



DELIVERING A DIFFERENTIATED CUSTOMER EXPERIENCE IN THE HOME

SURVEY RESULTS REPORT NOVEMBER 2014



EXECUTIVE SUMMARY

In a hyper connected, multi-device world, virtually every aspect of customer service has changed. In this digital age, we've become accustomed to the instant gratification—and the instant connection—that technology gives us.

It's no wonder that when it comes to the customer experience, technology has made us conditioned to want immediate connection. After all, we send 50 billion text messages every day to instantly communicate with others, and we collectively make 500 million posts to Facebook every single day. We even use technology to narrow down the time it takes to find a mate—a testament to the one-in-five couples who now meet online.

But in industries where the customer experience still demands some form of human interaction, what do consumers expect? And how do these industries—in this case cable and satellite providers—successfully combine the expectations of technology-savvy consumers with quality human interactions?

To better understand consumer expectations in the digital world we live in, CSG International and an independent survey provider polled nearly 400 consumers in the United States about where they

see the balance between technology and human interaction, particularly when it comes to a visit to their home as part of the customer experience.

Our survey found numerous opportunities for service providers to find new ways to perfectly blend innovative new technologies with good old fashioned communications, underpinned by three main findings:

- Consumers of communication services are ready for an “Uber-like” customer experience
- Customers want to be more empowered and in more control—and some are even willing to pay more for it
- Consistent and proactive communication is a differentiator, whether it's in person or through technology

**CABLE AND SATELLITE SERVICE PROVIDERS
MUST PERFECT THE SCIENCE OF BLENDING
TECHNOLOGY AND IN-PERSON EXPERIENCE
WHEN TECHNICIANS VISIT CUSTOMERS' HOMES.**



TAKING A CLOSER LOOK

So, where can cable and satellite providers improve the balance of technology and in-person interactions? Let's explore a little deeper into the survey results.

In what ways are consumers of communication services ready for an "Uber-like" customer experience?

We've seen some indication of what consumers want with the popularity of Uber, the slick mobile app in which you can find and bid for available transportation in just about any city across the globe.

With Uber, consumers have all the control: they can tell the app when they need service and what they are willing to pay for it. And when they book a reservation, they are notified of their driver's name with a photo as well as how others have rated them in previous jobs. They can also share their experience via social media when the trip is complete.

But it still comes down to the in-person experience once the Uber driver shows up. Was the driver courteous and friendly? Did he act appropriately? Was he abrupt or rude? Did he have bottled water and gum at the ready?

The same is true for cable and satellite providers who send technicians to the home. Consumers want to know, among other things:

- Who's coming to the home and is he/she qualified to perform the service?
- Does he/she have a good rating with other customers?
- Can the technician give me a heads up when he/she is on their way so I can maximize my time?

No doubt, Uber (and other services like it) has helped to transform consumer expectations when it comes to traditional industries where technology and human interaction still intersect—such as cable and satellite service calls.

Consider these survey statistics:

- 89% of consumers say they would be interested in using an Uber-like mobile application to know where their cable/satellite service technician is and what their ETA is to their home
- 97.5% of respondents said they were either interested or highly interested in having the capability of scheduling technician visits to their home or business online as an alternative to requesting service via a call center
 - 64.1% want option of scheduling online
 - 13.7% want option of scheduling via mobile device
 - 22.2% have no preference on method—they just want service providers to offer it
- Vital statistics about the technician scheduled to visit their home are important. For example:
 - Nearly 70% said they wanted the service provider to provide them with the name of their technician
 - 65% want a photo of their technician
 - 38.7% want the service ratings of the technician from other consumers
 - 32.7% want information about the technician's tenure with the company
 - 25.3% want reviews from other consumers of their visiting technician

A QUALITY IN-PERSON EXPERIENCE IS KEY. CONSUMERS WANT TO KNOW THEIR TECHNICIANS': NAME 70%, PHOTO 65%, RATINGS 38.7%, TENURE 32.7%



With this Uber-like technology in hand, it's no surprise that customers want technology to help them be more empowered and have more control—and in some cases they are willing to pay more for it.

