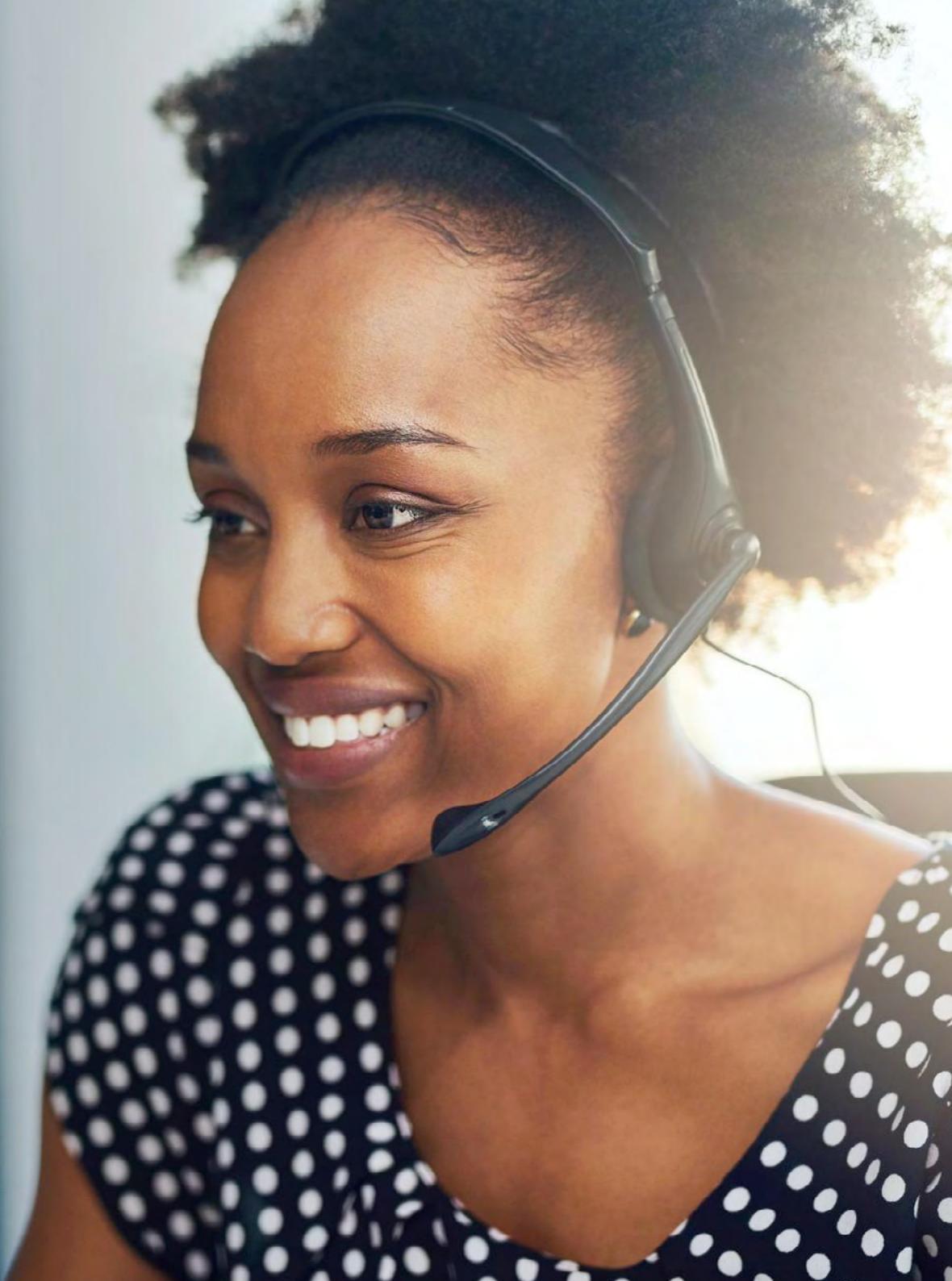




# 2018 Genesys cloud transformation survey: African small and medium-sized contact centres



# 2018 Genesys cloud transformation survey: African small and medium-sized contact centres



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Welcome to the *2018 Genesys cloud transformation survey: African small and medium-sized contact centres* that analyses cloud contact centre trends, forecasts and predictions across five African countries: Botswana, Kenya, Ghana, Namibia and South Africa.

We were excited to receive the assignment to conduct this survey at the behest of Genesys, a company that creates customer experience and contact centre technology for mid-sized and large businesses. The contact centre industry in Africa is both a vibrant and burgeoning sector, and from the outset we ensured that the fieldwork and the research process were conducted with veracity (truthfulness), fidelity (trust), confidentiality and privacy.

We believe that we have delivered a report that reflects the viewpoints, opinions and predictions of African small and medium-sized businesses and contact centres, juxtaposed with desktop research and qualitative commentaries from forward-thinking Genesys executives in the region. This is very much a working guide and compendium of insights for all contact centre decision makers to utilise when moving, and transforming, their contact centre operations into the cloud.

Thank you to all 130 respondents in the five respective African countries who took the time to complete this survey and who shared their valuable statistics, projections and perspectives. Without knowledge leaders like you this research report would not have been possible to create and publish.

We trust that this report will enable you, the reader, to make better informed decisions with regards to contact centre cloud trends, investment plans, people, technology and customer engagement requirements in the year ahead.

Happy (and insightful) reading!



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Research commissioned and first published in 2018.  
By Knowledge Executive.



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## About Genesys

Genesys powers more than 25 billion of the world's best customer experiences each year and is the only company recognized by top industry analysts as a leader in both cloud and on-premise customer engagement solutions. We passionately believe that great customer engagement drives great business outcomes. More than 11,000 companies in over 100 countries trust the Genesys customer experience platform to orchestrate seamless omnichannel customer journeys and build lasting relationships.

## About Knowledge Executive

Knowledge Executive empowers and enables global Knowledge Leaders. We co-create and publish business, trade and investment research, market intelligence and insights for executives of today's Knowledge Economy. This includes commissioned and syndicated specialist research reports, qualitative and quantitative surveys covering business process outsourcing, services and management (BPO, BPS, BPM) and customer experience (CX).

**Knowledge**  
**Executive**

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## About the research



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### Methodology and respondents

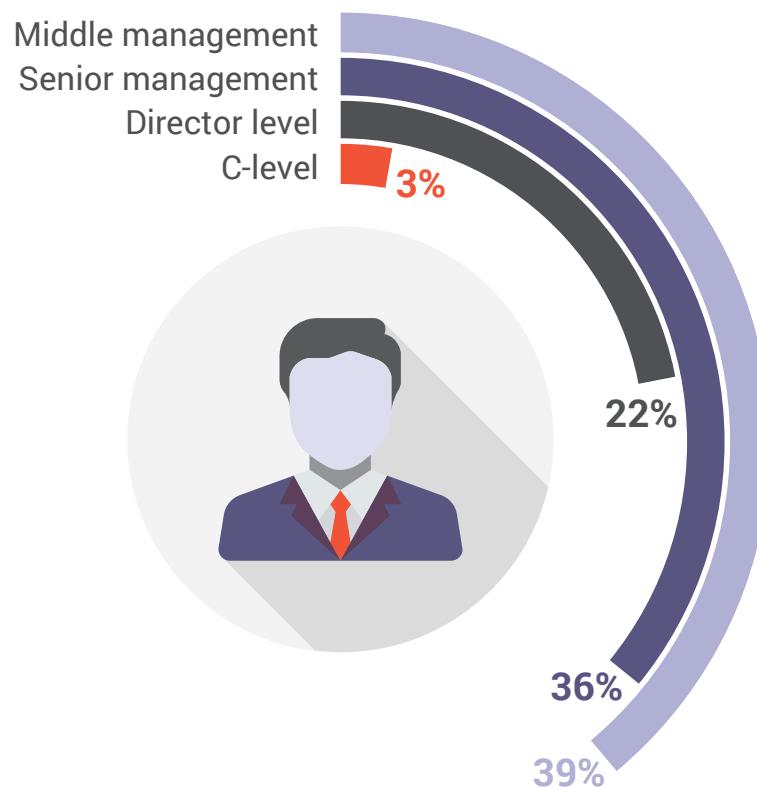
Knowledge Executive was commissioned to conduct the research by Genesys across five African countries: Botswana, Kenya, Ghana, Namibia and South Africa. C-level executives, contact centre directors and managers were invited to participate in the survey through telephonic interviews that were conducted in English over an eight-week period between November 2017 and January 2018. The respondents were assured that their personal details, and the information they shared within the questionnaires, would be kept confidential.

In total, 130 individuals were interviewed for the survey. These organisations represented 10 vertical markets, including automotive, banking and financial services, insurance, retail, telecommunications, travel and leisure, public sector/government, and healthcare and medical.

The analysis of the quantitative data was structured using a validated scoring matrix, while the text, graphs, icons and qualitative data were created to support the key findings.

### Respondents

What level do you operate at within your organisation?



## Sector split

What industry best describes your organisation?



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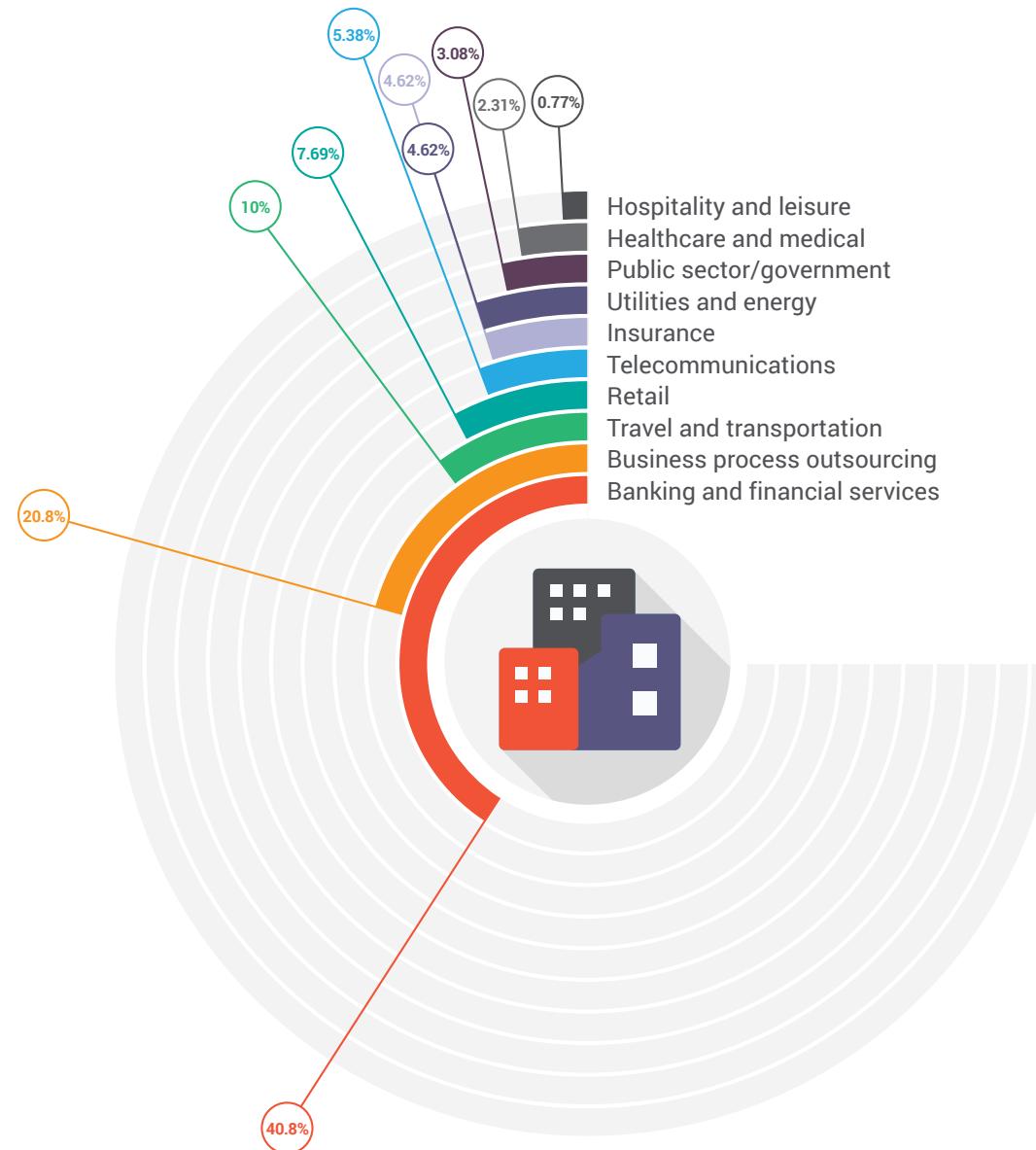
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## Agents



How many total agents, or seats, do you have in your call/contact centre operation(s)?

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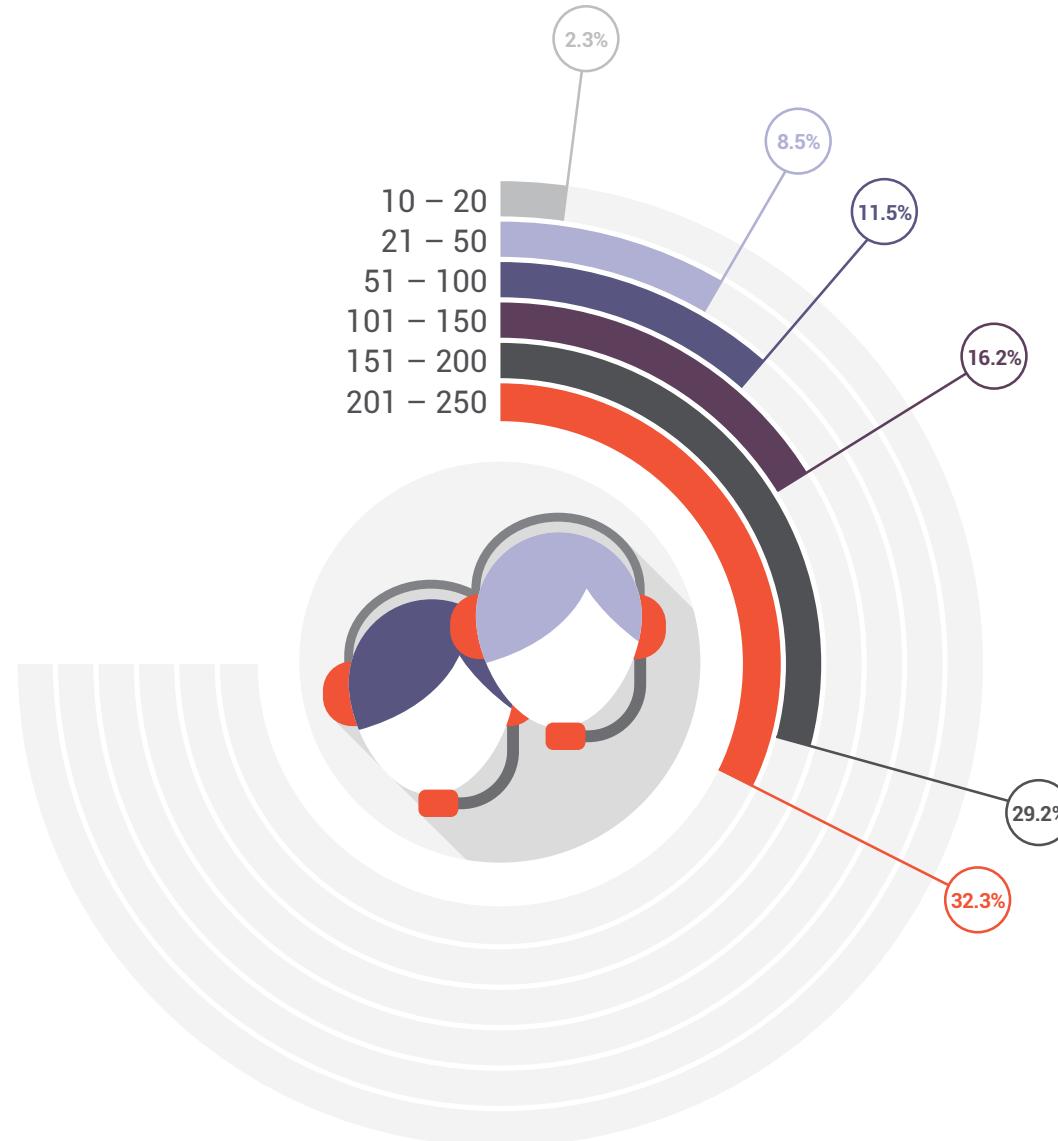
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## Employees

Approximately how many people work in your organisation?



