CCW CUSTOMER CONTACT WEEK DIGITAL

JUNE 2022

CX TRENDS, CHALLENGES, & OPPORTUNITIES

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CX TRENDS, CHALLENGES & OPPORTUNITIES

Brands can continue talking about customer centricity. They can continue exploring new digital options and workflow models. They can continue aspiring to compete on the customer experience. What ultimately matters, however, is whether these mindsets and strategies are leading to better, more frictionless, more personalized experiences across all channels.

As far as today's consumers are concerned, brands still have considerable work to do.

Only a small portion of consumers believe experiences have gotten markedly better over the past year. Worse, they continue to experience many of the same pain points they have for the past decade. They also remain underwhelmed by the caliber of agents, the efficacy of digital channels, and the level of personalization they experience across the omnichannel journey.

Where are brands going wrong? What opportunities do they have to turn customer centricity into a reality? Is there anything that *is* working?

This Market Study, the product of CCW Digital's annual Consumer Preferences Survey, has the answers.

TABLE OF CONTENTS

MEET THE TEAM

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METHODOLOGY & DEMOGRAPHICS

To understand customer behaviors, preferences, and expectations, who better to ask than the customers themselves? Indeed, CCW Digital compiled data for this Market Study by conducting its annual Consumer Preferences Survey, attracting participation from adults over the age of 18 across all income levels.

ABOUT THE AUTHOR

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Brian Cantor is the principal analyst and director for CCW Digital, the global online community and research hub for customer contact professionals. In his role, Brian leads all customer experience, contact center, technology, and employee engagement research initiatives for CCW. CCW Digital's articles, special reports, commentaries, infographics, executive interviews, webinars, and online events reach a community of over 150,000.

A passionate advocate for customer centricity, Brian regularly speaks on major CX conference agendas. He also advises organizations on customer experience and business development strategies.

KEY FINDINGS

1. The stakes of the customer experience remain high, with 60% of consumers saying they would switch to a competitor after just one or two bad experiences
2. Whether they ultimately switch or not, consumers are also ready to badmouth brands when experiences go awry. After dealing with rude employees, a staggering 63% will share the experience with close contacts or social media followers.
3. Other key complaint drivers include the inability to solve customers' problems, long wait times, declines in product quality, or challenges accessing a live agent.
4. Despite these high stakes, customer experiences have not been improving. Only 10% feel their brand interactions have gotten much better over the past year.
5. Long wait times, no option for a live agent, limited support hours, repetitive questions, and frequent transfers rank as the most frequent "pain points" during interactions.
6. A mere 14% of consumers feel the majority of their brand experiences are personalized.
7. Consumers are not high on today's contact center agents; only about a third feel agents know about them and their problems, and a similarly small number feel agents actually care about the customers they are serving.
8. Although they identify repetitive questions as a common pain point, some consumers *do* believe brands are making strides toward omnichannel. Nearly 50% would call their typical brand experience "seamless."
9. Consumers do, however, express some doubt about the omnichannel revolution. They still view phone as the most trustworthy channel, and confidence levels in digital channels like social media, self-service videos, and chatbots are very low.
10. The clear majority of customers still expect access to live agents for most issues; 30% downright *prefer* live support for all interactions.
11. "Asynchronous support" may be a trendy topic, but many consumers still seek real-time support options.
12. Consumers have a mixed reaction to brands that align with social issues. The key takeaway is that the position should be rooted in authenticity rather than strategy.
13. Consumers are not over the moon about how brands have been addressing recent supply chain issues.

UNDERSTANDING THE URGENCY OF CUSTOMER CENTRICITY

Demonstrating the stakes of the customer experience has never been challenging. For the past many years, companies have been able to point to statistics confirming that *many customers* will consider competitors after just one or two bad experiences.

That reality holds true in 2022.

A whopping 60% of consumers would consider switching to a competitor after two or fewer bad experiences, with 17% only requiring one poor interaction to look elsewhere.

And it is not as if the other 40% have infinite tolerance for suboptimal experiences. Thirty-five percent (35%) would consider switching after 3-4 experiences, meaning only 5% are willing to give a brand five or more tries.

To put it simply, customers are demanding great experiences with the weight of their long-term *business and support,* not just their short-term happiness and feedback.

Granted, many customers will voice their dissatisfaction either in lieu of or alongside their decision to switch to a competitor.

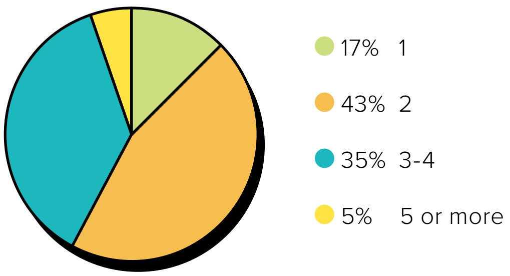
Rude or disrespectful employees make for the largest complaint driver, with 63% saying they would discuss the poor treatment with friends, family, coworkers, and/or social media followers.

