



# Service Excellence Cockpit

## Management Summary for the Ukrainian market – 2019

Including excursus: Efficiency and customer satisfaction  
– no contradiction



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Zürich, August 2019

## Editorial

Dear reader

We are pleased to present the 6<sup>th</sup> report on the Service Excellence Cockpit. This year again, a lot more participants took part in the survey.

In the last year we heard the term "Service Excellence" at more and more occasions. Service Excellence Managers are hired, courses on Service Excellence are taught and even the "Marketiers" are using the term, because they start to comprehend customer service as a driver for customer satisfaction. We are of course pleased with this successful spreading of the term and are also proud of the impact we were able to make on this development with the Service Excellence Cockpit. It's the result of a bigger strategic meaning for customer care, as we can confirm with our benchmarking data. This development is based on a **constant striving for better customer satisfaction and higher quality in customer service** which leads to added value for the customers and companies.

After 6 years of measuring and comparing the most important KPIS, thanks to our benchmarking, we are increasingly in a position to identify the levers and measures for improvement.

Our data analysis shows that a service center's strategic direction has an impact on business performance and customer experience. A more strategic awareness of customer service has a significantly positive correlation with customer satisfaction and Net Promotor Score (NPS) and thus with the quality of the customer service provided. You can find out more about this in this year's Excursus, which we warmly recommend as a read.

In addition, you will certainly be interested in how the many technological possibilities affect the work of the employees and the performance in customer service.

This is what the Service Excellence Community values.

For **Joseph Jossen of the Swiss Federal Railways** "a constant comparison with other service centers ensures that new trends are not missed, for which the Service Excellence Cockpit is excellently suited".

**Johannes Kroker, Entega Energie adds:** "The Service Excellence Cockpit allows me to look beyond company and industry boundaries. What I particularly like is how the Cockpit team responds to the concerns of the users. We suggested introducing the key figure Number of Contacts to Number of Customers. In the next survey this KPI was integrated!"

**And Reto Frei from Swisscom was able to** "demonstrate to the management team the need for transformation with the help of the objective benchmarking figures from the Service Excellence Cockpit".

The aim of the Service Excellence Cockpit remains, to make **customer service measurable and comparable** and thus create the foundations to continuously improve the quality in the service centers. For we are convinced that **customer service** in our world of interchangeable products and services is **becoming a decisive competitive advantage**.

We are pleased to present a detailed summary of the relevant market data for the service center industry in this report.

With excellent greetings



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This study represents general non-binding information. The contents reflect the opinion of the authors at the time of publication and the results of the conducted survey. Although the information has been compiled with the greatest possible care, there is no pretence to correctness, completeness and/or timeliness. Particularly, this publication cannot take into account the special circumstances of a particular case. The use is therefore in the readers own authority. Any liability is excluded.



# Service Excellence Cockpit

In times of increasing competition and interchangeability of products and services, excellent customer service is developing more and more to a decisive comparative advantage for all companies in the market. Quality of customer service will therefore be even more important in the future. For continuous monitoring and improvement of the service quality, strategic KPI's and benchmarking are necessary. That's where the Service Excellence Cockpit comes into play.

## Measurement and comparison of the service quality of service centers

An interactive customer dialogue between companies and their customers is linked to the competences of the employees and the successful integration of the communication channels. The control of these communication channels is becoming more and more complex due to its multiplicity and is becoming an important competition criterion. One difficulty with the integration is the lack of generally accepted and established benchmarks or key performance indicators (KPIs).

For service centers, many operational, but little to no generally accepted and established strategic KPIs exist that support the management of customer service. This means that standards are missing for measurement and comparison with other service units.

The research project of the Lucerne University of Applied Sciences, Crystal Partners and CallNet.ch developed a framework based on DIN EN 15838, supported by technical specialists from Credit Suisse and Swisscom. The "DIALOGUE KPIs" represent the service quality for the management of service centers. The framework consists of the five dimensions:



Figure 1: Framework of the Service Excellence Cockpit

The framework is the basis for comprehensive benchmarking of service centers. The analyses of the differences are intended to facilitate the development and improvement of competitive advantages. The comparison can refer to different objects (services, processes) and target sizes (cost, quality, time, satisfaction). For the classic communication channels, but also for the social media channels, the average response time for the various channels can be determined and compared. The comparison allows an assessment of the company's own business, also with regard to available best practices, and thus shows a potential need for action. The informative value can be increased by taking account of overall conditions, e.g. branch-specific opening times. In order to point out the starting points for the closure of the gap, the framework also allows the analysis of the deviations.

## Service Excellence Cockpit

Compared to the standard studies, the framework provides, in addition to a location determination, also concrete analysis possibilities and recommendations for action for the own service center. This allows companies to gain a competitive advantage through excellent customer service.

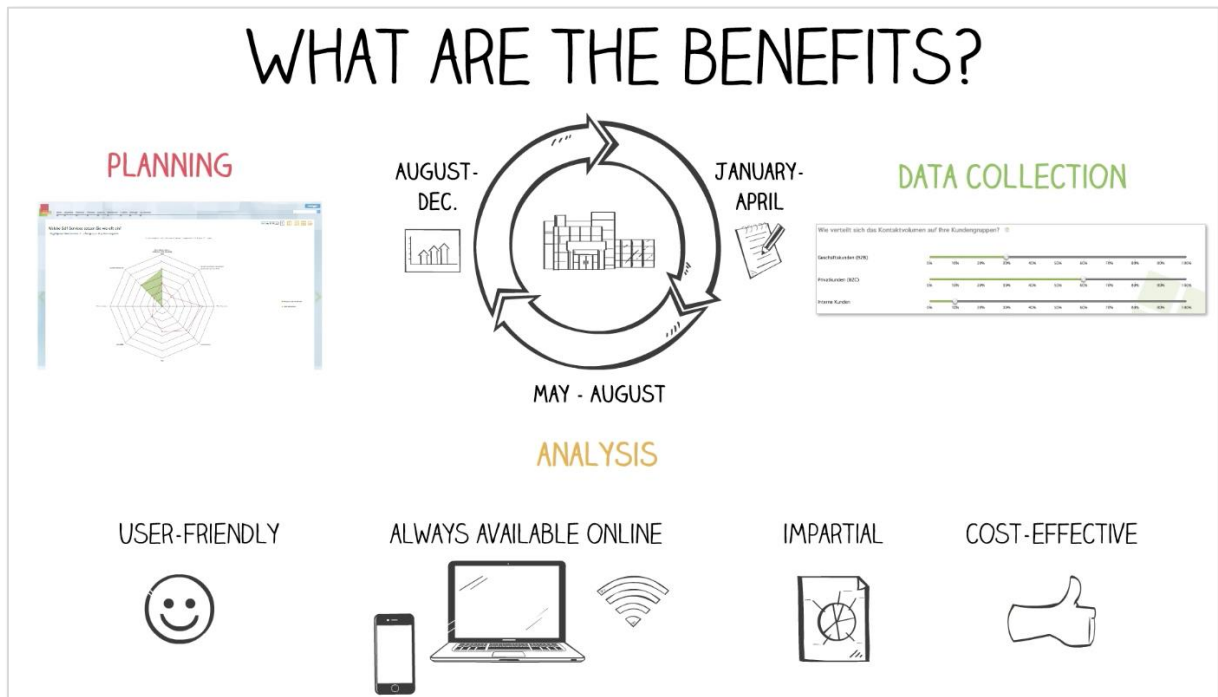


Figure 2: Advantages and objectives of the Service Excellence Cockpit

The Service Excellence Cockpit provides in-depth analysis and is thus an effective management tool for the planning, control and monitoring of service centers.

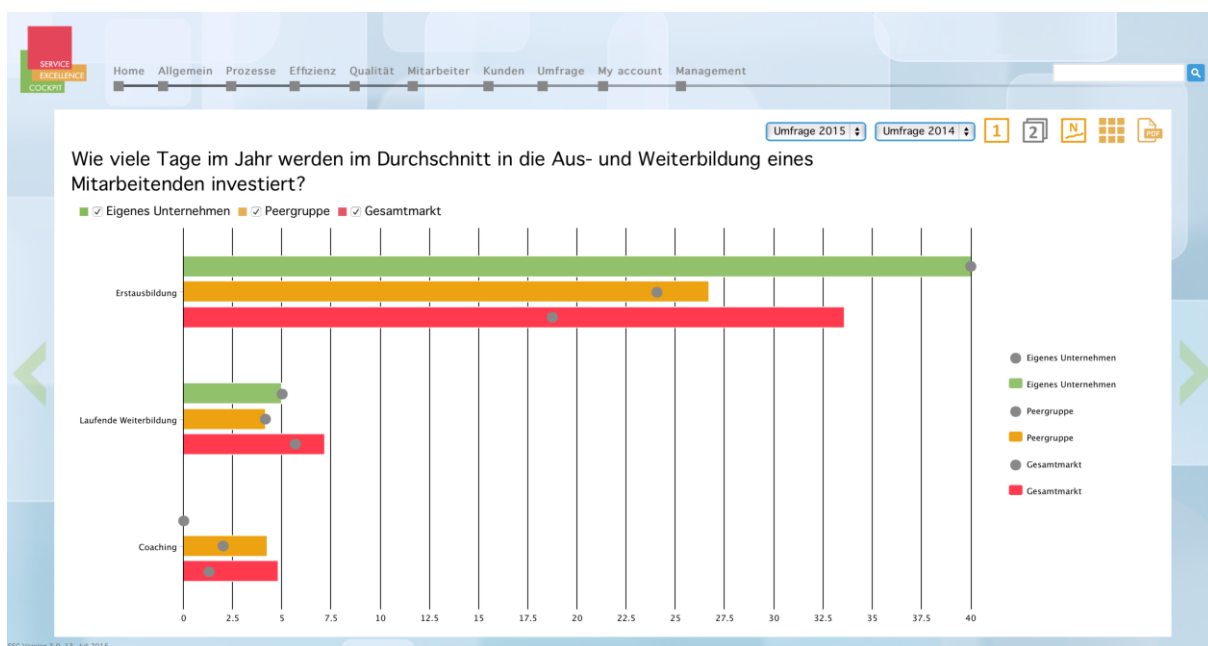


Figure 3: The interactive Service Excellence Cockpit



Customer service becomes more strategic and plays an increasingly important role in the company. With the Service Excellence Cockpit, we address a broad target group: managers of service centers, marketing managers, controllers, financial managers and not least the entire management. On the basis of hard facts, the cockpit offers numerous possibilities:

**Presentation and analysis:** The Service Excellence Cockpit offers interesting comparisons with the overall market, different peer groups (e.g. own industry, centers of similar size or similar structure), the own and third-party figures or the individually defined target values.

**Simulations:** The Service Excellence Cockpit can be used to simulate the dependencies of the KPIs and the potential impact of interventions by the management. In the case of upcoming investment decisions, the business case pays off more easily and the comparison base will be substantially larger. The assumptions made can be objectivised.

**Optimisation options:** With the Service Excellence Cockpit, optimisation potentials in service centers can be systematically evaluated and forward-looking measures taken to improve on the basis of comparative values.

# Summary

The latest results of the Service Excellence Cockpit are available. For the second time, Ukrainian service centers took part in this year's survey.

The concept of Service Excellence has become established and does not only include the service levels of call centers, but all aspects of a sustainable customer management.

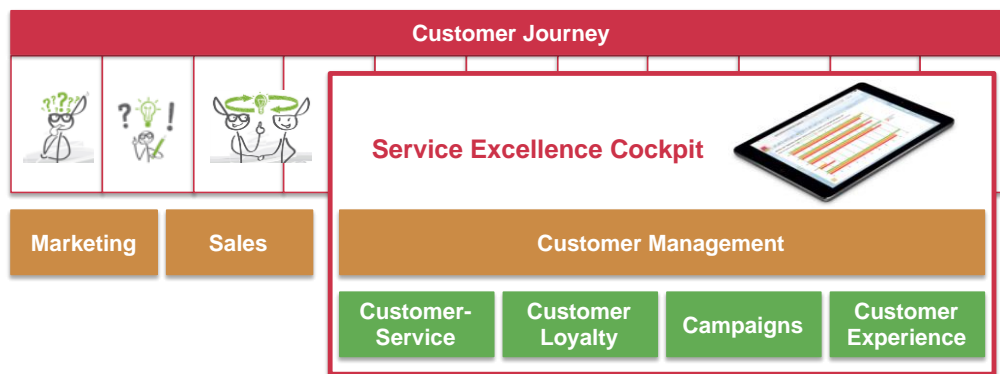


Figure 4: Service Excellence in the customer journey

Companies strive to differentiate themselves from the competition with exceptional customer service services. However, it is challenging to plan, control and execute the interactions between the customer and the company so that the customer is thoroughly satisfied with the services in the end. As the Service Excellence Cockpit shows, general criteria, processes, efficiency, quality and employees of the service center play the decisive role.

