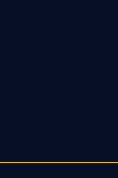


2023 Global Customer Experience Report

The rise of AI, cloud and employee experience in shaping the CX of the future



AI is surging and automation is set to revolutionize the entire spectrum of CX. Organizations continue to invest in building AI-led capabilities to differentiate and enhance their CX capabilities.

And, as automation accelerates, they're prioritizing and redefining the world of EX as they look to differentiate and grow.

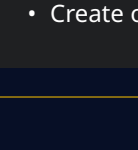
To keep pace with changing technology demands, organizations are prioritizing cloud and enhancing security to achieve business goals.

01

The rise of EX

02

AI will fuel the revolution



Previously recognized as a #1 CX priority, EX has evolved to become a #1 C-suite priority.



Organizations recognize the potential of AI in enhancing CX and EX.

EX has been redefined to focus on technologies that:

- Enable the employee
- Drive empowerment
- Create optimal efficiency

- CSAT with AI-led CX interactions is now on par with CSAT for human-led interactions.
- Customers' resistance to AI-led CX is falling year on year.
- AI is cited as the top enabler for CX and EX in the next 3 years.

03

Cloud critical

04

Security: an all-important requirement



To enable AI, CX and EX technologies, organizations are relying on managed service providers to support their move to the cloud.

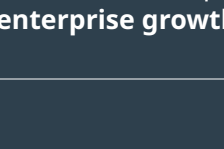


Improvements to CX and EX technologies are underpinned by the need for enhanced cybersecurity.

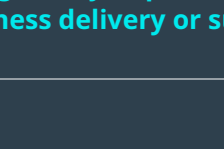
The crucial link between CX, EX and profitability for enterprise growth has led to a greater need for strategy alignment.



Over 90% of organizations agree that CX and EX improvements will directly affect their net profit.



96% agree that CX and EX strategies must be closely aligned to maximize their impact on enterprise growth.



However, 82% agree that their EX levels are low and that this negatively impacts their business delivery or success.

Learning from top performers

Top-performing organizations* have not only executed most of these priorities effectively but are also ahead of the curve when looking to the future.

Top performers are:

over 2x more likely to be very satisfied with their current CX capabilities.

10x more likely to have significantly increased their IT spend.

3x more likely to have significantly improved customer satisfaction.

25% more likely than all other organizations to be offering top-rated CX via AI.

91% more likely than all others to have significantly increased their employee satisfaction.

*Top performing organizations are those with more than 10% year-on-year revenue growth and an operating profit margin of more than 15% in the last financial year. Top performers have been compared to underperformers unless otherwise stated. Underperformers are organizations with 0% or less year-on-year revenue growth and an operating profit margin of less than 5% in the last fiscal year.

01

The EX Factor

The EX narrative has changed: EX is now about the technologies that enable and empower users and drive efficiency, with a focus on collaboration and mobility tools for seamless EX, regardless of location.



91% of respondents agree that improvements in EX directly impact their bottom line.



88% of CX managers agree that human-led support remains a critical channel option and two-thirds of CX interactions still require some form of human support.

Hybrid-work enablement is critical

70% will make use of an office



Improving employee experience is a top C-suite priority

The hybrid challenge: advancing mobility

Despite the growing prominence of technology in CX, the human role remains essential, but organizations need to adapt to new requirements.

4 key insights

just 48%

of organizations say their employees have access to the technology they need to work from home or remotely.

94%

say hybrid work has already caused them to increase their investment in data protection and security.

73%

have already invested in mobility. Top performers are nearly twice as likely as underperformers to have significantly increased their investment.

57%

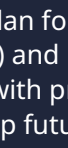
of organizations have invested in business-grade internet connections; 79% of top performers have made the investment.

02

AI or goodbye

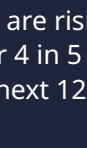
Organizations are prioritizing AI and digital and evolving technology architecture that enable CX and EX success

The majority of organizations agree strongly that they're increasing digital technology investments to counter current economic pressures.



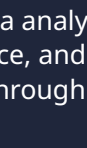
Top performers are already prioritizing AI

(a 3-year plan for most other organizations) and looking to build on AI with predictive analytics (a top future-CX enabler).



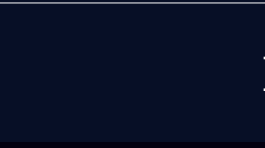
AI is voted the #1 enabler of future CX and EX strategies

AI interfaces are rising to become the norm for 4 in 5 organizations within next 12 months.

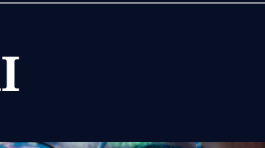


Digitalization is fostering hyperpersonalization

via analytics intelligence, and organically through AI.



77% of top performers say that AI is meeting or exceeding expectations for delivering CX results



86% say the same about robotics.

Benefits of using AI

80%

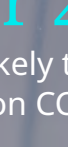
of operations managers say AI and automation are making a significant impact on removing drudgery from agent interactions.

1. Improved efficiency (e.g. core business process automation)
2. Improved customer experience (i.e. real-time assistance/convenience)
3. Improved employee experience (e.g. removal of mundane tasks)

03

Cloud critical

The cloud revolutionized how organizations leverage technology, driving digital transformation and empowering organizations.



Security is the #1 consideration

for organizations when moving to the cloud.

95%

of organizations say cloud enablement is vital to CX/EX outcomes.

#1

Cloud is listed as the top enabler that will positively help reshape future CX capabilities.

Top performers are over 2x more likely to select a cloud contact-center platform based on CCaaS and collaboration integration.

04

Security: an all-important requirement

The pursuit of robust security measures remains paramount to protect sensitive information.



46% agree strongly that current cybersecurity controls are effective in protecting and enabling their employees wherever they work



Top performers are nearly 3x more likely to fully involve their CISO or cybersecurity team in their CX

How organisations manage and buy CX products and services

Most organizations work with a third party to partner their CX and EX infrastructures. Final decisions on technology and partner selection now extend beyond IT.

9 in 10 say the pandemic and other macroeconomic factors have forced in-house IT teams to focus on core business activities. Complex CX/EX workloads are increasingly outsourced.

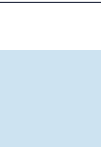
98% of CIOs are already using or open to a using a UCaaS model

Top 3 factors in selecting a partner

1. Leading innovation/strategic vision
2. Enhanced cybersecurity
3. Improved service delivery

How CX will be delivered

Top 3 factors in selecting a communication and collaboration platform



1. Ease of use
2. Security
3. Integration with other systems, applications and platforms

Top 3 tools to improve employee interactions



1. Virtual learning assistance
2. Interaction advice
3. Knowledge management system

In conclusion:

Organizations need to embrace new technologies to evolve their CX, supported by newly prioritized EX.

NTT can help you navigate the new world of AI- and cloud-enabled CX and EX.

Our experience in migrating organizations to the cloud, combined with our proven CX and EX capabilities, will complement your existing infrastructure and technology service and give you a competitive edge.



Align your CX and EX strategies to improve your return on investment



Invest in a partner with the expertise to guide you through the new world of intelligent CX and EX



Move to models like CCaaS and UCaaS model to access speed, innovation and flexibility

Create superior connections Join the conversation



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