Other noteworthy complaint stimuli include the inability to solve customers' problems (58%), too much waiting or delays during the experience (57%), a change in product quality (45%), and inability to access support from a live agent (43%).

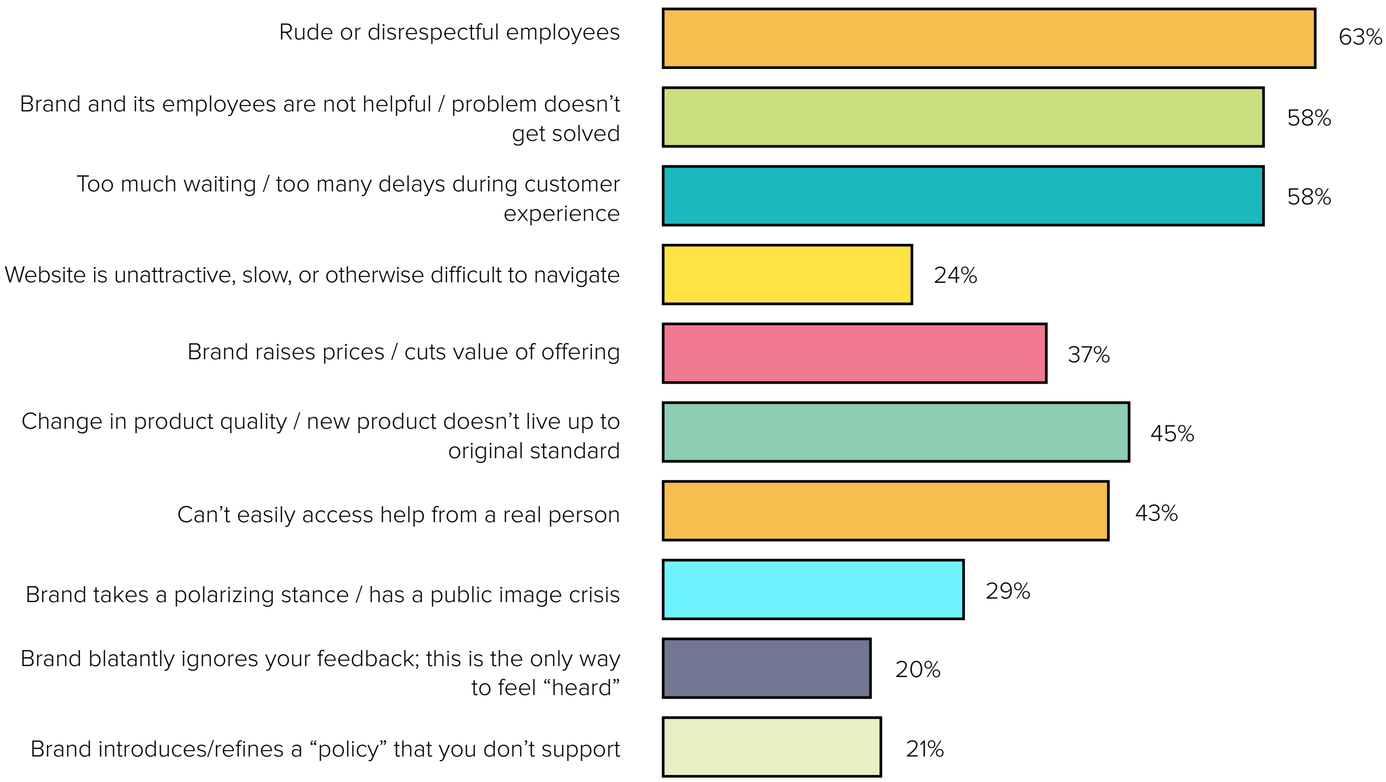
Collectively, these factors confirm that *quality* absolutely matters. Customers expect to receive great products; when operational changes *compromise that quality,* customers feel no choice but to voice their frustration. Not simply about letting the brand know of its failure, such complaints reflect customers' willingness to remove their prior endorsement for a brand. Brand support dictates identity in the era of social likes and follows, and customers cannot let a brand losing its way – or choosing to cut corners – adversely impact their own credibility.

Granted, even the best-made products will have problems, which will require customers to seek support. If the process of getting support is slow, impersonal, or ineffective, many customers will publicly share their frustration.

After how many bad interactions with a company would you consider switching to a competitor?



Which of the following would make you complain about a brand to friends/family/coworkers or on social media?



SCORING TODAY'S CUSTOMER EXPERIENCES

Whether in the form of lost business, weaker advocacy, or viral criticism, the costs of poor customer experiences are obvious.

Coupled with the buzz around "competing on the customer experience" and "exceeding customers' growing expectations," this fear of fallout *should* pressure brands to improve their operations and commit to exemplary customer journeys.

Should and *does* are, unfortunately, two vastly different concepts. Many brands continue to deliver underwhelming experiences. Worse, they continue to struggle with some of the same pain points and challenges that have been affecting them for many years.