This year's report is based on data from 228 service centers in Switzerland, Germany, Austria, Ukraine, Spain, Luxembourg and Poland and covers the following industries:

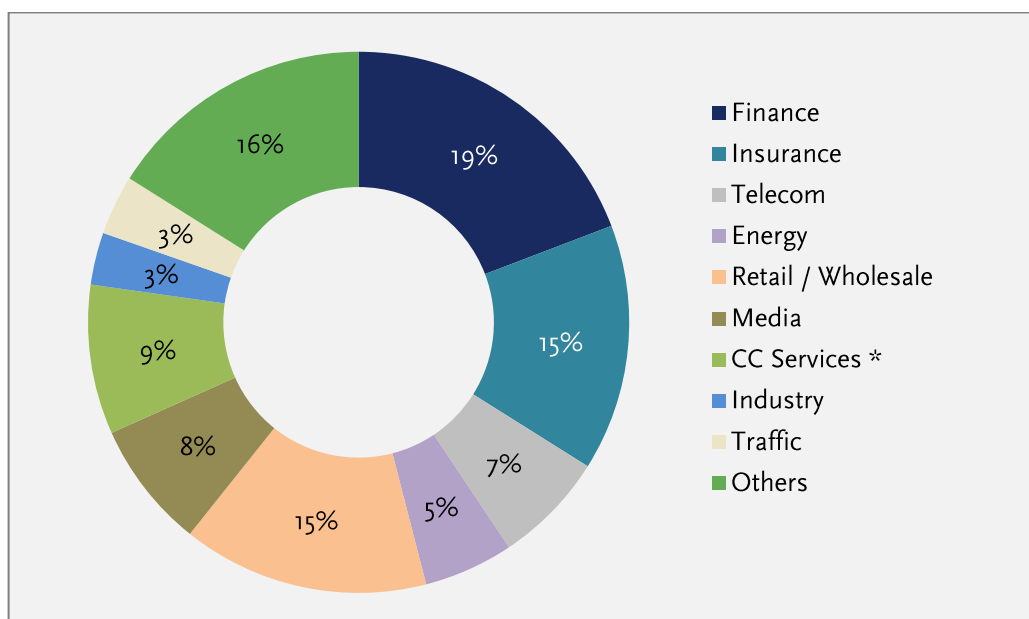


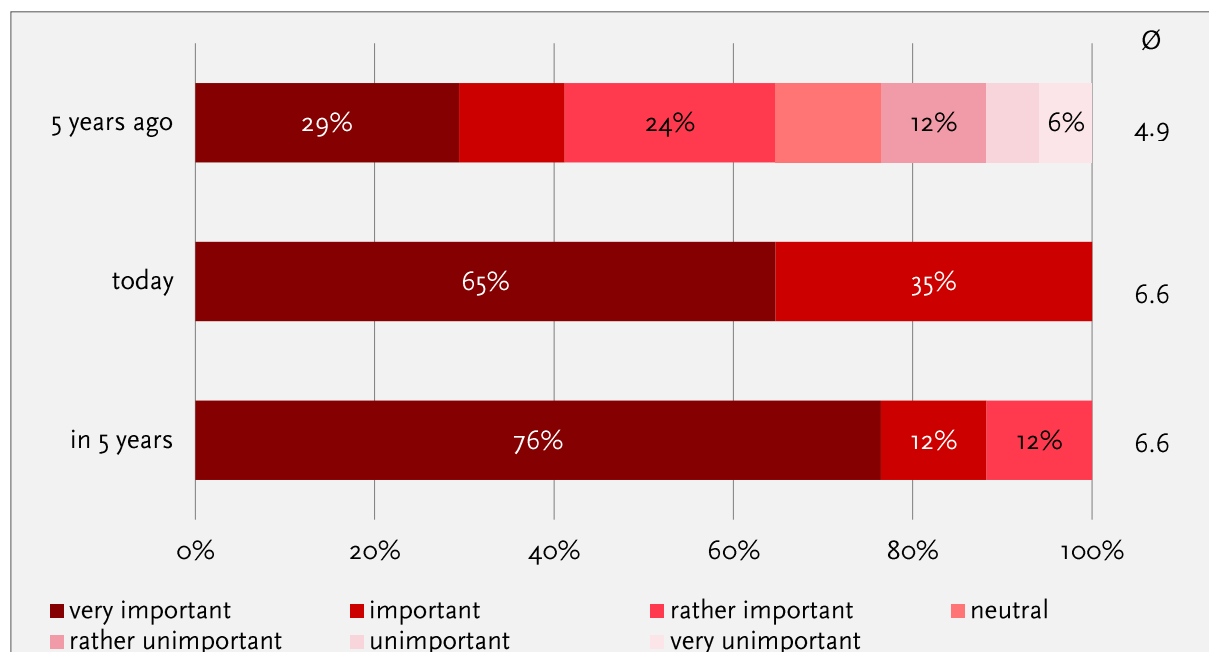
Figure 5: Industry distribution of survey participants (n=228)

7 Percent of the participants are based in Ukraine. **We therefore do not have enough data yet to provide a representative analysis for the Ukrainian market segment.** This summary should only be understood as an example of how future Ukrainian market analysis will look like. For more detailed and representative market analysis, we therefore refer to our Service Excellence Report 2019 or the online Cockpit.

The most important findings for the **Ukrainian market segment** are as follows:

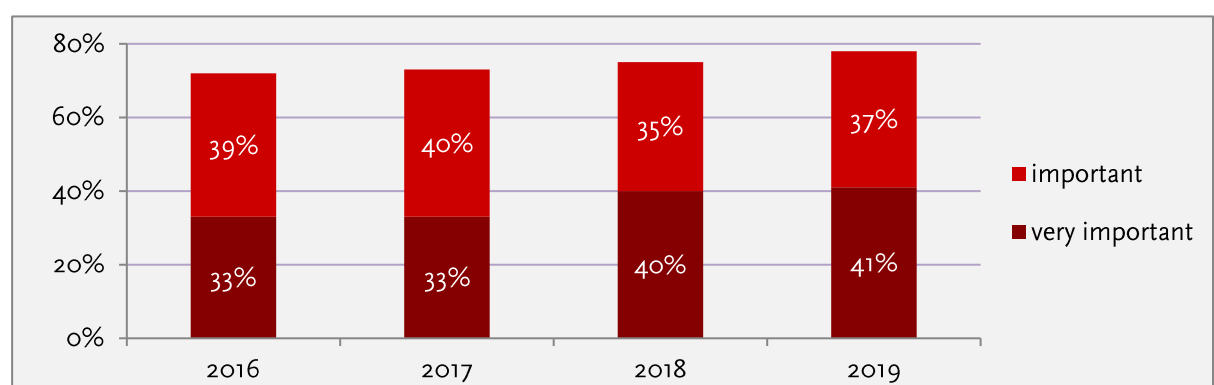
### Strategic importance of the service center

Ukrainian companies are increasingly understanding the potential of customer service and are obviously also willing to invest. Behind this understanding is a desire to differentiate by means of excellent customer experience in customer service. All Ukrainian participants are convinced that customer care is a very important or an important factor today. This is clearly increasing, compared to 5 years ago.



**Figure 6:** Strategic importance of service centers from the perspective of the Ukrainian service center management in 2019

Behind this is clearly a desire to differentiate on the basis of excellent customer experiences. In the overall European market 87 percent of the service center Management surveyed ascribe a very important or important strategic importance to the service center within the company.



**Figure 7:** Increasing strategic awareness of customer service, overall European market

But that's not all: In our data analysis, we find evidence that a service center's strategic direction has an impact on business performance and customer experience. A more strategic awareness of customer service is positively correlated with customer satisfaction, the Net Promoter Score (NPS) and thereby the overall customer experience.

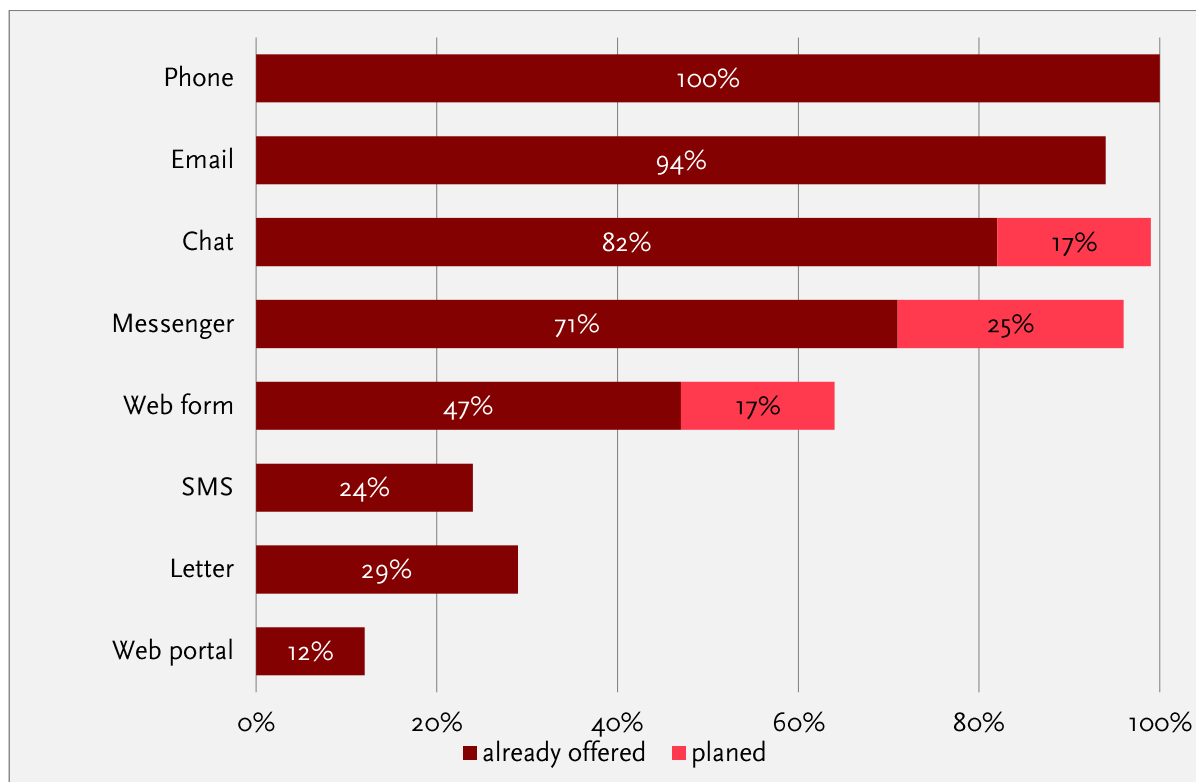
In concrete terms, service center with a higher strategic awareness of customer service (measured on a scale of 1 = very unimportant to 7 = very important) have a higher average customer satisfaction of 0.3 points (measured on a scale of 1 = very dissatisfied to 7 = very satisfied). We find consistent results for the Net Promoter Score. This score increases by an average of 4.2 points (scale from -100 to +100) when the strategic awareness of customer service increases by one category.



**Figure 8:** Effect of strategic awareness on NPS

## Omnichannel - Expansion of online channels

Providing the right channels is crucial for customer experience and customer satisfaction. All Ukrainian service center offer the phone channel and 94 percent offer Email. The results in 2019 show an ongoing trend towards the availability of online channels. Chat can be viewed as an example: as early as today, 82 percent use it and another 17 percent plan its implementation. Consistent developments can be seen for other online channels like messenger and web form.



**Figure 9:** Offered and planned contact channels for customers, Ukrainian market segment

However, this positive trend should not obscure the fact that online channels still account for a small share of the total contact volume. Compared to 2015, they all gained in importance, but 78 percent of all contacts are still handled via the telephone channel.