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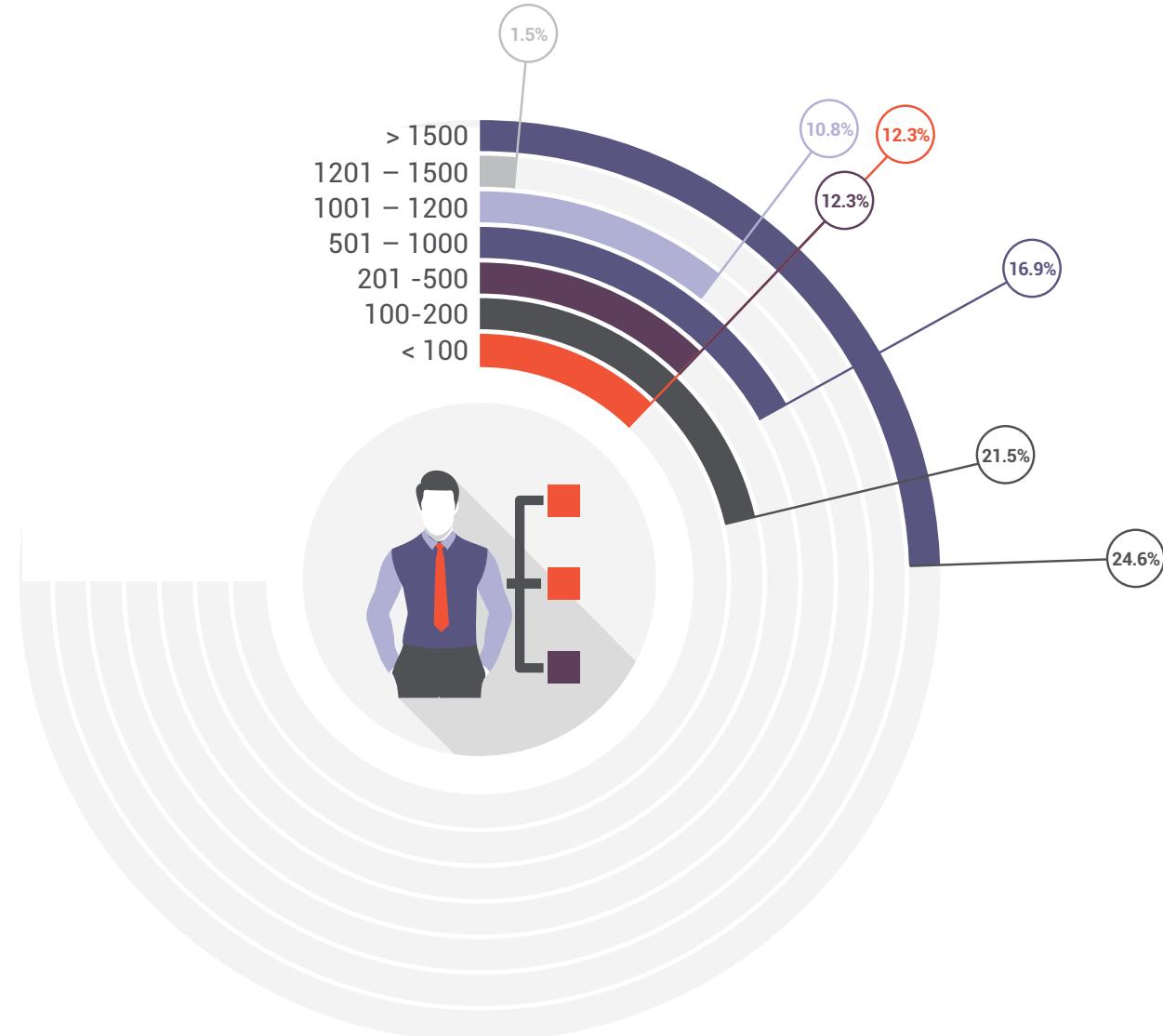
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## Executive summary



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The 2018 Genesys cloud transformation survey: African small and medium-sized contact centres confirmed that the adoption of cloud computing technology in the African contact centre industry is growing and maturing as many companies across the continent shift from on-premises to hybrid and cloud models.

The inclination is strong in Africa's vibrant contact centre industry to adopt the cloud with hosted, virtual and Contact-Centre-as-a-Service (CCaaS) solutions. However, a lot of work still needs to be done for further transformation to take place.

### Adoption of cloud computing

Over the past 2-3 years, 56% of the contact centres interviewed in Africa have adopted cloud computing. The major types of cloud-based technology adopted include CRM systems, voice recording and cloud/VoIP phone systems. Those that have not moved into the cloud (44%) indicated that the major barriers that they face include security, risk and compliance. Others prefer on-premises solutions while many organisations have never thought of cloud-based technology as an alternative. For these companies to consider moving to the cloud, the technology service provider must guarantee security and data protection (75.44%), mature technology and IT support (75.44%) and, in some cases custom, integrated services (59.65%).

### Employee engagement

Employee experience and engagement is top of mind for most contact centres in Africa, with many deploying employee engagement technology and applications such as workforce optimization and omnichannel solutions together with employee collaboration and performance tools. Hybrid cloud technology seems to be the preferred model by contact centres for the deployment of this technology due to the flexibility it offers to combine public cloud, private cloud and on-premises services, enabling critical or risk-intensive services to remain in-house.

**56% of contact centres are undergoing a cloud transformation.**

**44% have yet to move into the cloud.**



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## Business process services

Contact centres in Africa enable the fulfilment of a broad range of business process services (BPS) that include inbound calls (92.32%), outbound calls (73.85%), customer service support (70.77) and toll free support (61.54%). Other BPS activities include mobile app support, sales services, finance and accounting and debt collections.

Customer/client communications channels  
Over 90% of the contact centres in the five African countries utilise voice services and email communications channels. Other communications channels include fax, SMS, social media, mobile apps and IVR. In addition, many organisations are intending to deploy new technologies such as video chat and

intelligent automated agents or chat bots. Of interest is that most of these applications and channels are managed within silos as standalone technology with only a few of the respondents indicating that they have integrated them within one solution platform.

## Customer engagement

As employee experience is a top priority, so too is customer experience at the forefront of many contact centre strategies in Africa. The most applied customer engagement technologies include IVR (46.92%), voice recording (46.15%), CRM systems (37.69%) and ACD at 24.92%. Other customer engagement technologies being implemented include text and speech analytics and robotic process automation (RPA). The majority of those interviewed for

the survey prefer on-premises models for their customer engagement technology, however there are many organisations that are adopting cloud and as-a-service models.  
Social media channel management  
Currently, 29% of the respondents are utilising social media channel management solutions while 35% are planning to deploy social management solutions in the next 12 months. All of the respondents interviewed stated that their social media management applications do not enable agents to respond to social expressions. This indicates that most contact centres in Africa still need to link social interactions with customers directly to agent desktops with 88% of the respondents indicating that they would do this in the year ahead.



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## Outbound dialling campaigns

When asked what outbound dialling campaign solutions or platforms they currently utilise in their contact centres, only 42% of the respondents indicated that they have deployed such technology. The results indicate that many centres still utilise on-premises outbound dialling platforms, however more organisations are deploying the hybrid cloud model signifying future potential for growth in cloud-based solutions. There is a strong appetite for outbound dialling campaign solutions to integrate with CRM applications or provide personalised and proactive outbound customer care or services.

## Commercial models

It was no surprise that most contact centres prefer the pay-as-you-go commercial model for the delivery of contact centre applications and technology. Other centres prefer per-user/agent, per hour and licensed commercial models. This signals the appetite for many contact centres in Africa to evolve into as-a-service contracts with cloud technology providers that can offer flexible and stackable finance options.

## Pain points

The major technology pain points and challenges that contact centres face include compliance demands (50%), data protection and security (48.46%) and organisational silos. Other challenges noted include the increased need to implement social media CRM applications and the requisite lack of IT and analytical skills. Automation capabilities (16%) and technology silos (21.54%) also present significant challenges to contact centres.

## Technology service providers

Service providers were placed under the spotlight in the survey with the majority of the respondents indicating that a good technology service provider should have the appropriate industry experience and certified staff. Omnichannel capabilities and tailored/flexible commercial models were also highlighted as the main criteria contact centre heads look for when procuring technology. Other crucial features highlighted include providing proper metrics for quality assurance, flexible partnership approaches and evidence of success in previous deployments.

## Technology budgets

The survey confirmed that technology (and with it, cloud) transformation is front and centre for most contact centres in Africa. However budgets are under restraint with almost half of the respondents (53%) indicating that their annual technology budget range is below \$100,000. When taken in context, however, most of the respondents to the survey consist of small to medium businesses with contact centres that range from 10–300 seats. These organisations will surely grow over the next five years, and with that their inclination to evolve and transform into the cloud with omnichannel capabilities.

Indeed, the next 12 months, and the years beyond, will be an innovation-driven, strategically-charged period for small and medium sized contact centres in Africa marked by the adoption of new enabling technologies while addressing challenges with compliance, security and organisational silos.

# Global contact centre cloud transformation trends



# Global contact centre cloud transformation trends



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The global contact centre market is increasingly shifting from traditional, voice-only call centre services to fully integrated and digitised customer lifecycle management (CLM) processes in an effort to deliver an exceptional customer experience at every turn. In this new consumer paradigm, the customer holds true power and is increasingly demanding more relevant, beneficial and personalised services and interactions. Today, customer experience is the most powerful differentiator in business. If contact centres do not deliver the experience they expect, customers will gravitate to other service providers that satisfy their needs and requirements.

Genesys espouses the fact that the plethora of communication channels businesses use to service customers—phone, text, chat, social media, email—results in immense amounts of data that reveal actionable insights. One of the fastest ways to process that data in real-time is through the cloud. A 2017-2018 Ovum Decision Matrix survey conducted on behalf of Genesys, states: “Cloud solutions are growing in popularity and gaining an increasingly significant share of the market as their feature sets and flexibility begin to duplicate or, in

some cases, surpass those of legacy premises-based systems.”

The trend globally is for many organisations to deploy multichannel or omnichannel contact centre solutions—in the cloud—that enables agents to talk to customers over multiple touchpoints and devices all within a single





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application. A white paper published in 2018 by IDC and Genesys entitled, “Transformation of customer experience with cloud-based customer engagement applications,” states “In the customer-centric digital world, it is essential for organisations to track customers across channels, and respond to queries and grievances in real-time. IDC believes cloud will be transformational in the way contact centres operate. The cloud model empowers engagement agents to have full visibility of customers who communicate via voice and through multichannel platforms including web chat, social media, video and mobile apps.”

When examining how organisations globally are adopting cloud or CCaaS, it's clear from

this survey and other global research, that customers prefer pay-as-you-go subscription models when deploying enabling technology for employee and customer engagement. A McKinsey survey on subscription preferences indicated that 46% of respondents like that a subscription model involves a smaller upfront investment, 43% said they prefer opex over capex, and 43% said they like the flexibility and ability to “burst” capacity.

Indeed, the adoption of CCaaS is a worldwide phenomenon that has set the stage for contact centres of all sizes to transform their operations, services, communication channels and engagement methods with both customers and employees alike.



# Cloud transformation in African contact centres



# Cloud transformation in African contact centres



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As global organisations evolve and transform their contact centres into the cloud, so too are their counterparts across the African continent. This survey of African small to medium contact centres indicates that while many organisations still have strong preferences for premise-based technology and platforms, more than half of the respondents have deployed cloud contact centre solutions.

With a combined nominal GDP of US\$ 3.3 trillion and purchasing power parity (PPP) of US \$6.75 trillion, continental Africa is certainly an emerging, developing and burgeoning market. The five countries covered in this survey: Botswana, Kenya, Ghana, Namibia and South Africa have combined populations of up to 132,361 million citizens fuelling a customer centric industry that is becoming more informed, networked and device-connected. Smartphone penetration in South Africa alone is estimated to reach over 25 million by 2022 (according to Statista), which equates to 6.5 million additional customers using the mobile screen as a way to connect, interact and engage.

