLS (N = 17)

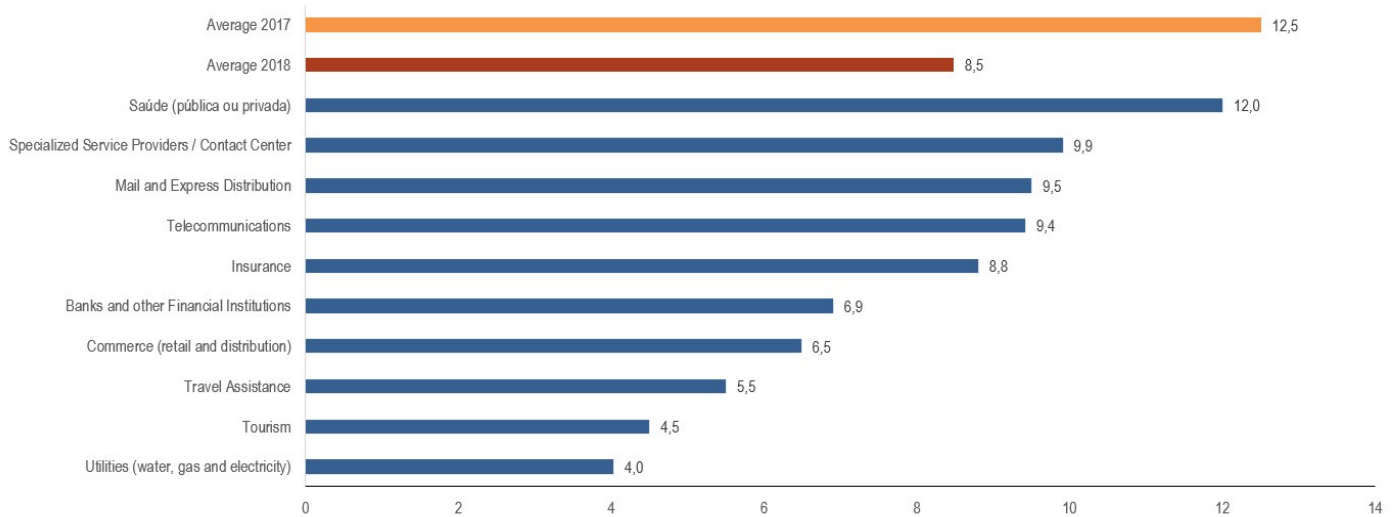


QUESTION: What is the average number of calls per hour attended by the operator?

COMMENT: The number of calls answered by the operator per hour had a significant reduction, from a value of 12.5 calls verified in 2017, registered 8.5 in 2018. The sectors with the higher number of calls attended per hour and operator were Health (12) and Specialized Service Providers (9.9) and the sectors with lower registers were Utilities (4.0) and Tourism (4.5).

FIGURE 23

AVERAGE NUMBER OF CALLS ATTENDED PER OPERATOR PER HOUR AND SECTOR OF ACTIVITY (N = 135)



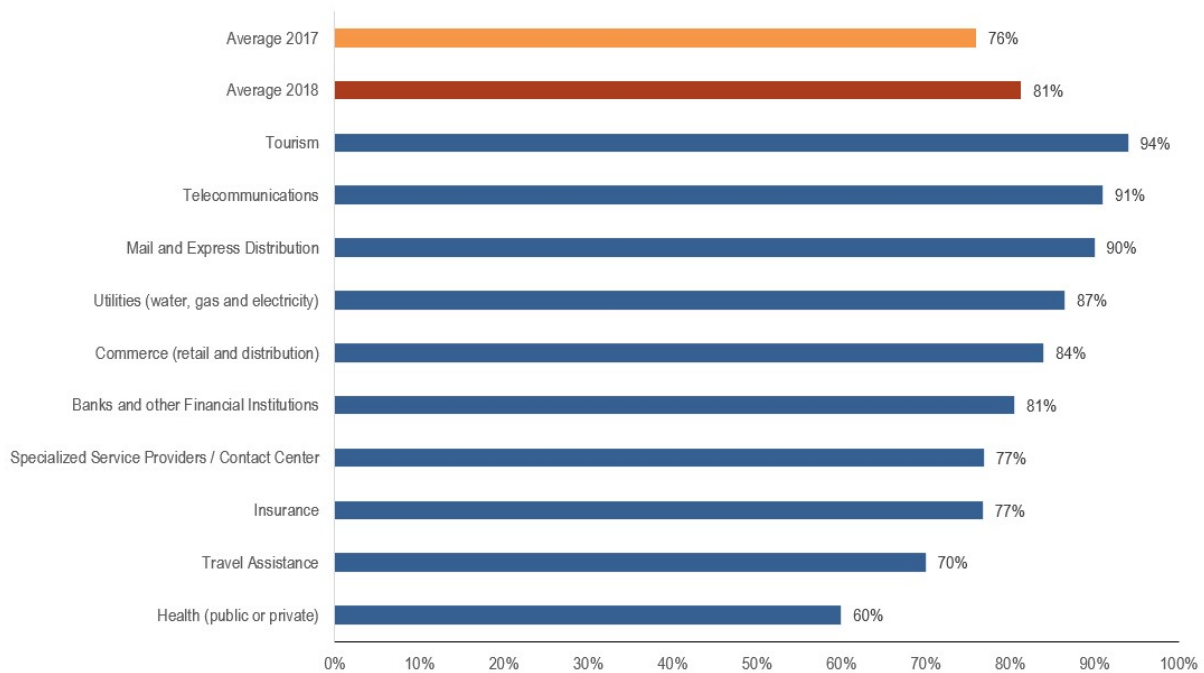
3. Human Resources

QUESTION: What is the average resources occupancy rate in 2018?

COMMENT: Regarding the previous year, the average resource occupancy rate ascended from 76% to 81%. The sectors with higher occupancy rates were Tourism (94%), Telecommunications (91%) and Mail and Express Distribution (90%). The lower occupancy rates occurred in Health (60%) and Travel Assistance (70%).

FIGURE 24

AVERAGE RESOURCES OCCUPANCY RATE (N = 115)



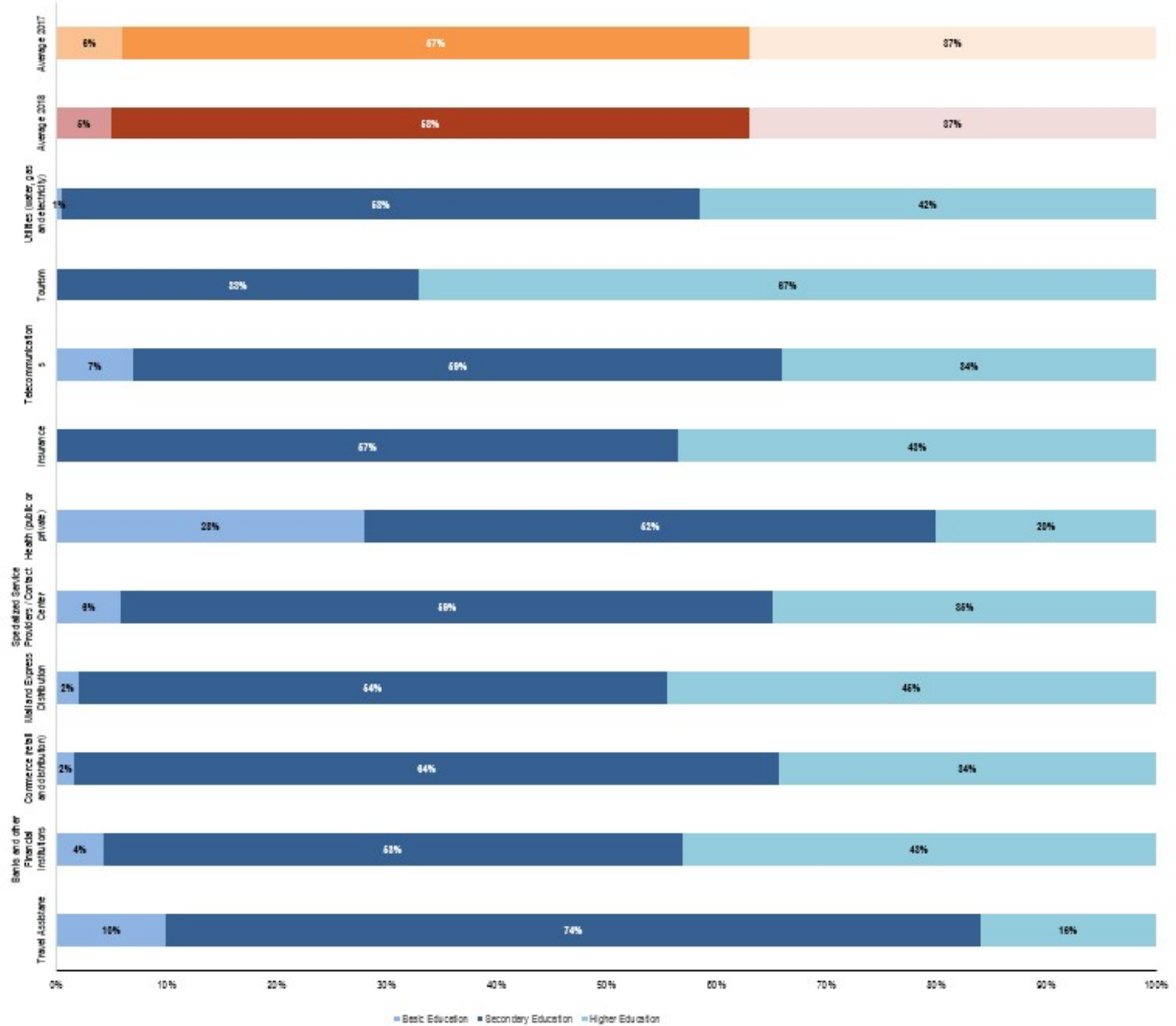
QUESTION: What is the distribution of employees by level of education?

COMMENT: As in 2017, the values of distribution of employees by degree of education remain almost unchanged, 37% with university degree, 58% with secondary level and only 5% with basic degree. It should be noted that the sectors in which we find the higher percentage of employees with higher education are Tourism (67%) and Mail and Express Distribution (45%). Travel Assistance records the lower percentage of employees with higher education (16%). The most prominent occurrences of employees with basic level are in Health (28%) and in Travel Assistance (10%), while Utilities have the lower incidence (1%).

FIGURE 25

DISTRIBUTION OF CONTACT CENTER EMPLOYEES BY LEVEL OF EDUCATION

(N = 142)

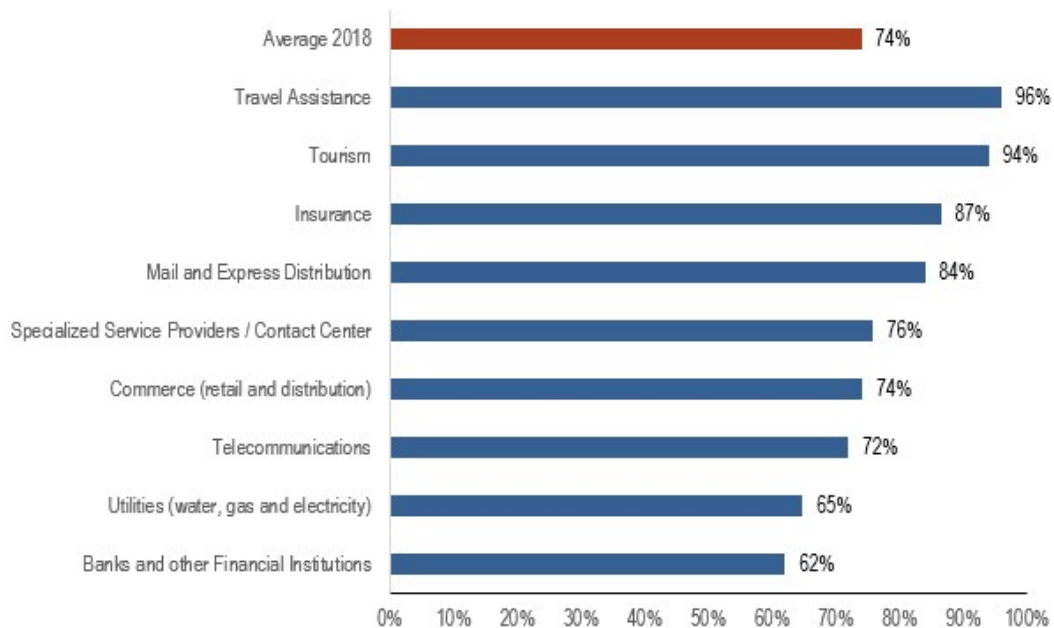


QUESTION: Are employee satisfaction surveys performed? If so, what rating is obtained on a scale of 0% to 100%, in the last year?

COMMENTS: 93% of the operations participating in the study indicated the fulfillment of employees' satisfaction surveys. The sectors in which we find higher levels of satisfaction are Travel Assistance (96%) and Tourism (94%), while the lower values occur in Banks and other Financial Institutions (62%) and Utilities (65%). It should be noted that there is no total correlation between the levels of employee satisfaction and their remuneration levels, by sector.

FIGURE 26

RATING ACHIEVED ON EMPLOYEES SATISFACTION SURVEYS (N = 133)



QUESTION: What is the frequency of the individual feedback actions?

COMMENT: Compared to the previous year, 2018 shows an increase in the percentage of daily feedback actions (from 36% to 47%). There is also the almost disappearance of the biweekly periodicity (from 29% to 3%), by counterpart of the monthly periodicity growth (from 3% to 26%).

FIGURE 27
**FREQUENCY OF INDIVIDUAL
FEEDBACK ACTIONS IN 2017**
(N = 89)

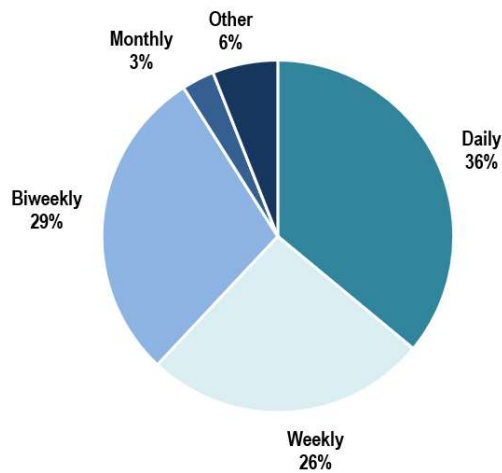
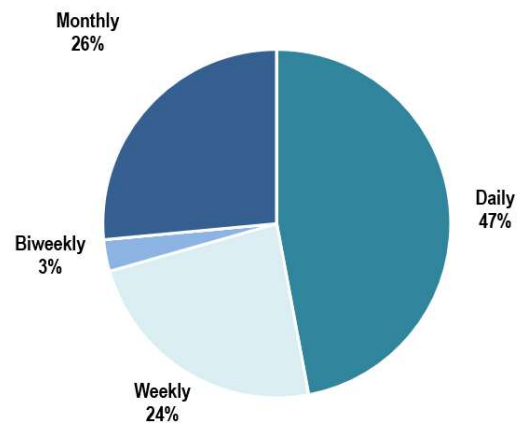


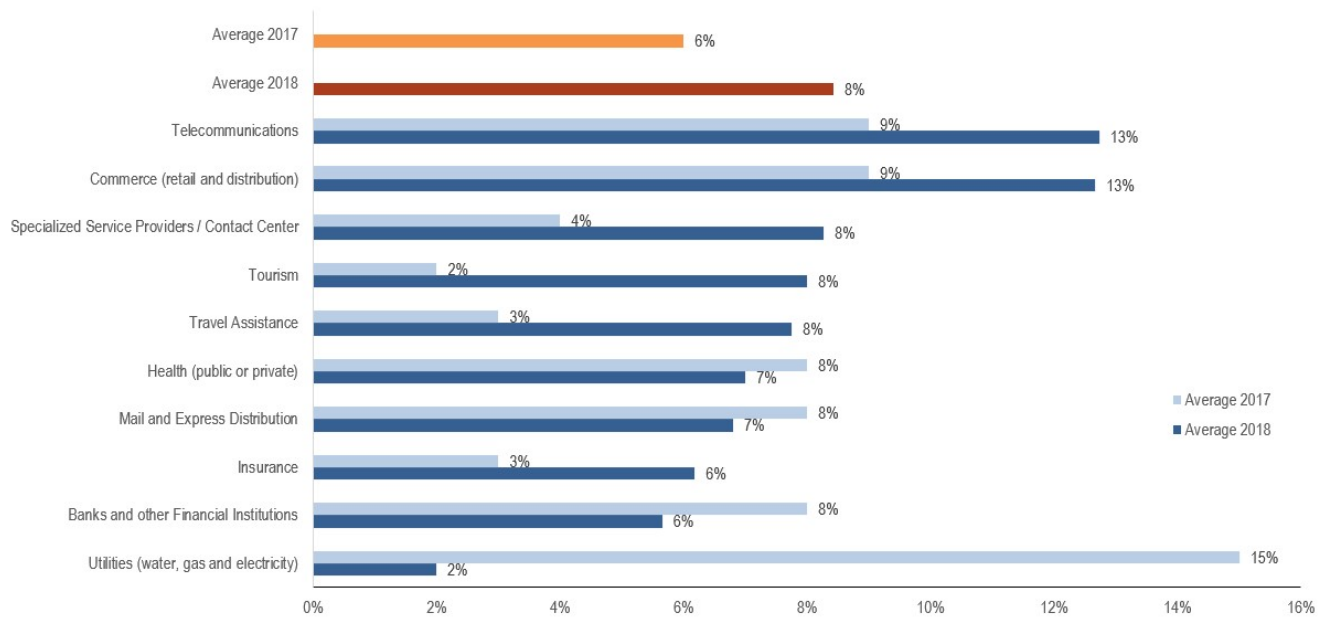
FIGURE 28
**FREQUENCY OF INDIVIDUAL
FEEDBACK ACTIONS IN 2018**
(N = 140)



QUESTION: What is the average absenteeism rate of Operators in 2018?