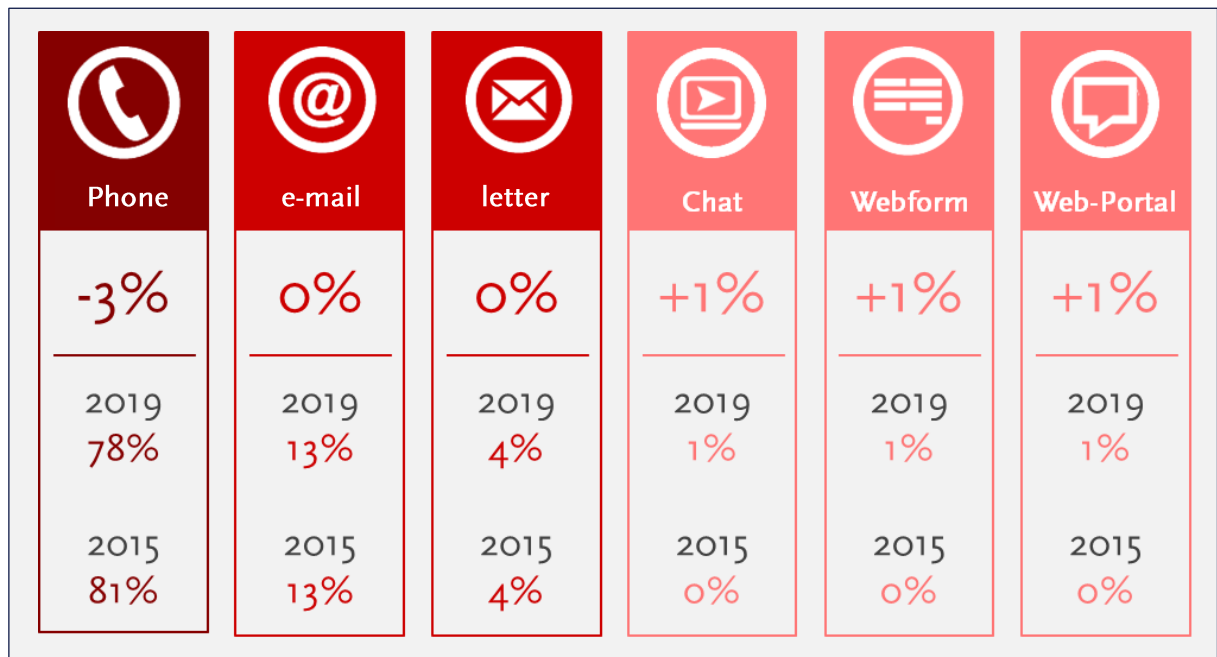


Figure 10: Share of total contact volume per channel

In summary, online channels are increasingly being used and implemented. Nevertheless, the telephone remains the most widely used and efficient channel. It is therefore important to keep an eye on possible process improvements in telephone communication.

### Service Level – Key for customer satisfaction

The service level shows what percentage of the contacts are answered in a certain time. It therefore has a direct influence on the quality of the service and contributes significantly to customer satisfaction. It also provides a key performance indicator and a planning input, for example for the number of employees required. In addition to a good service level, the first contact resolution is primarily responsible for the overall satisfaction of the customer. The average service level of the participating Ukrainian service center is 71% which is a bit lower than the average level in other European markets. The average waiting times only marginally differs.

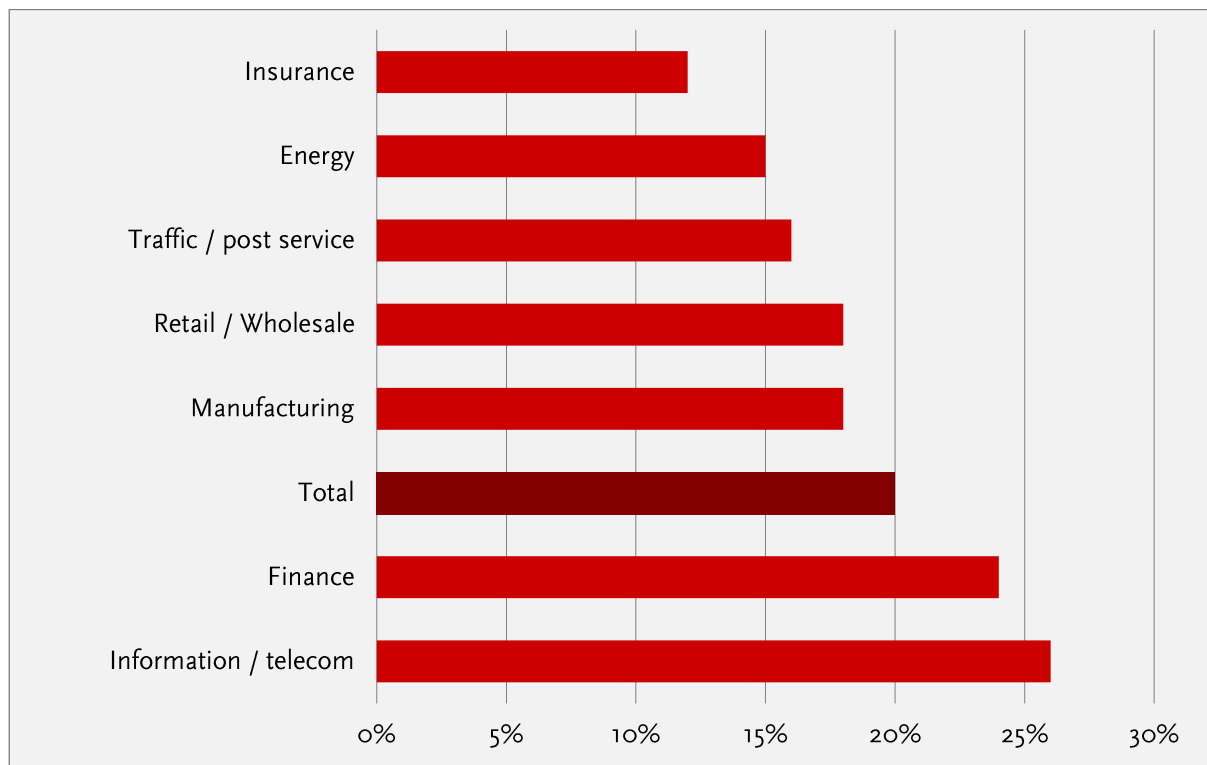
	Level of service	Average waiting time
Ukrainian market	71%	34 seconds
Overall Market	75%	38 seconds

Figure 11: Average service level on the phone channel

## Self services to gain customer satisfaction and efficiency

The use of self services is an expression of the increasing expectations of many customers: they expect a constant availability, fast response to service requests and the independent execution of activities. The primary goals are to increase customer satisfaction through constant availability and save resources through increased efficiency. We are already noticing a trend towards biometric applications being established.

Interesting for the deployment of self services are the significant differences by industry, with the information and telecom industry playing a leading role, as we can see in our data of all European participants.



**Figure 12:** Saved contacts through self-services across different industries, overall European market

In most industries, more than 80% of enquiries in service centers are highly repetitive, written or spoken. If, therefore, an automation of online channels is considered, modern chatbots come into consideration for the simpler requests of the customer. This is software that is capable of engaging with people in a per defined dialogue. This dialogue is based on artificial intelligence algorithms that must be taught through a large number of dialogues between customers and companies. In this context, an increased implementation of machine learning and the resulting artificial intelligence within service centers is worth mentioning.

## Artificial intelligence finds its way into the service center

Excellent customer service is based on a seamless interaction between employees, processes and technology. It's therefore crucial, that Service Excellence Manager are aware of the newest technologies on the market. In this years' survey, we also examined the use of applications based on «artificial intelligence» (AI) and machine learning systems in customer care. The participating Ukrainian Service Center seem to be quite far in the process of experimenting and implementing tools based on AI, compared to other markets in continental Europe.

Artificial intelligence is a promising technology which can particularly be useful for a further development of self service applications. Our data indicate that service center managers are aware of that. Already 80 percent of the Ukrainian participants are planning to implement self services based on AI. 60% have already implemented such tools or are in pilot phase. There is also testing with AI going on in other areas, but still on a lower level. It will be interesting to observe and analyze the progress made in the use of such technologies in the coming years.

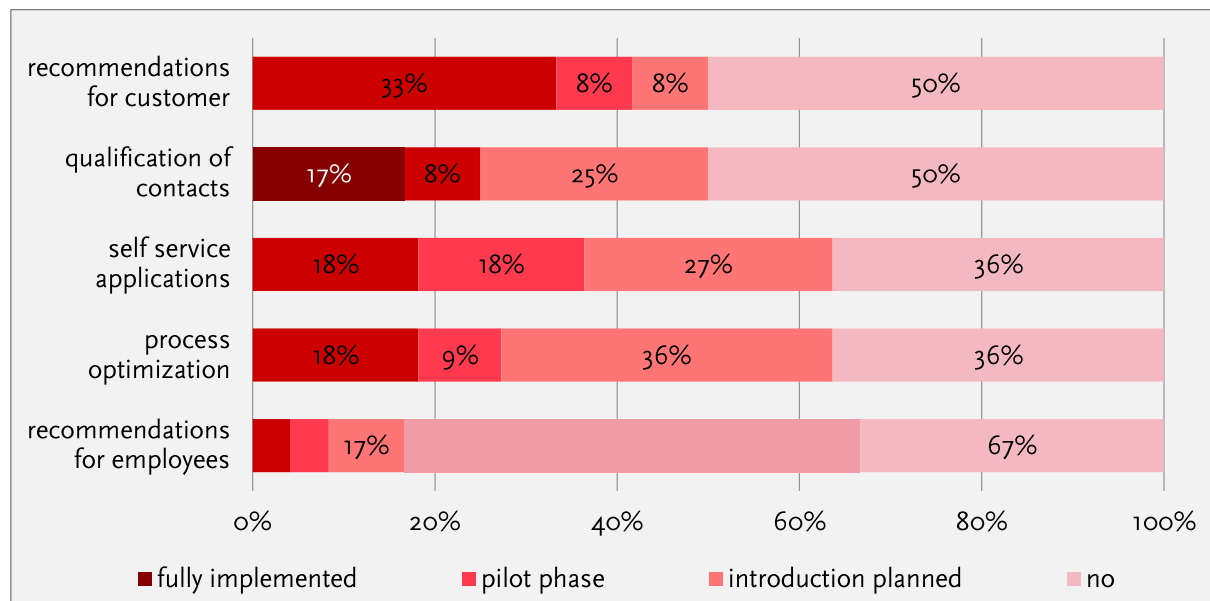


Figure 13: Use of applications based on AI in Ukrainian Service Center

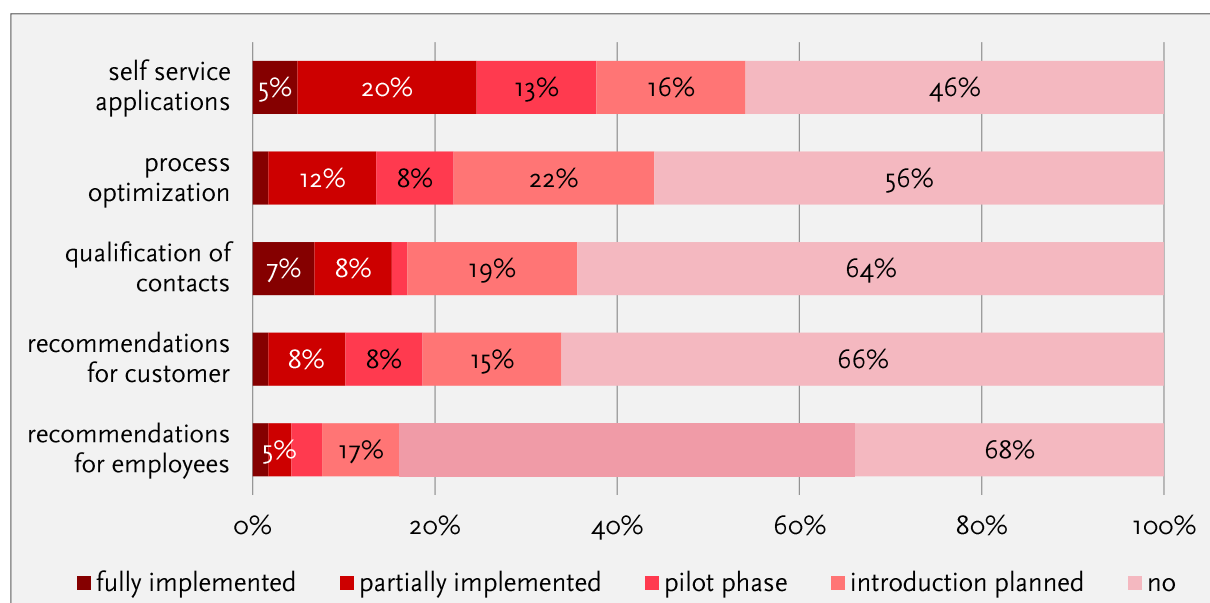


Figure 14: Use of applications based on AI in Europe

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# 1 General Information



Service centers work in a very dynamic environment, which is characterised by high customer expectations, new technologies and efficiency improvements. In this context, the value contribution of service centers is often questioned, as the costs, but not the success, are transparent to the decision-makers. This lack of transparency can lead to false strategic decisions. In order to make fundamental changes to the service center, the current market data and its effects must be examined. The market data is an important basis for the creation or adaptation of the service strategy in the company.