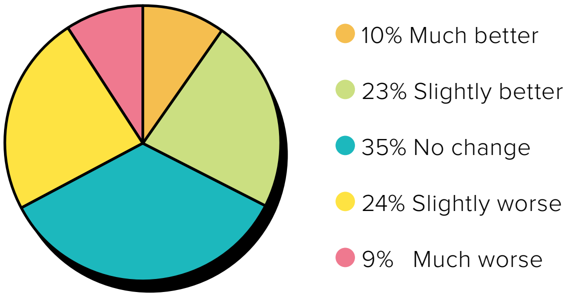
ARE EXPERIENCES IMPROVING?

Even as all companies recognize the importance of the customer experience, rebound from COVID-driven limitations, invest in new technologies, and respond to growing competitive threats, the majority are failing to make meaningful improvements.

Only 33% of consumers, in fact, feel that their typical customer experience has improved over the past year. A paltry 10%, moreover, report *meaningful* improvement.

The remaining 67% report stagnant or declining experiences; just shy of 35% cite no meaningful changes, while just under 33% say experiences have gotten worse. Nearly 9% feel they have gotten *much worse* over the past year.

Have your customer experiences with businesses gotten better or worse over the past year?



BIGGEST PAIN POINTS

On the one hand, it is certainly plausible that the sobering "improvement" scores are a consequence of growing customer expectations. As consumers become less tolerant of the "COVID excuse," hear all the hype about customer centricity, *and* begin to interact with disruptive brands that deliver legitimately remarkable experiences, they have reason to expect more from each brand interaction. A brand that *technically* made slight improvements, therefore, may still register as a stagnant or even deteriorating provider.

On the other hand, companies cannot exclusively blame the moving target. The unfortunately reality is that many long-lingering pain points continue to affect many, if not the majority of, customer experiences. And so customers who cite a lack of improvement are not simply signaling a lack of *remarkable evolution.* Many are sincerely blaming brands for not getting better.

Proof of this reality comes in data regarding the pain points that consumers *frequently* encounter when interacting with brands. A staggering 60%, for example, often encounter long wait or hold times when reaching out to brands.

Although the number is better than the 68% specifically reported in last year's CCW Digital Consumer Preferences Survey, it is generally in-line with data from the past half-decade.

More importantly, it is simply an *inexcusable* number in a marketplace that trumpets the value of efficiency and convenience, let alone one in which brands could use proactive engagement, low-touch digital channels, and predictive analytics to mitigate volume and hold issues.

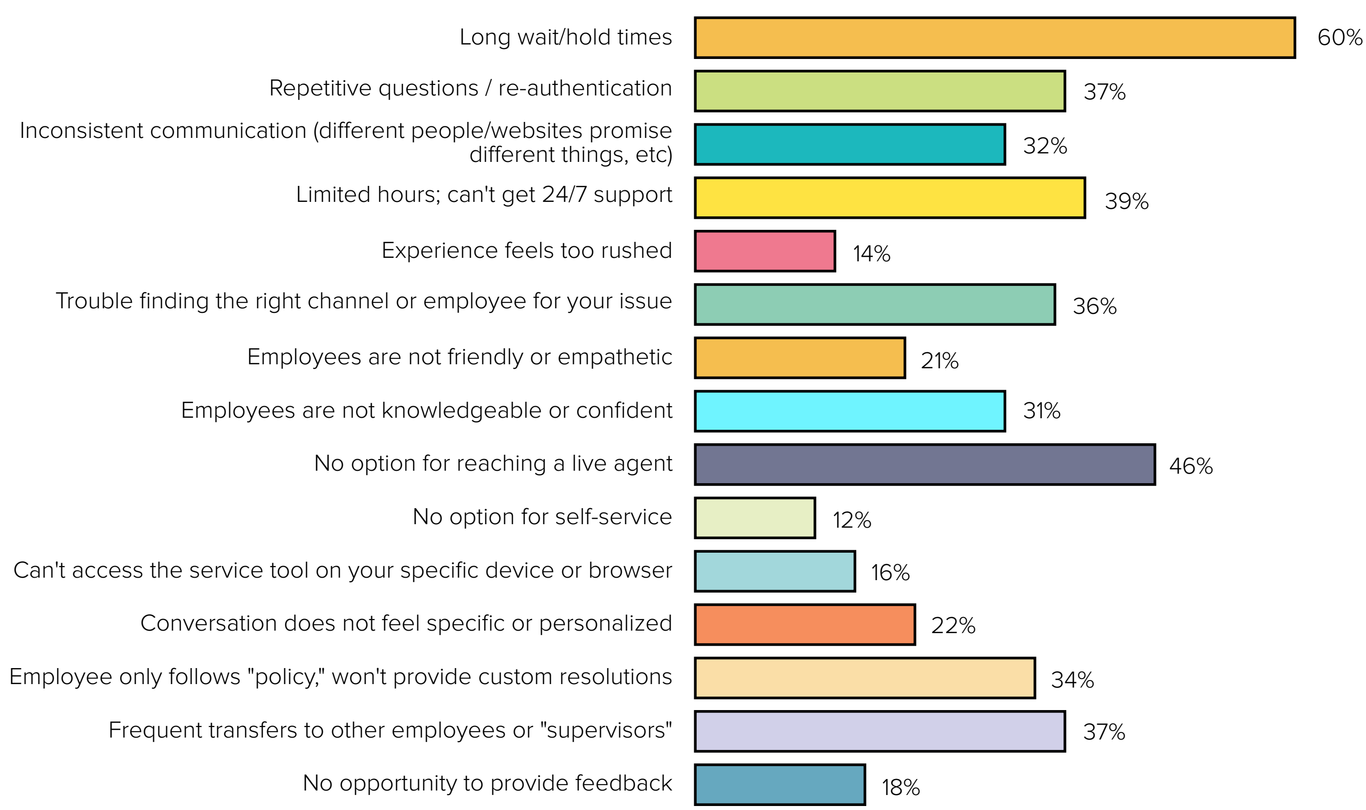
Other frequent pain points include no option for reaching a live agent (46%), limited support hours (39%), repetitive questions (37%), and frequent transfers (37%).