Cloud computing is not an unknown information technology paradigm in Africa, as many countries have already adopted high-end cloud-based technology and software in vertical market industries such as financial

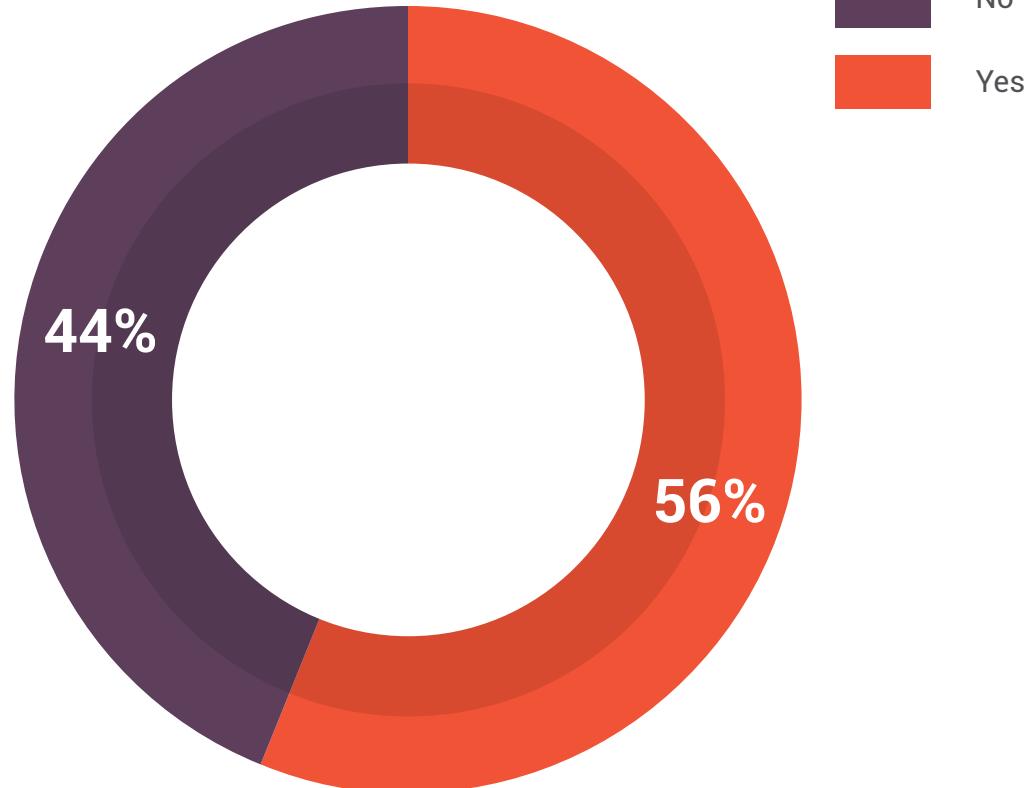
services, telecommunications and media. Research by Knowledge Executive indicates that cloud service adoption in Africa is forecast to grow by over 41% over the next four years. African-based companies have seen that the cloud offers excellent economies of scale while providing access to the latest technologies and innovations on the fly. Small to medium businesses (SMEs) are rapidly adopting the cloud to gain access to platforms, applications and solutions previously only available to large enterprises.

For captive and outsourced African-based SME contact centres, this presents an opportunity to leap frog ahead of large centres and enterprises with legacy systems, enabling them to be at the leading edge of technologies that facilitate exceptional customer and employee experiences.

## Does your call/contact centre utilise cloud-based technology?



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No  
Yes

To determine cloud adoption and transformation in contact centres in the five African countries, the survey asked the respondents if they utilise cloud-based technology. Over half of the organisations interviewed (56%) indicated that they have adopted cloud-based technology in their contact centres while 44% of the companies prefer premises-based models.

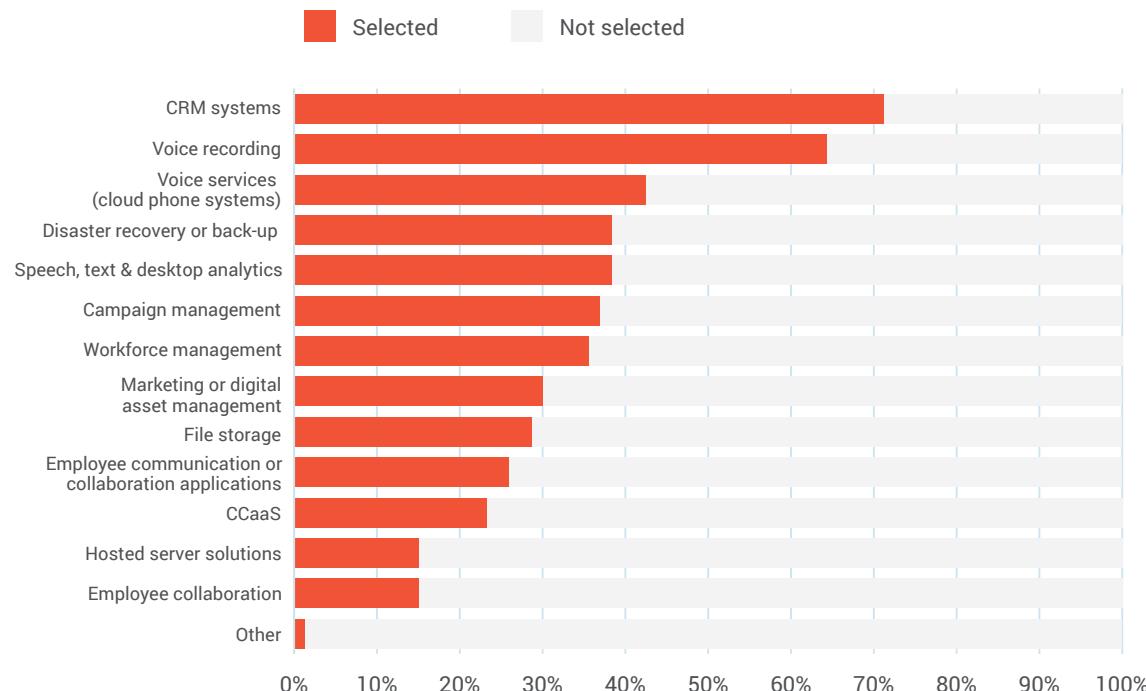
### Forecast:

As more African SME contact centres start to realise the revolutionary benefits of progressive technology such as robotics, intelligent assistants and artificial intelligence (AI), expect more organisations to shift from the perceived control of premises-based systems to the agility and adaptability of cloud-based platforms.

## What cloud-based technologies you are using in your contact centre?



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The cloud technologies most implemented in African SME contact centres are CRM systems (71.23%) and voice recording (64.38%). However, businesses have also adopted cloud technologies for voice-based cloud phone systems (42.47%), speech and desktop analytics (38.36%), disaster recovery (38.36%), and campaign management (36.99%).

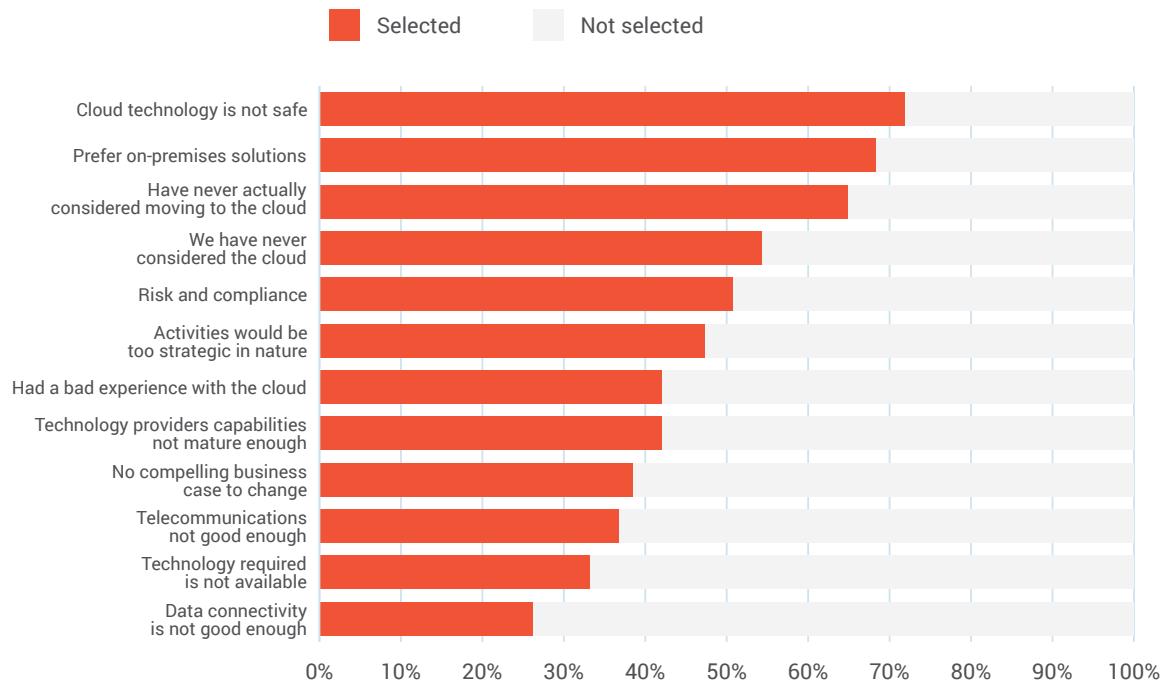
### Forecast:

CCaaS is certainly on the radar of many African SME contact centres with 23.29% already deploying as-a-service models. We predict that this number will increase two-fold over the next five years as more technology-savvy contact centre decision makers seek to digitise their operations in seamless and streamlined ways.

## Please specify the reasons why you do not use cloud based technology for your contact centre?



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When asked why they do not use cloud technology, 71.93% of the respondents indicated that security was their main concern. Other companies indicated that they prefer on-premise solutions (68.42%) while 64.91% have never considered moving to the cloud. Other major hindrances include complexity with risk and compliance (50.88%) and the lack of compelling reasons to change (38.60%). Many contact centres have never considered cloud as an alternative (54.39%) and others have had a bad experience in deploying cloud technology (42.11%).

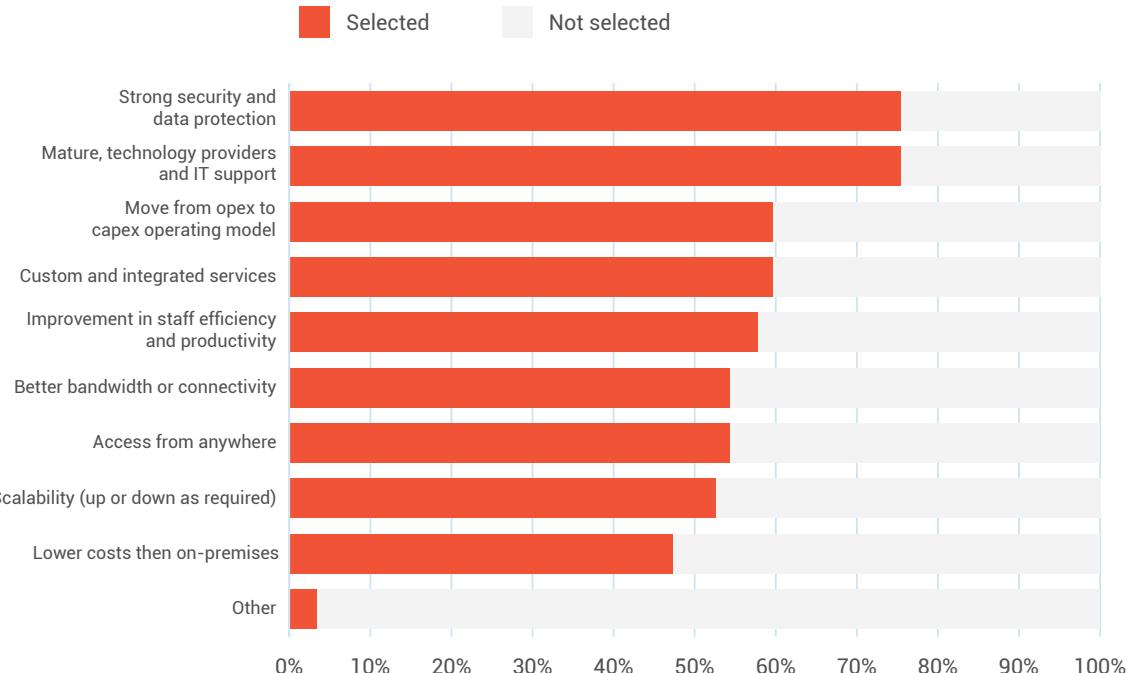
### Forecast:

As the perceived myths and misconceptions about the risks, security, capability and connectivity issues surrounding cloud adoption are proved to be unfounded, expect to see more contact centres readily adopt hosted cloud-based solutions.

## What would be the key criteria for you to consider moving to the Cloud?



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Contact centre service providers would be motivated to adopt the cloud if strong security and data protection (75.44%) and mature, technology providers with the requisite IT support and SLAs are in place. Other catalysts include moving from capex to opex operating models (59.65%), custom and integrated services (59.65%), enhancing staff efficiency and productivity (57.89) and better bandwidth (54.39%).

### Forecast:

As mature, global-to-local technology providers such as Genesys penetrate further into African markets, create more awareness and gain more market share, expect to see more contact centres in these countries adopt CCaaS models with the assurance that these service providers give them of greater security along with flexible opex models.

# Employee engagement



## Employee engagement



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Employee experience matters, bottom line. By creating a compelling employee experience, engaging with their agents and maximising their capabilities, contact centres can impact their overall customer experience in substantial ways. Employee experience is a rich, contextual, engaging branded experience, and should be unique to an organisation's culture and mission.

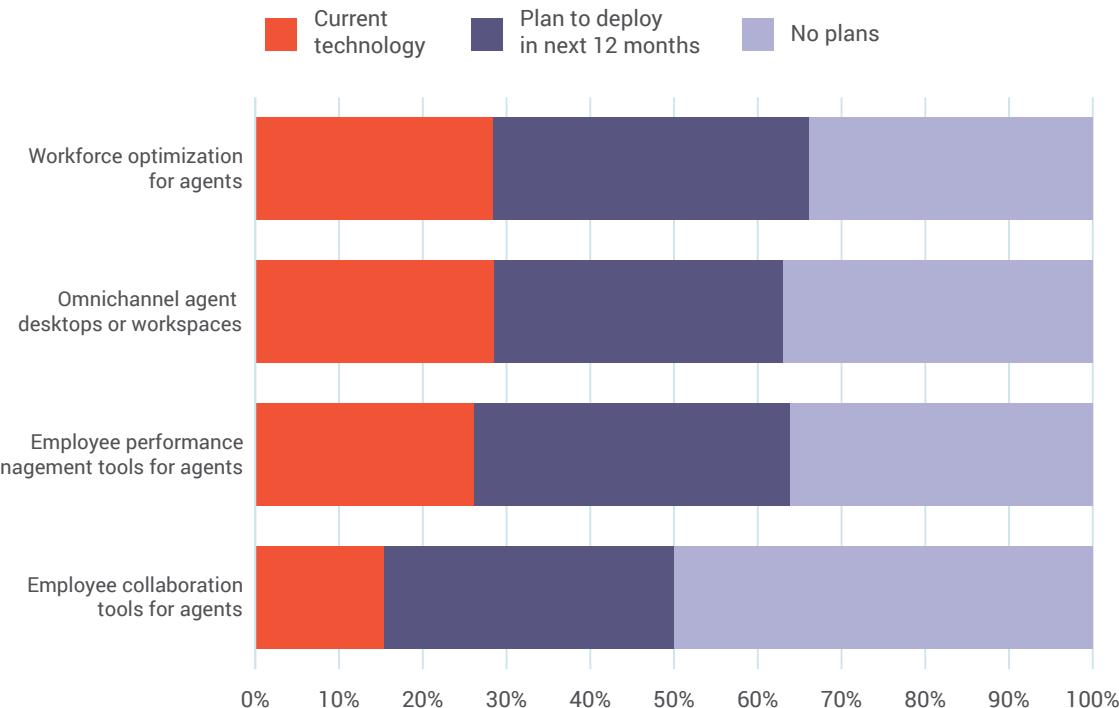
In Africa's emerging digital, hyperconnected economy, high-performing contact centre agents are in demand—and they are demanding themselves. Many contact centre agents are happy to have a job that provides them with a steady income to support themselves and their families. However, as they grow and develop they tend to want more out of their jobs. This places the onus on many African contact centres to not only provide their agents with generous compensation, but greater collaboration tools and performance management based on honest and constructive feedback.