## 1.1 Location of the service center

Of the 228 service centers questioned, 62 percent are based in Switzerland and a quarter in Germany. 7 percent operate in Ukraine, 4 percent in Austria and a further 4 percent in Spain. The remaining service centers are from other European countries. In this report we focus primarily on the results of our Ukrainian participants.

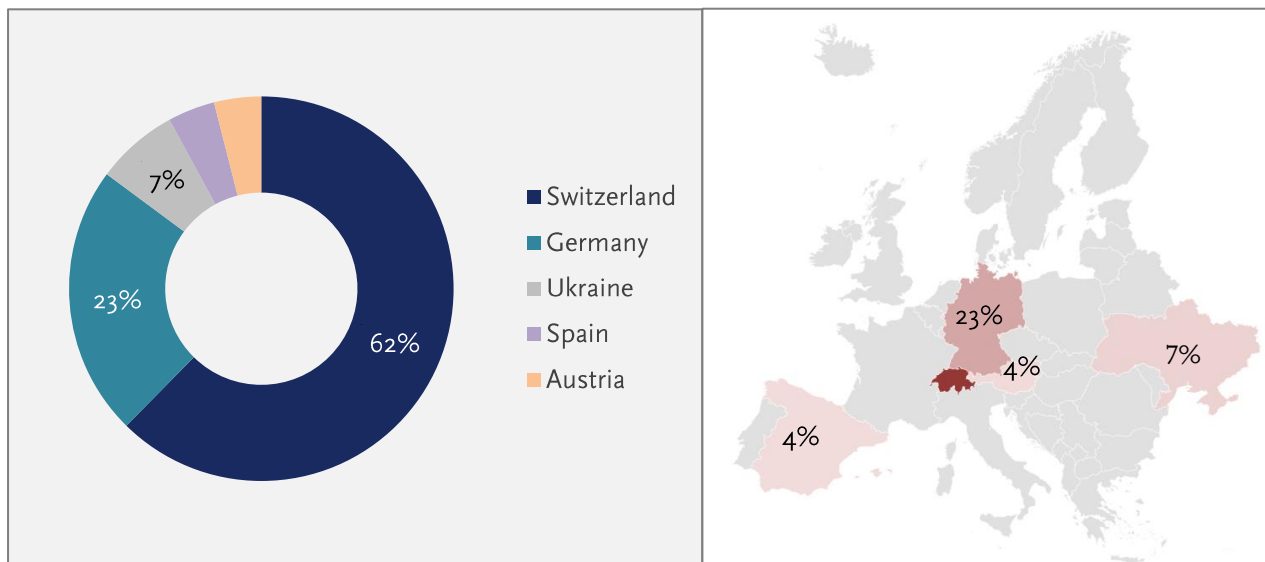


Abbildung 16: Location of Service Center

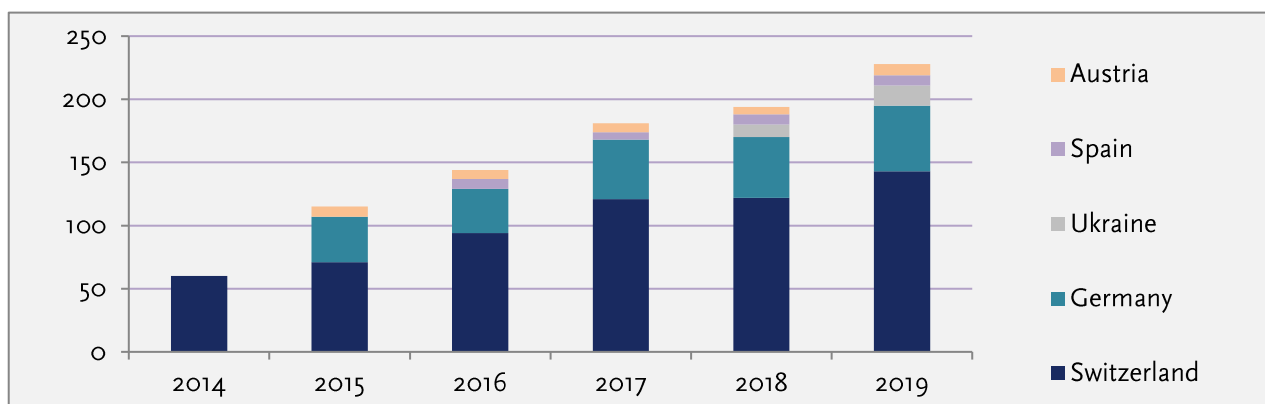


Abbildung 15: Number of participants over time

## 1.2 Industry distribution

In the grouping according to industry, it is clear that from 228 service centers, which participated in the survey, a large part works in the service industry. Service centers from the financial sector predominate, followed by those from the insurance and health insurance industry which are then followed by the Retail and Wholesale industry. But excellent customer service concerns all companies. Throughout the industries, companies are developing viable strategies to meet changing market conditions.

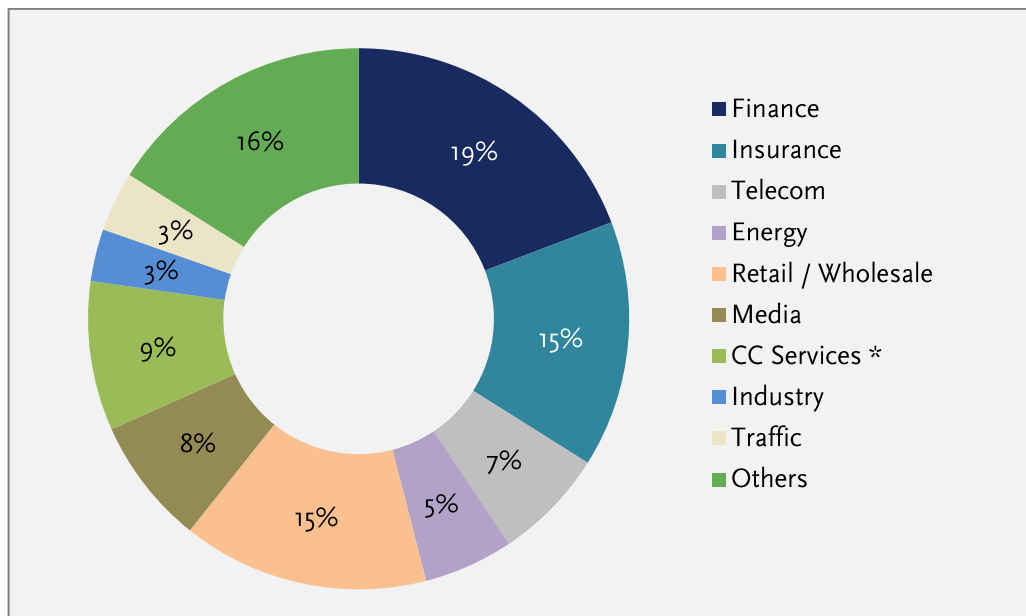


Figure 17: Industry distribution of survey participants (n=200)

## 1.3 Strategic importance of the service center

Ukrainian companies are increasingly understanding the potential of customer service and are obviously also willing to invest. Behind this understanding is a desire to differentiate by means of excellent customer experience in customer service. All Ukrainian participants are convinced that customer care is a very important or an important factor today. This is clearly increasing, compared to 5 years ago. We observe the same trend in all other European markets as well.

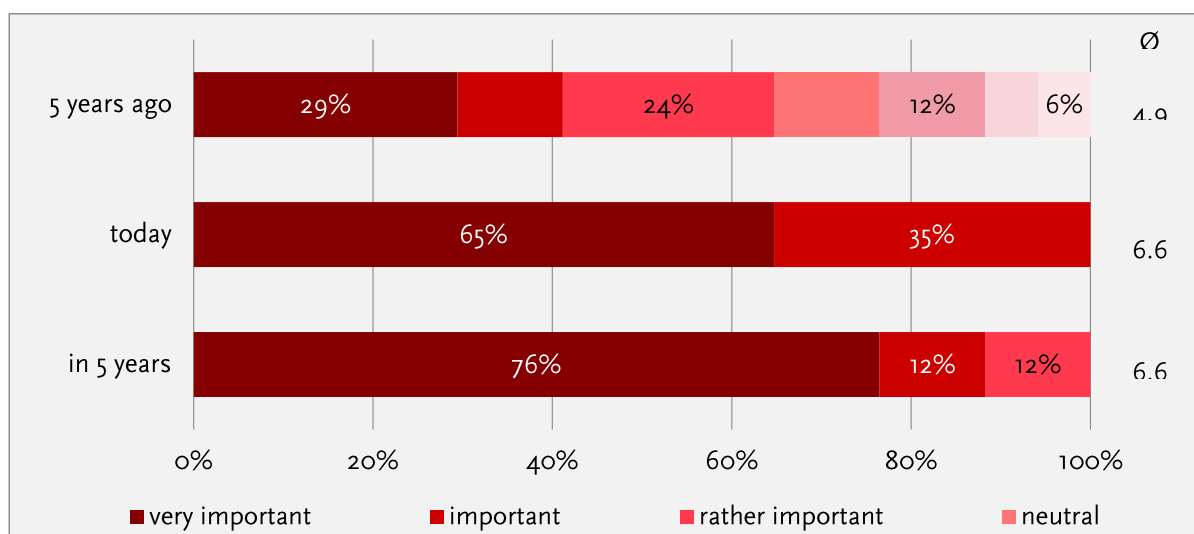


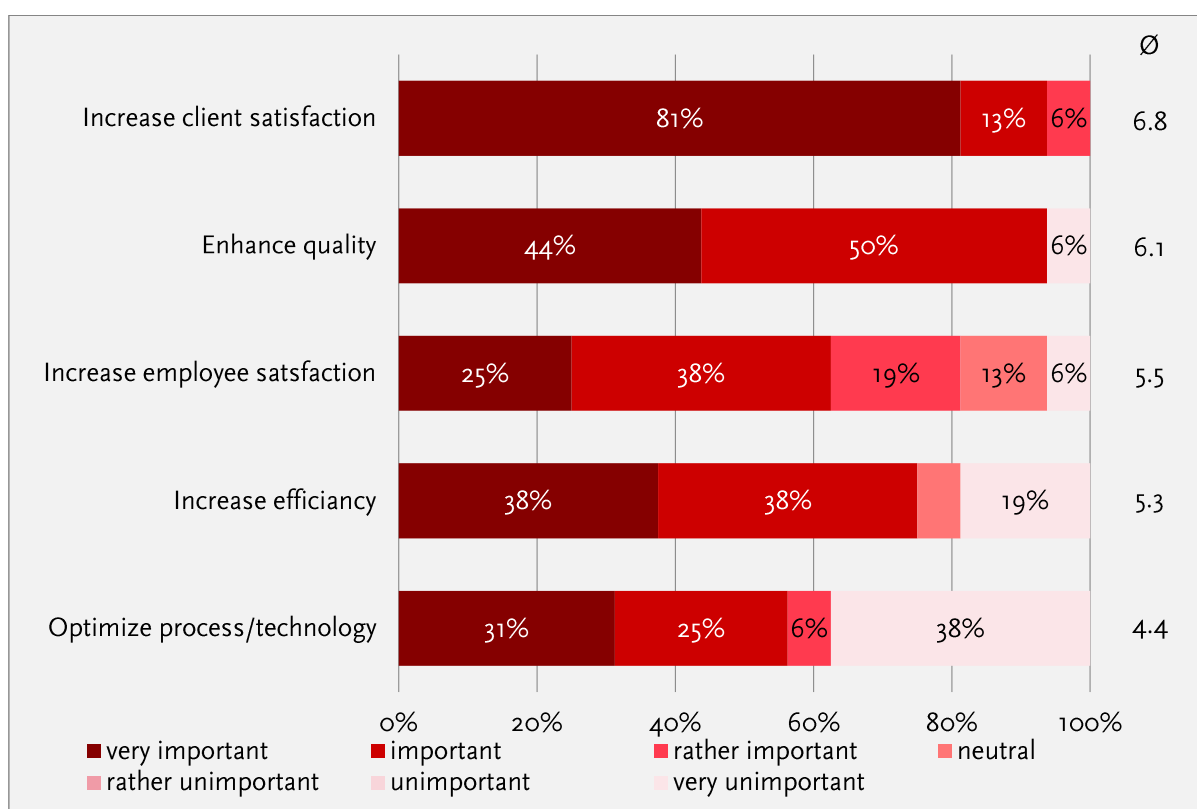
Figure 18: Strategic importance of service centers from the perspective of the Ukrainian service center management in 2019

**What should be considered in this context:**

- Does the service center organisation meet the growing strategic requirements?
- Are adequate strategic performance indicators available for the management?
- Do the concerns of the service center reach the ears of the management as they should?