In theory, self-service represents the antidote to long wait times. Many customers will be able to *avoid* waiting for live agents by solving problems on their own, and those who *do still require* agent assistance will have a faster pathway to the requisite support.

Unfortunately, self-service experience quality *and* education continue to underwhelm. Customers do not trust these as credible support options, meaning they will continue to seek live agent assistance – and continue to condemn brands who do not offer such support when they want to connect.

As frustrating as lengthy wait times can be, they are even *more* problematic when customer service is not available at the end. Such treasure is elusive in today's environment, as evidenced by the fact that many customers deal with repetitive questions and frequent transfers upon finally reaching an agent. These issues add friction to the journey, while further signaling the brand's lack of respect for its customers and their time.

Which of the following issues do you frequently experience when interacting with companies?



ARE CUSTOMER EXPERIENCES SUFFICIENTLY PERSONALIZED?

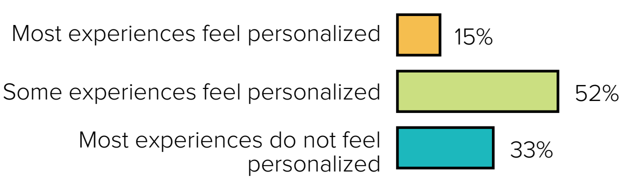
Thought leaders routinely remind contact center leaders that frictionless and personalized experiences are not mutually exclusive. The best brands, in fact, *leverage* personal data to expedite the engagement process.

Unfortunately for today's consumers, the opposite can also be true. Experiences that are slow and plagued by wait times can also be decidedly impersonal.

Only 14% of consumers feel most of their brand experiences are personalized. Fifty-two percent (52%) encounter some degree of personalization, while a staggering 33% feel most experiences are *not* personalized.

At a time when customers are not only demanding higher-caliber experiences but sharing a plethora of personal data with brands, the absence of experiential personalization is very disappointing.

In general, do you feel companies are sufficiently personalizing customer experiences based on your specific preferences, needs, past interactions, etc?



ARE AGENTS LEAVING A FAVORABLE IMPRESSION?

One does not need to be familiar with adages like "happy agents equal happy customers" to appreciate the connection between employee performance and customer satisfaction. Agents are the ones on the frontline, engaging with customers, providing resolutions, and humanizing the brand and its supposed commitment to customer centricity.

Today's agents are, unfortunately, not consistently providing stellar impressions.

A disconcerting 64% of consumers feel that the typical customer service employee *does not* care about them. An even greater 65%, moreover, do not believe the typical customer service employee knows much about the customers they are serving or the companies they are representing.

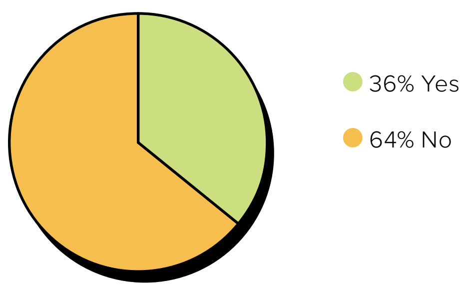
Clearly, agents are not engaging in the most productive, empathetic conversations possible. They do not come across as sensitive to, let alone knowledgeable about, the problems customers are facing.

In some cases, this is directly attributable to the agent. Not all potential candidates are meant to engage on the frontlines, especially at a time when customers expect agents to handle more complex interactions, with higher degrees of personality and empathy.

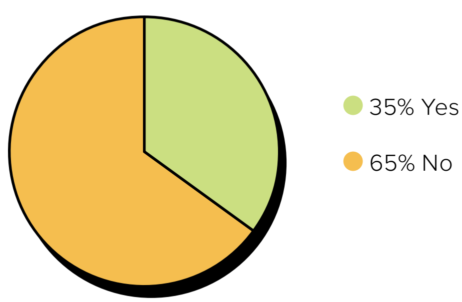
In others, the issue is one of training and performance management. If leaders do not provide agents with the necessary skills and guidance or fail to measure their performance in the most customer-centric manner, poor interactions will result.