COMMENT: The average rate of absenteeism in the sector had a significant escalation, going from 6% (2017) to 8%. The sectors in which absenteeism is higher and which have significantly escalated the performance of 2017, were Telecommunications and Commerce, both with 13% absenteeism. The sector with the lower absenteeism was Utilities, with only 2%. It should be noted that the escalation was felt in several sectors, with this important indicator improving only in Health, Mail and Express Distribution, Banks and other Financial Institutions and Utilities.

FIGURE 29
OPERATORS AVERAGE ABSENTEEISM RATE (N = 143)

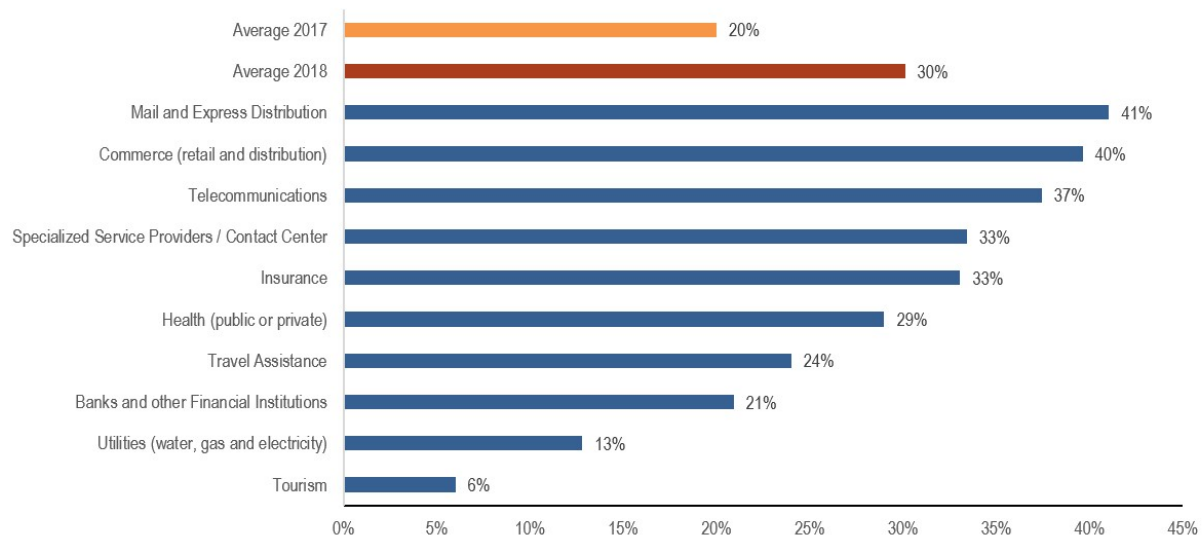


QUESTION: What is the Operators rotation rate in 2018?

COMMENT: In the year 2017 there was a relevant growth of the rotation rate of Operators, from 13% to 20%. In 2018 we see this indicator escalating even more, reaching 30%. The sectors with greater difficulties in this issue were Mail and Express Distribution, with 41% and Commerce, with 40%. The sectors with the lower values were Utilities (13%) and Tourism (6%).

FIGURE 30

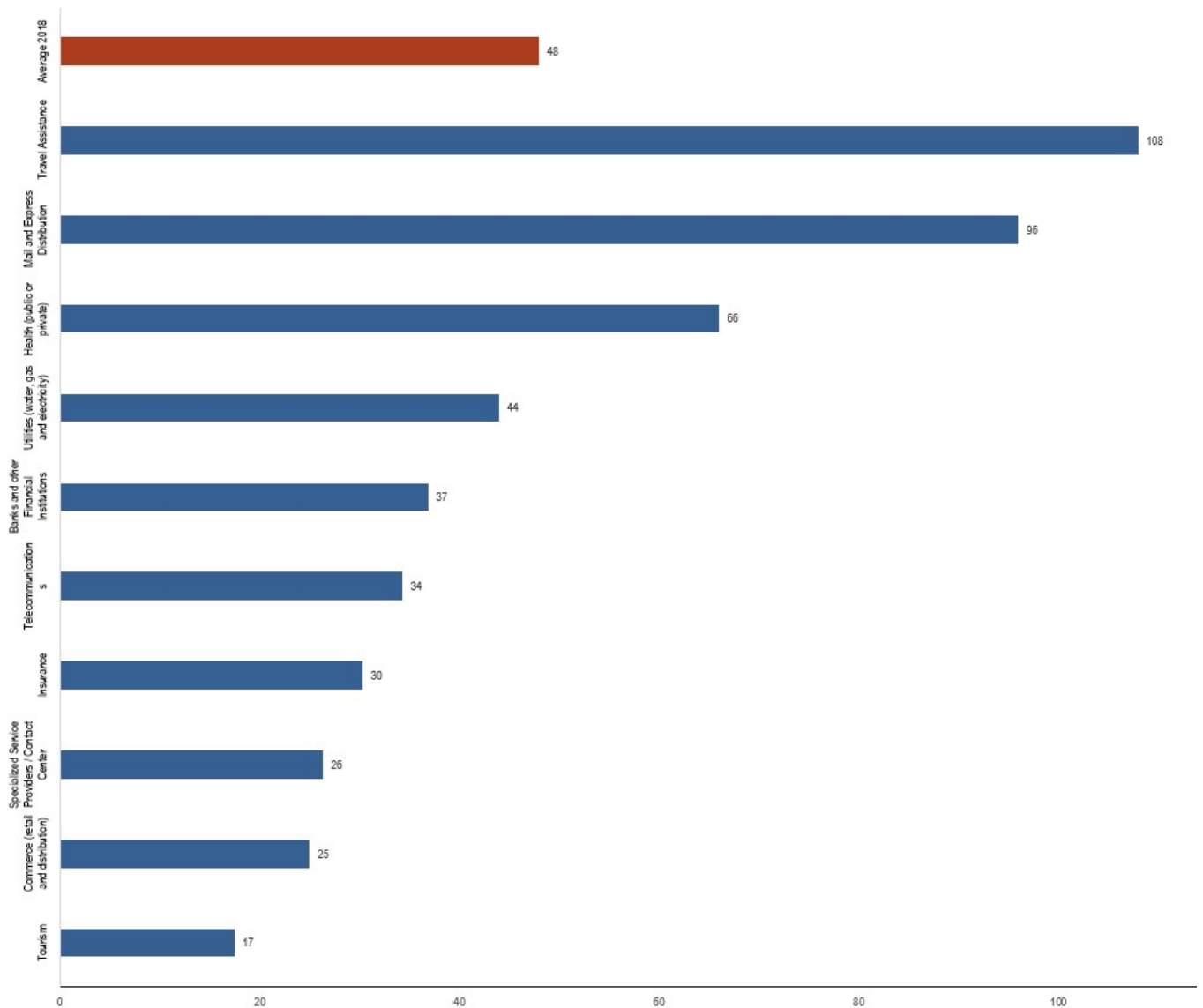
OPERATORS ROTATION RATE IN 2018 (N = 143)



QUESTION: What is the average seniority of Operators?

COMMENT: The average seniority was 4 years, varying between 9 years in Travel Assistance and 17 months in Tourism.

FIGURE 31
OPERATORS AVERAGE SENIORITY (MONTHS) (N = 143)

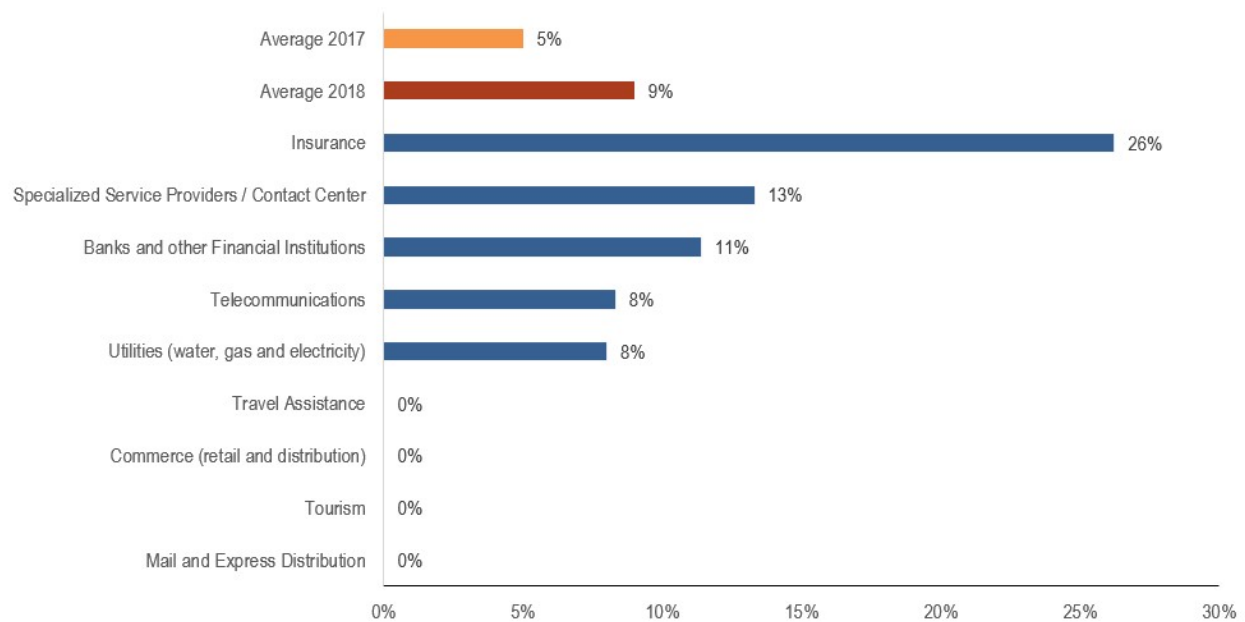


QUESTION: What is the Supervisors rotation rate in 2018?

COMMENT: As verified among the Operators, also with Supervisors there was an escalation of the rotation rate, from 2017 to 2018 (from 5% to 9%). The sector where this rotation was most felt was Insurance (26%), being noteworthy four sectors in which there was no rotation: Mail and Express Distribution, Tourism, Commerce and Travel Assistance.

FIGURE 32

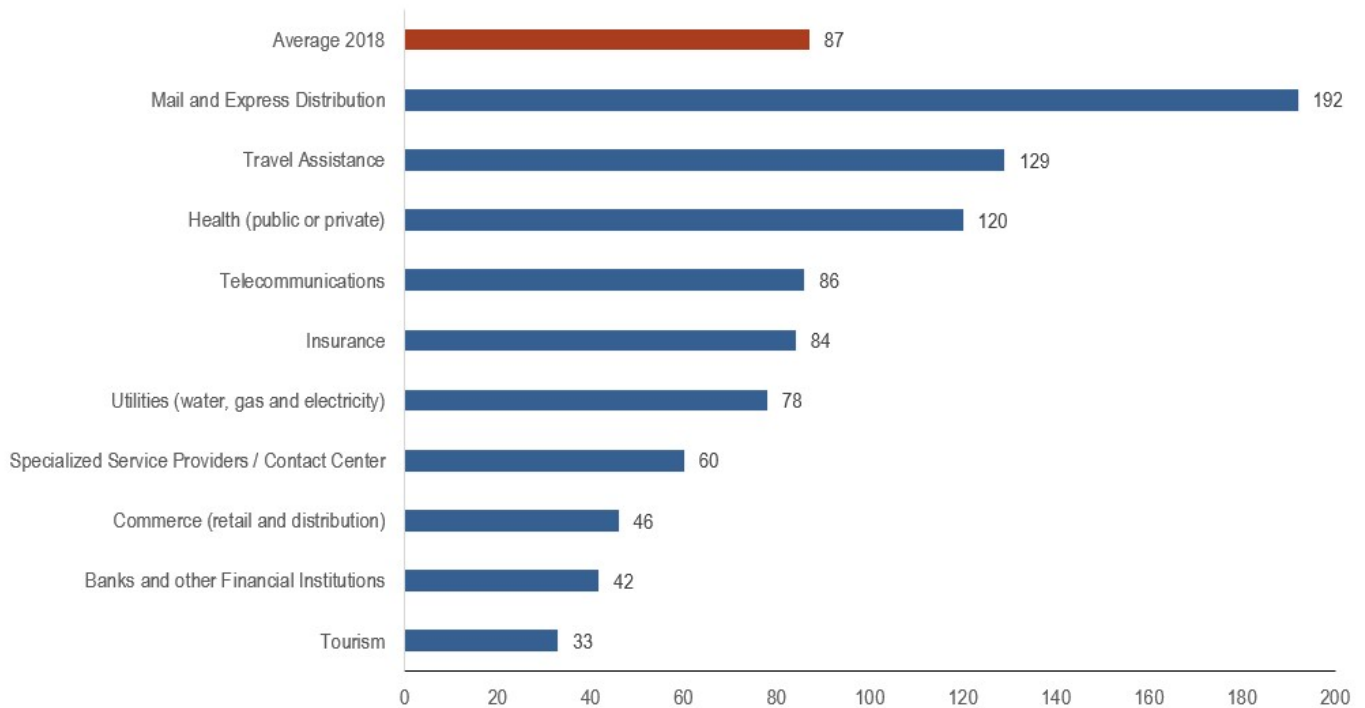
SUPERVISORS ROTATION RATE IN 2018 (N = 143)



QUESTION: What is the average seniority of Supervisors?

COMMENT: The verified data shows an average seniority of Supervisors over 7 years. The sectors in which this antiquity is greater are Mail and Express Distribution (16 years), Travel Assistance (10 years and 9 months) and Health (10 years). The sector with the lower seniority of Supervisors is Tourism (2 years and 9 months).

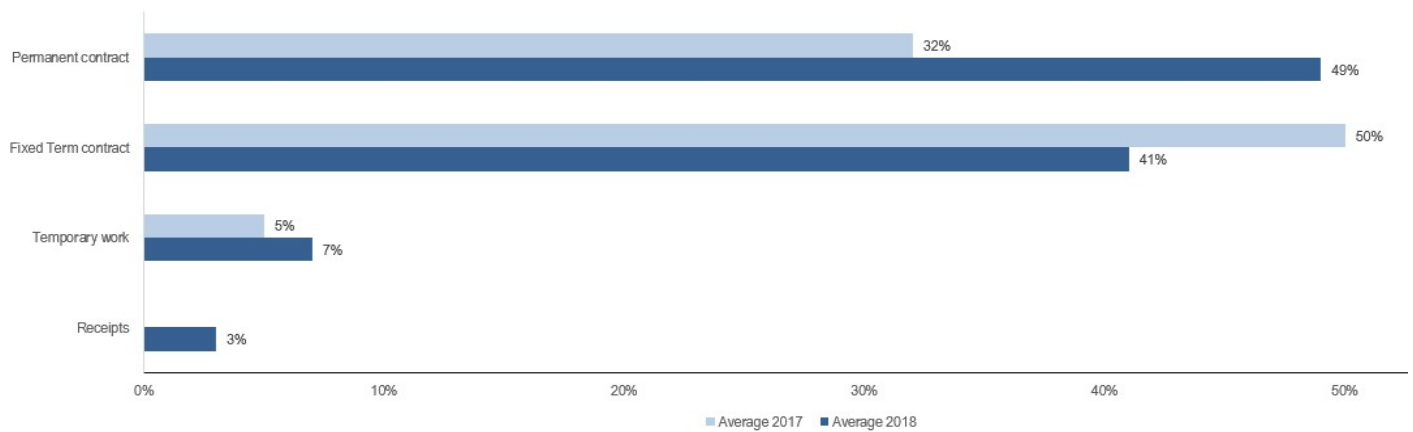
FIGURE 33
SUPERVISORS AVERAGE SENIORITY (MONTHS) (N = 143)



QUESTION: What is the distribution of employees by contractual bond?