#### 1.4 Goals of the service center

The primary task of a company is the realisation of the company's goals- All business units must make their contribution to the goal. A service center has a cross-section function and thus contributes value to internal and external customers. The increase in customer satisfaction and service quality is defined by the service centers as a very important goal. Interestingly, in 2019, the quality goal is weighted higher than the efficiency goal. Increasing efficiency in service centers is a continuous process that can only be achieved through the targeted use of resources and efficient processes by means of optimal use of technologies. Compared to other European markets, Ukrainian service center consider process and technological optimizations somewhat less important. Otherwise, the results are quite similar.



**Figure 19: Importance of goals for ukrainian service center**

**What should be considered in this context:**

- The service center goals should be ambitious and in line with company objectives. In this context, a certification of the quality system may be taken into account (see chapter Fehler! Verweisquelle konnte nicht gefunden werden.).
- The goals must be regularly reviewed and compared with competitors.
- In the case of goal deviations, necessary corrective measures must be initiated.

## 1.5 Service hours

Due to the high degree of competition, the customer can and will demand long service hours from the company. In order to meet the expectations of the customers, they must be treated with high esteem. A high esteem is generated by an interaction independent of location, time and channel. The customer's expectation for immediate contact and fast reaction times therefore place high demands on the opening times.

80 percent of the participating Ukrainian service centers are open for their customers from Monday to Sunday. 53 percent are available around the clock. Compared to other European markets, the Ukrainian service center have significantly longer service hours. This gives them a clear competitive advantage. For example, only 23 percent of all our European participants are available 24 hours a day.

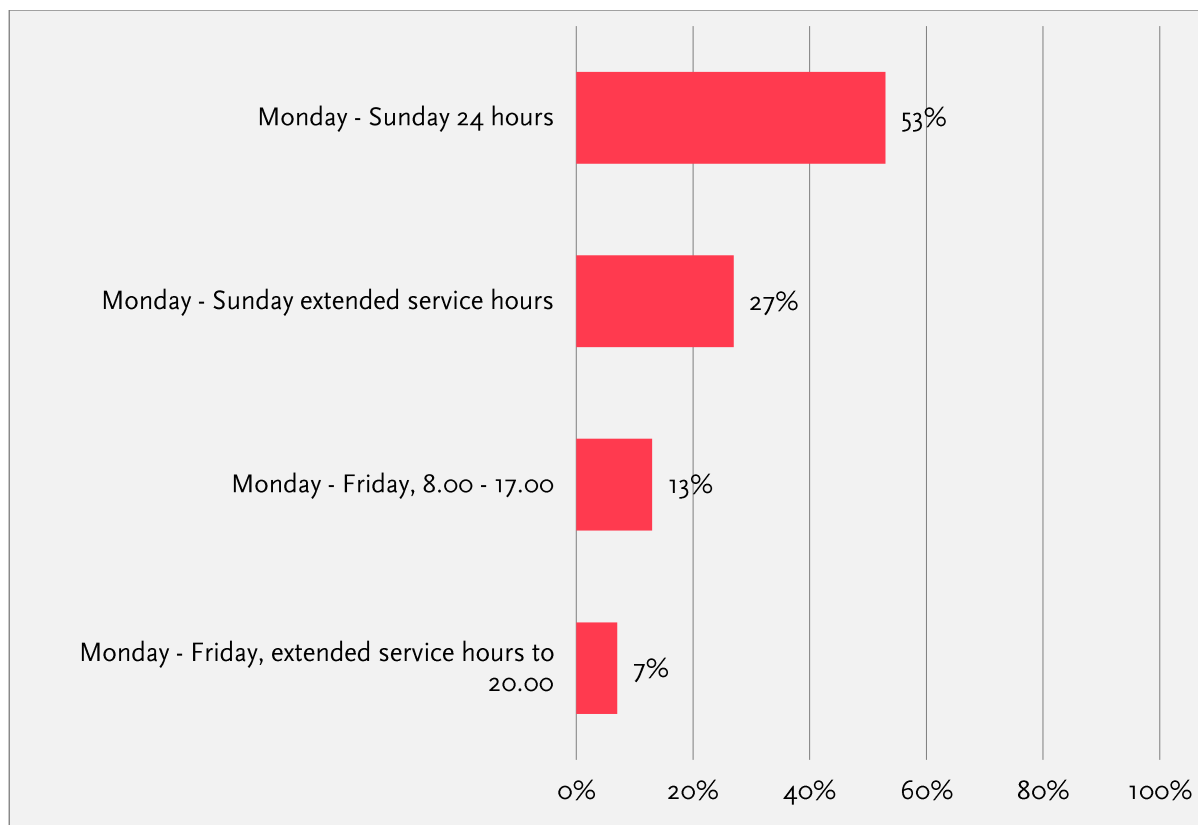


Figure 20: Service hours, ukrainian market segment

### What should be considered in this context:

- Companies now have to provide a broad range of services. The customer decides when and how he would like to get in touch with the company. Extended opening times however are associated with additional costs. That's also one the reasons for the increased importance of self service (see in addition chapter o).

## 2 Processes



The processes in the service center require continuous monitoring in order to increase the efficiency of the process. Within a chance and risk analysis, service centers must systematically investigate the extent to which new technologies are able to increase quality and reduce costs of the customer service. When implementing new technologies, company-specific requirements and processes must be taken into account in order to optimally support the operational areas. This is the only way to avoid dissatisfied users, duplications and ultimately negative effects on the company's goals.

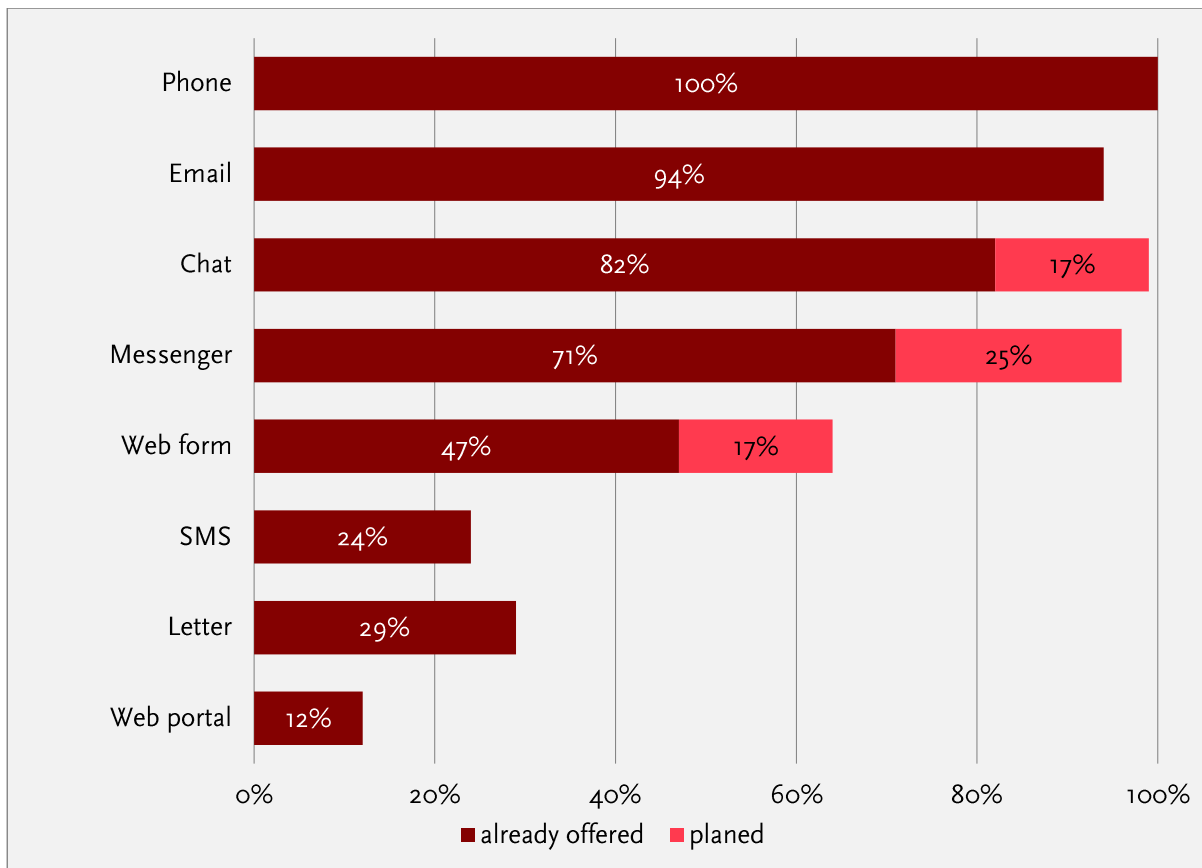
### 2.1 Channels

The channels determine the way in which a company communicates with its customers and how the transfer of services between them takes place. (Bieger, 2011).

The customer expects a wide range of possibilities to get in contact with a company. Contact is to be understood as the interaction between customers and service centers, analogue and digital, real-time and non-real-time, across all channels. A large added value for the customer is generated by a broad channel portfolio. Service centers are responsible for the operation of these channels and must deal with the different challenges of the channels.

The surveyed service centers provide the traditional channels like telephone, letter, email and fax for contacting the customers. However, these channels are subject to economic dynamics which are influenced by today's customer behaviour. After only a few years, new channels such as web form and web portal have established themselves as an integral part of customer communication. Compared to other European markets, the Ukrainian service centers are ahead regarding implementation of new channels. For example, 82 percent of our Ukrainian participants already offer chat and 71 percent messenger, compared to only 29 percent and 19 percent of all our European participants. Letter seems already to play a less important role in Ukraine compared to elsewhere, as only 29 percent still offer it.

In addition, social media has gained in importance in recent years. These media are increasingly complementary to the classic channels. However, in many cases there is still a lack of experience in dealing with this new form of communication.



**Figure 21:** Offered and planned contact channels for customers, Ukrainian market segment

**What should be considered in this context:**

- It's crucial for service center to make a quantitative and qualitative assessment of the customer channels on a regular basis in order to identify shifts within the channels offered and to reassign resources.
- The processing time must also be taken into account as the most important efficiency factor (see chapter Fehler! Verweisquelle konnte nicht gefunden werden.).

## 2.2 Technology support for voice communication

Numerous possibilities are available for supporting voice communication. The Ukrainian service center most often use technologies to identify the caller or plan a call-back time. Recorded greetings are common as well.