Another explanation involves tools. If agents do not have access to AI assistance, robust knowledge bases and 360-degree customer analytics, they will have no choice but to focus intently on *searching* for information or *asking* repetitive questions. Neither supports the agent's ability to focus on the quality and tone of the actual customer conversation.

Do you feel the typical customer service employee seriously cares about you, your feelings, and your issues?



Do you feel the typical customer service employee knows a lot about you and the company/product they're supporting?



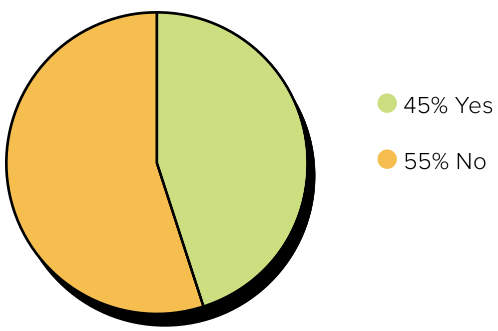
ARE EXPERIENCES SEAMLESS?

About 91% of companies acknowledge that agents have to access multiple interfaces to solve even the most typical customer issues. Few trumpet their ability to access 360-degree customer views or deliver truly “omnichannel” experiences.

Surprisingly, these self-confessed fracture points do not always trickle down to the customer.

Just over 45% of consumers believe their typical experience is seamless, allowing for easy transitions between different channels or different employees. Although that means the majority still feel as if they face undue friction moving throughout the journey, the number is not nearly as bad as it could have been given how commonly businesses discuss misalignment within their organizations.

Do you feel your typical customer experience with brands is “seamless” (can easily move between communication channels, from bot to agent, never have to repeat information, etc)?



HOW CUSTOMERS FEEL ABOUT OMNICHANNEL ENGAGEMENT

There is no denying that *business leaders* are prioritizing the omnichannel revolution. They are consistently pursuing new channels for engaging customers, as well as improved methods of connecting those touch points.

A business' own feeling about its channel mix cannot, however, be the driving force behind strategy. The principle of customer centricity mandates that customers themselves make the rules. It is therefore imperative to understand how customers themselves feel about different engagement methods.

WHAT CHANNELS DO CUSTOMERS TRUST?

Although customers are increasingly comfortable engaging in digital environments, they still see phone as their best customer support option. Seventy-five percent (76%) of customers say that they trust phone as a venue for getting their problems solved.

Other comparatively trustworthy channels include live chat (59%), e-mail (45%), and text or messaging (34%). The least trustworthy channels include social media (8%), instructional video options (15%), and chatbots (15%).

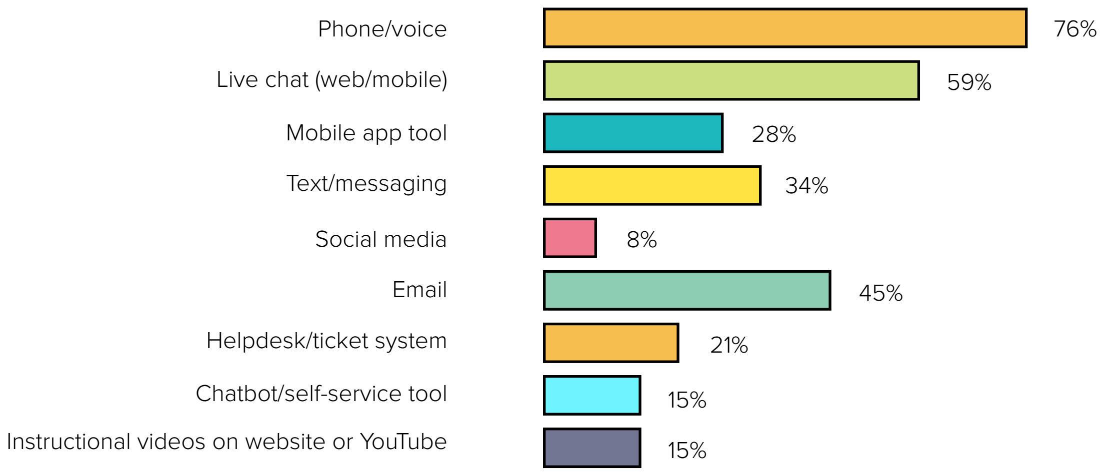
The hierarchy offers two conclusions: customers are most comfortable with what they know, and they are most comfortable with direct support. Phone, e-mail, chat, and messaging are familiar both as customer service options and general engagement platforms. Social, video, and chatbots, on the other hand, are newer concepts.

Social and video, moreover, make no guarantee of a singular "human" response. Some brands go out of their way to answer social inquiries as *brands* rather than as *individual people.* Self-service video and chatbot options very explicitly do not involve live conversations.

When it comes to the idea of "trust," social media does offer the option of public pressure. A brand that fails to solve a problem will be doing so publicly, therefore risking its reputation with existing and prospective customers. The fact that customers are so unenthusiastic about social, however, suggests that companies have not been caving to this pressure.