More agents will want to be rewarded, trained and optimised in their workplace. Recognising these agents needs, and investing in technologies that enable them to want to perform and offer the best customer experience, is the antidote to bad customer service and support levels.



## What employee engagement technology and applications do you currently utilise or are you planning to deploy in the next 12 months for your call/contact centre(s)?

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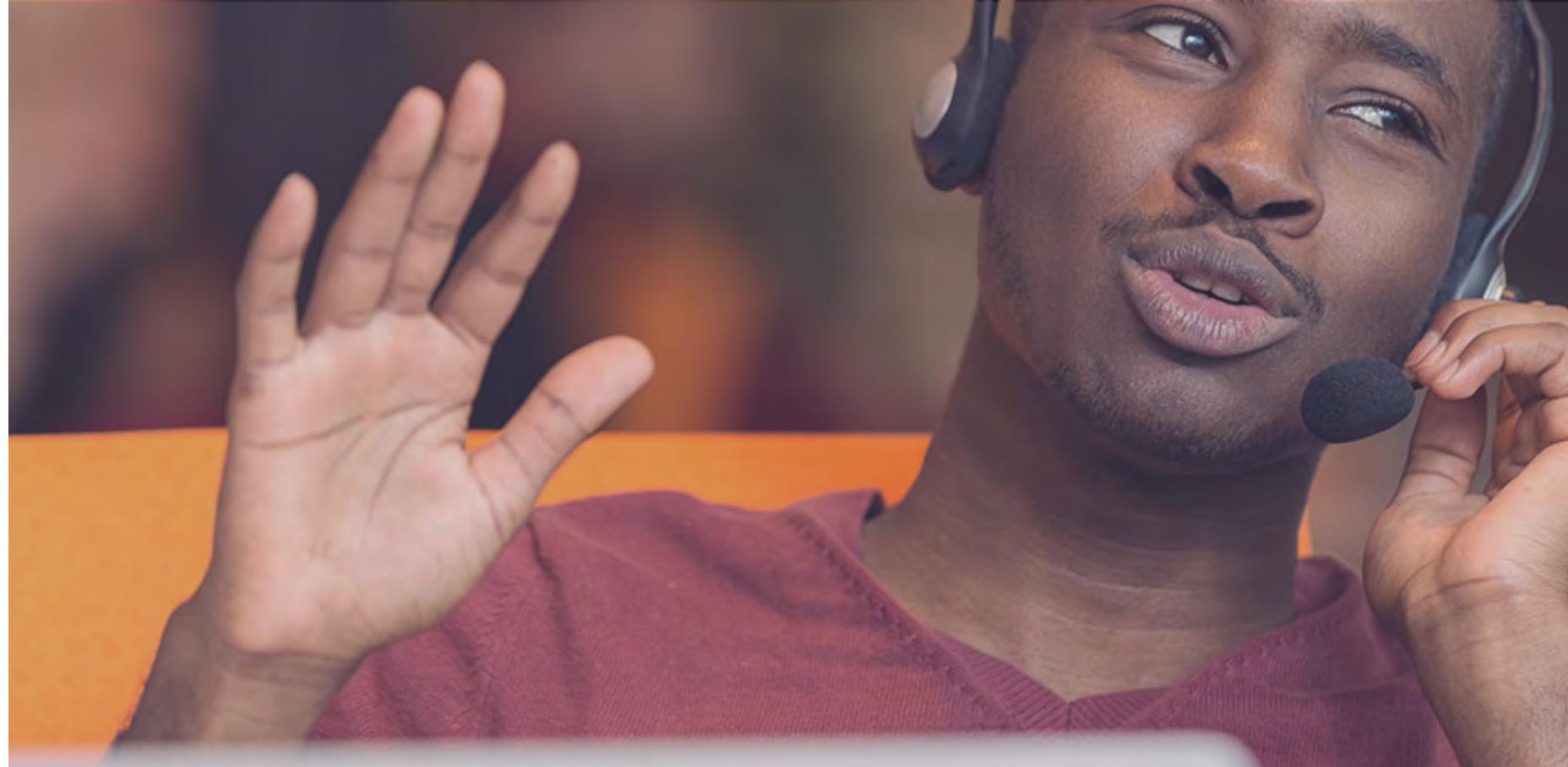
Employee engagement is high on the agenda of African SME contact centres. Currently, the main technologies used to engage with agents and employees include workforce optimization (37%) and omnichannel agent desktops (37%). However, more companies will deploy workforce optimization (49%) and employee performance management tools (49%) in the next 12 years.

Contact centres will also deploy quality management/assessment and interaction analytics to monitor and assess their agents.

### Forecast:

Expect the number of African SME contact centres adopting omnichannel technology and applications to double in the next 12 months as they seek solutions that enable their agents to have full visibility of customers.

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Customer experience is greatly enabled by the frontline teams of contact centres that are becoming known as relationship or customer engagement hubs. The survey indicates that African SME contact centres offer a plethora of services from inbound and outbound voice services to specialised business process services such as finance and accounting, IT support, legal, emergency and medical services.

These centres utilise multiple communication channels to engage and connect with consumers including IVR, web chat, instant messaging, mobile apps, social media and more. As brands across the African continent compete for the attention, time and share of pocket of digitally empowered consumers, contact centres will be compelled to provide enhanced engagement and richer, more meaningful experiences.

These experiences and engagement activities will need to become more seamless, proactive and personalised across all channels and touchpoints throughout the entire customer lifecycle. As a result, contact centre cloud technologies and digital platforms will become more pervasive, and the underlying technology itself will become a competitive differentiator for SME contact centres. The bad news is that there will be more complexity and additional communications channels to implement

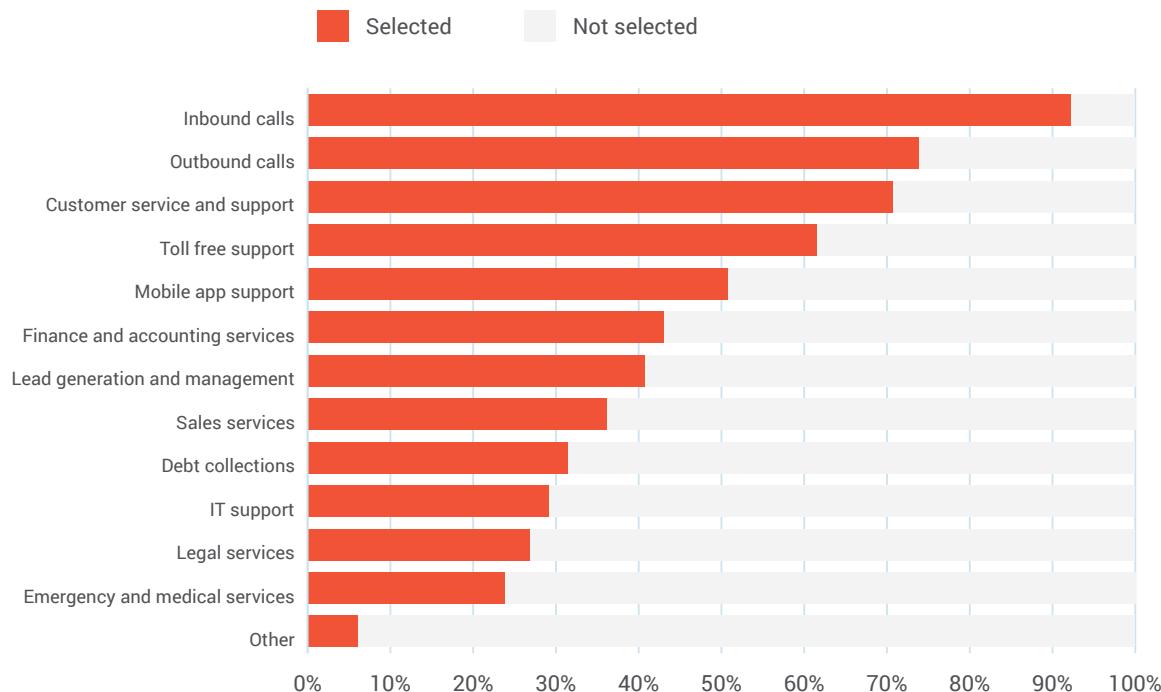
and manage. The good news is that African SME contact centres-as nimble and adaptable as they should be-can rapidly adopt and deploy these channels that provide greater automation, intelligence and responsive services.



## What business process services or call/contact centre services does your contact center fulfill?



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The business process services mainly provided by the contact centres interviewed are inbound calls (92.32%), outbound calls (73.85%), customer service and support (70.77%) and toll free support (61.54%). Other services regularly provided include mobile app support, finance and accounting services, lead generation and management, and sales services.

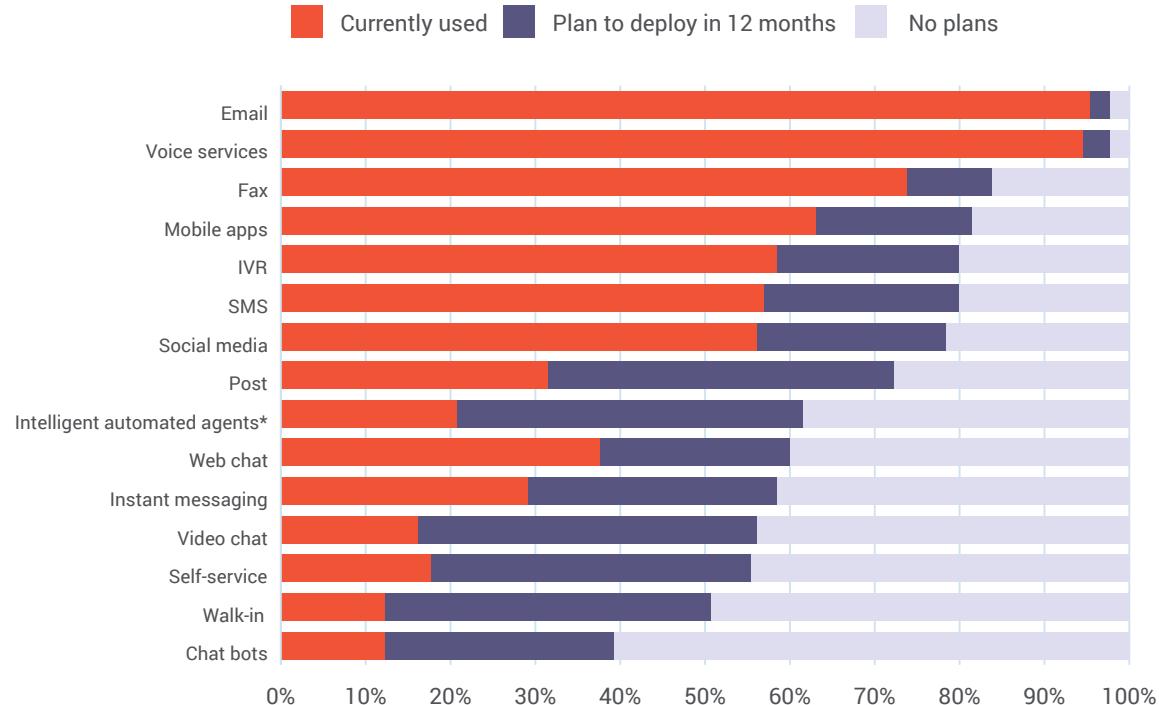
### Forecast:

As digital-savvy consumers in Africa demand greater customer centric services and communications, expect to see more SME contact centres evolve from just offering inbound and outbound call services, to delivering specialised business process services, vertical market expertise and end-to-end customer lifecycle management.

## What customer or client communications channels does your call/contact centre(s) currently offer/utilise or do you plan to rollout in the next 12 months?



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Predominantly, the communication channels that many of the respondents utilise to engage with customers include email (95.38), voice services (94.62%), and fax (73.85%). SMS, social media, mobile apps and IVR are offered to a lesser degree. Approximately half of the companies that currently do not offer select customer communication channel services, reported plans to expand and include these services in the next 12 months. Currently, very few companies deploy chat bots (12.31%) however 26.92% of respondents indicated that chat bots is a key focus area over the next 12 months. There are also definitive growth plans in intelligent virtual agents\* and video chat with over 40% of contact centres planning to deploy these channels in the next 12 months.

### Forecast:

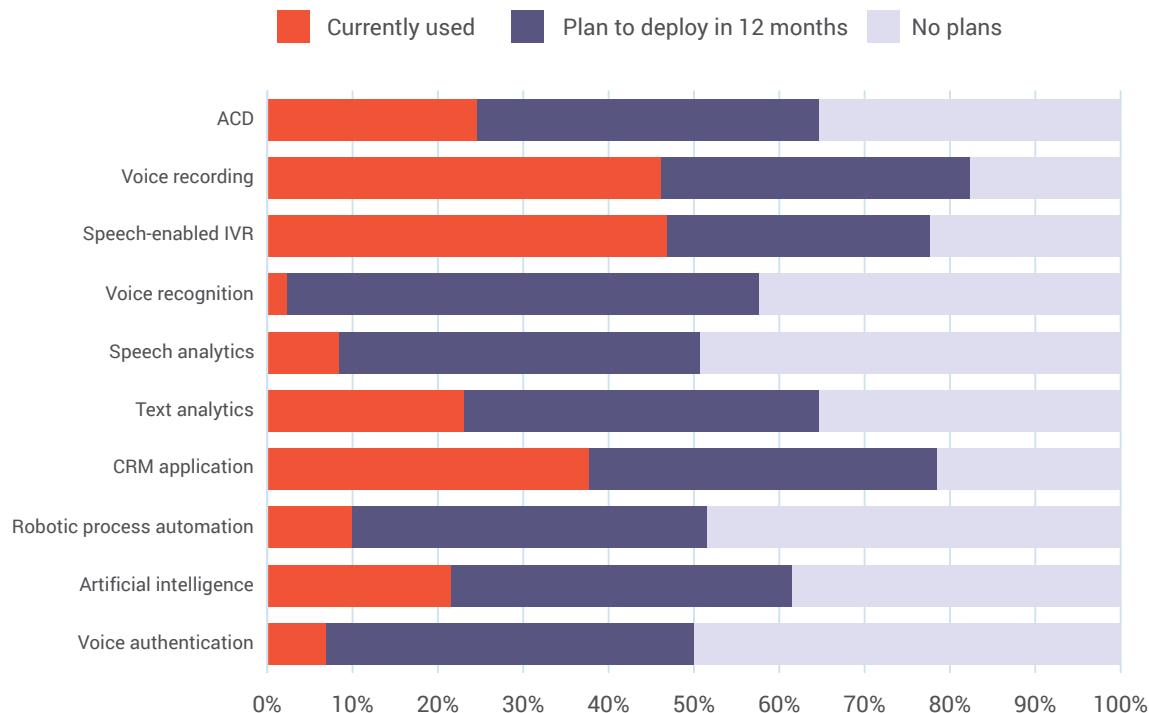
Instant messaging (29.23%) and web chat (37.69%) channels are growing in Africa (reflecting a trend globally) and will rapidly become preferred communications channels by consumers that are restrained to connect with voice channels. Email will also remain as a dominant communications channel for some consumer segments.

