



Customer Engagement
Leadership Council
FROST & SULLIVAN

Virtual Deep Dive:

Robotic Process Automation 2019 Market Outlook for Customer Care

March 13, 2019

TODAY'S AGENDA



Member Introductions



Presentation , Discussion and Q&A



Today's Presenter from:

F R O S T & S U L L I V A N



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Principal Analyst, ICT



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Functional Expertise

- 30+ years of industry experience spanning product marketing and management, market analysis and strategic consulting, with a focus on Contact Center and Speech Technologies. Particular expertise in:
 - Supply and demand-side quantitative market research and analysis
 - Product management, marketing, branding and competitive analysis
 - New market expansion strategies and partner development programs for vendors

Industry Expertise

- 13 years of experience in a major contact center vendor's product management and marketing department
 - Contact routing infrastructure and applications
 - IVR/Speech self-service, virtual assistants, bots
 - Speech technologies
 - Omni-channel and proactive customer care, WFO, WFM, RPA, digital transformation

What I bring to the Team

- More than 30 years of contact center industry experience and company relationships
- In-depth supply and demand-side market research and analysis expertise
- In-depth writing, editing and communications skills

Career Highlights

- Extensive expertise in contact center products/applications and customer experience management.
- President & Principal Analyst, Jamison Consulting
- UCStrategies Expert team member, and decade-long writer for Speech Technology Magazine
- Director & Principal Analyst, Gartner Group
- Product Manager, IBM/ROLM

Education

- B.S. In Linguistics from University of California at Berkeley

Today's Participants



Ed Ariel

Vice President, Customer Service
ezCater



Joel Kell

Senior Director, Service Operations
Elevate



Claudia Comtois

Assistant Vice President, Support Services
Nationwide



Eileen Lash

Managing Director, National Contact
Center
TIAA



Gary Couitt

Vice President, Customer Service
StockX



April Sealy

Vice President, Operations
Elevate



Eric Thalmann

Director, Customer Service Central European Region
Danfoss

Today's Participants

aetna[®]



Panel Questions

- 1) Have you heard of RPA before and does your company have any RPA projects?

- 2) Are you looking to deploy RPA in your contact center?

Robotics & AI

Automation – core to the future of CX operations

- ▶ Fully automated robotics and AI set to surge. 88.3% anticipate robotic automation and AI volumes to increase during the next two years.
- ▶ 71.6% believe that up to one quarter of CX activity currently supported by agents could be fully automated.
- ▶ Top benefit of robotics and AI expected to be improved CX.
- ▶ Costs and cybersecurity vulnerability top risks/fears associated to AI and robotics. 45.0% have lingering concerns it could create negative customer feedback.
- ▶ As a result, some 80.3% of organizations are expecting technology budgets to increase; conversely 55.1% expect headcount employed to fall.



Creating a new CX reality:

You need to **understand...**
but how?



Develop your automation strategy balanced and designed with the human touch



Optimise your CX operating model



Encompass cultural adoption of automation – EX and CX

Harmonize CX to improve

Key Findings

- ❑ Robotic Process Automation (RPA) has been used in enterprises for over twenty years. While it can reduce costs and increase operational efficiencies across organizations, it is starting to have a significant impact on the contact center.
- ❑ Cost reduction is a primary goal, however, RPA also can be geared toward revenue generating or revenue recouping activities, such as upselling products and services, or uncovering accounting errors.
- ❑ RPA applications are easier to deploy than many enterprise applications as they work with the presentation layer that a live agent or back office worker would see rather than having to integrate with each application.
- ❑ Using RPA agents to access information on legacy systems and applications can extend the life of aging infrastructure, by automating rekeying of data between systems.
- ❑ RPA can bypass security bottlenecks as virtual agents can access data that is restricted to live personnel, thus bypassing a security hurdle to complete a process.
- ❑ Increasingly, adjacent technology capabilities are bleeding over into the traditional RPA space. Virtual agents, bots, and chat bots are gaining in features/capabilities that automate cross-organizational business functions. This has led to confusion as RPA doesn't necessarily incorporate AI functionality, and providers are adding best-of-breed partner capabilities.
- ❑ RPA needs to be part of a cross organizational plan for automation, as it can impact processes and people's roles within an organization.

Source: Frost & Sullivan

Key Findings (continued)

- ❑ Overall, the use of RPA within customer contact is still emerging. Interest is growing, but real deployments are still a relatively small part of contact center growth.
- ❑ In order for this segment of the market to mature, there needs to be greater awareness of the potential impact of RPA in the contact center, and it's greater benefit when tied into a formalized operating model, alongside other RPA initiatives.
- ❑ Because of their versatility, the creation of robot catalogs and marketplaces with reusable robot components (as we have seen in other areas of customer contact), will greatly accelerate adoption. Bot marketplaces, shared community spaces, bots as microservices, and other resources, with vertical or horizontally oriented bots, such as finance advisors, HR, materials management, accounting, etc., will speed time to deployment. Some vendors have started to create these marketplaces.

Source: Frost & Sullivan

CX and EX are intertwined and RPA can assist with that



Join us for a Council Mixer at:



3:00pm on Sunday, April 7, 2019



Customer Contact East:

A FROST & SULLIVAN EXECUTIVE MIND XCHANGE

April 7 - 10, 2019 | Marco Island, Florida