Phone's status as the most trustworthy channel is wholly understandable insofar as it is the most familiar and generally the best-resourced. The fact that many generations of customers are less likely to prefer phone for everyday conversation, however, suggests that businesses have an opportunity to close the gap. If they commit to delivering the same caliber of conversation, with the same commitment to creative and unique problem-solving, in channels like chat, they can start to position the digital transformation as a reality rather than an aspiration.

Suppose you have a customer support issue. In which of the following channels would you trust companies to successfully solve your problem?



SELF SERVICE VS. AGENTS

The aforementioned channel breakdown shows a high preference for agent-led conversations. The fact that customers cite a lack of a human agent option as a top pain point offers further support for this notion.

Only 3% of consumers, in fact, feel self-service is wholly sufficient. A whopping 30%, meanwhile, prefer an agent for *all* interactions. A substantial 47% will try to solve some issues on their own but always seek the ability to escalate, and 19% expect to handle most issues on their own but still value agents for complex issues.

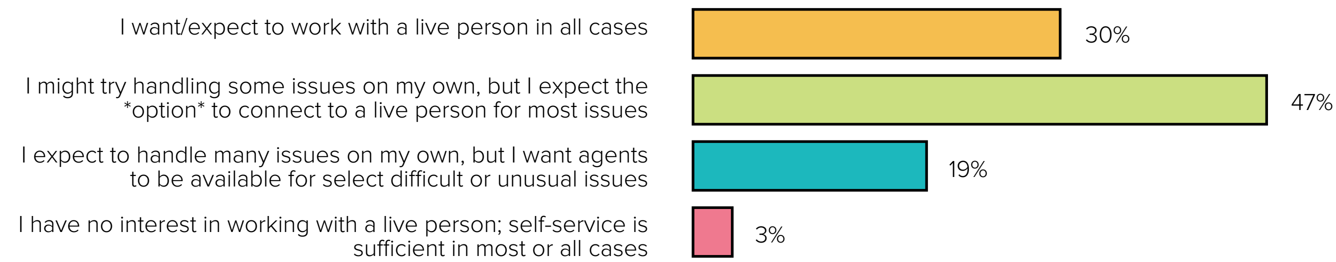
In one sense, these statistics may be a condemnation of existing self-service practices. After so many suboptimal interactions with chatbots and IVR platforms, customers have little reason to trust self-service platforms and thus more reason to demand live agent help for most or all issues.

In another sense, it is hard to blame the statistic *entirely* on poor experiences. Some customers clearly value what live agents represent – accountability, creativity, and emotional empathy – and will demand that from brand interactions moving forward.

No company, therefore, should be plotting a strategy for eliminating agents from their customer contact operations. They should not be hiding phone numbers or adhering to narrow support windows to *force* customers into self-service. Instead, they should be using self-service where appropriate, to ensure customers who *need* agents can access a higher-caliber type of agent, where and when they prefer.

High-caliber is, of course, an important descriptor here. Given the noted concerns customers have with agents' knowledge and empathy, it is important to hire and then empower agents who are capable of thriving in today's ever-complex engagement landscape.

Do you require access to an agent/representative when dealing with a customer service or tech support issue? Or is it OK or preferable if the brand focuses on self-service options like chatbots, FAQ pages, and automated voice menus?



REAL TIME VS. ASYNCHRONOUS SUPPORT

For today's customers, it is not enough to provide access to human agents. It is also important to grant them access to *live* conversations.

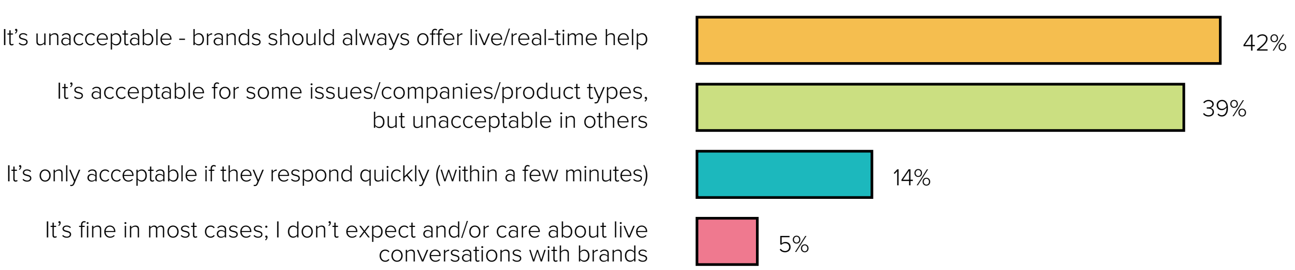
A staggering 41% of consumers say it is flat-out *unacceptable* for brands to only offer asynchronous options like e-mail or messaging. Successful brands, in their eyes, must allow consumers to engage with human employees in real-time.

Just shy of 40% are willing to forgive a lack of real-time agent support in some cases, but they fully expect it in other situations. Another 14%, meanwhile, accept the *principle* of asynchronous support but believe it belongs on a tight leash. They are only OK with delayed support if the company commits to addressing e-mails, messages, or social posts within a few minutes.