\*Intelligent virtual agents are computer generated, animated, artificial intelligence virtual character that serve as online customer service representatives.



## What customer engagement technology do you currently utilise or plan to deploy in the next 12 months in your call/contact centre(s)?

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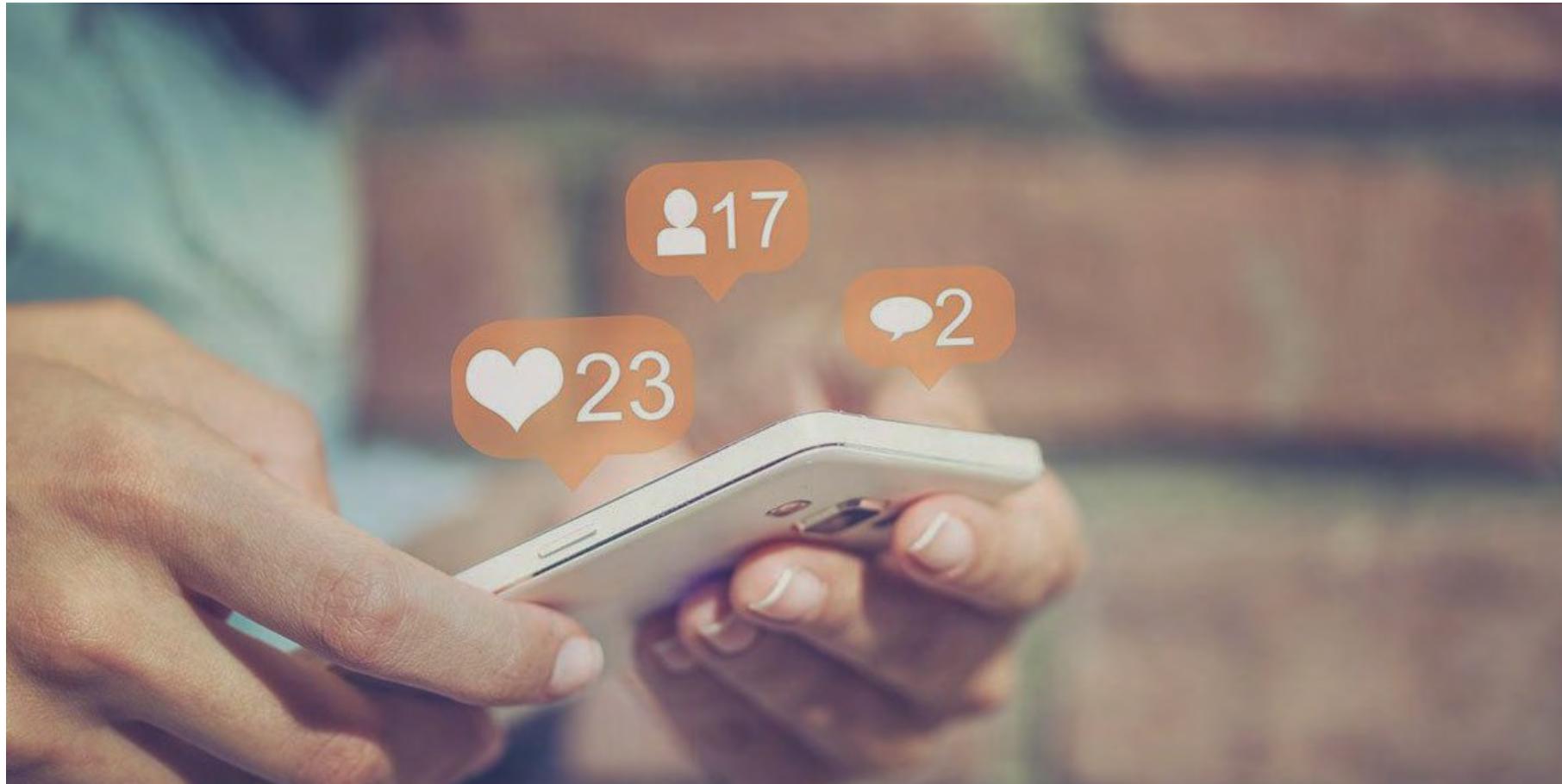
IVR (46.92%), voice recording (46.15%) and CRM systems (37.69%) top the list of customer engagement technology currently deployed. In the next 12 months, the contact centres interviewed intend to rollout some new technologies such as voice recognition (55.38%), speech analytics (42.31%) and text analytics (41.54%), while over 40% will deploy new CRM applications. Robotic process automation (RPA) and Artificial Intelligence (AI) will also receive focus and investment as contact centres adopt smart, intelligent processes.

### Forecast:

Advancements in voice recognition, speech analytics, text analytics, RPA and AI signal a knock-on growth effect in cloud services as many contact centres will look to deploy such technology in the cloud.



# Social media channel management



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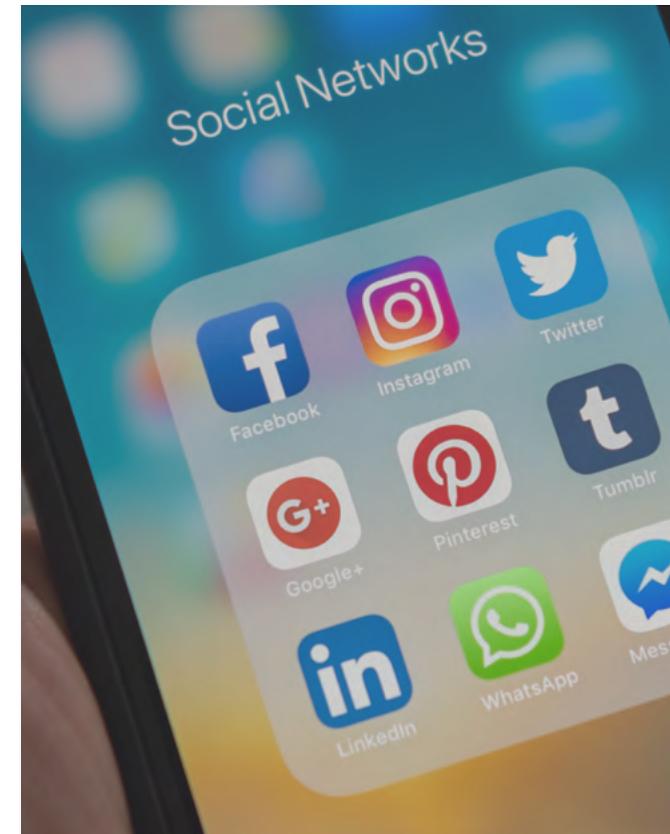
The explosion of social media networks such as Facebook, Twitter, Instagram, LinkedIn and Snapchat across the African continent has transformed the ways that customers connect with businesses—and the ways in which they express themselves. Internet World Stats indicate that there was significant growth in internet users in the five respective African countries in 2017.

The stats reported are as follows:

- Botswana 923,528 internet users, representing 39.4% of the population
- Ghana 9,935,286 internet users, representing 34.7% of the population
- Kenya 43,329,434 internet users, representing 89.4% of the population
- Namibia 797,027 internet users, representing 31% of the population
- South Africa 29,935,634 internet users, representing 54% of the population

Collectively, these countries have over 27 million consumers who use Facebook as a preferred channel. Clearly, social media is fast becoming a dominant customer communications service channel in Africa. Contact centres are being challenged to monitor, engage and respond to tweets, posts and requests across various social networks as they would to phone calls.

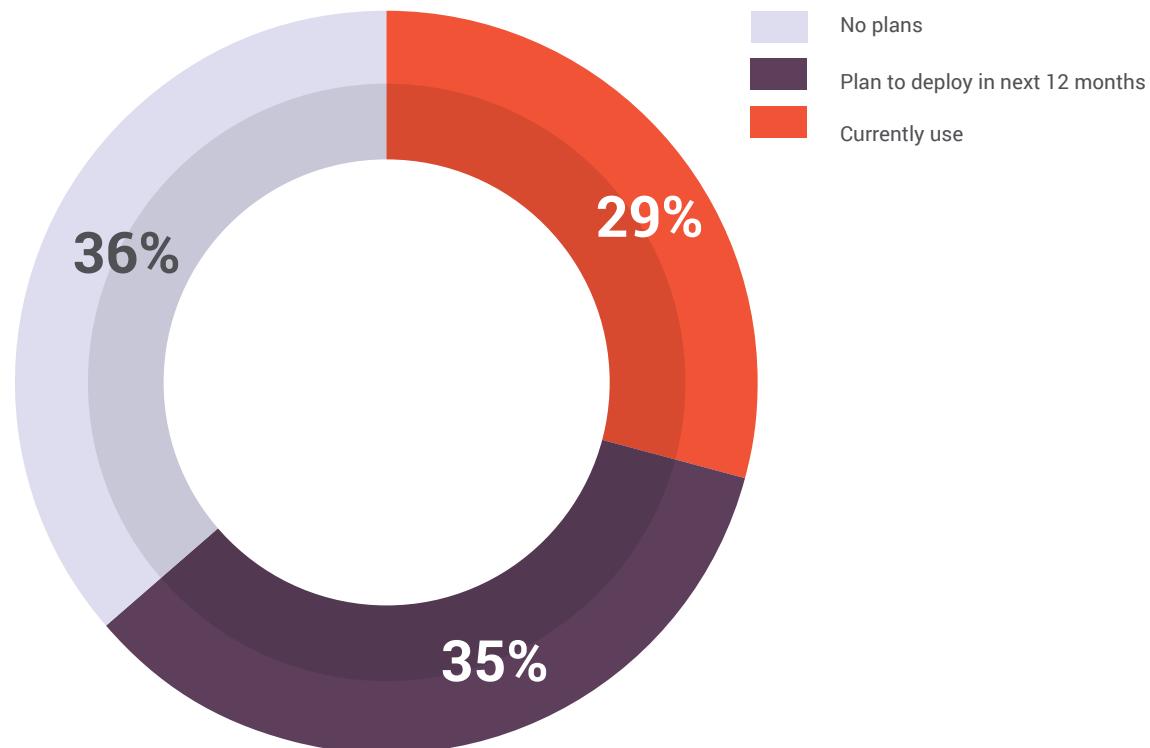
However, when asked if they have deployed social media channel management solutions, and if these solutions can respond to social expressions such as tweets, most of the African SME contact centres had not yet implemented such technology. Reassuringly, almost a third of respondents indicated that they would deploy such technology in the next 12 months.





## Do you currently utilise, or plan to deploy in next 12 months, social media channel management solutions for your call/contact centre(s)?

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Of the African-based SME contact centres interviewed, 29% utilise social media management solutions, while 35% of companies have plans to deploy social media management solutions in the next 12 months. Surprisingly, 36% of the respondents have no plans to utilise or deploy social channels. This could be because it is not required as yet (such as in specialised business processes), or they have not yet experienced consumer demand for social interaction.

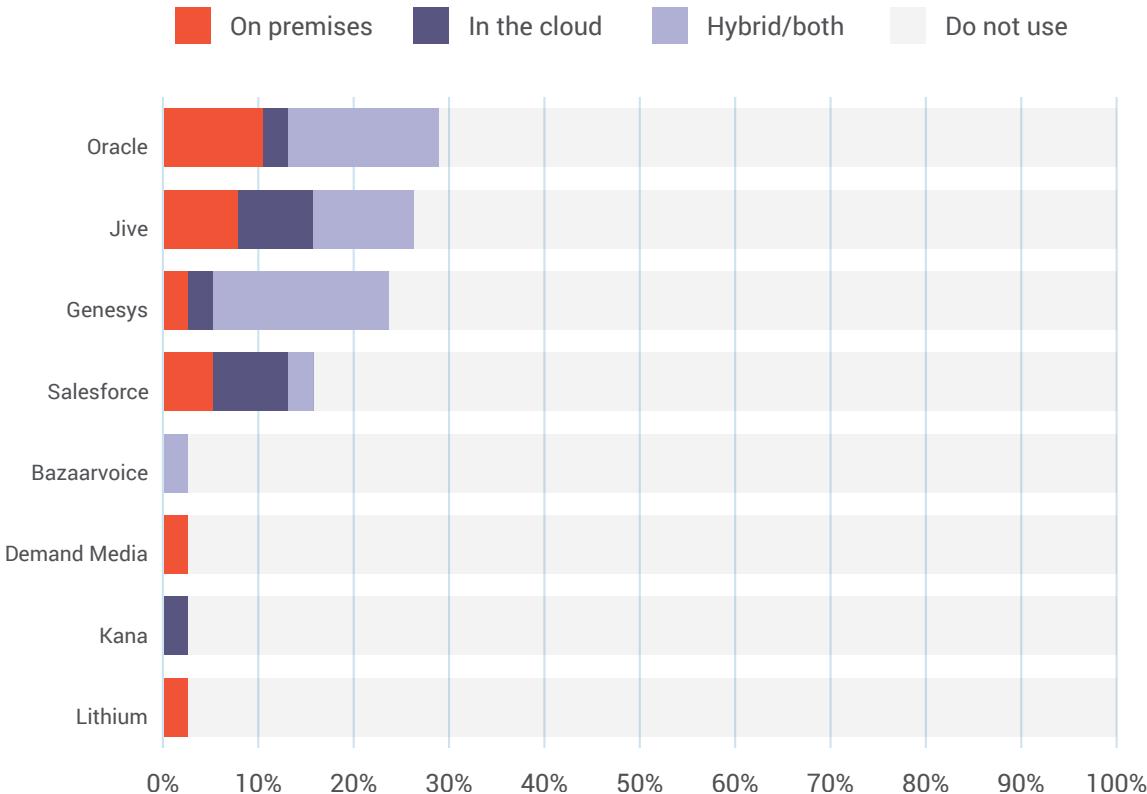
### Forecast:

Consumer demand to be heard and serviced on social channels will steadily increase in Africa as millennials and other age groups opt to communicate via social networking platforms such as Facebook and Twitter.

Please state for the list of service providers social media channel management solutions, is it on-premises, in the cloud, hybrid/both or no plans?



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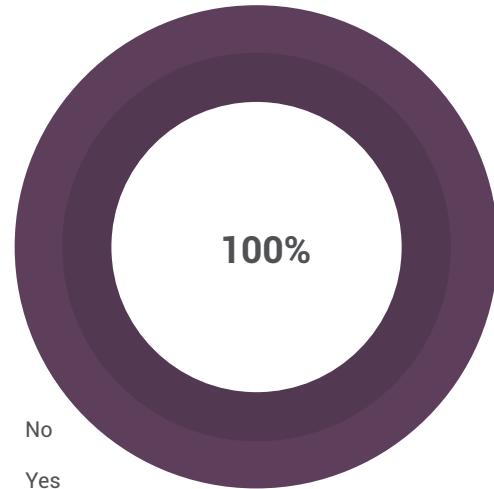


Hybrid cloud-based social media channel management solutions are most commonly used by the contact centres profiled in the survey. Approximately 45% of users engage with this model, while approximately a third use on-premise solutions. The major service providers utilised include Oracle, Jive, Genesys and Salesforce, with Bazaarvoice, Demand Media, Kana and Lithium also covering a portion of the market. Only 21% of users have opted for full cloud-based models.