As consumers, we are surrounded by the concept of priority access. We get priority access on the turnpike when we have two people in the car (or we've paid for the privilege of driving in that lane); and we pay for priority access to sail through the painstakingly long line at the airport. So why should access to cable and satellite customer service be any different?

Our survey touched on an interesting potential area in which consumers could get what they want—and cable service providers could find another revenue stream in the process.

Consider this:

→ 85.6% of consumers said they would pay up to \$25 for the ability to choose technician visits that were convenient to them, such as same-day service or weekend appointments. When asked for their preference, consumers said they would pay for the option to book:

- Same day service (20.7%)
- Service on Saturday or Sunday (17.3%)
- Guaranteed specific arrival time (15.4%)
- Guaranteed one-hour window (11.1%)

→ Priority access to service technicians also can serve as a differentiator for service providers. For example, 36.2% of consumers said they would rather have a cable and satellite provider send a replacement immediately when their technician is more than an hour late for their appointment, while 30% preferred to be rescheduled but with priority access.

And let's not forget the insatiable desire for consumers to be empowered. Consumers increasingly want the ability to do it themselves and on their own terms—and some even prefer the DIY method over booking a service technician and waiting for their visit.

For example:

- 85.7% of respondents said they would rather fix an issue themselves so a technician wasn't needed at all
- More than 83.9% of consumers would prefer a website with step-by-step instructions on how to fix issues, while 69.6% prefer online videos
- In fact, 100% of respondents who reported having service in the last month said they would use a troubleshooting site; significantly higher than the overall

85.6% OF CONSUMERS SAID THEY WOULD PAY UP TO \$25 FOR THE ABILITY TO CHOOSE TECHNICIAN VISITS CONVENIENT FOR THEM
CONSUMERS ALSO WOULD PAY FOR:

20.7% SAME DAY SERVICE

11.1% GUARANTEED ONE-HOUR WINDOW

17.3% SERVICE ON SATURDAY OR SUNDAY

15.4% GUARANTEED ARRIVAL TIME



Finally, regardless of the communication channel, consistent and proactive communication is still a differentiator. In other words, consumers want quality interactions, combined with the best technology the marketplace has to offer.

Regardless of how much technology is part of our daily lives, consumers in the digital age still expect the basics: be on time, be honest and respectful—and communicate proactively when things are not going to go as planned. Our survey results bear this out in the following ways:

- If a technician is running late, consumers want to know about it before their appointment window has begun
 - For example, 55.8% of respondents want a personal phone call from their CSP while 34.8% say a text message would suffice
- Nearly 90% of consumers want an explanation of what the technician is going to do in their home in advance of their scheduled visit. Equally important is that the technician explains what has been done during a service appointment (and why it was done) before they leave.
- 86.6% say they value a fully informed technician when they arrive at the door for their appointment. Consumers say it is important that a technician has the necessary information they provided during their call center interaction to fulfill their work order already documented when they arrive.
- 89.9% say they would use a service that automatically alerted them of outages in their area instead of having to endure a lengthy wait on the telephone inquiring with the CSP

CONSUMERS IN THE DIGITAL AGE STILL EXPECT THE BASICS:

55.8% want a phone call if the technician is running late

90% want an explanation of what the technician is going to do prior to arrival

89.9% would use a service that automatically alerted of outages in their area

86.6% want the technician to be fully informed upon arrival

CSG'S POINT OF VIEW

For cable and satellite service providers—who regularly schedule technicians to visit consumers' homes to upgrade, troubleshoot or install service—finding the right balance between using technology and people has been a longstanding priority. And what seasoned technicians and dispatchers will tell you is that this perfect balance is part art and part science.

The survey results prove that their efforts are paying off, with the majority of cable and satellite consumers saying they are generally satisfied with their in-person experiences. Our survey reported more than 76% of consumers overall said they were satisfied with their cable/satellite provider's last service visit to their home. In addition, 73.5% said they were confident that their cable/satellite technician would be on time.

So what else can service providers do? We believe there are several opportunities to improve the overall customer experience scores using new technologies.