Only 5% completely absolve businesses of the burden of live conversations.

Although some consumers are more demanding than others when it comes to live support, it is clear that most *do* value speed. They want to know that when they have an issue, the business will take accountability for solving it in an accurate, timely fashion.

Some companies do not offer live chat/phone/messaging options and only allow you to request help via email or support ticket. Which best describes how you feel about this?



CX TRENDS THAT MATTER

They may still command ample conversation, but concepts like self-service and omnichannel engagement are hardly "hot trends." They have been focuses for customer contact leaders – and trickled down to consumers – for many years.

There are, however, customer experience issues that *do* constitute buzzy trends. They are uniquely reflective of the current landscape, and how brands navigate them can enormously impact business' ability to attract and keep customers.

SOCIAL ISSUES

Conventional wisdom once said that brands should *rarely* take stances on hot-button social or political issues. Why risk alienating half of a potential customer base to advocate for a cause that may not have any direct relevance on one's business?

That mindset has shifted in recent years, in part because companies increasingly believe there *is* direct relevance. Brands are looking to transcend from *serving customers* into *connecting with them.* By taking a stance on issues, especially ones of relevance to the customer base, brands humanize themselves and open the door to these meaningful connections.

At least, that is the argument in theory. Not all consumers agree in practice.

Nearly 28% of consumers do not care either way, while 26% do *not* support it regardless of the brand's specific stance. Brand activism, therefore, will fail to generate positive enthusiasm from more than half of customers.

Support for activism comes from the other 46% of consumers. Just shy of 28% value brand activism if they agree with the cause, while 19% appreciate the effort regardless.

With a limited *guaranteed* upside, but also reasonably low risk of *alienating* the overwhelming majority of customers, a fair takeaway is that brands should prioritize *authenticity.* If it makes sense for their brand, their customers, or their personal morals to speak about a particular issue or cause, they should feel every incentive to do so. More innocuous brands should not, however, feel pressure to speak up on every issue just because social advocacy is more common and accepted in today's business landscape.

SUPPLY CHAIN DELAYS

Introduced by COVID-19 and accelerated by many other world factors, numerous industries have been facing supply chain shortages. These supply chain shortages directly affect customers, who not only have to *wait* months for the privilege to buy products like new cars or appliances but may even have to spend thousands over the anticipated list price to secure their purchase.

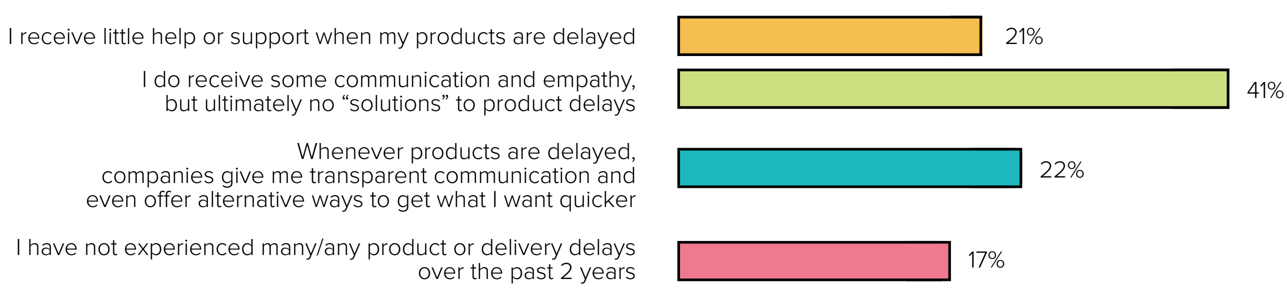
Naturally, this reality has ramifications for the customer experience. The very idea of waiting for overpriced products will itself affect customer sentiment and support. Companies' success in disclosing, navigating, and alleviating these wait times will also speak to their commitment to customer centricity.

In today's landscape, consumers feel that brands are comparatively strong at the *acknowledgement* component. They are less celebratory, however, about brands' ability to transparently address and resolve problems.

Just shy of 41%, in fact, say the *typical* brand responds to supply chain issues by showing some degree of communication and empathy but nothing approximating a solution. Nearly 22% feel brands generally offer transparent communication and even alternative solutions for expediting the process, while 21% feel they offer little-to-no support. The remaining 17% have not yet encountered noteworthy supply chain issues.

How do you feel about brands that take a public stance on social/political issues?

From your experience, which best describes how have brands been handling supply chain challenges and/or other recent product and delivery delays?



JUNE 2022

PRACTICALITY GUIDE

CallMiner

BEYOND SURVEYS: BUILDING A MODERN VOC PROGRAM

When measuring CX, surveys alone fall short. It's time to use unsolicited customer feedback from throughout the customer journey to establish a more comprehensive VoC program to drive real improvement in customer satisfaction, brand loyalty and retention.

For decades, surveys have been the primary mechanism used to gauge customer satisfaction. And while metrics derived from surveys, such as customer satisfaction (CSAT) scores and net promoter scores (NPS) are useful, they can be imperfect indicators of how your customers *actually* feel about your company, its service and support, and more.