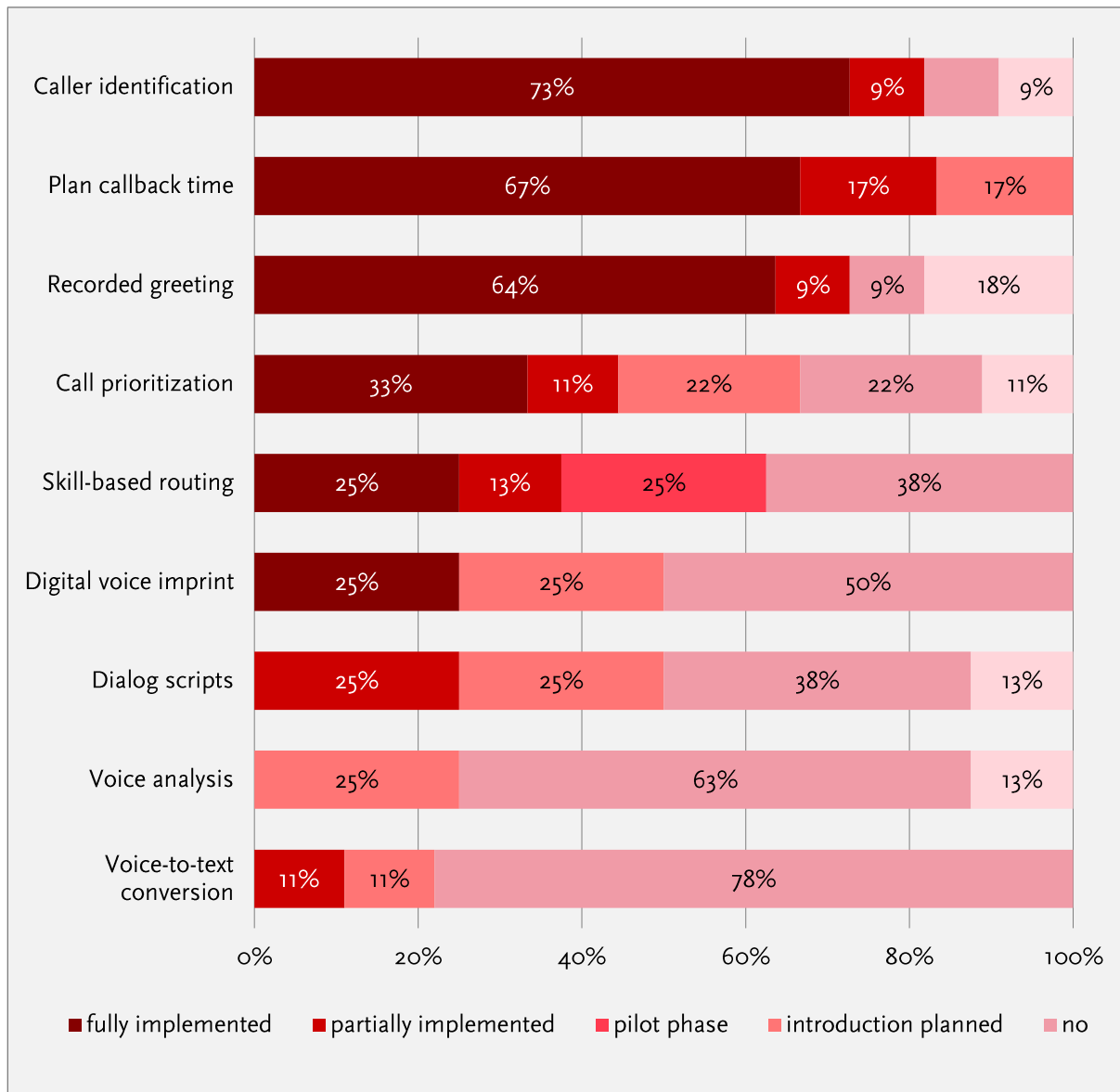


Figure 22: Technology support for voice communication

## 2.3 Interactive Voice Response & Voice Recognition

An interactive voice response system (IVR system) is an automated voice dialogue system that allows the caller to interactively have a dialogue with the service center by pressing key combinations or by speaking (Becker et al., 2010). IVR systems are used for process optimization e.g. the identification of the callers or the identification of requests. The goal is to reduce costs through a reduction of the call time and to connect the customer to the best suitable employee, which increases customer satisfaction. 77 percent of Ukrainian service centers use IVR, which is a slightly higher share compared to other European markets,

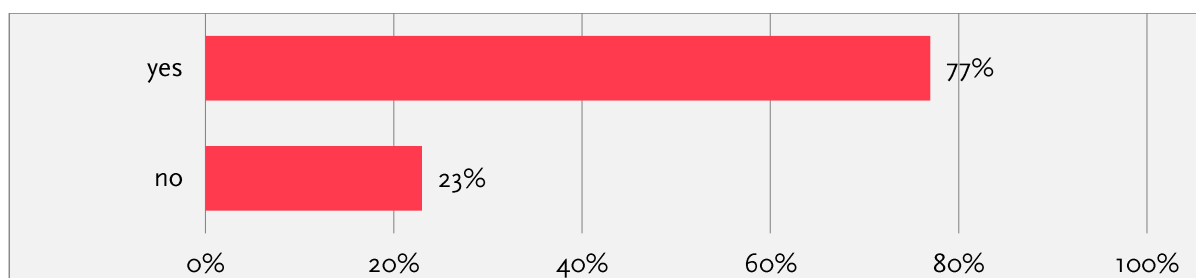


Figure 23: Use of Voice Portal (IVR), Ukrainian Market Segment

**What should be considered in this context:**

- Technologies for voice identification, recognition and conversion into text are still rarely used by the surveyed service centers. Here, it is important to observe which speech recognition technologies become accepted in the next years.

## 2.4 Instruments based on artificial intelligence

Excellent customer service is based on a well working interaction between employees, processes and technology. It's therefore crucial that Service Excellence management are always aware of the newest technologies on the market. In this years' survey, we examined for the first time the use of applications based on «artificial intelligence» (AI) and machine learning systems in customer care. The participating Ukrainian Service Center seem to be quite far in the process of experimenting and implementing tools based on AI, compared to other markets in continental Europe.

Artificial intelligence is a promising technology which in particular can be useful for a further development of self service applications. Our data indicates that service center management is aware of that. Already 80 percent of the Ukrainian participants are planning to implement self services based on AI. 60% have already implemented such tools or are in pilot phase. There is also testing with AI going on in other areas. It will be interesting to observe and analyse the progress made in the use of this technology in the coming years.

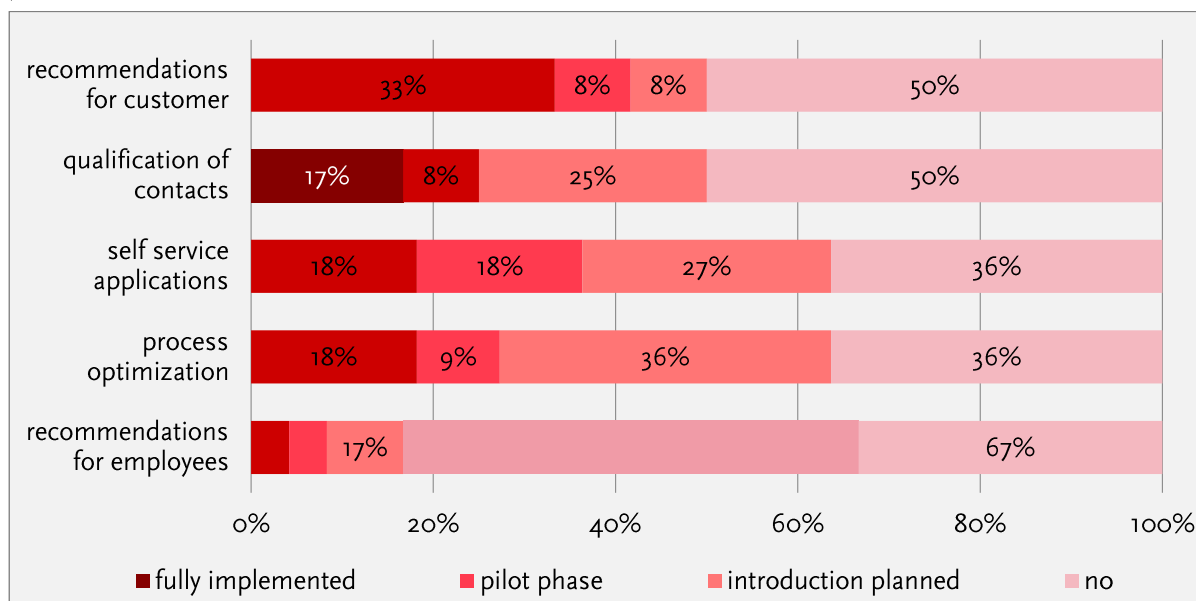


Figure 24: Use of applications based on AI in Ukrainian Service Center



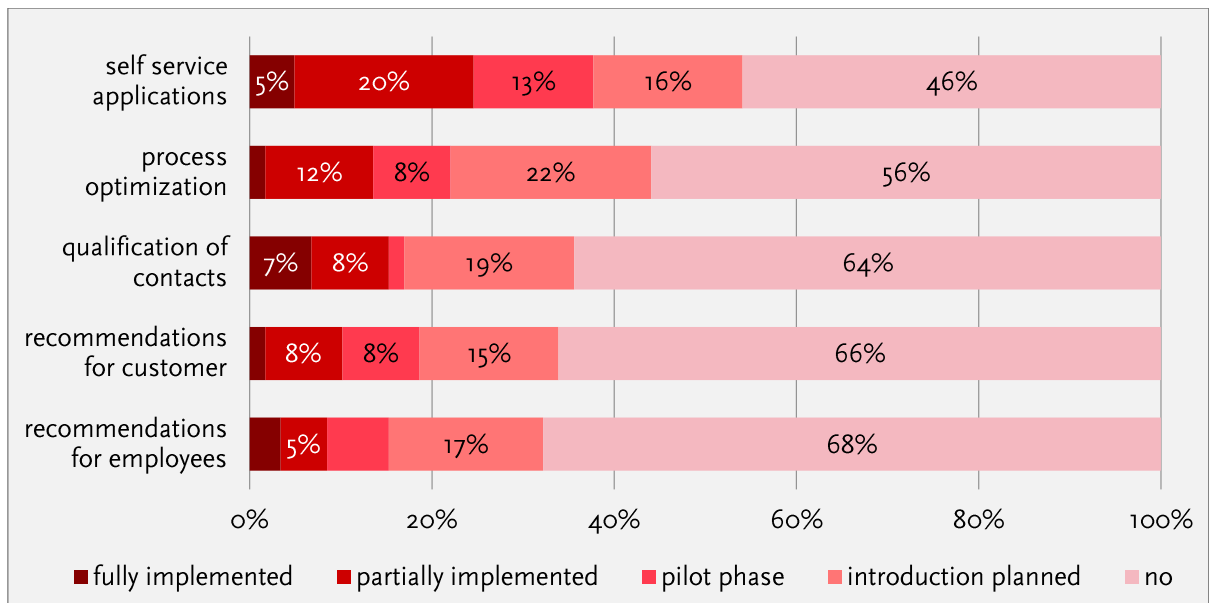


Figure 25: Use of applications based on AI in Europe

## 2.5 Outbound contacts

We note that classic customer service centers are increasingly engaged in outbound activities, especially after an inbound contact when the service level permits it. Information and administration topics are thereby mostly addressed.

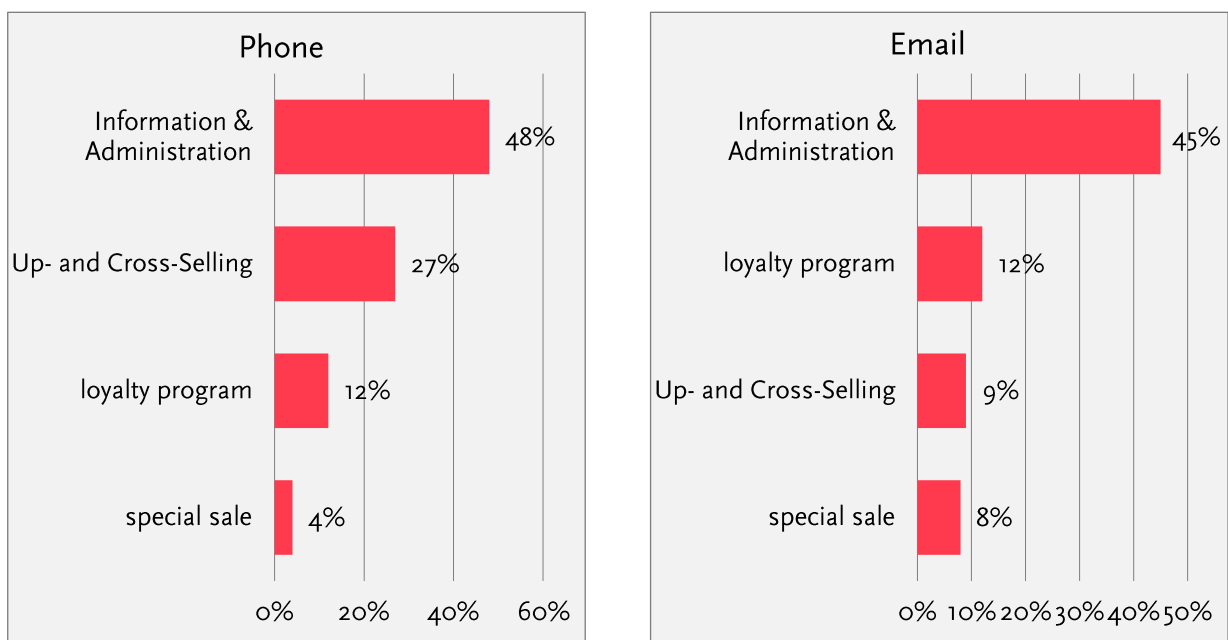


Abbildung 26: Initiated activities after an Inbound contact per channel

## Excursus

## Efficiency and customer satisfaction – no contradiction

Positive customer experience is developing more and more to a decisive competitive advantage for all companies in the market. The awareness for it is steadily increasing. But which concrete measures help to improve customer satisfaction? The data analysis of the Service Excellence Cockpit finds evidence for the positive effect of employee satisfaction and technological support tools on both customer satisfaction and the first contact resolution. Efficiency and customer satisfaction are thus not contradictory but go hand in hand.