COMMENT: A very important issue, because it is one of the most unfounded criticism that the sector is frequently targeted with in 2018 there was a significant change in the existing framework of the previous year. The percentage of employees with an effective link went from 32% to 49%, and now is 41% the incidence of term contracts. The use of temporary work or green receipts is at 7% and 3% respectively.

FIGURE 34
DISTRIBUTION OF CONTACT CENTER EMPLOYEES BY CONTRACTUAL BOND
(N = 137)

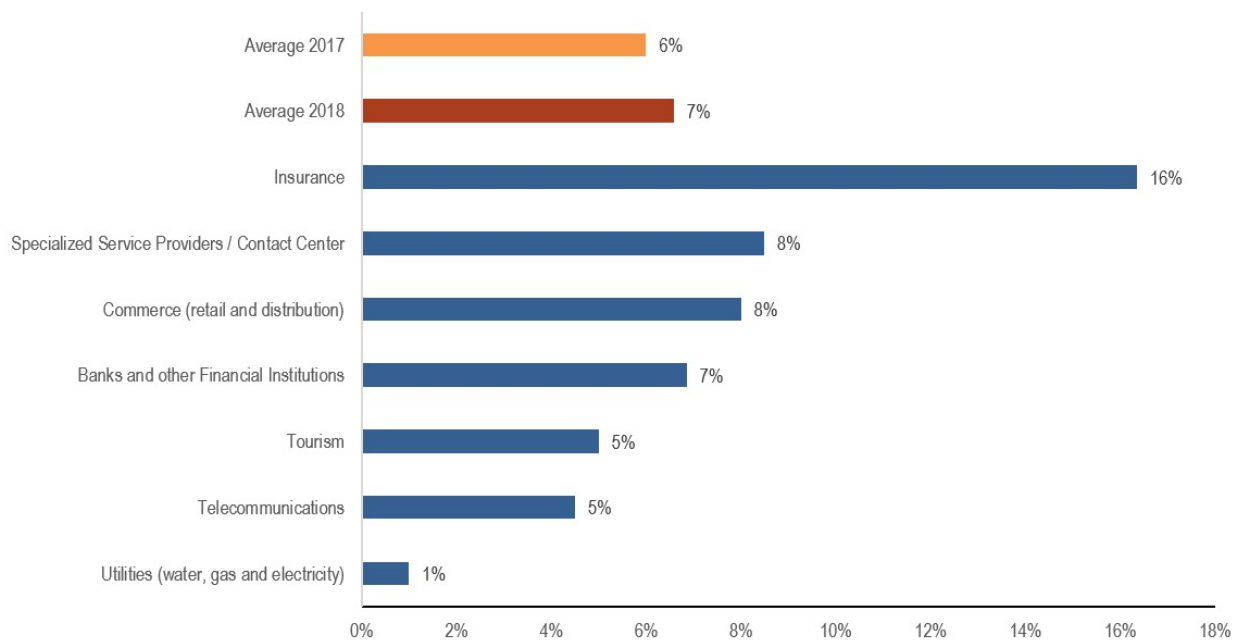


QUESTION: What percentage of Contact Center employees have access to other roles/functions within the Organization?

COMMENT: This indicator had a slight growth in 2018 compared to the previous year, from 6% to 7%. The sector in which access to other areas of the companies is most frequent is Insurance (16%), Utilities being the sector in which it less occurs (1%).

FIGURE 35

PERCENTAGE OF CONTACT CENTER EMPLOYEES ACCESSING OTHER FUNCTIONS WITHIN THE ORGANIZATION (N = 42)

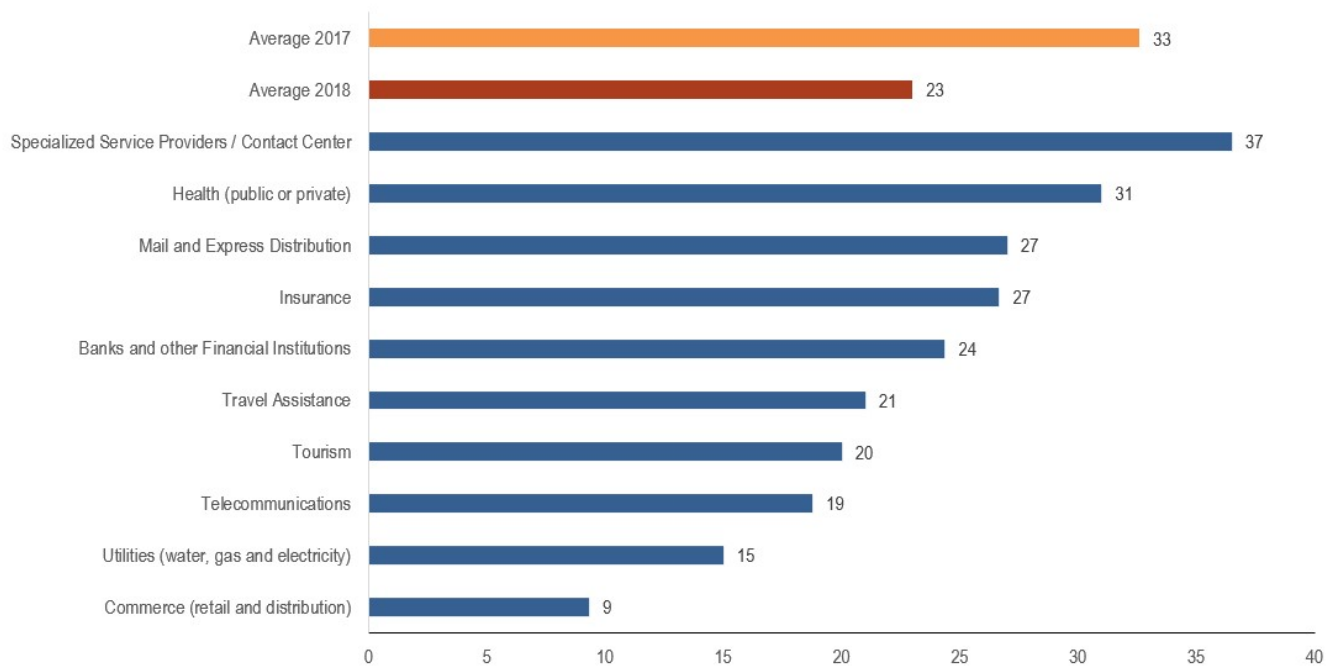


QUESTION: What is the average time required to train an employee who has just entered the Contact Center?

COMMENT: The duration of the initial training is one of the factors that guarantee the quality of the service provided. From the previous year, the average duration declined very significantly from 33 to 23 days. The large increase in the number of responses obtained in 2018, should be taken into consideration because it does not allow a literal comparison between the two values. Nevertheless, it is not a positive data. Register that the sectors of Specialized Service Providers (37 days) and Health (31 days) remain at the level compatible with the values of 2017. On the other hand, Commerce (9 days), Utilities (15 days) and Telecommunications (19 days) have the lower values.

FIGURE 36

AVERAGE TIME REQUIRED TO TRAIN AN EMPLOYEE WHO HAS JUST ENTERED THE CONTACT CENTER (DAYS) (N = 84)

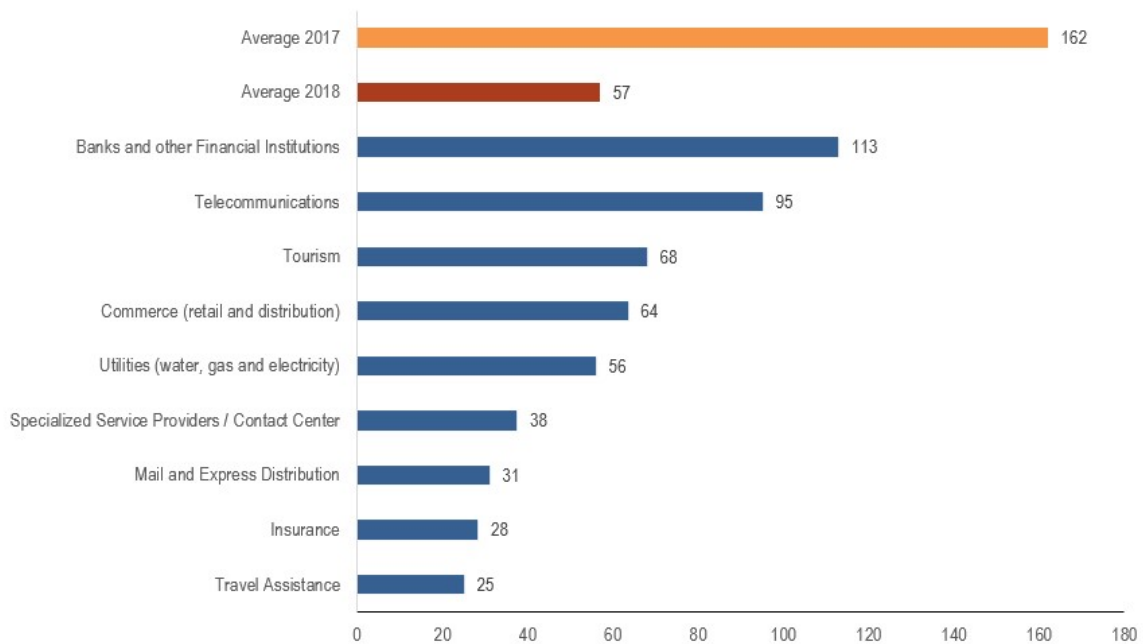


QUESTION: What is the number of annual training hours, including recycling, per Operator?

COMMENT: As is the case with the initial training, in this item we can also conclude that there is a large reduction in the volume of training given to Operators throughout the year in various ways. In 2018 the calculated value is 57 hours. Not failing as an important value, it's very short of the 162 hours established in 2017. The sector with the larger number of hours of training was Banks and other Financial Institutions (113 hours) and the one where they occurred in smallest number was Travel Assistance (25 hours).

FIGURE 37

HOURS OF ANNUAL TRAINING PER OPERATOR (N = 119)

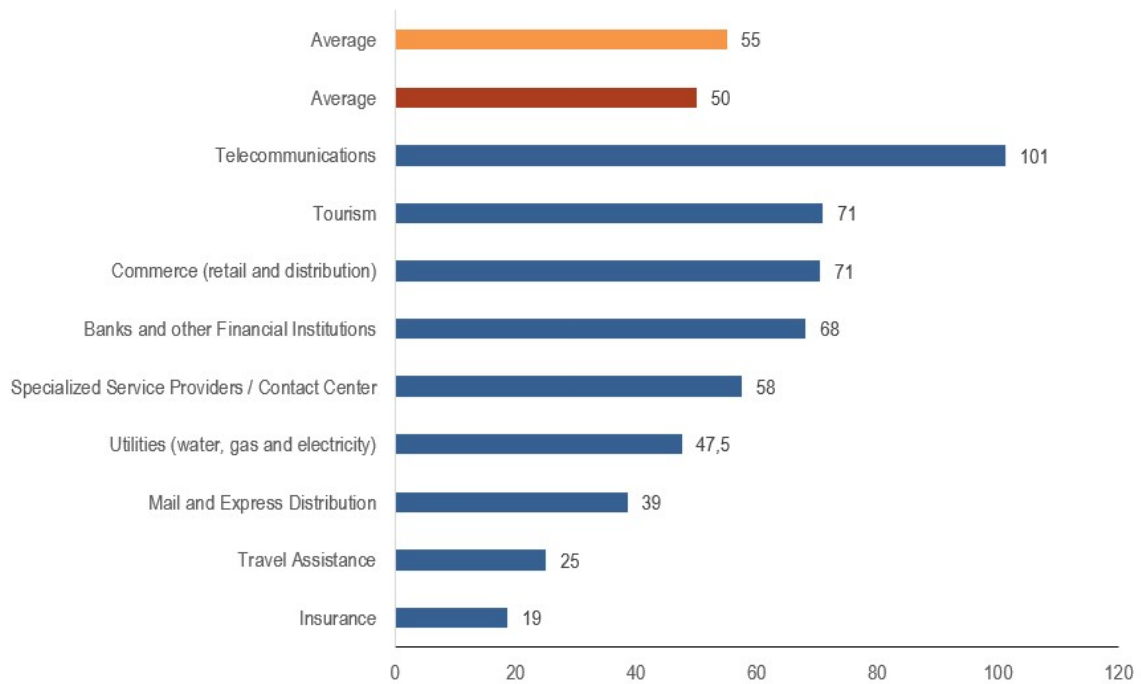


QUESTION: What is the number of annual training hours, including recycling, per Supervisor?

COMMENT: Although in the case of Supervisors there is a reduction in the volume of training given, this reduction has a much lower expression (from 55 hours in 2017 to 50 in 2018). The sector in which there is a higher volume of training of supervisors is Telecommunications, with 101 hours, and the lowest volume is Insurance, with 19 hours.

FIGURE 37

HOURS OF ANNUAL TRAINING PER SUPERVISOR (N = 115)

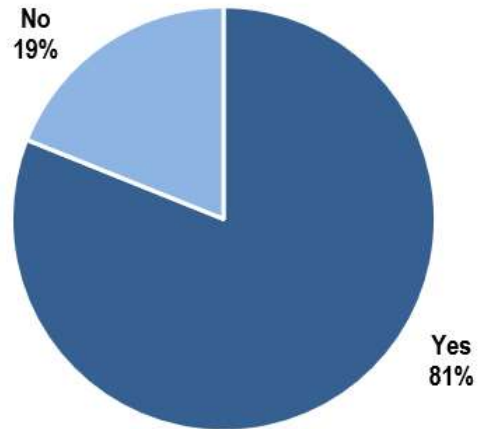


QUESTION: Is there a plan, training program or a specific accreditation for Supervisors?

COMMENT: The percentage of affirmative responses was 81%, which compares negatively with the 99% verified in 2017.

FIGURE 39

PLAN/TRAINING PROGRAM/SPECIFIC ACCREDITATION FOR SUPERVISORS (N = 120)

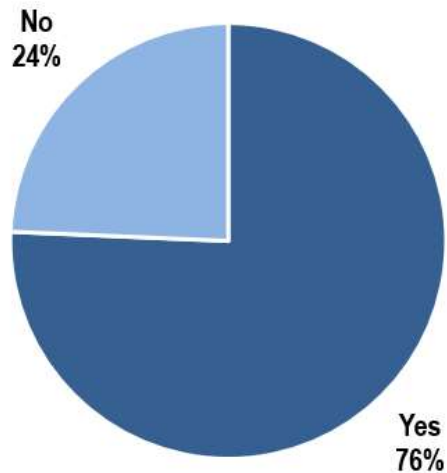


QUESTION: Is there a plan, training program or a specific accreditation for Trainers?

COMMENT: The calculated value was 76%, much lower than the 99% indicated in 2017.

FIGURE 40

PLAN/TRAINING PROGRAM/SPECIFIC ACCREDITATION FOR TRAINERS (N = 120)



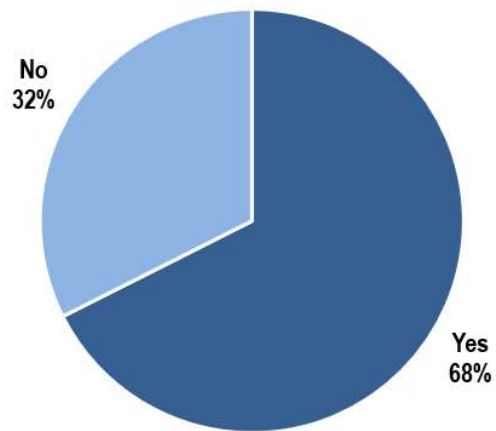
QUESTION: Is there a plan, training program or a specific accreditation for Quality Experts?

COMMENT: Regarding 96% of positive responses recorded in 2017, the value found in 2018 was only 68%.