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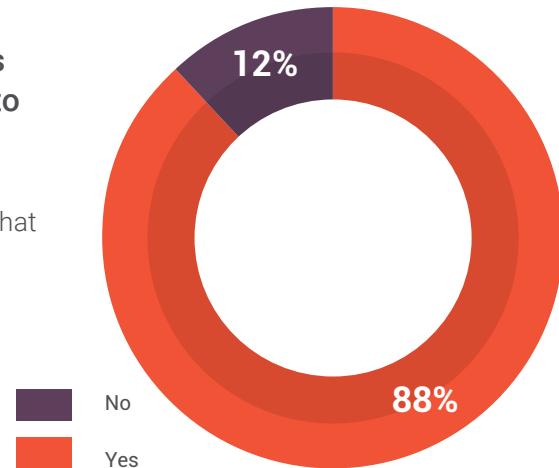
### Do your social media channel management applications respond to social expressions?

All the respondents reported that their social media channel management applications do not respond to social expressions.



### Would you like your social media channel management applications to enable your agents to respond to social expressions?

However, 88% of organisations indicated that they would like their social media channel management applications to enable their agents to respond to social expressions.



# Outbound dialling campaigns



## Outbound dialling campaigns

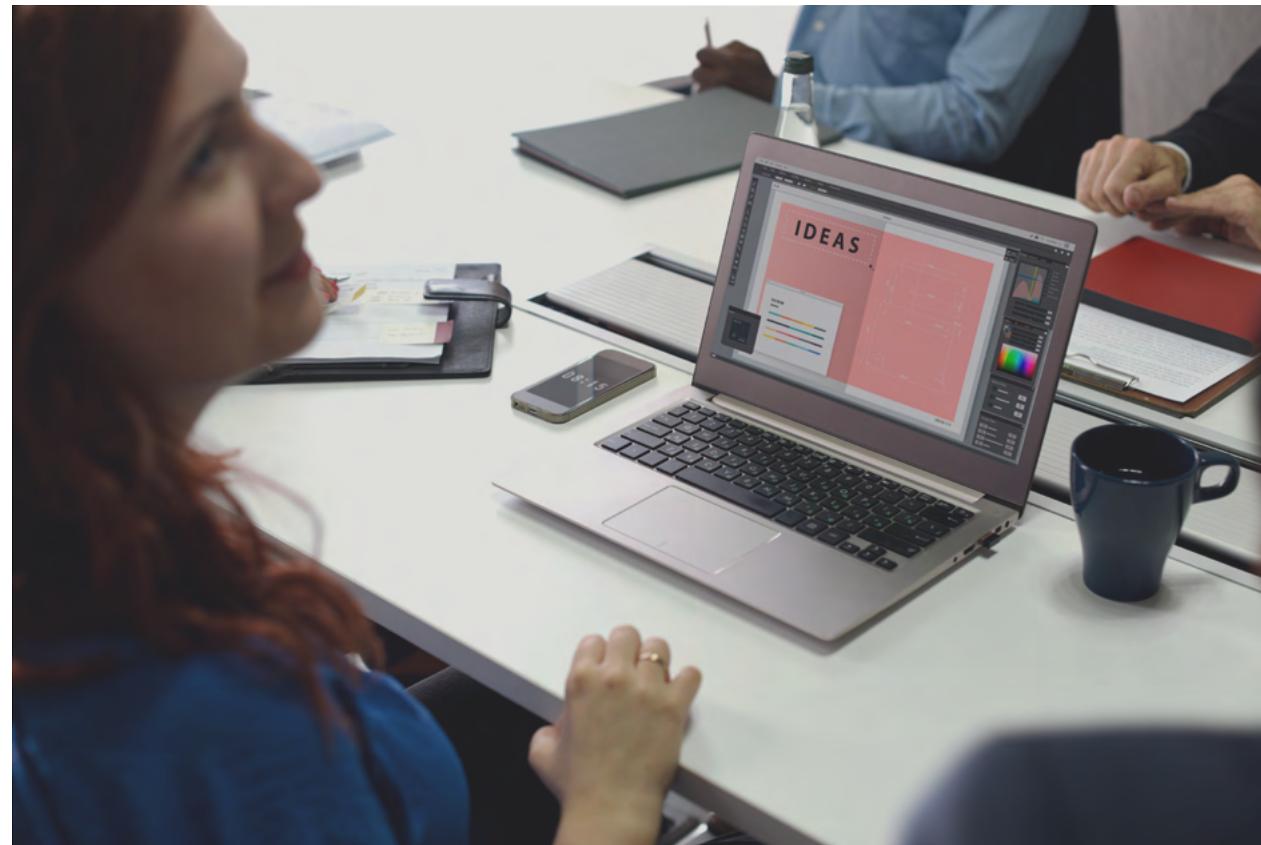


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Many African SME contact centres utilise campaigns for collections, telemarketing, support or outbound calling and, as such, have deployed outbound dialler platforms that dial multiple telephone numbers within a campaign and seamlessly pass live calls to available agents.

Outbound dialling solutions enable agents to preview customer details before calls are launched while predictive diallers connect customers to agents as soon as they complete a previous call, service or transaction.

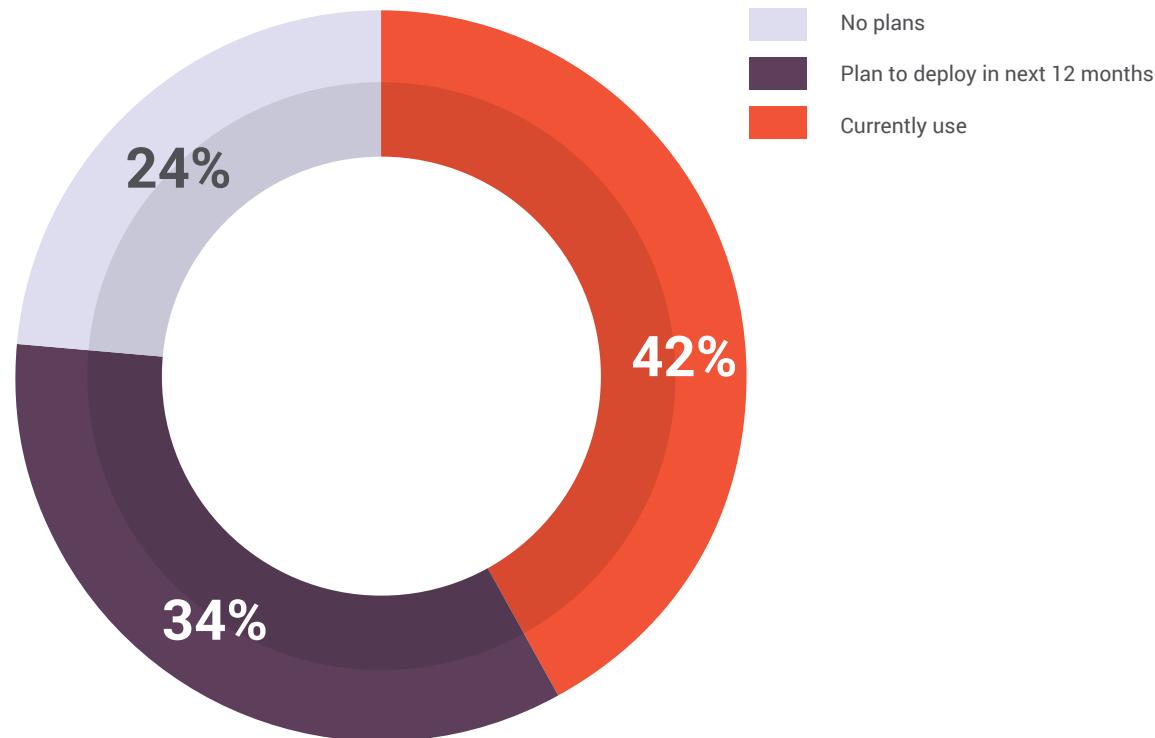
The survey points to an upsurge in the adoption of outbound dialling campaign solutions with 34% of African SME contact centres saying they will deploy such technology in the next 12 months. Over 65% of organisations whose outbound dialling solutions do not link to their CRM applications and/or provide personalised and proactive outbound communications, would like them to do so.





## Do you currently utilise, or plan to deploy in next 12 months, outbound dialling campaign solutions for your call/contact centre(s)?

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Outbound dialler campaign platforms are certainly on the rise with 34% of respondents planning to deploy this technology in the next 12 months. An additional 42% of the respondents have already rolled out outbound diallers. The remaining 24% have no plans to introduce campaign management solutions in their contact centres.

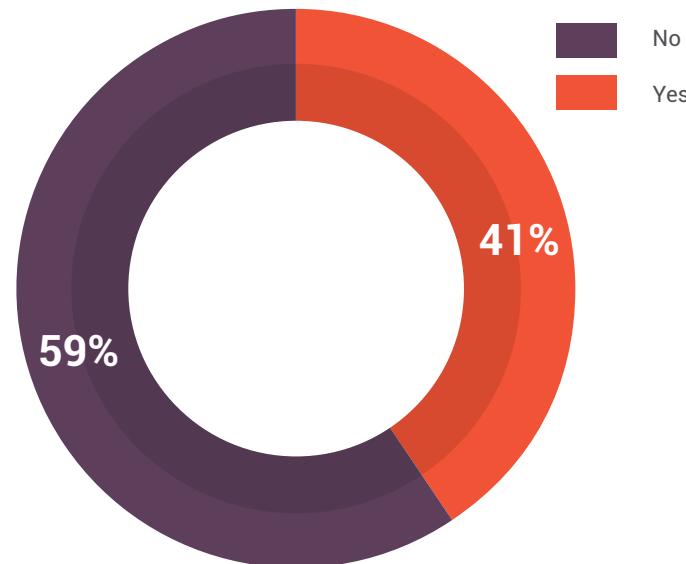
### Forecast:

Expect to see more contact centres in Africa deploy multichannel campaigns with outbound diallers, automated and agent-assisted resources. On the other hand, data regulation and compliance will also shift campaigns from outbound to high-value inbound communications.

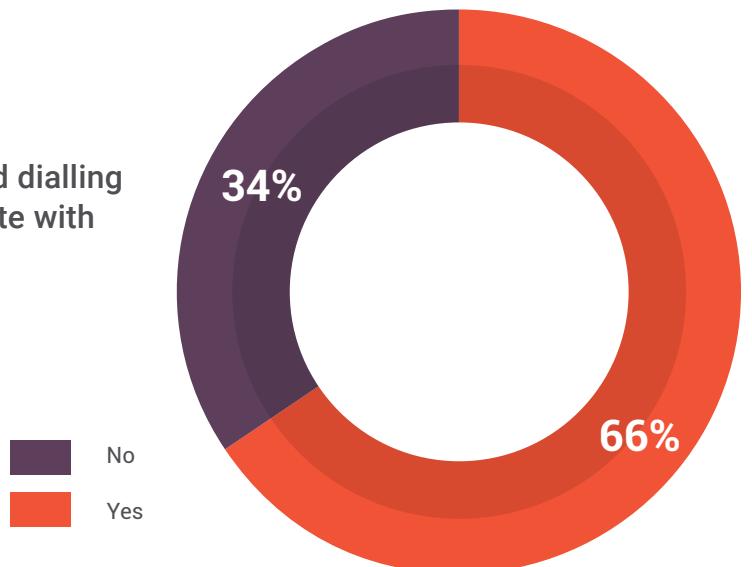
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### Does your outbound dialling campaign solution integrate with your CRM application?

Only 41% of the respondents indicated that their outbound diallers integrate with their CRM applications. 66% of the respondents whose outbound diallers do not link with their CRM applications would like them to be integrated.



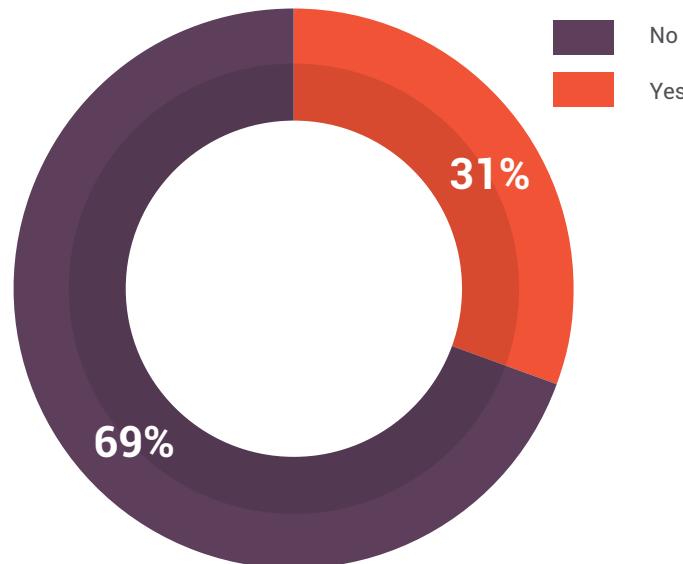
### Would you like your outbound dialling campaign solution to integrate with your CRM applications?



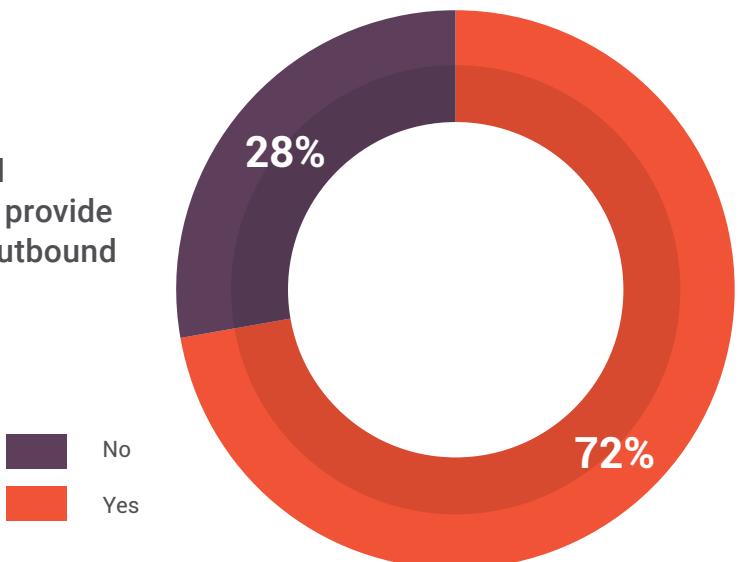
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### Does your outbound dialling campaign solution provide personalised and proactive outbound communications?