By Lukas Stiefel and Daniel Stiefel

Numerous key figures are collected for the management of a service center and the measurement of the customer experience. The Service Excellence Cockpit helps to identify the relevant key figures and provides comparative values from the market and from definable comparison groups. However, it is not only the individual key figures that are interesting, but also the correlations and dependencies among them. For example, an above-average number of training days for new employees is not bad per se if as a result the first contact resolution (FCR) is higher than for competitors which in turn improves customer satisfaction. By interpreting various key figures and comparing them with peer groups, fields of action can be identified, and improvement measures defined. However, it has always been difficult to estimate what impact specific measures will have on the customer experience. We can now close this gap with the data from the Service Excellence Cockpit.

By means of regression analysis, we can now identify and quantify the relevant influencing factors on customer satisfaction and the first contact solution. We use all the data collected since the start of the Service Excellence Cockpit in 2015 for this purpose. The aim is to prove the effectiveness of concrete measures and to calculate their business cases.

We will therefore discuss the following questions in this chapter:

1. What's the effect of the increasing strategic awareness of customer service?
2. How does employee satisfaction affect customer satisfaction?
3. Which factors have a positive effect on employee satisfaction?
4. Which other factors affect customer satisfaction?
5. Which factors have a positive or negative effect on the first contact resolution?

In the following presentation of the results, we specifically concentrate on those factors where statistically significant effects have been identified.

### 1. Strategic awareness of customer service improves customer satisfaction

In recent years, we have noticed an increasing strategic awareness of customer management. Companies increasingly understand the potential of excellent customer service. This can be explained by the

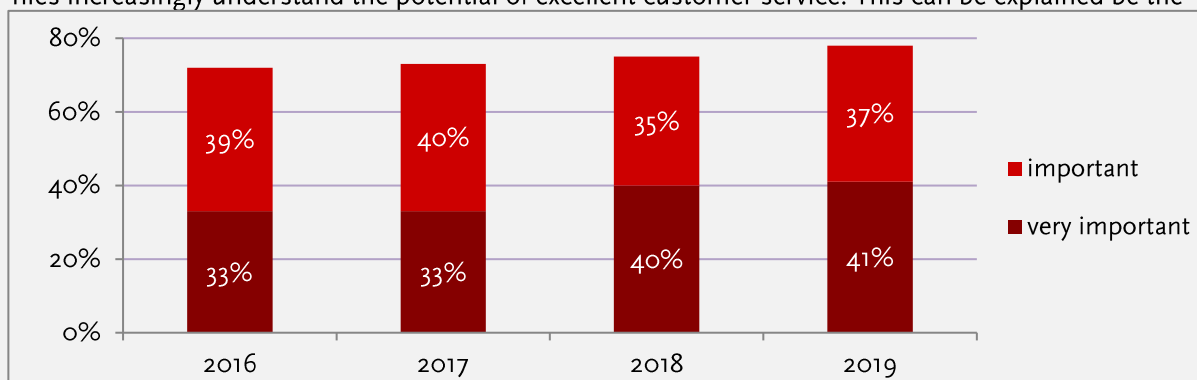


Figure 27: Increasing strategic awareness of customer service

increasing will to differentiate oneself in the market through excellent customer experiences. Today, 87 percent of the service center Management surveyed ascribe a very important or important strategic importance to the service center within the company.

This raises the question of what influence this development has on the customer experience. In our data analysis, we find evidence that a service center's strategic direction has an impact on business performance and customer experience. A more strategic awareness of customer service is positively correlated with customer satisfaction, the Net Promoter Score (NPS) and thereby the overall customer experience. In concrete terms, service centers with a higher strategic awareness of customer service (measured on a scale of 1 = very unimportant to 7 = very important) have a higher average customer satisfaction of 0.3 points (measured on a scale of 1 = very dissatisfied to 7 = very satisfied). We find consistent results for the Net Promoter Score. This score increases by an average of 4.2 points (scale from -100 to +100) when the strategic awareness of customer service increases by one category.

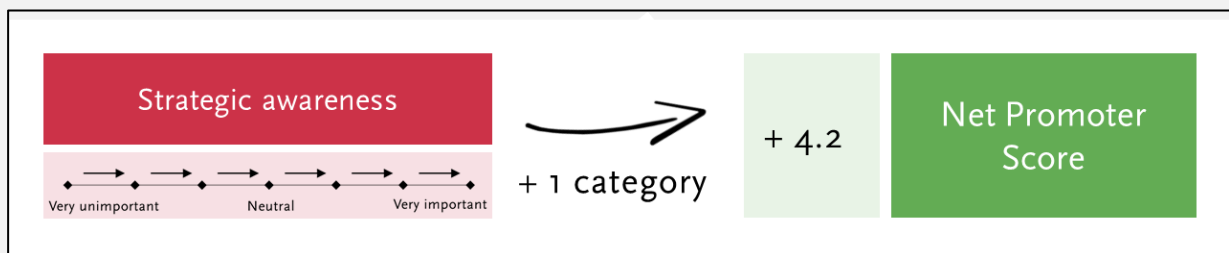


Figure 28: Effect of strategic awareness on NPS

## 2. Satisfied employees for satisfied customers

The analysis also confirms the common hypothesis that satisfied employees lead to more satisfied customers. Satisfied employees make a significant contribution to the success of a company. On one hand, the external fluctuation rate is decreasing with an increasing employee satisfaction (measured on a scale of 1 = very dissatisfied to 7 = very satisfied). But first and foremost, customer satisfaction (scale of 1 = very dissatisfied to 7 = very satisfied) significantly increases with more satisfied employees. Service centers are therefore required to maintain a positive corporate culture and should carefully consider any measures with a positive impact on employee satisfaction.

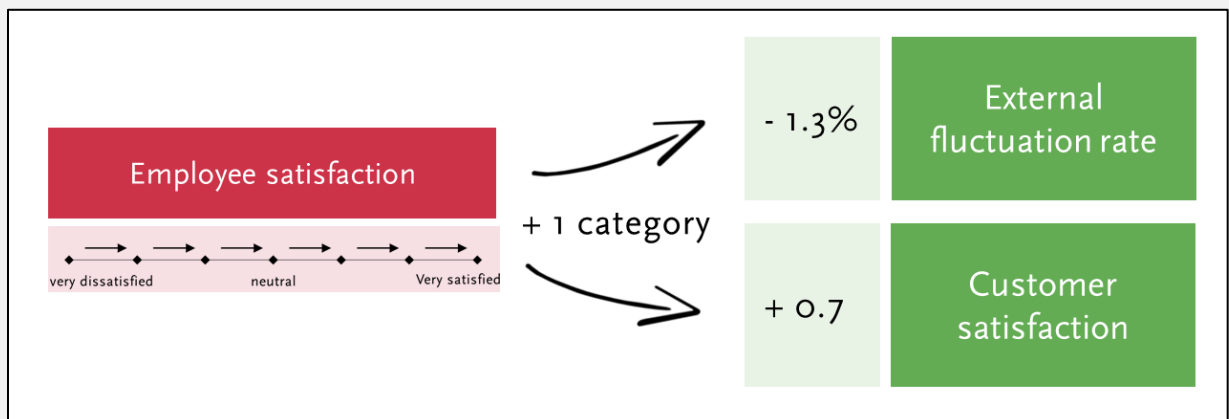


Figure 29: Effect of employee satisfaction on fluctuation rate and customer satisfaction

## 3. Flexible work hours improve employee satisfaction

Satisfied employees thus positively effect customer satisfaction. But which concrete measures improve employee satisfaction? First of all: Money alone does not make employees happy. In fact, we don't find a

significant effect of the average gross salary on employee satisfaction. On the other hand, bonus payments for employees seem to have a positive effect on employee satisfaction.

The most important factor for employee satisfaction is therefore not salary, but flexibility for the employee. This is a clear indication of what is important in today's society. Accordingly, we find positive effects of both the share of home office workplaces and personnel deployment planning tools on employee satisfaction. Employees also appreciate the possibility of rotation to other departments and the freedom of movement with wireless headphones. An acoustically optimized workplace is also positively correlated with employee satisfaction.

Employee satisfaction	Effect
Gross salary	o
Bonus payments	+
Home office	+
Personnel deployment planning tools	+
Wireless headphones at the workplace	+
Rotation to other departments	+
Acoustically optimized workplace	+

**Figure 30:** Influencing factors of employee satisfaction

#### 4. FCR, channel offer and technological support improve customer satisfaction

We already discussed the significant effects of the Service Center's strategic perception and employee satisfaction on customer satisfaction. Of course, many other factors play an important role to ensure customer satisfaction as well.

For example, the first contact resolution (FCR) contributes significantly to customer satisfaction. Customers also value a wide range of channels and a customer community. Finally, we find evidence that cross-channel technological support tools such as skill-based routing or a trouble ticket system can have positive effects on the customer experience.

Customer satisfaction	Effect
Employee satisfaction	+
Strategic awareness of customer service	+
First contact resolution (FCR)	+
Channel offer	+
Customer community	+
Trouble ticket system	+
Skill-based routing	+

**Figure 31:** Influencing factors of customer satisfaction

#### 5. Satisfied employees and technological support improve first contact resolution

On the one hand, a first contact resolution (FCR) is desirable for reasons of efficiency, but above all it has, as shown before, a significant effect on customer satisfaction. It's people who primarily determine the first contact resolution. In concrete terms, it's the satisfied and motivated employees who do everything in their power to solve the customer's concerns directly.

It comes as no surprise that rapid access to the necessary knowledge is crucial for rapid problem-solving. Central to this is the use of suitable technologies such as a knowledge database or skill-based routing. More training and further education also seems to have a positive effect, but the correlation is not very significant.

Certification according to ISO 18295 (formerly EN 15838) has a clearly positive effect on the first contact resolution as well. The certification raises awareness of the importance of the FCR. Certified companies therefore consciously align their processes accordingly.

In this context, the outsourcing of business areas must be viewed critically. According to the analysis, outsourcing is on average negatively correlated with the FCR.

First contact resolution (FCR)	Effect
Employee satisfaction	+
Further education	+
Operative CRM	+
Knowledge database	+
Trouble ticket system	+
Certificate ISO 18295	+
Outsourcing	-

**Figure 6:** Influencing factors of FCR

## Conclusion

Today, a positive customer experience is an important differentiating factor in the market. The evaluated data from the Service Excellence Cockpit provide important information on which measures can be used to optimize the customer experience. The following recommendations for action can be derived from the analysis:

1. Strategic approach to customer service  
Net promoter score and customer satisfaction are positively correlated with a strategic awareness of customer management. A strategic approach to customer management is therefore a prerequisite.
2. Employee empowerment  
Employee satisfaction has a clear effect on both customer satisfaction and the FCR. Flexible working models help to ensure high employee satisfaction.
3. Processes and channel offer  
Besides employee satisfaction, a high first contact resolution as well as a broad range of channels have a positive effect on customer experience.
4. Technological support  
The use of appropriate technological support tools can help to increase the first contact resolution which in turn has a positive effect on customer satisfaction.