FIGURE 41

PLAN/TRAINING PROGRAM/SPECIFIC ACCREDITATION FOR QUALITY EXPERTS

(N = 120)

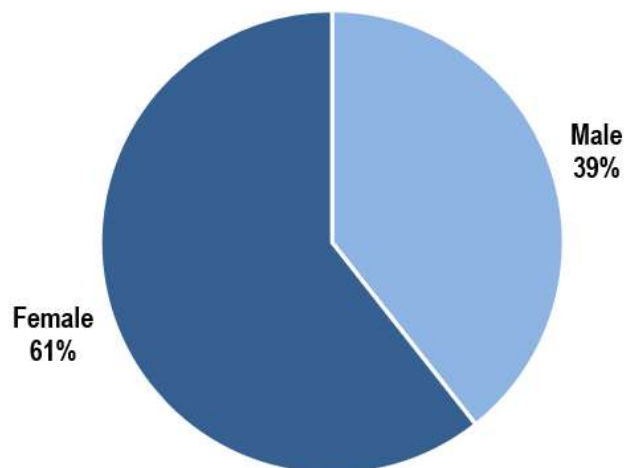


QUESTION: What is the Operator distribution by gender?

COMMENT: The distribution of Operators by gender is 61% female and 39% male, less balanced than the distribution of the Portuguese population (52.7%/ 47.3%, respectively).

FIGURE 42

OPERATOR DISTRIBUTION BY GENDER (N = 143)

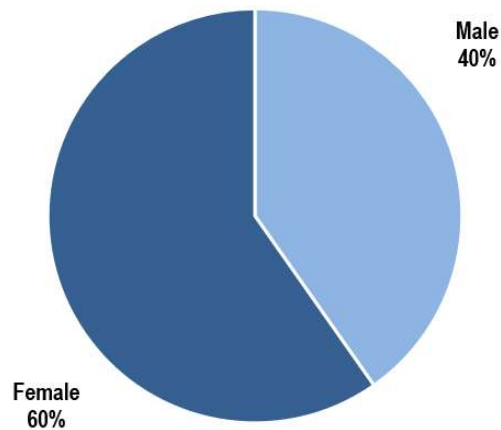


QUESTION: What is the Supervisor distribution by gender?

COMMENT: The distribution of Supervisors by gender is 60% female and 40% male, almost identical to the distribution of Operators, which allows to assume the non-existence of gender discrimination in access to the Supervisory function, as well as no discrimination in the remuneration plan.

FIGURE 43

SUPERVISORS DISTRIBUTION BY GENDER (N = 143)

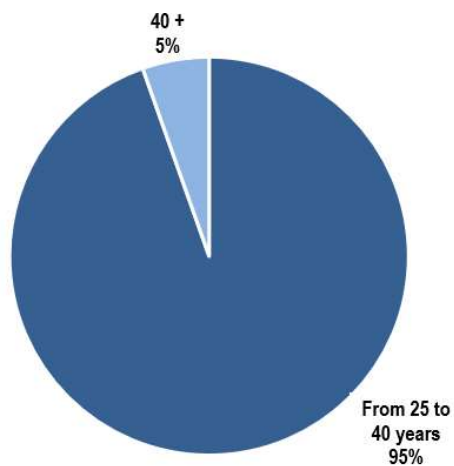


QUESTION: What are the Operators average age?

COMMENT: In 95% of the respondent companies, the average age of the Operators is in the range of 25 to 40 years and 5% of the companies indicated an average age of the Operators equal or higher than 40 years.

FIGURE 44

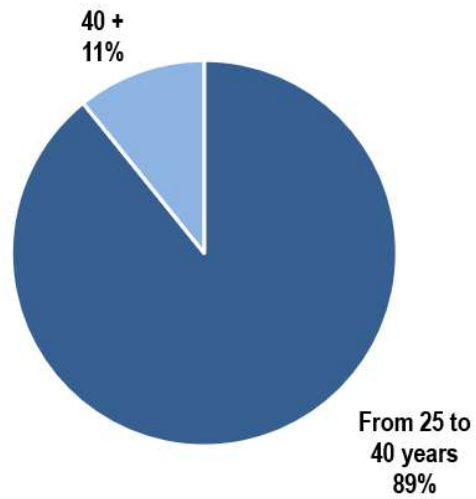
OPERATORS AVERAGE AGE (N = 142)



QUESTION: What are the Supervisors average age?

COMMENT: In 89% of the respondent companies, the average age of Supervisors is in the range of 25 to 40 years and 11% of the companies indicated an average age of Supervisors equal or higher than 40 years.

FIGURE 45
SUPERVISORS AVERAGE AGE (N = 142)



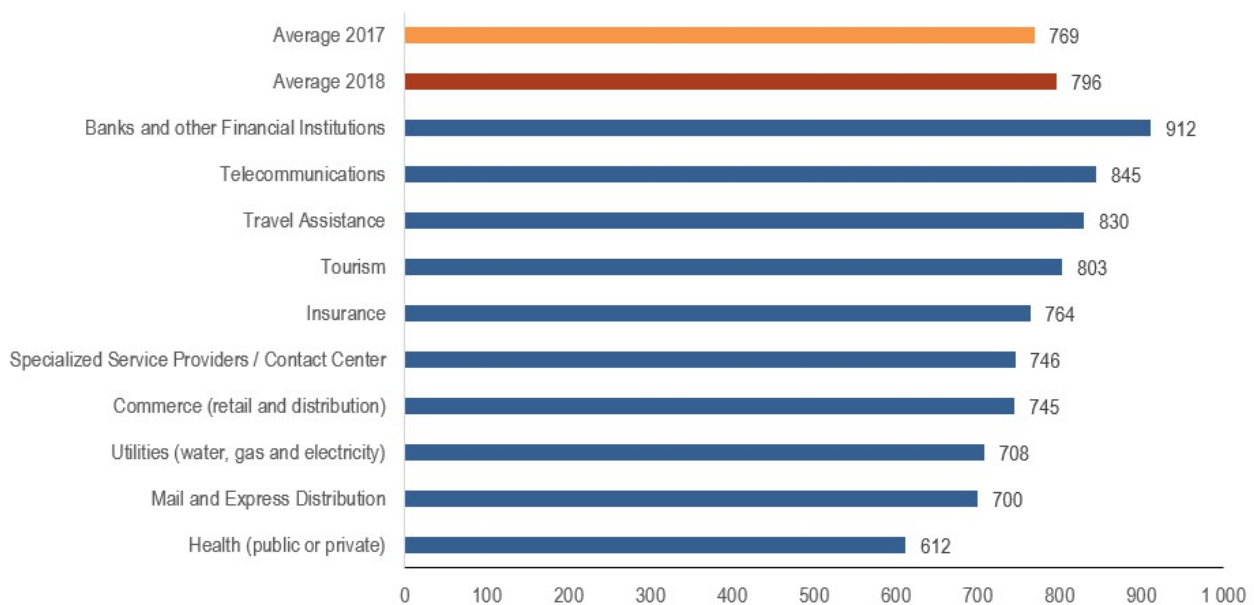
4. Policies and Benefits

QUESTION: What is the Operators average monthly gross salary?

COMMENT: In 2018 the average value of the remuneration of the operators increased 3.5%, compared to 2017, from €769 to €796. The sectors in which the higher average remunerations were found were Banks and other Financial Services (€912), Telecommunications (€845) and Travel Assistance (€830). On the other hand, the lower average amounts occurred in Health (€612), Mail and Express Distribution (€700) and Utilities (€708). These average values only consider basic remuneration and not variable components.

FIGURE 46

OPERATORS AVERAGE MONTHLY GROSS SALARY (EUROS) (N = 56)

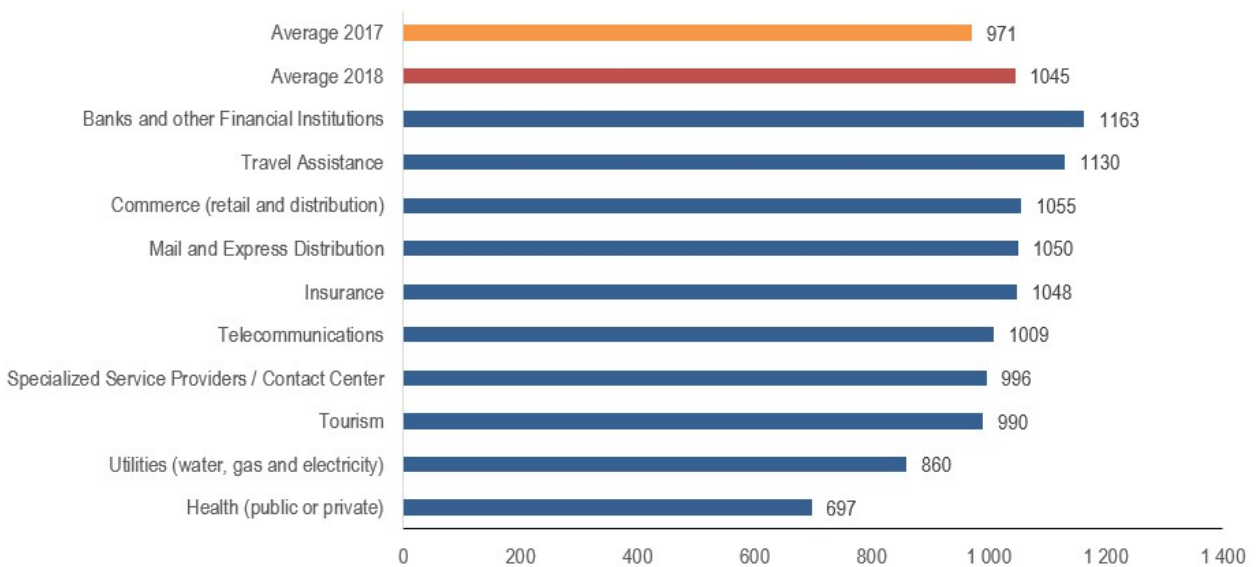


QUESTION: What is Supervisors average monthly gross salary?

COMMENT: As observed in the case of remuneration of the Operators, also in the case of Supervisors there was an increase in the average monthly remuneration from 2017 to 2018, (€971 to €1,045, increase of 7.7%). The sectors with the higher averages are Banks and other Financial Institutions (€1,163), Travel Assistance (€1,130) and Commerce (€1,055). The lower average amounts occur in Health (€697), Utilities (€860) and Tourism (€990).

FIGURE 47

SUPERVISORS AVERAGE MONTHLY GROSS SALARY (EUROS) (N = 56)

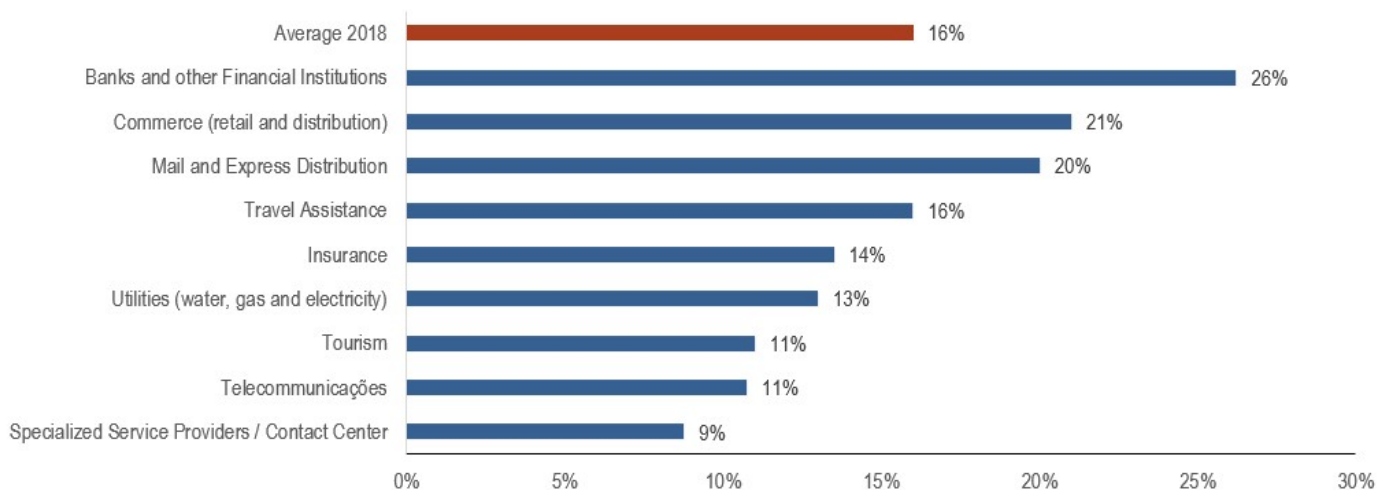


QUESTION: What is the ratio of other remunerations to the monthly gross salary of Operator?

COMMENT: The average ratio between the supplementary remuneration of the Operators and their average base salaries is 16%. The sectors in which this ratio is higher are Banks and other Financial Institutions (26%), Commerce (21%) and Mail and Express Distribution (20%). It should be noted that Banks and other Financial Institutions are also the sector with the highest remunerations. On the other hand, the sectors with the lower ratios are the Specialized Service Providers (9%), Telecommunications and Tourism (both sectors with 11%).

FIGURE 48

RATIO BETWEEN OTHER REMUNERATIONS TO THE AVERAGE MONTHLY GROSS SALARY OF OPERATORS (N = 54)

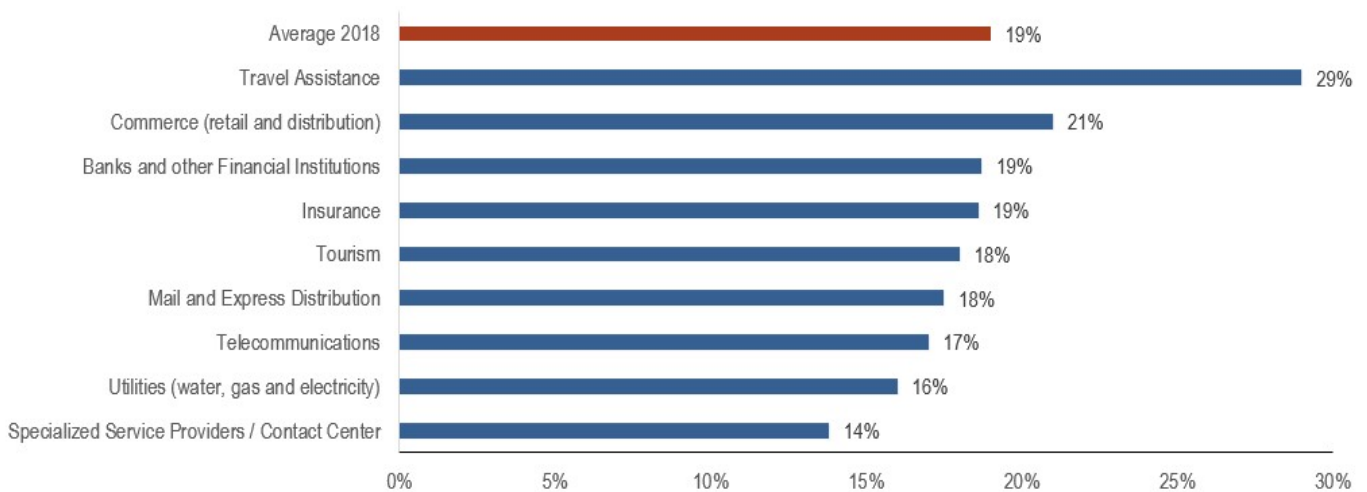


QUESTION: What is the ratio of other remunerations to the monthly gross salary of Supervisors?

COMMENT: Similarly, to what is verified with the previous indicator, for Operators, Supervisors also earn remuneration beyond the base, representing on average 19%. The sectors where ratios are higher are Travel Assistance (29%) and Commerce (21%) and the sectors with lower ratios are Specialized Service Providers (14%) and Utilities (16%).

FIGURE 49

RATIO BETWEEN OTHER REMUNERATIONS TO THE AVERAGE MONTHLY GROSS SALARY OF SUPERVISORS (N = 53)

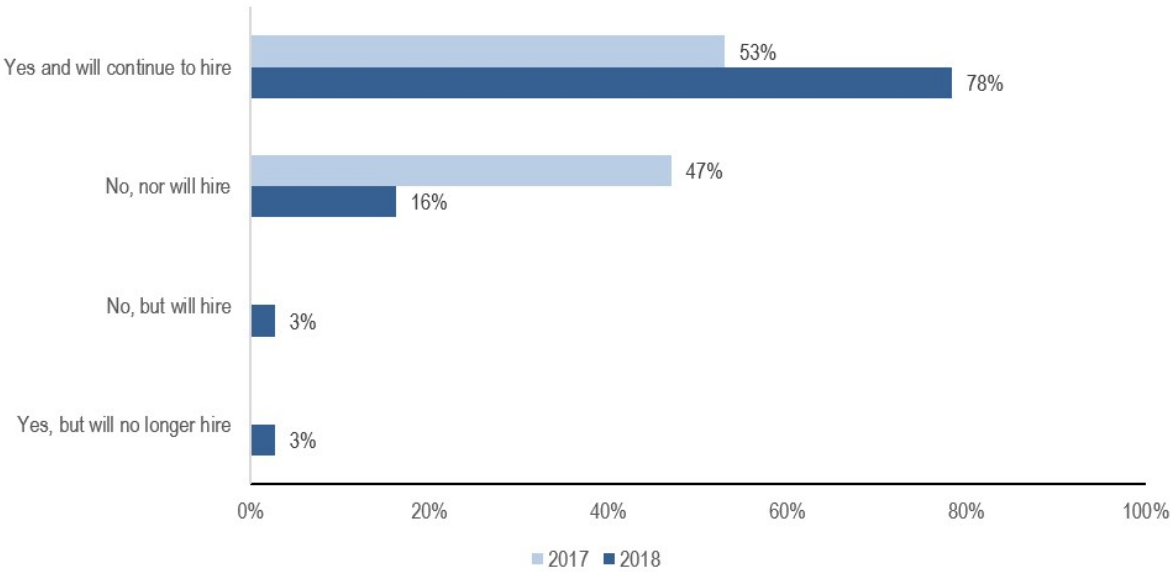


5. Resort to Outsourcing

QUESTION: Does the company hire Outsourcing Services for Contact Center functions?