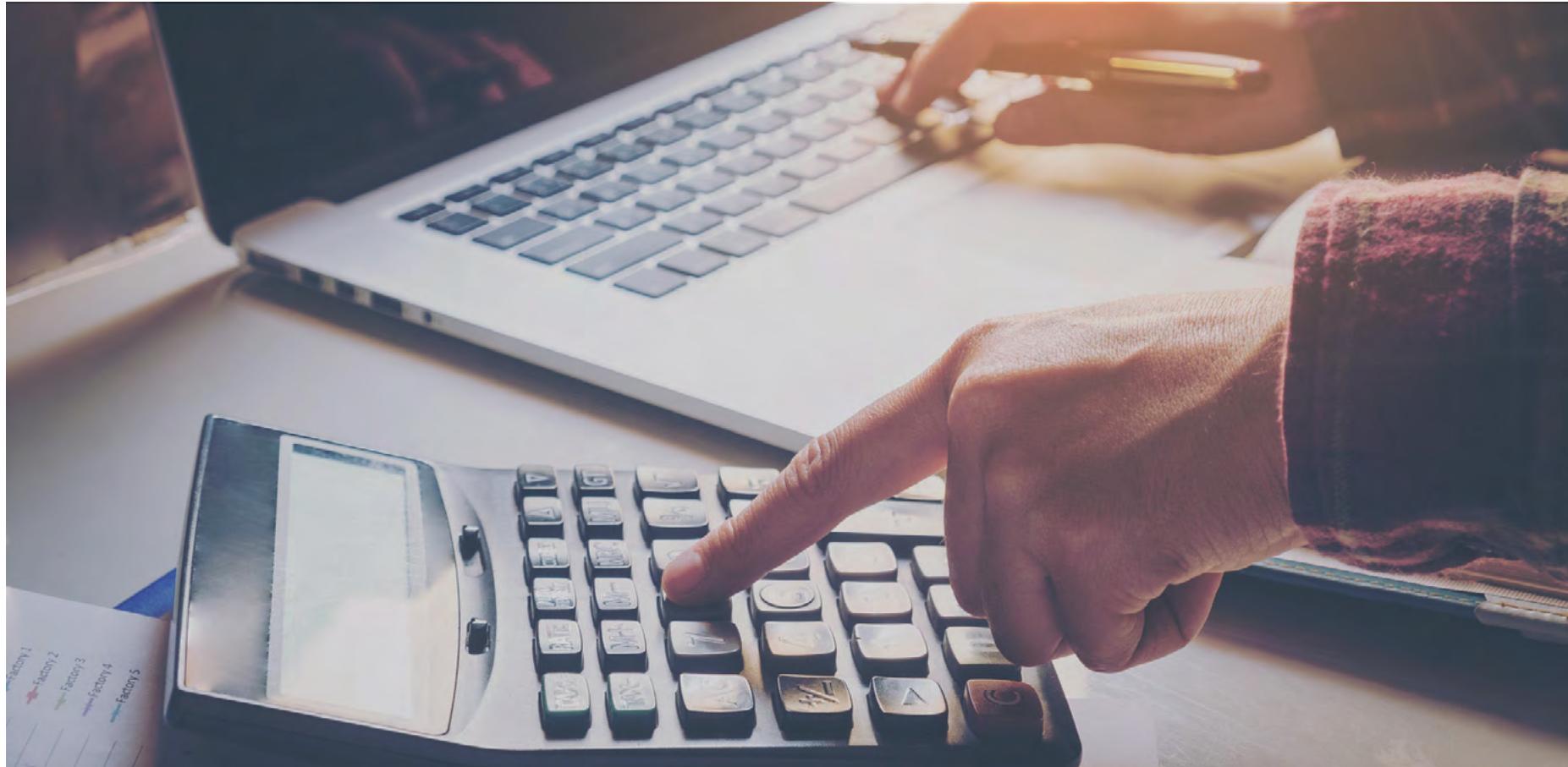
With consumer demand for personalisation and customisation on the rise, it is no surprise that many contact centres (72%) indicated that they would like their outbound diallers to provide personalised and proactive outbound customer care. There is a strong recognition that personalised services help in effectively connecting and interacting with customers and getting higher response rates. Of the companies interviewed, only 31% say that their outbound dialling campaigns are enabled to provide personalised services.



### Would you like your outbound dialling campaign solution to provide personalised and proactive outbound communications?



# Commercial models and budget ranges



## Commercial models and budget ranges



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As cloud contact centres and CCaaS become more prevalent, so too will confusion over pricing and commercial models for contact centres. While almost 30% of the respondents want to grow their on-premises models, more contact centres in Africa are opting for the flexibility of pay-as-you-go and license per user models.

The setup, maintenance, update and configuration costs of premise-based models can become unrealistic for many SMEs. While many captive contact centres are forced to go this route due to risk, compliance or customisation requirements, more contact centre decision makers will start to take note of the cloud.

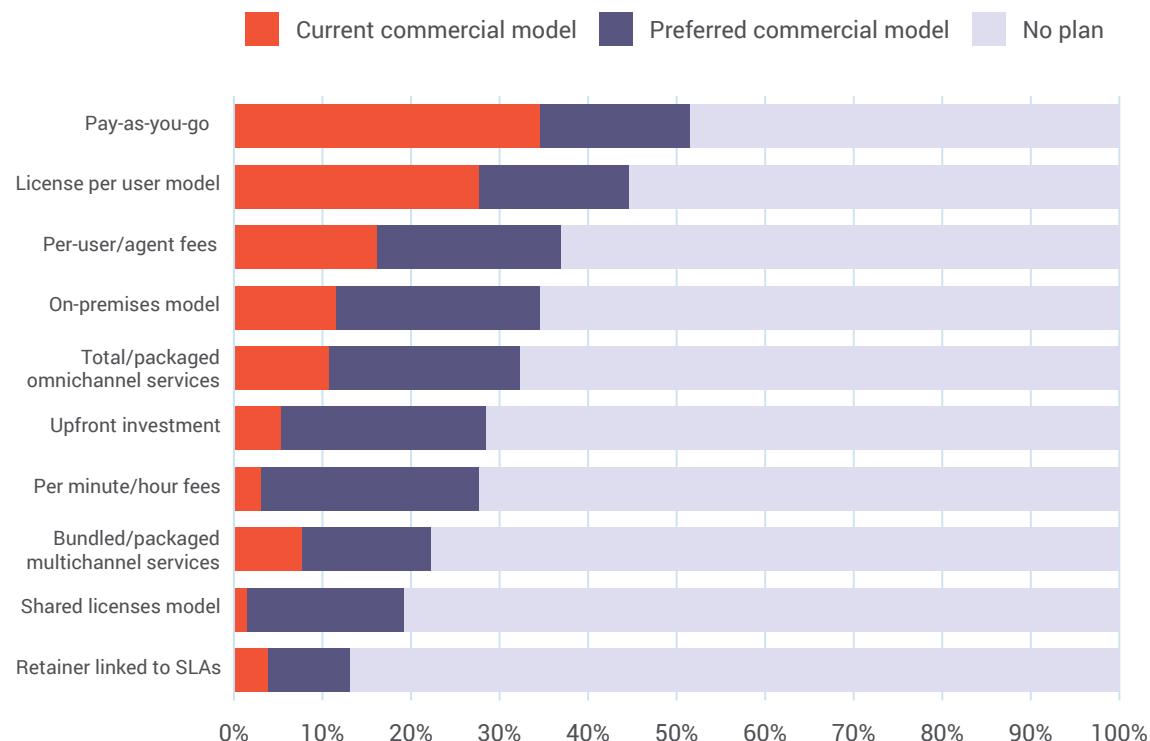
They will want to remain agile, and focus on their core business/operations, while reducing costs. These contact centres will progressively switch to the less expensive, simple to manage scalable and flexible models that CCaaS offers.



## What is your current and preferred commercial model for the delivery of technology and applications for your call/contact centre(s)?



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Pay-as-you-go and license-per-user models are most frequently utilised—and preferred—for the delivery of technology and applications for contact centres. Per-user/agent, per minute/hour fees and on-premises were also ranked as preferred models.

### Forecast

The pay-as-you-go commercial model will continue gaining popularity as many contact centres move into the cloud. Expect to also see significant growth in omnichannel and multichannel services.

# Pain points and challenges



## Pain points and challenges



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In other global surveys conducted by Knowledge Executive, and with partners such as Ryan Strategic Advisory, enterprise contact decision makers indicated that their biggest pain point was data protection and security. This seems to reflect in the SME market with almost 50% of the African SME contact centre respondents citing this as one of the major challenges that they face.

As all eyes turn to the European Union with the adoption of General Data Protection and Regulation (GDPR) and South Africa with the Personal Protection of Information Act (POPIA), many organisations and their contact centres will naturally be thinking about compliance and how to ensure they collect, process, store and share data in regulated ways.

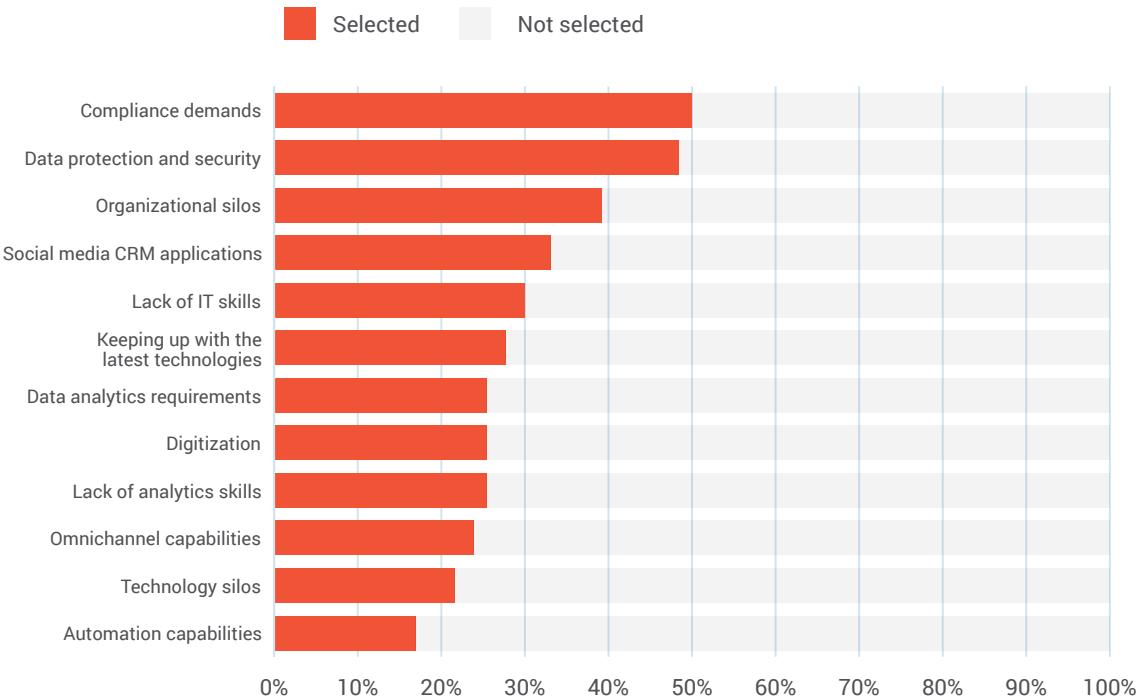
Most contact centres are also challenged by organisational silos with pockets of customer data sitting in different departments, product houses and data warehouses. This has a knock-on effect on customer experience as many customers have to call multiple numbers and contact centres within the same organisation and, as a result, never experience first call resolution.



## What are the current technology pain points or challenges that you experience in your call/contact centre(s)?



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Compliance demands (50%), data protection and security (48.5%), and organisational silos (39.2%) are highlighted as the leading technology pain points or challenges currently experienced in contact centres. Of interest is that automation capabilities (16%) were reported as the least technological pain point experienced by contact centres.

### Forecast

With incoming data protection and information regulations, and a rise in cyber crimes, compliance, security and data protection will continue to be major considerations, and pain points, for most African SME contact centres.



# Technology services provider requirements



## Technology service provider requirements

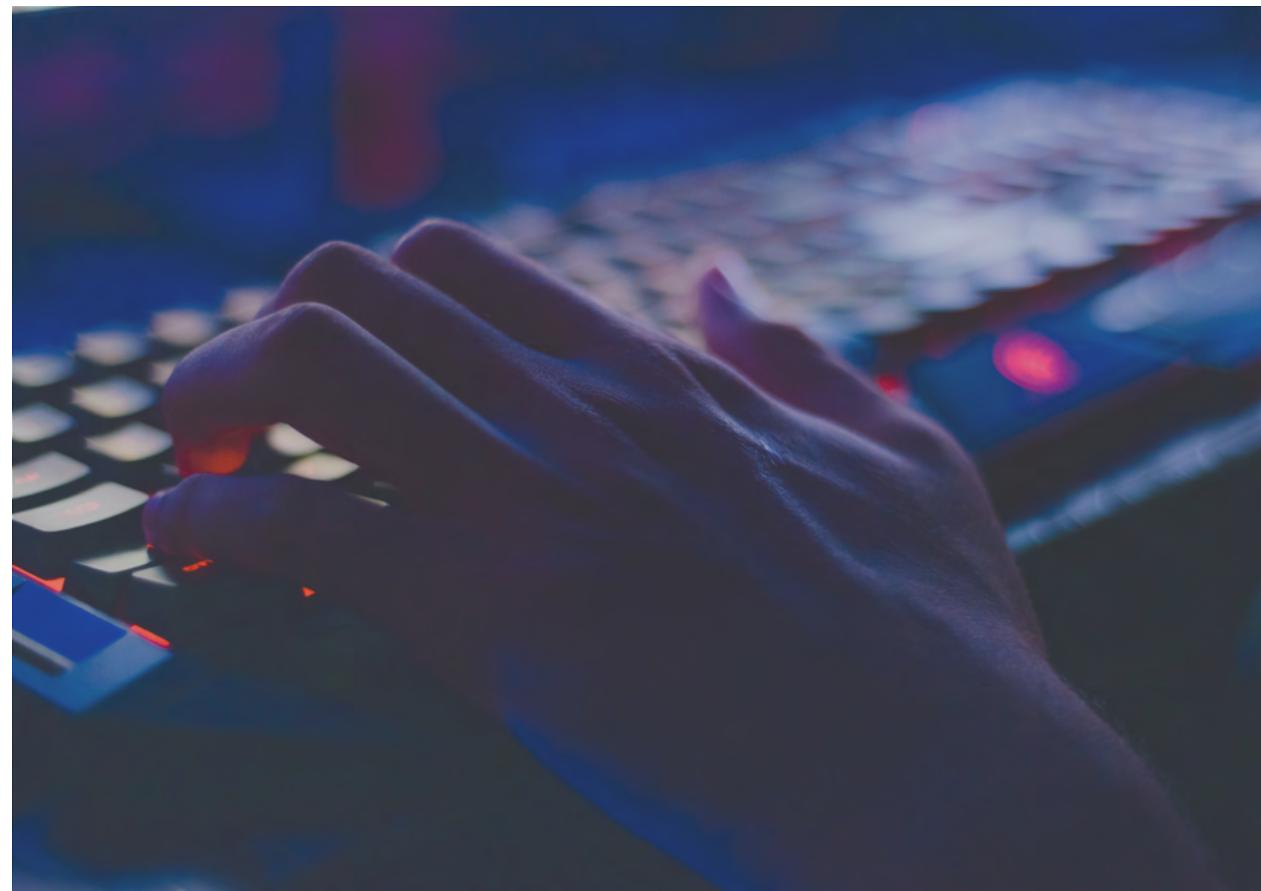


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Technology service providers will be challenged to do more to win and retain business in the next 12 months. Most African SME contact centres look for experience, certification, innovation and best practice from their service providers.