Why? Because surveys put the onus on customers to answer questions, which doesn't always happen as quickly, frequently or accurately as we'd like. What's more, there are often discrepancies in the actual customer experience (CX) compared to the 'remembered experience.'

Today, organizations are embracing modern VoC programs that combine solicited feedback (such as surveys) and unsolicited feedback (such as voice and text-based customer interactions, social media comments, reviews and more), driving the insights needed to improve internal processes and better meet customers' needs based on their feedback.

FIVE TIPS FOR LEVERAGING CUSTOMER INSIGHTS TO BUILD A MODERN VOC

By capturing and analyzing every conversation with your customers, regardless of channel (phone, email, chat, social media, or surveys), you can derive contextual meaning on top of what is said, including acoustic measures that derive both emotion and sentiment, that paints a clearer picture of customer behaviors.

Here are five tips for building VoC program that incorporates both unsolicited and solicited feedback:

1. **Evaluate where you are today using a maturity model framework.** A maturity model is a powerful tool to help you objectively assess your functional capabilities compared to best practice recommendations. It helps target the tactical and strategic resources upon which you need to focus or invest to reach the next level of success and return on investment. It also highlights the factors across your organization that have a significant impact on success. By identifying these accelerators, your program owners and executive sponsors can be aware of the organizational alignment needed to build and grow your analytics initiatives.

   You should conduct a maturity assessment at the outset of a program to identify strengths and opportunity areas, and then revisit it on a regular basis to evaluate progress.

2. **Create a customer journey map.** Customer journey maps offer a unique perspective on what it's like to be your customer. By visualizing every step of the path from first contact with your company to engaging online, making a purchase, and interacting with customer service, customer journey maps provide insight that can help you improve every interaction and create exceptional customer experiences.

   A customer journey map begins with identifying a buyer persona and the touchpoints involved as they move from first contact with your brand to receiving communications, interacting online, making a purchase, seeking support, writing reviews, and hopefully continuing to choose your products and services. This ultimately helps you understand your customers' emotions and opinions about your brand at each stage of the journey.

3. **Implement a conversation intelligence solution.** With the right solution, you can uncover agent patterns that negatively impact CX, such as longer-than-usual AHTs, churn, silence on calls and more, or discover agent behaviors that deserve positive reinforcement, and serve as the foundation for an effective training program.

   Beyond these insights on agent performance, you'll discover both the explicit and implicit meaning your customers are trying to convey throughout their interactions with your brand. This includes both the acoustics of what people say and the semantics of how they say it, or their intent.

4. **Act on the insights you uncover.** Using the insights discovered within a conversation intelligence platform, your teams can make measurable business improvements. One important step is to work with agents on the front lines to continuously improve through enhanced coaching and training programs, based on what's actually happening during customer interactions.

   In addition, you can leverage these insights across departments to improve the products and services you offer, engage with customers more effectively through data-driven marketing campaigns, shorten sales cycles, and meet regulatory compliance goals.

5. **Use surveys to fill in the blanks.** After you've gained a comprehensive view into what your customers are telling you through unsolicited feedback, you can more effectively design customer surveys. Use these surveys to gather information that customers may not be readily giving you through unsolicited feedback.

   For example, surveys can be used to gain insights before launching new products and services, or to understand how external factors impact customer buying decisions. They can also be used to validate findings that have been uncovered by your conversation analytics programs,

TAKING CUSTOMER EXPERIENCE BEYOND THE SURVEY

Combining unsolicited customer insight with solicited survey feedback helps you discover the true VoC and understand how your frontline employees represent your brand. Rather than waiting days or weeks to collect and analyze survey responses, conversation analytics provides a holistic "before, during and after" picture of the CX in real time.

Taking it a step further, integrating this conversation intelligence feedback with data from your CRM systems allows you to analyze interactions within the context of all the other demographic, firmographic, purchase and other data you have about your customers. This enables you to identify and solve operational problems and CX issues, as well as uncover sales and marketing opportunities that can spark even more revenue.

APPENDIX

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- **Beyond Surveys: Building a Modern VoC Program**
- **Continuum Maturity Model**

2022 EDITORIAL CALENDAR

JANUARY

State Of Contact Center Technology

MARCH

Customer Contact Industry Review

JUNE

Customer Experience Trends, Challenges & Opportunities

AUGUST

Modernizing Service Experiences With AI & Digital

TBD

OCTOBER

Customer Contact Intelligence & Analytics

TBD

NOVEMBER

Future Of The Contact Center: A Forecast

TBD

FEBRUARY

Strategic Planning For CX Operations

February 9-11, 2022

APRIL

State Of Contact Center Technology

April 6-8, 2022

MAY

New Standards For Customer Contact Performance

May 25-27, 2022

JULY

Modernizing Service Experiences With AI & Digital

July 20-22, 2022

SEPTEMBER

Customer Experience Trends, Challenges And Innovations

September 14-16, 2022

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Business Continuity 2.0

October 26-28, 2022

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Future Of The Contact Center: A Forecast

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