COMMENT: The results found in this issue allow us to conclude that it has clearly increased the use of Outsourcing services, which covers, in 2018, 78% of respondents, when in 2017 they were 53%. Only 16% said they did not resort or intend to turn to this model of contracting services in the future. It should be noted that there is a minimum percentage of 3% either of companies that do not use but think they will hire, and companies that hire but think to stop hiring, which reveals a stable perspective on the companies' options.

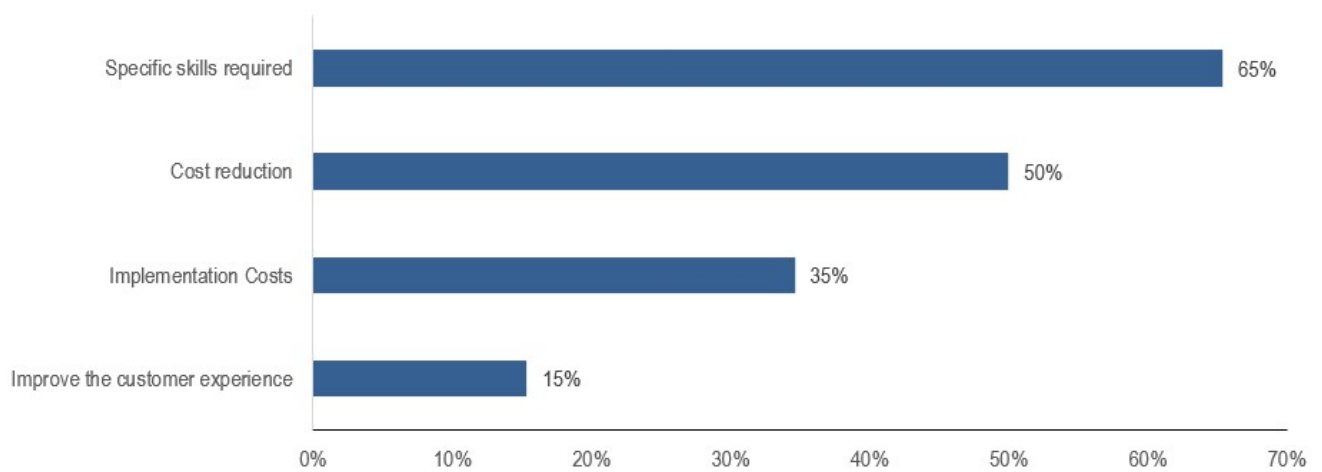
FIGURE 50
OUTSOURCING SERVICES HIRING (N = 141)



QUESTION: What are the reasons for hiring Outsourcing Services for Contact Center functions?

COMMENT: It is particularly significant that the most relied on reason to support the decision to hire Outsourcing services is the demand of specific skills (65%).

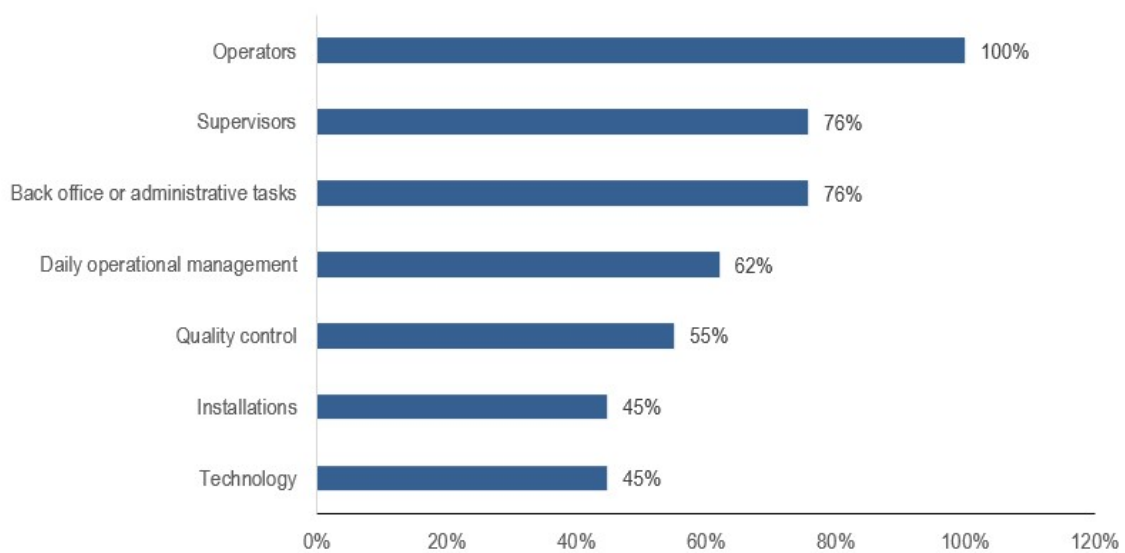
FIGURE 51
REASONS TO HIRE OUTSOURCING SERVICES (N = 47)



QUESTION: What services are contracted in an Outsourcing model?

COMMENT: Respondents who hire Outsourcing services identified the top three: Operators (100% of cases), Supervisors (76%) and Back-office (76%). With the smaller number of references arises Technology and Facilities (in both cases with 45%).

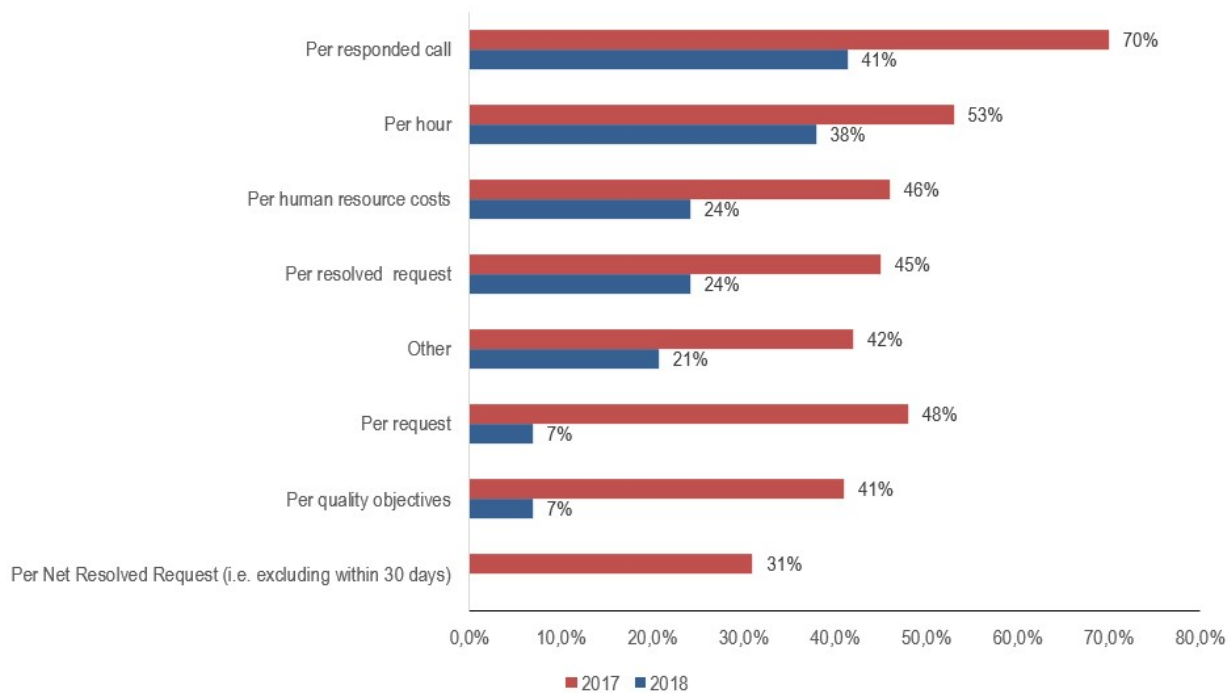
FIGURE 52
HIRED SERVICES IN OUTSOURCING (N = 50)



QUESTION: What is the compensation model for Outsourcer?

COMMENT: In the case of a question that allows multiple responses, it was found that this multiplicity occurred in much fewer situations than in the 2017 survey. Still, it was found that there were some models of remuneration that, from 2017 to 2018, were no longer mentioned (case of "per net resolved request") or were reported with much lower frequency ("by quality objectives", from 41% to 7% and "by request", from 48% to 7%). The remuneration models most mentioned in 2018 were "per call attended" (41%) and "per hour" (38%).

FIGURE 53
COMPENSATION MODEL FOR OUTSOURCER (N = 50)

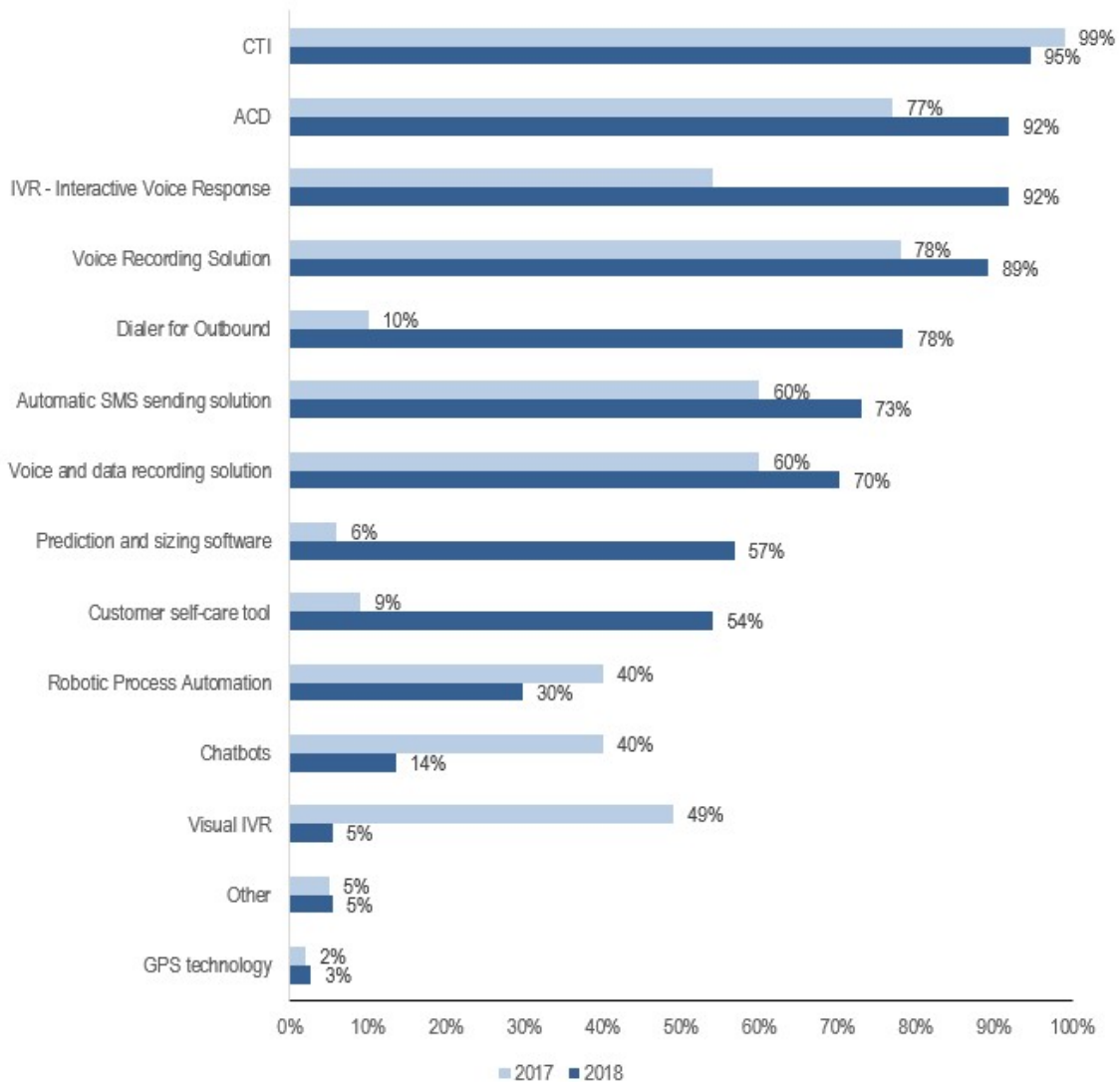


6. Technology

QUESTION: What are the main technological solutions used?

COMMENT: In 2018, a large investment was made in technological solutions such as the IVR (Interactive Voice Response, 92%) and dialer for Outbound (78%). However, CTI remains the leading solution (95%). On the contrary, solutions such as Robotic Process Automation (RPA), chatbots and Visual IVR are no longer the preferred choice, with negative variations of 10%, 26% and 44%, respectively.

FIGURE 54
CONTACT CENTERS SOLUTIONS (N = 142)

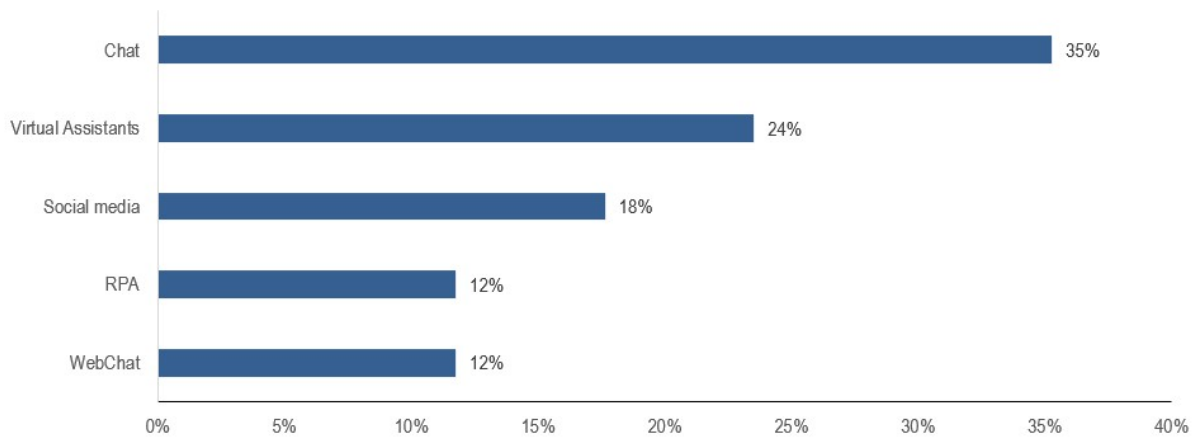


QUESTION: What new channels are you considering using in the future?

COMMENT: Companies indicate what channels they intend to use in the future Chat (35%), Virtual Assistants (24%) and Social Media (18%).