Indeed, there seems to be a strong trend towards contact centres demanding innovative, tailored and value added solutions from their service providers. They will want these services to be smart, intelligent and automated and create tangible impact on business processes.

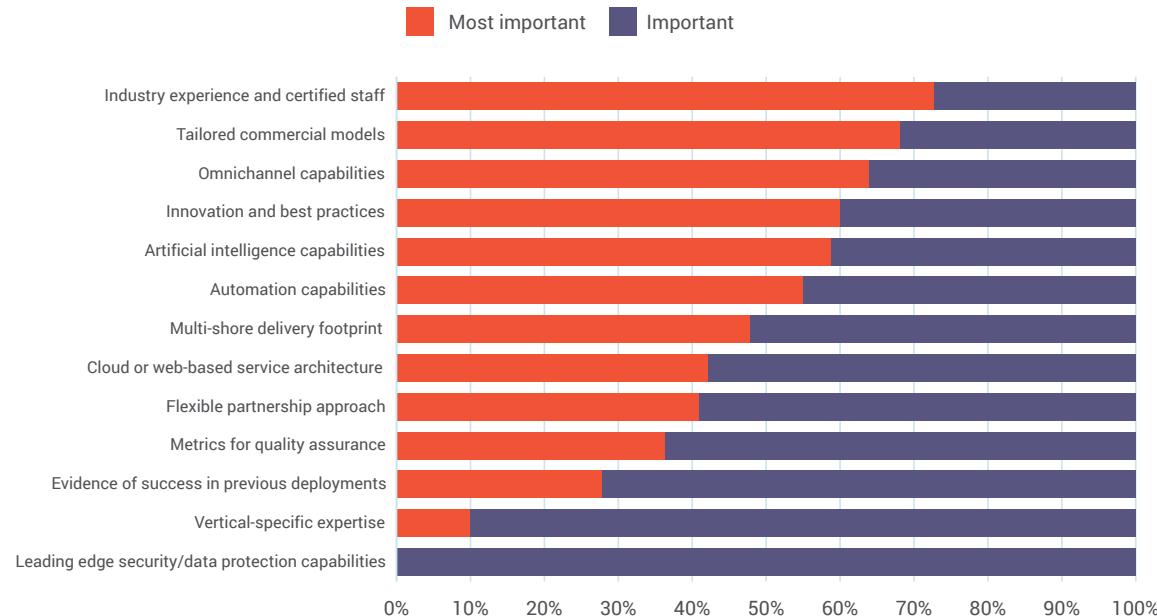
Other contact centres will want to create strong partnerships with their service providers and require that they offer global-to-local, multi-shore scale and delivery. Quality assurance, streamlining end-to-end processes and vertical market expertise are also considerations, as are success stories and case studies in previous deployments.



## What are the main criteria that your technology provider must have to win and retain your business?



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Based on respondents' input, technology service providers will need to demonstrate that they have the appropriate industry experience and certified staff, while offering omnichannel capabilities and tailored commercial models in order to retain and grow their client base. Other deciding factors for clients include demonstrating innovation and best practice, providing proper metrics for quality assurance, providing a multi-shore delivery footprint and enabling automation.

### Forecast

Going forward, service providers will need to be flexible to meet specific client needs and be able to provide comprehensive, bundled solutions across different channels. They will also need to provide as-a-service models with proven data protection capabilities in order to win and retain customers.

# Business and customer trends



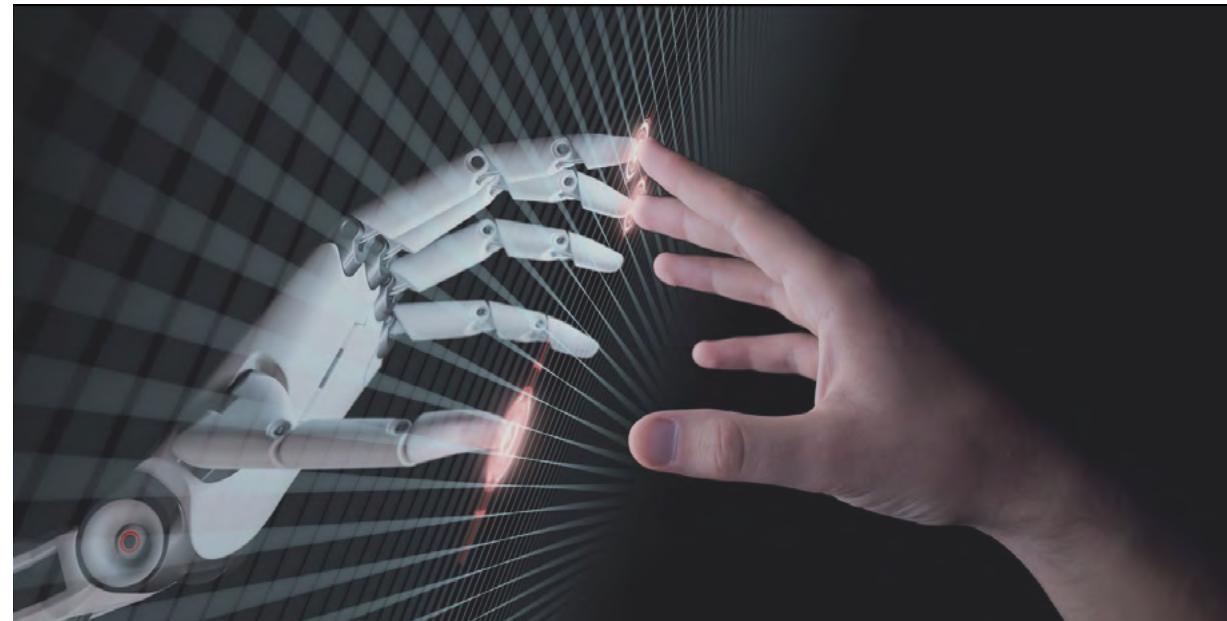
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Robotic process automation (RPA) topped the list of trends that African SME contact centres believe will impact their businesses in the next 12 months. Popular functional areas for RPA will include HR, IT and customer service with finance and accounting processes and services taking the lead.

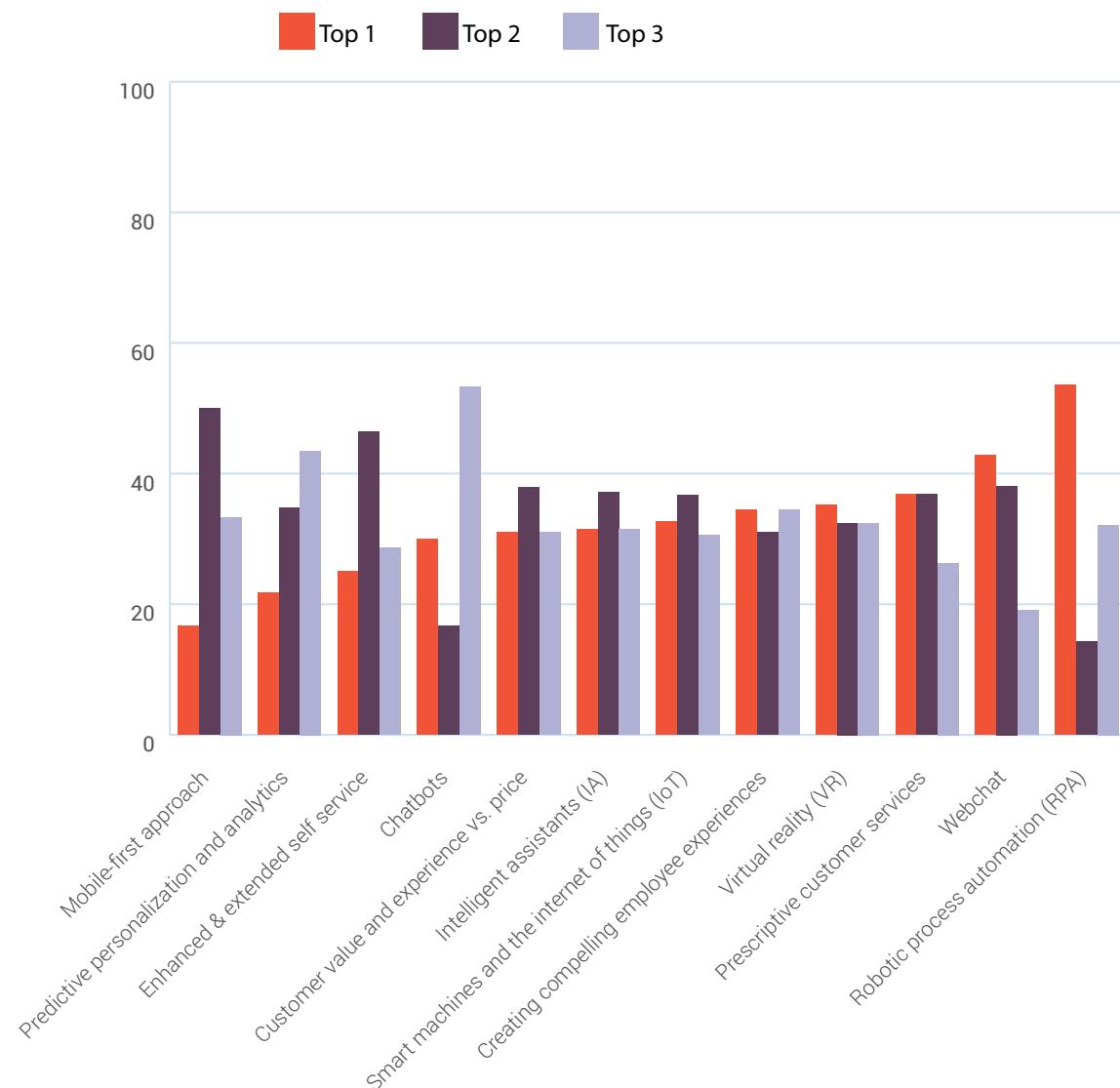
Contact centres also see the need to offer more proactive and prescriptive customer services, while applying a consumer lens to providing compelling employee engagement and experiences. In the Top 2 categories, adopting a mobile-first approach and providing enhanced and extended self-service platforms for customers were in the lead. Chat bots and predictive personalisation and analytics were the front-runners chosen in the Top 3 category.



## What are three top business and customer trends that you foresee impacting on your business over the next 12 months?



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Business and customer trends that are foreseen to impact contact centres in the immediate future include the rise of robotic process automation (RPA) and the demand for prescriptive customer services. Contact centres will also look to create compelling employee experiences while deploying smart technologies such as virtual reality (VR) and intelligent assistants.

## Epilogue



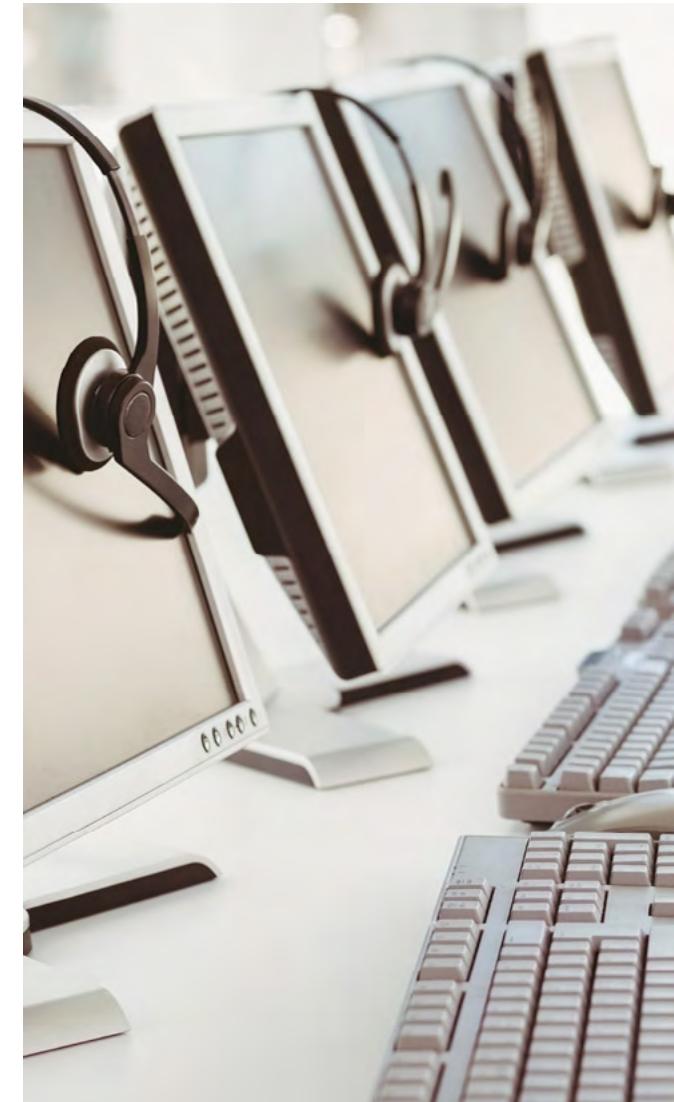
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The general consensus, based on this survey, is that while small and medium-sized contact centres in Africa have a definitive, bright future, budget constraints, compliance demands, data protection and security regulations and organisational/technology silos will continue to present challenges.

Automation, analytics and proactive/prescriptive customer services are trends and innovations that these contact centres are watching with great interest, with an appetite to deploy them while balancing digital and human resources. However, there is much to still do to transmute from traditional call centres with voice only services, to omnichannel, multimedia relationship centres with one view of the customer. African SME contact centres can leapfrog with new, intelligent and interconnected technology.

As cloud services gain more popularity due to their ability to quickly and effectively bridge digitised gaps, expect to see more contact centres adopt CCaaS solutions.

Watch them transform their on-premises systems to cloud and hybrid cloud solutions in an effort to become fully optimised, digitised and humanised customer lifecycle management centres that deliver world-class customer experience.



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AI - Artificial intelligence  
ACD - Automatic call distribution  
BPS - Business process services  
Capex - Capital expenditure  
CCaaS - Contact centre as a service  
CLM - Customer lifecycle management  
GDPR - General Data Protection and Regulation  
IA - Intelligent assistants  
IoT - Internet of things  
Opex - Operational expenditure  
POPIA - Protection of Personal Information Act  
SME - Small to medium business  
RPA - Robotic process automation  
VR - Virtual reality



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