CSG recommends four key solutions:

1. Unify communications tools and field workforce systems.

The survey data shows that many consumers believe information is power. They want to know when a technician is near their home. Unified communications tools give operators the ability to proactively alert a customer that a technician is on the way, whether that's a phone call at home when the technician is 30 minutes away, or a text message appointment reminder.

Operators are also starting to send a digital business card for the technician along with appointment notifications. This allows customers to know who is going to be at the door, their tenure and experience with the company and how to contact them, creating a more personalized experience. All of this addresses the need for consumers to know who is coming, how qualified they are and when they will be there.

2. Leverage GPS for location-based information.

Integrating GPS technology with mobile field service management can drive dramatic efficiencies. For example, one large CSP has reduced vehicle idle time by 25 minutes per vehicle per day (which, by the way, translates into a reduction of millions of dollars per year in fuel costs alone). These same GPS technologies that improve operational efficiencies in the field can be leveraged to show consumers via mobile where their technician is en route; calculate based on real-time traffic data when they will arrive; and use location-based data to trigger an automated update to the customer when a technician's estimated arrival time has changed.

3. Eliminate the silos for how field technicians

support customers. CSG's experience has shown that operators who optimize the movement of their technicians in the field are those who consolidate and manage all scheduling information across all lines of business. Through a consolidated view, operators can "see" the customer service process in its entirety—and that holistic view opens the opportunity to not only serve the customer well, but also upsell and cross-sell services. This is a must-have in today's competitive landscape. Eliminating these silos within field workforce systems themselves is also critical. CSPs must integrate scheduling and resources in order to ensure consistency across the enterprise—regardless of how many back-end billing, order management and workforce optimization systems they use.

4. Centralize customer communications preferences.

It's one thing to let a customer know in advance that a technician is on their way, but how do you know it will reach the customer through the right channel? By using a centralized "profile" on each customer, operators customize communications based on the consumer's preferences. This profile data can serve as a central hub for all other systems in need of this information—from billing to Customer Relationship Management to the technician workforce in the field.



SUMMARY

It's an incredible world we live in—and technology has made our lives richer and the tasks of daily life more efficient and convenient.

But even in a hyper connected, multi-device world, consumers still want an authentic experience from their service provider—particularly when it comes to a cable technician's visit on their own turf.

To achieve this, service providers must focus on ensuring customer care and operational systems are in place to optimize the technician's visit. They must consider adding other solutions to ensure proactive communications with their customer, including automated messages and phone calls to provide updates on a pending appointment and online troubleshooting capabilities. But that's not enough. In order for these to be effective, they must work seamlessly with existing systems that care for the customer, including billing, order management and field force management.

We know there is more opportunity for service providers to empower customers and give them more control. As customers become more connected, they have come to expect that their cable or satellite service provider will be more proactive in their communications.

The tools are available to deliver the next generation of customer care solutions to consumers of cable and satellite services. By combining the best of what technology has to offer with a high-quality human interaction, how could a service provider go wrong?

METHODOLOGY

CSG's survey explored what consumers want when it comes to technicians visiting their home to install, upgrade and troubleshoot service. Through independent research firm Intengo, CSG asked 400 consumers of cable and satellite communication services for perspective on their experience during their last technician visit to the home. Consumers who participated in the survey:

- Ranged in age from 18-65
- 67.5% were as cable subscribers and 32.3% were subscribers of satellite TV services
- Of those who participated, 55.3% had a technician visit within the past year, while the remainder (40.3%) had service more than a year ago

ABOUT CSG

CSG simplifies the complexity of business transformation in the digital age for the most respected communications, media and entertainment service providers worldwide. With over 35 years of experience, CSG delivers revenue management, customer experience and digital monetization solutions for every stage of the customer lifecycle. The company is the trusted partner driving digital transformation for leading global brands, including Arrow, AT&T, Bharti Airtel, Charter Communications, Comcast, DISH, Eastlink, iFlix, MTN, TalkTalk, Telefonica, Telstra and Verizon.

At CSG, we have one vision: flexible, seamless, limitless communications, information and content services for everyone. For more information, visit our website at csgi.com and follow us on [LinkedIn](#), [Twitter](#) and [Facebook](#).