FIGURE 55

NEW CHANNELS TO USE IN THE FUTURE (N = 16)

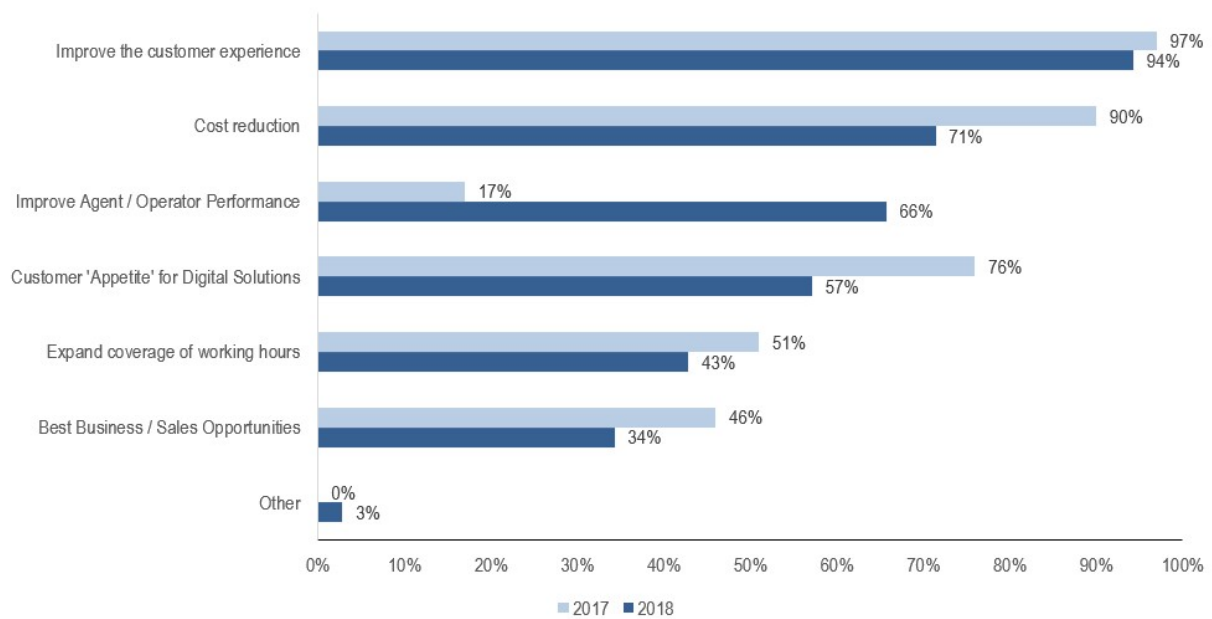


QUESTION: What are the main reasons to offer self-care service tools / channels?

COMMENT: "Improving the Customer experience" remains the main reason to offer self-care tools / channels (94%), followed by cost reduction (71%). With a significant increase compared to 2017, "improving Agent/Operator performance" is a valued reason for 66% of companies.

FIGURE 56

REASONS TO OFFER SELF-CARE TOOLS / CHANNELS (N = 139)

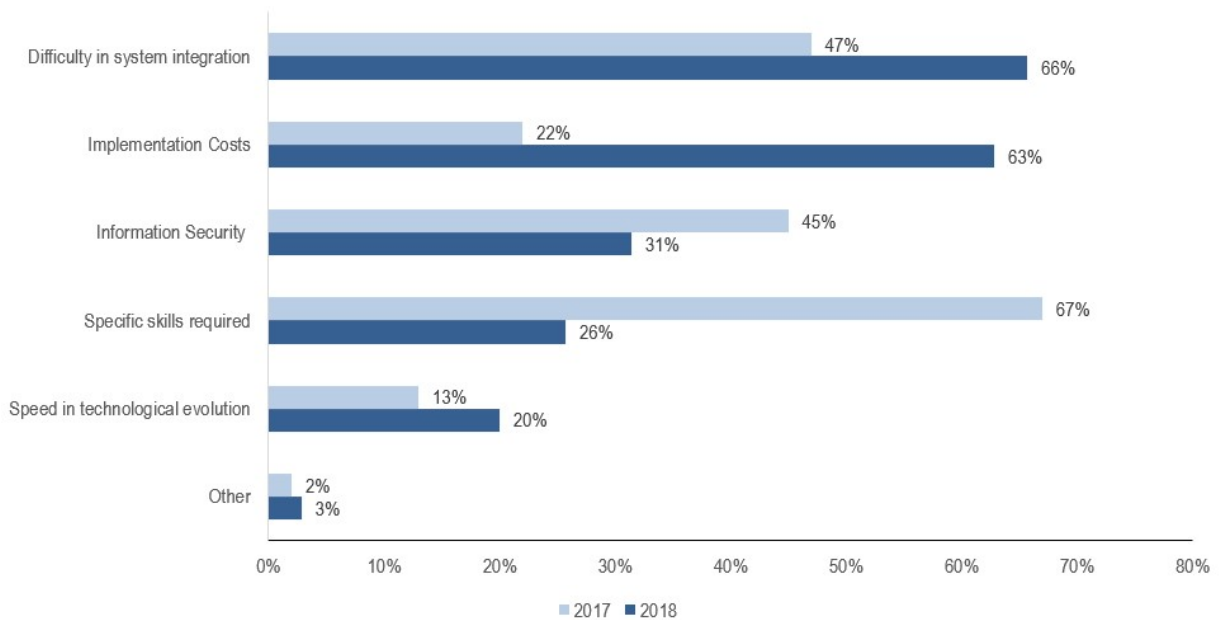


QUESTION: What are the bigger challenges to establish efficient self-care solutions?

COMMENT: In 2018, the most significant challenges to establish efficient self-care solutions were the difficulty in integrating systems (66%) and implementation costs (63%). The specific competencies needed were not considered as an obstacle so relevant to the implementation of self-care tools, as in the previous year, presenting a very significant reduction (from 67% to 26%).

FIGURE 57

CHALLENGES TO ESTABLISH EFFICIENT SELF-CARE SOLUTIONS (N = 139)

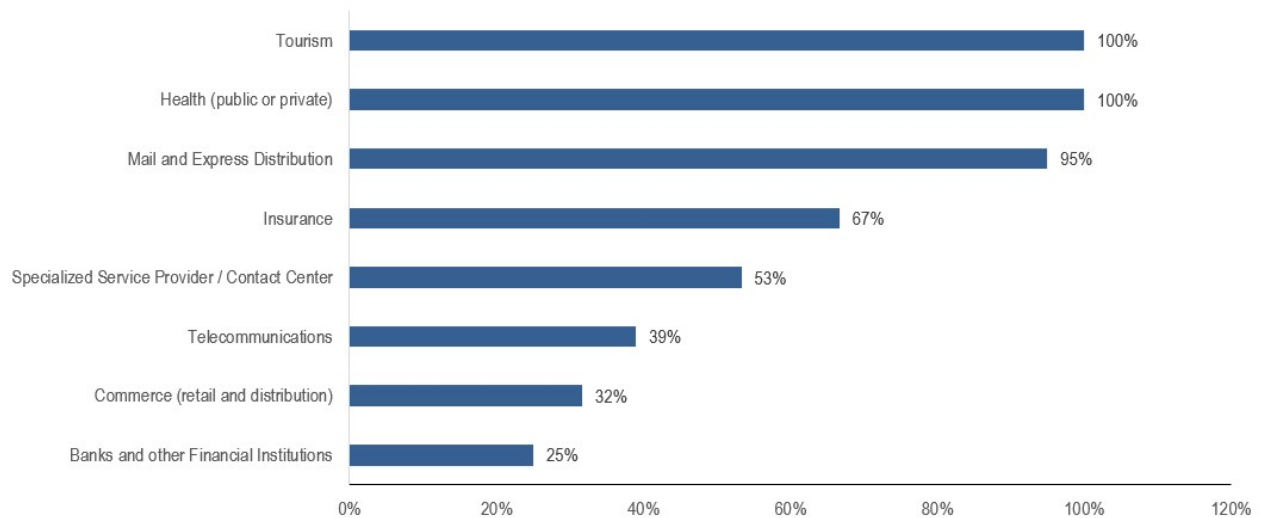


QUESTION: What is the use of a Cloud-based technology model by sector?

COMMENT: The sectors of Tourism and Health use a totally Cloud-based technology model. The Mail and Express Distribution sector indicates using 95%. On the other hand, the Telecommunications, Commerce, Banking and other Financial Institutions sectors use less than 40% of a Cloud-based technology model.

FIGURE 58

USE OF A CLOUD-BASED TECHNOLOGY MODEL (N = 68)

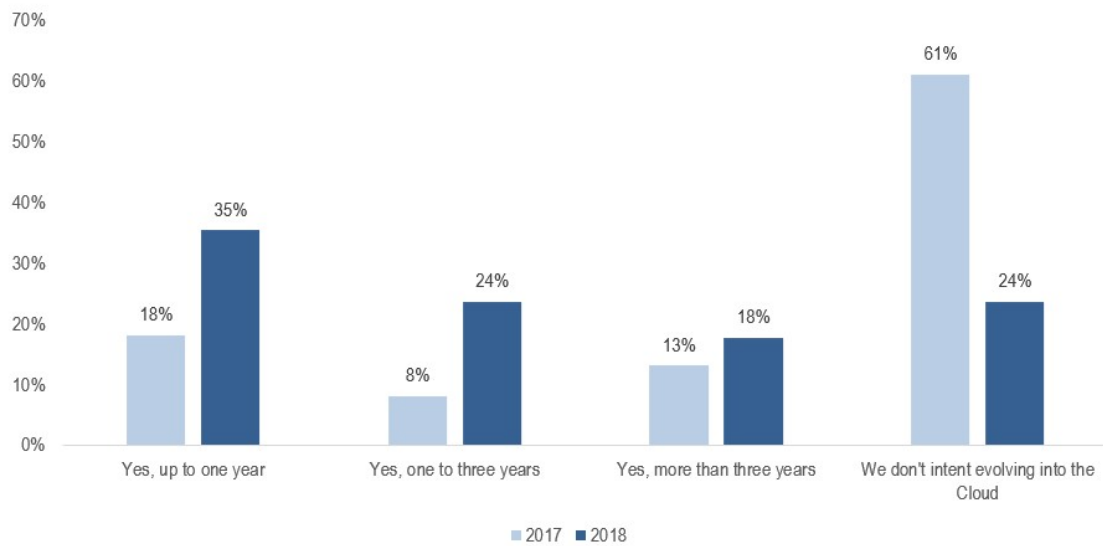


QUESTION: Do you equate evolving your Contact Center to the Cloud?

COMMENT: In 2018, the trend of Cloud usage in Contact Centers has changed, with the intention of using cloud in short or medium term. Companies that do not intend to evolve to the Cloud are now only 24% and not 61% as in 2017. In contrast, 35% of companies recognize the need for Cloud usage within one year.

FIGURE 59

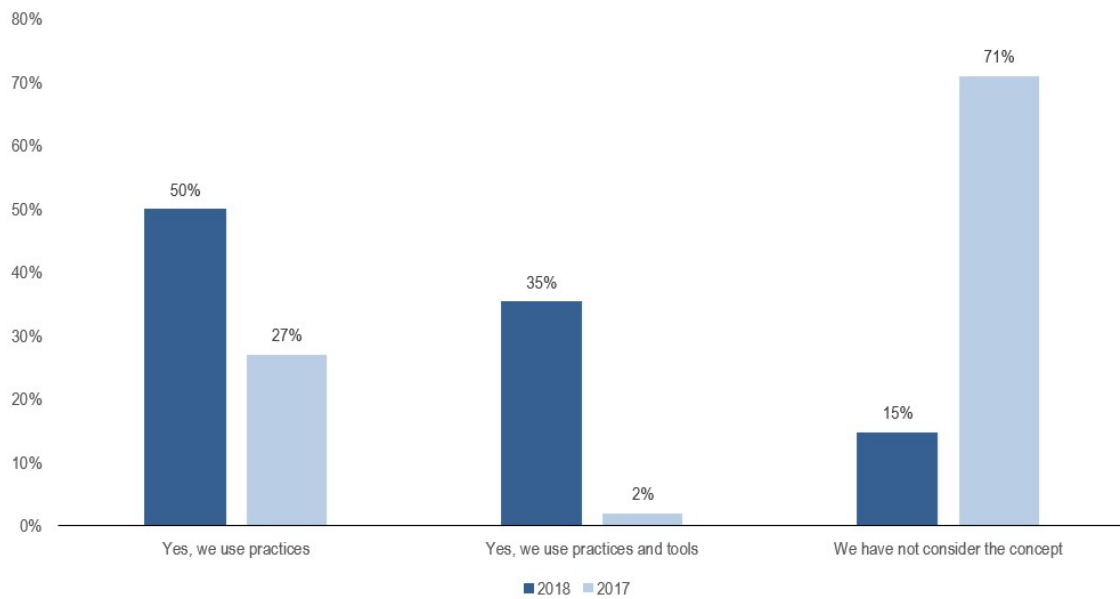
CONTACT CENTER EVOLUTION INTENT TO THE CLOUD (N = 138)



QUESTION: Does your organization use Gamification tools?

COMMENT: Gamification is a concept that companies began to consider and use more intensively in 2018, compared to the previous year. While in 2017, only 2% used gamification tools and 71% did not consider the concept, this year the scenario is inverse: Only 15% does not consider the concept and 35% uses practices and tools.

FIGURE 60
USE OF GAMIFICATION TOOLS (N = 138)

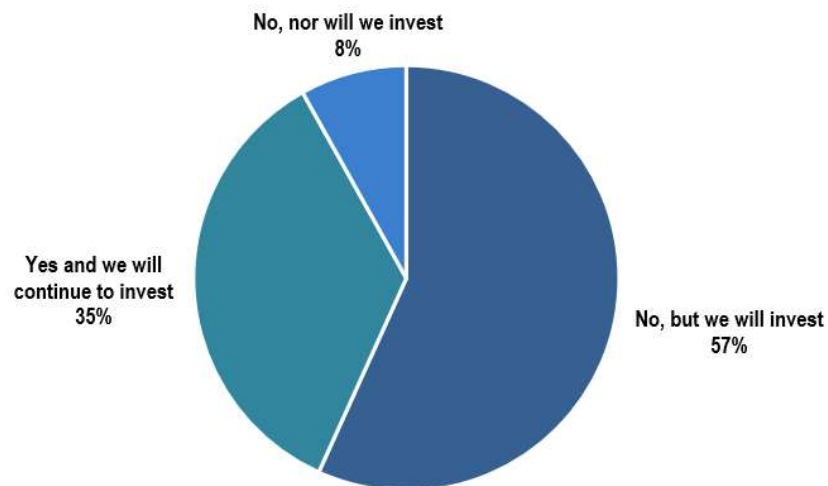


QUESTION: Are you currently investing in Robotic Process Automation or planning to invest in the future?

COMMENT: In an overview, currently, most companies surveyed do not invest in Robotic Process Automation (65%), but about 57% want to invest in the future. Of the 35% companies that already invest, none intends to stop investing.

FIGURE 61

INVESTMENT IN ROBOTIC PROCESS AUTOMATION (N = 142)

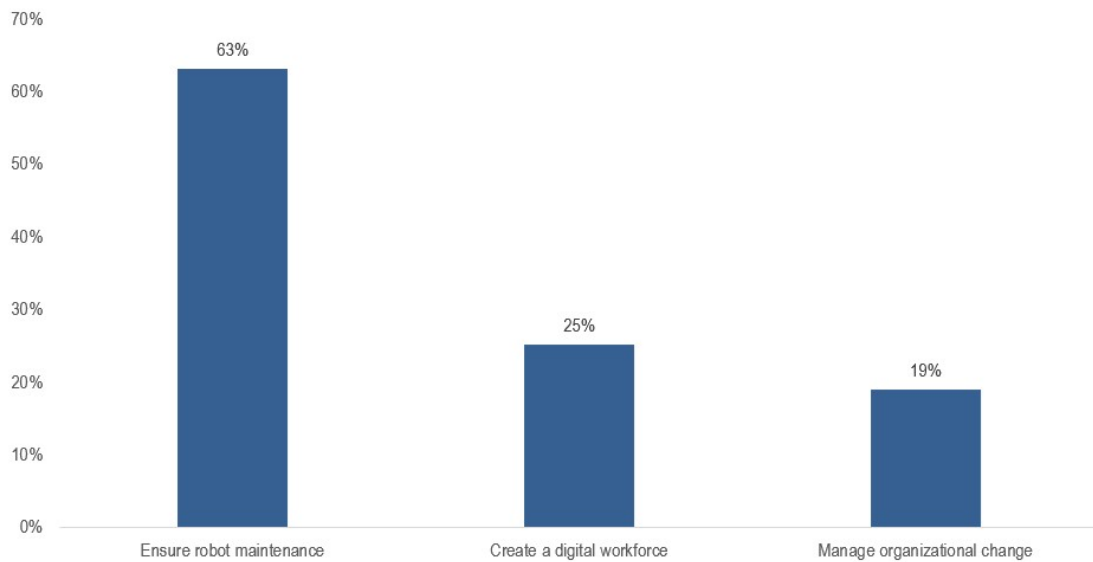


QUESTION: What are the bigger challenges you have faced during an RPA project?

COMMENT: Companies that currently invest in RPA identify, as major obstacles in an RPA project, the need to ensure the maintenance of robots (63%), create a digital workforce (25%) and manage organizational change (19%).

FIGURE 62

CHALLENGES FACED DURING AN RPA PROJECT (N = 40)

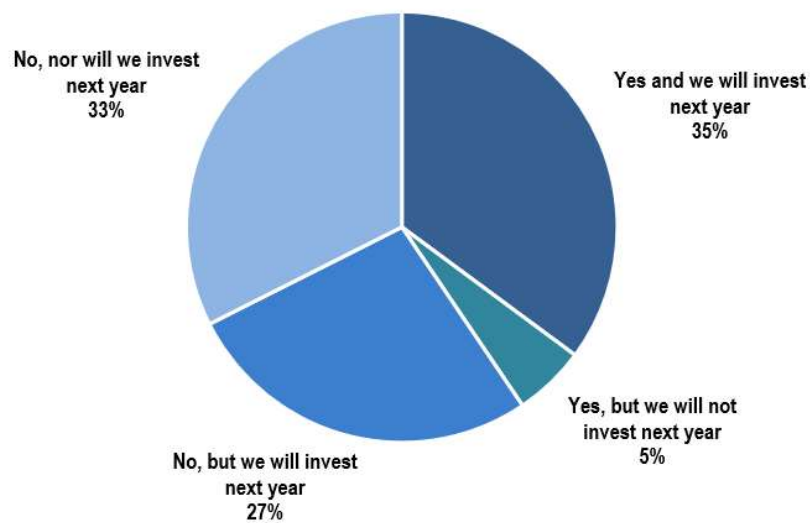


QUESTION: Are you currently investing in solutions based on Artificial Intelligence or planning to invest next year?

COMMENT: More than half (60%) of the studied companies do not invest in solutions based on artificial intelligence and among these 33% do not intend to invest next year. As for companies that have implemented these solutions (40%), 5% do not intend to invest next year.

FIGURE 63

INVESTMENT IN SOLUTIONS BASED ON ARTIFICIAL INTELLIGENCE (N = 142)



QUESTION: Do you have an Omnichannel Solution or planning to invest next year?

COMMENT: The group of companies' respondents in 2018, has a lower percentage than in 2017, as to the number of operations that present Omnichannel solutions (from 85% to 70%). On the other hand, the percentage of Contact Centers that currently do not present an Omnichannel Solution, but plans to invest in the future is 22%, when in 2017 was only 7%.

FIGURE 64
OMNICHANNEL SOLUTION 2017
(N = 89)

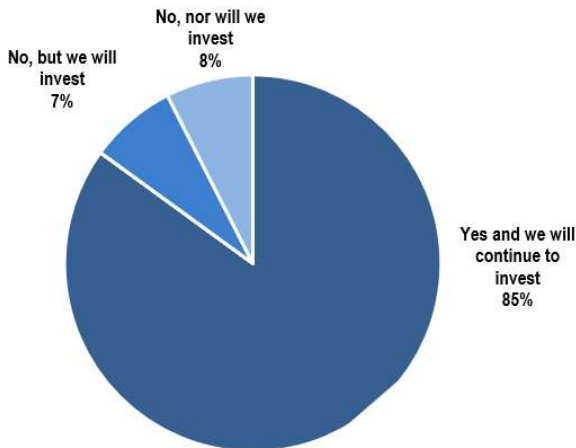
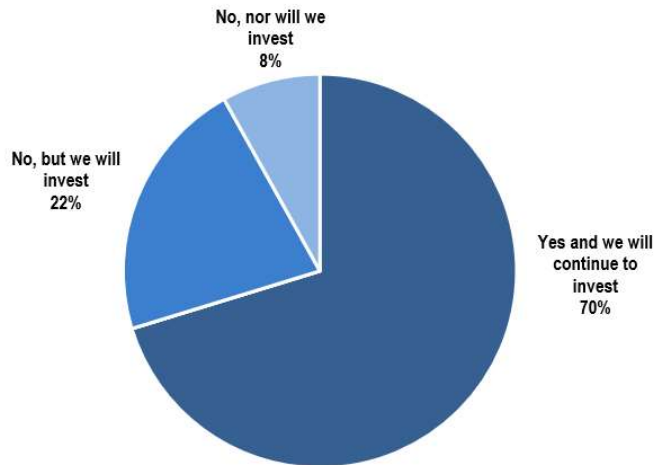


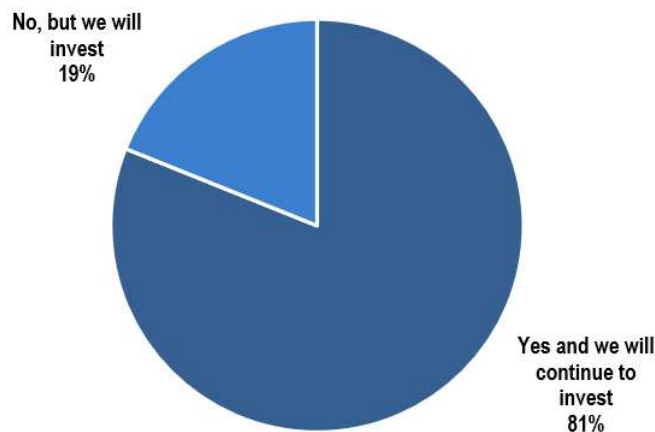
FIGURE 65
OMNICHANNEL SOLUTION 2018
(N = 142)



QUESTION: Do you currently invest in Customer Experience Projects?

COMMENT: In 2018, the respondent companies stated that they invest and will continue to invest in Customer Experience Projects (81%) or, not investing yet, intend to do so (19%).

FIGURE 66
CURRENT INVESTMENT IN CUSTOMER EXPERIENCE PROJECTS (N = 142)

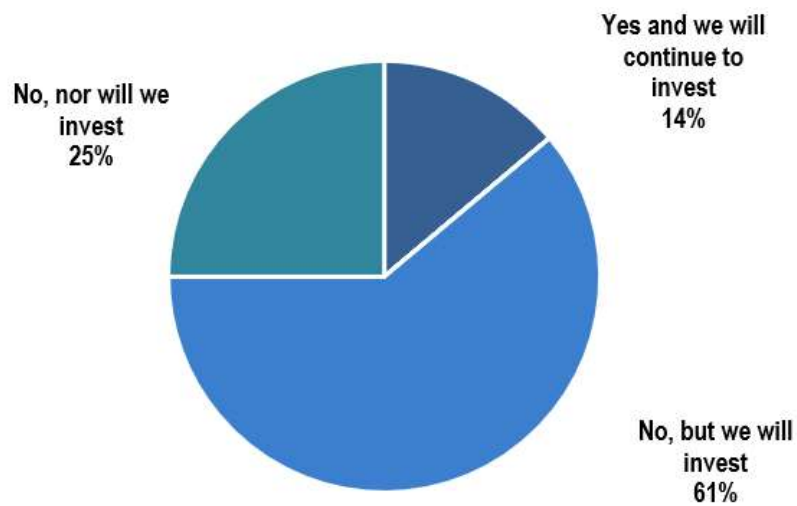


QUESTION: Do you have a Speech to Text Solution or are you planning to invest next year?

COMMENT: According to the answers obtained, only 14% of the companies in the sector have Speech to Text Solutions and intend to continue investing. However, among the 86% of companies that do not have these solutions, 61% claim they will invest and only 25% are not available for this investment.

FIGURE 66

SPEECH TO TEXT SOLUTIONS (N = 118)



7. Continuous Improvement

QUESTION: Are customer satisfaction surveys conducted to measure the quality of the service? If so, what is the classification obtained in 2018, on a scale from 0% to 100%?

COMMENT: In 2018 the percentage of companies that indicated to carry out surveys to customers, to measure the quality of the service was 94%, minus 3% than in 2017. On the other hand, the results obtained in these surveys have a higher value than that of the previous year (79% in 2018 compared to 75% in 2017). The sectors with the higher classifications were Travel Assistance (96%), Insurance (92%) and Specialized Service Providers (83%). The lowest value occurred in the Mail and Express Distribution (55%).

FIGURE 68
FULFILLMENT OF SATISFACTION SURVEYS (N = 118)

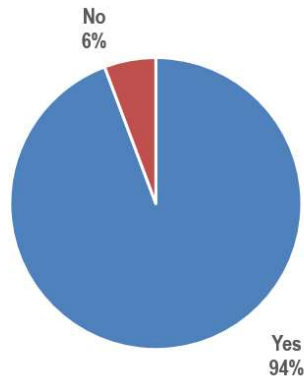
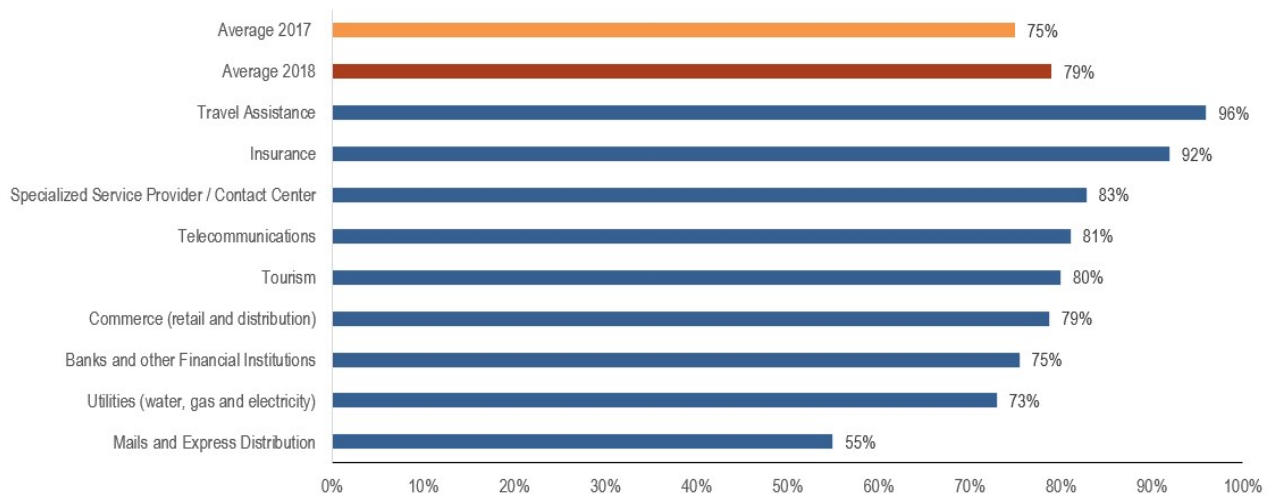


FIGURE 69
AVERAGE CLASSIFICATION OF CUSTOMER SATISFACTION SURVEYS (N = 118)

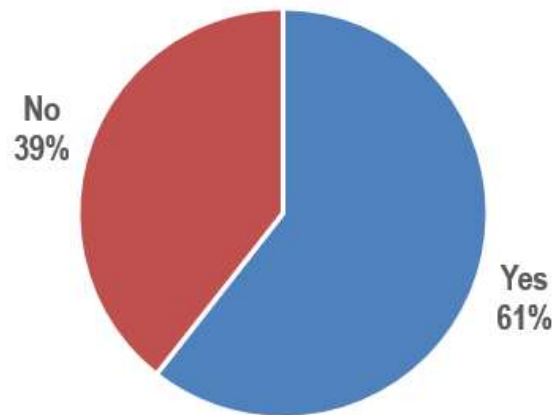


QUESTION: Is the Net Promoter Score (NPS) used to perform satisfaction surveys?

COMMENT: In all the participants who carry out customer satisfaction surveys, only about 61% indicate using NPS, when in 2017 this value was 89%.

FIGURE 70

USING NET PROMOTER SCORE (NPS) (N = 33)

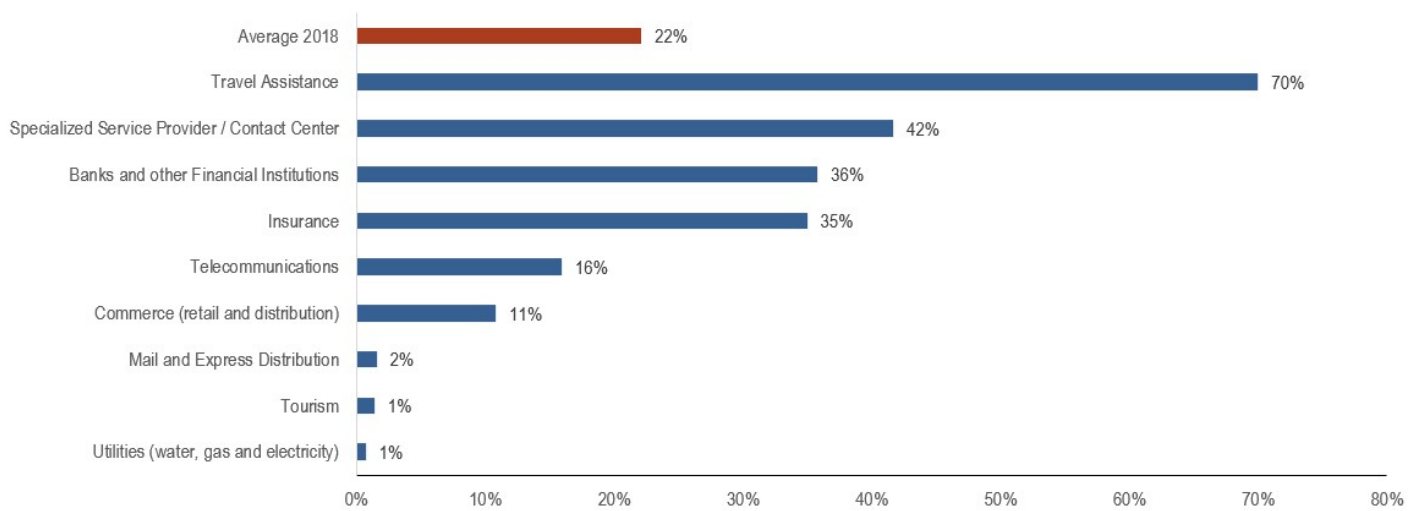


QUESTION: What is the percentage of calls in 2018 with quality measurement (through a satisfaction survey)?

COMMENT: The value found in this issue (22%) result from dramatically differentiated behaviors among the various sectors, from 70% Travel Assistance, 42% Specialized Service Providers and 36% Banks and other Financial Institutions, to Utilities or Tourism (1% in both cases).

FIGURE 71

PERCENTAGE OF CALLS THAT HAVE QUALITY MEASUREMENT ASSESSED BY THE CUSTOMER (N = 46)

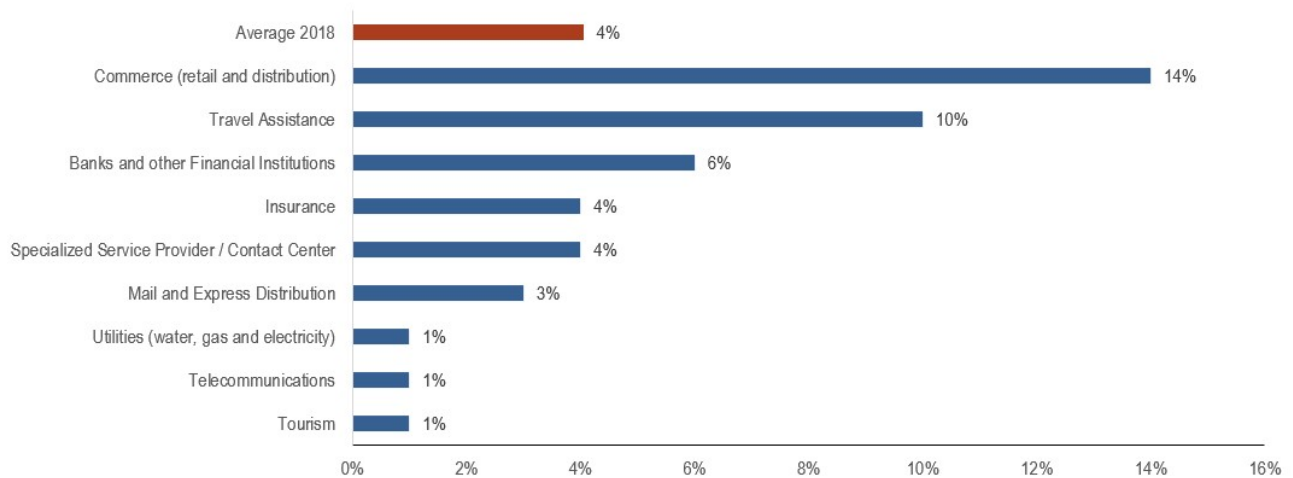


QUESTION: What is the percentage of target contacts of internal monitoring in 2018?

COMMENT: The percentage of contacts object of internal monitoring in 2018 was 4%. The higher values occurred in Commerce (14%), Travel Assistance (10%) and Banks and other Financial Institutions (6%). The lowest value, of 1%, was found in Telecommunications, Tourism and Utilities.

FIGURE 72

PERCENTAGE OF CONTACTS TARGET IN INTERNAL MONITORING (N = 49)

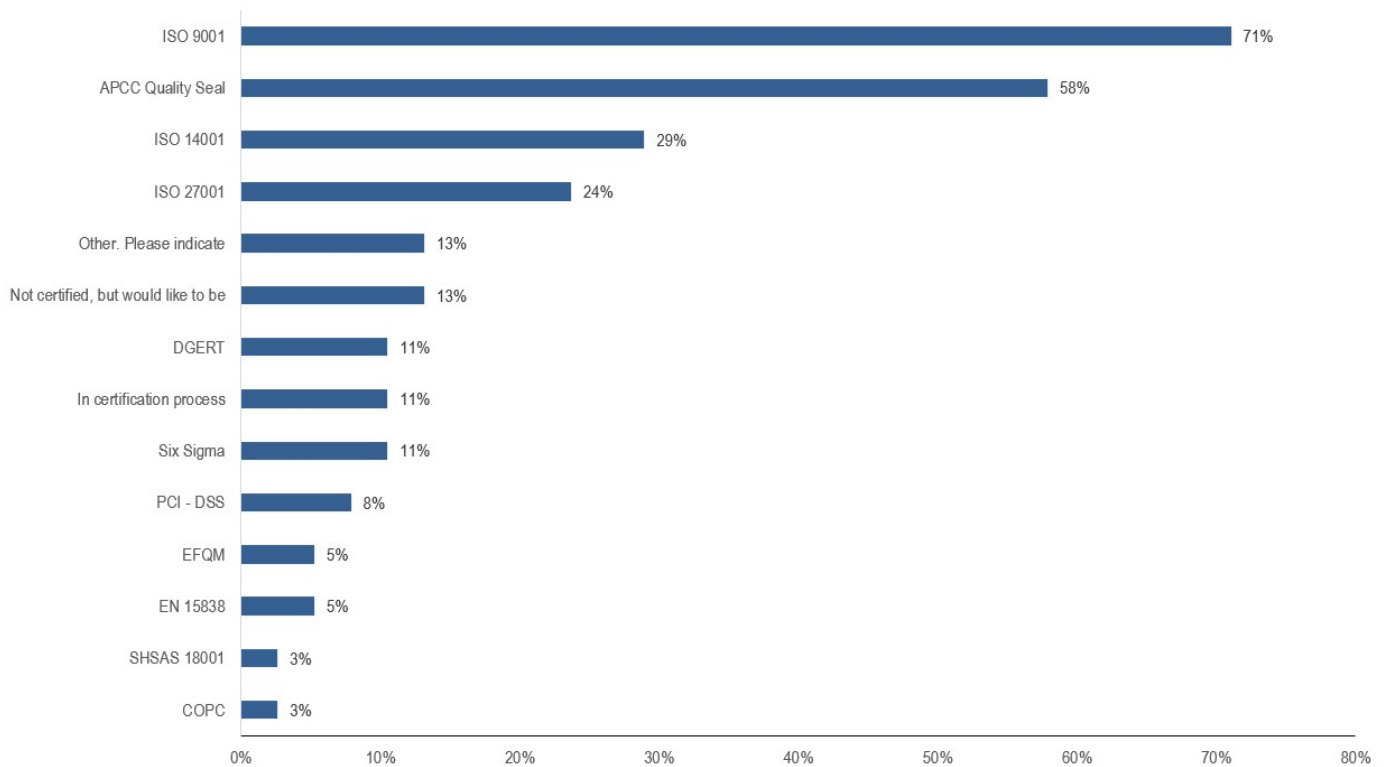


QUESTION: Which of the following certifications does the Contact Center have?

COMMENT: The most frequent certifications are ISO 9001 (71% of respondents) and the APCC Quality Seal (58% of respondents). In both cases, the values are below those established in 2017 (93% and 68%, respectively). This should be attributed to the large increase in the number of respondents this year.

FIGURE 73

KEY CERTIFICATIONS OF THE CONTACT CENTER (N = 143)



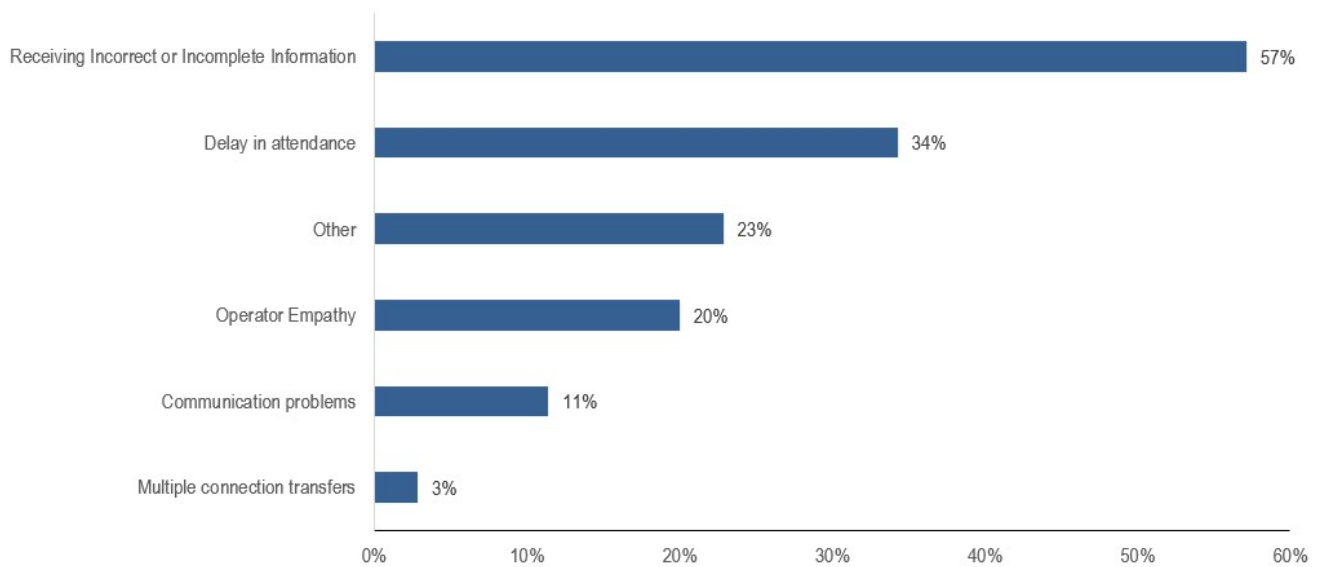
QUESTION: What are the main reasons for complaints of the Contact Center Service received?

COMMENT: Only complaints with the Contact Center Service were considered. The reasons for the higher number of occurrences were incorrect or incomplete information (referred to in 57% of cases) and delay in attendance (referred to in 34% of cases). In this last reason, the duplication of the average waiting time to be serviced by the Contact Center, in 2018 face to 2017 must be taken into consideration (see Figure 14).

FIGURE 74

REASONS FOR COMPLAINS RECEIVED FROM THE CONTACT CENTER SERVICE

(N = 117)



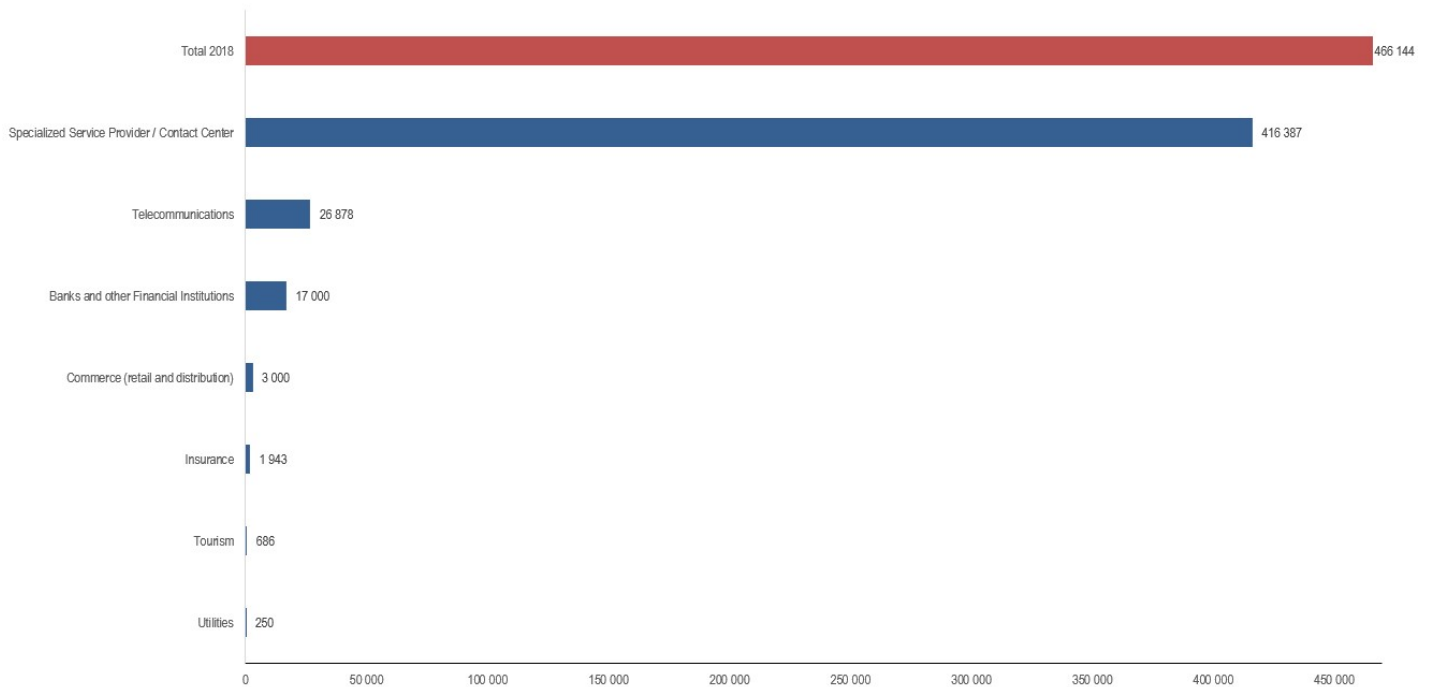
8. Financial Data

QUESTION: What is the annual turnover of the Contact Center?

COMMENT: The answers to this question give a necessarily modest image of the true representativeness of this study, since they result from a reduced number of answers (28). We should also bear in mind that the operations managed internally do not allow to identify invoicing but add value in their organizations. Still, the aggregate of the responses obtained in 2018 totalizes 466.1 million euros, of which 89% correspond to the invoicing of Specialized Service Providers.

FIGURE 75

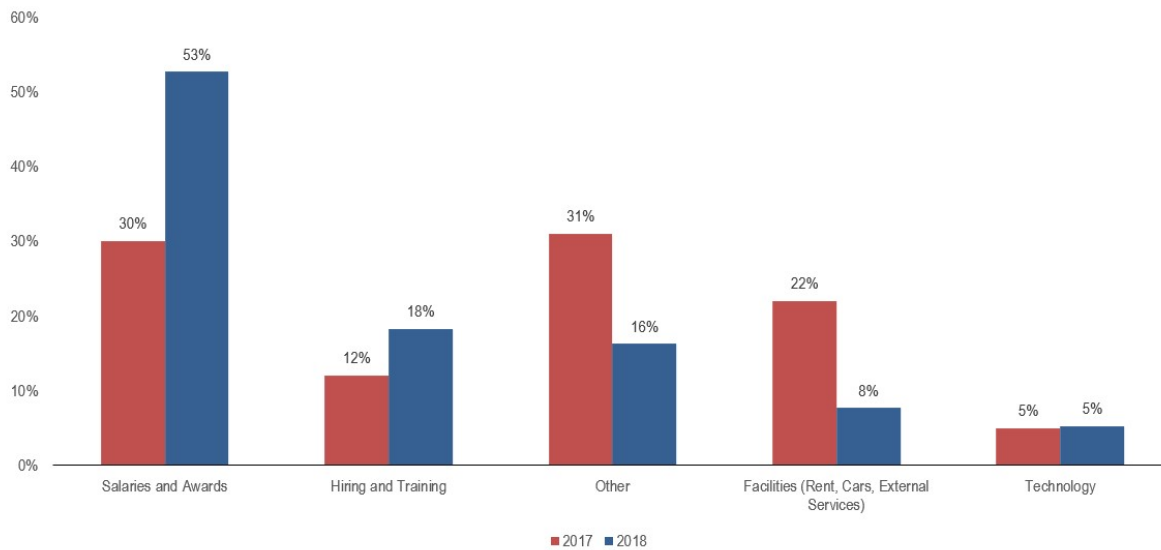
BUSINESS TURNOVER OF THE STUDY SAMPLE (IN THOUSAND EURO) (N = 28)



QUESTION: What is the distribution of the overall OPEX structure by the major headings?

COMMENT: Regarding 2017, the weight of the "salaries and premiums" heading grew from 30% to 53% and in "hiring and training" from 12% to 18%. On the other hand, "facilities" dropped from 22% to 8%. The heading "Technology" maintains the weight of 5%.

FIGURE 76
OPEX DISTRIBUTION OVER THE PRINCIPAL ITEMS (N = 28)

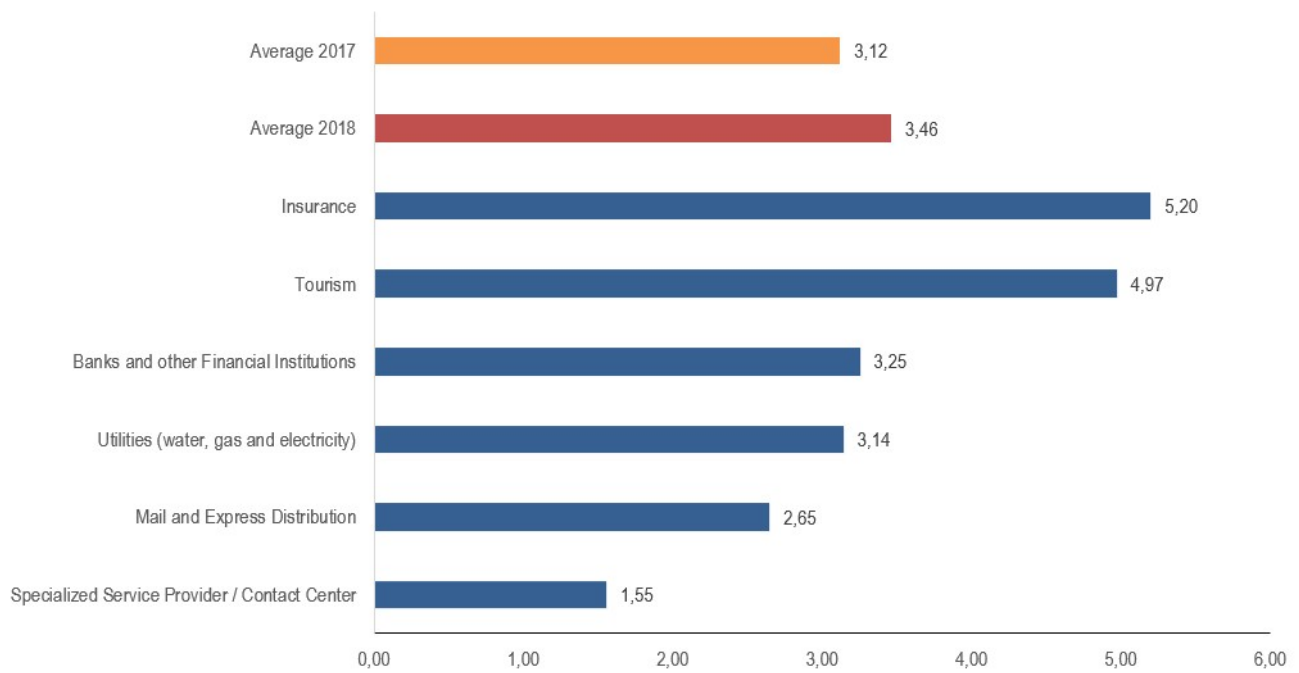


QUESTION: What is the average cost per contact?

COMMENT: Bearing in mind the value established in 2017, the cost per contact increased almost 11%, from €3.12 to €3.46, being higher in the Insurance (€5.2) and Tourism (€4.97) sectors.

FIGURE 77

OPEX COST PER CONTACT (N = 13)



QUESTION: What is the OPEX cost per request resolved?

COMMENT: In 2018, the average cost of each request resolved was €5.31, 23% more than in 2017, varying between €10 in Banking and other Financial Institutions and €1.40 in Telecommunications.

FIGURE 78

OPEX COST PER REQUEST SOLVED (N = 14)