The customer experience is linked to many factors and depends not least on the individual case. Nevertheless, the data analysis of the Service Excellence Cockpit can shed some light on the situation. Process-related, technological and human factors all influence the customer experience. Service centers are therefore well advised to increase efficiency through technological progress but should thereby never forget the great importance of the human factor. Because in the end it's satisfied employees who work more efficient and make customers happy.

## 3 Efficiency



The increasing spread of smartphones and tablets is changing the communication behaviour of the customers. Websites or apps offer comfortable alternatives to a telephone call. The automation of the service processes will continue to increase, in particular to relieve the service center of standard transactions. Ultimately, it is a question of increasing the efficiency of the service centers and thus making a value contribution for customers and companies.

### 3.1 Self services

New digital communication and interaction channels have been established. At the same time, customers' expectations of companies and service offerings are growing steadily. A constant availability, quick response to service requests and the possibility of independently carrying out activities are expected. Companies react to this changed customer behaviour and move their service offers to the Internet.

60 percent of all the surveyed service centers offer self services and 11 percent plan their implementation. Of our Ukrainian participants, 80 percent already offer self-services. Dynamic web forms and customer portals are the most frequently used self services. The classical voice dialogue systems are frequently used as well. Mobile applications (apps) make business processes available to customers at all times and from all devices. This year, the app offering continues to grow at the service centers surveyed. Service communities and automated chat offers are still not widely used, but first applications are already available in the market.

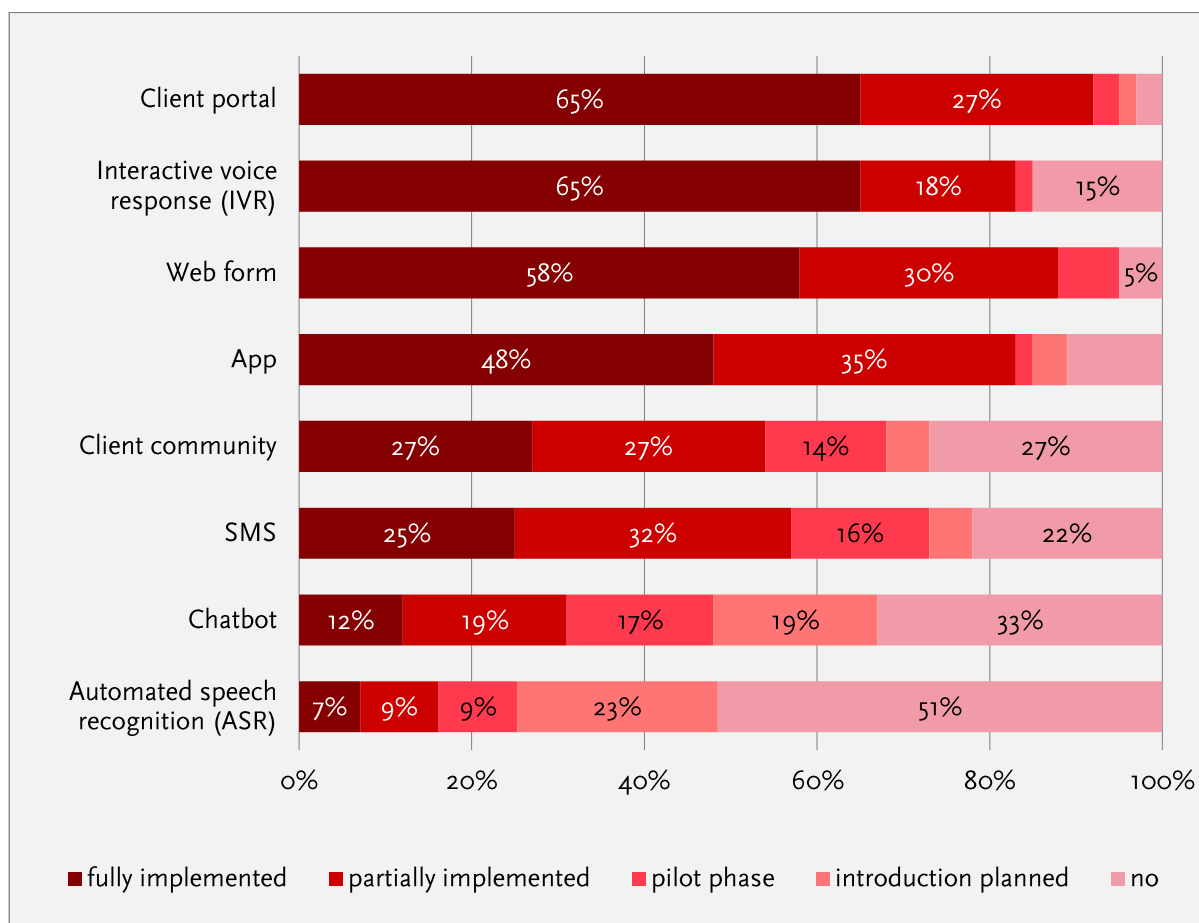
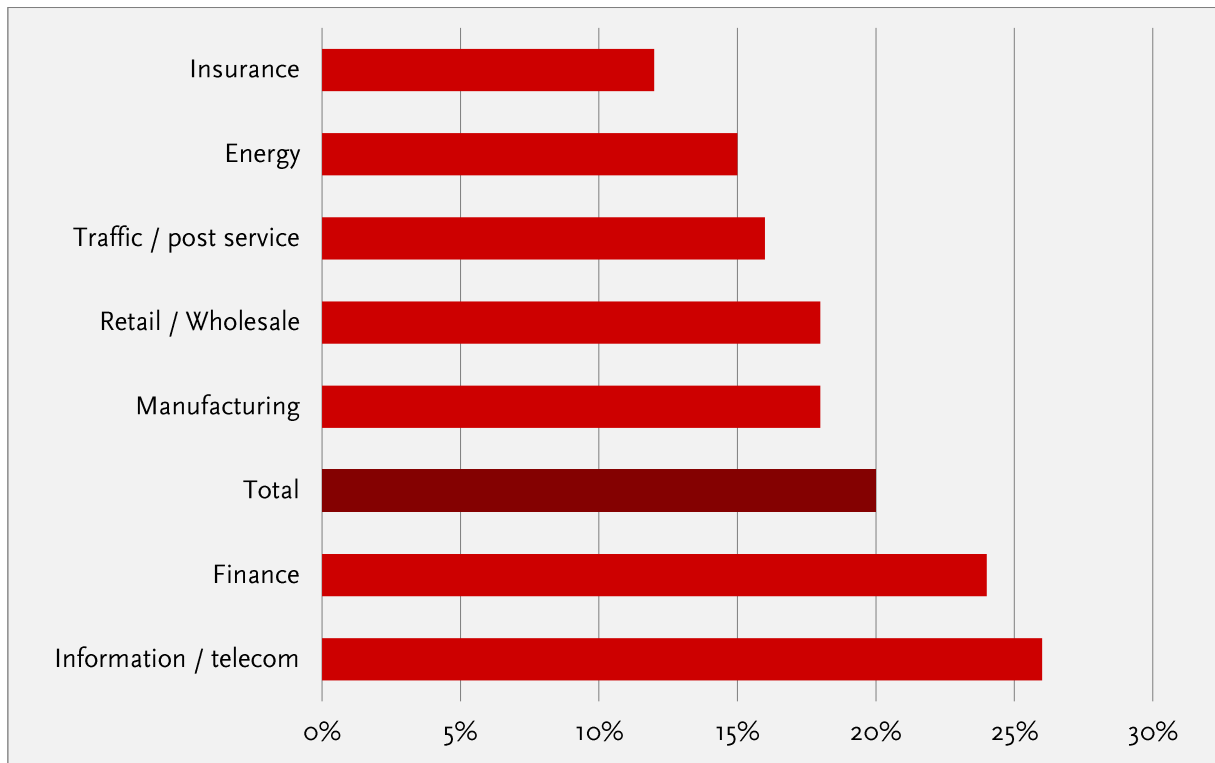


Figure 32: Appliance of self services (overall European market)

There are significant differences by industry, with the information and telecoms industry playing a leading role in the implementation of self services.



**Figure 33:** Saved contacts through self-services across different industries, overall European market

When implementing self services, the primary goals are to increase customer satisfaction through constant availability and to save resources by increasing the efficiency. The cockpit shows that companies save an average of 20 percent of the contacts through self services. Standardised service requests such as address change or newsletter registration can be carried out efficiently via self services. Recurring service requests can be handled through pre-defined solutions. However, it should be prevented that customers have the feeling of being part of a cost-cutting program. Added value can be achieved, for example, through individual online configurations or by extending the self-service offerings to the mobile channel.

**What should be considered in this context:**

- With regard to efficiency, it should be noted that the self-service processes only lead to a complete automation of the business and an increase in efficiency when fully integrated.

### 3.2 Drivers for self service

The use of self services is an expression of the increasing expectations of many customers: they expect a constant availability, fast response to service requests and the independent execution of activities. More than two-thirds of companies use self services, with the primary goals of increasing customer satisfaction through constant availability and saving resources through increased efficiency.

An important driver for self services is the goal of increasing customer satisfaction by increasing the quality of service, e.g. by reducing waiting times as well as by providing multi-channel availability. The focus is also on cost reduction by reducing contacts with employees. The freed capacity can be partially used for sales-increasing activities. Self-service automation can help reducing the number of simple cases, which often has a positive impact on employee satisfaction. This aspect has become significantly more important than in the previous year.



Figure 34: Drivers of Self Services (overall European market)

It's important to monitor how customers deal with self services, whether difficulties or dissatisfaction occur. The wishes, intentions and improvements of the customers must be taken seriously by the companies. In this context, particular attention must be paid to the simplicity and user-friendliness of the processes as well as the personalisation and emotionalisation. Companies should review the channels on a regular basis and make the interactions of the various channels user-friendly.

In addition to the "served" channels, self services are an important component in Omnichannel's strategy to improve service, reduce costs and increase competitiveness. In addition to the wide range of self services, customers should still be offered the opportunity to reach a service center directly via telephone or chat.



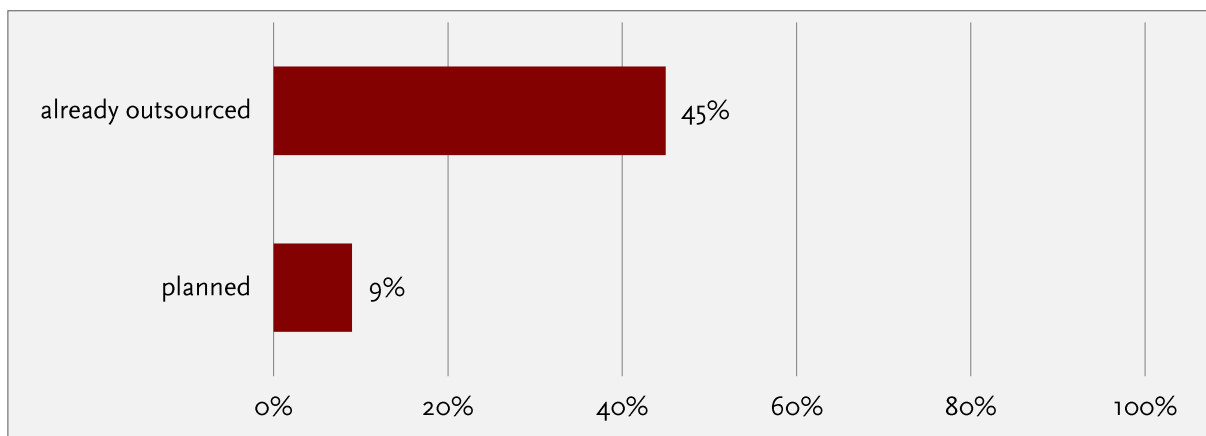
**What should be considered in this context:**

- What is the impact of comprehensive digitalisation on customers and the company?
- What is the importance of self services for customers and how do the requirements for employees in the service center change?
- How can the value contribution of self services be measured?
- Who is responsible for self services in the company?

### 3.3 Outsourcing of the service center

Outsourcing is a highly discussed topic, especially due to the importance of the customer dialogue and the challenges involved in the recruitment and retention of employees in customer service. For the companies surveyed, access to reserve capacity in addition to the hoped-for cost savings is a main reason for outsourcing of customer service. On the other hand, there are also good arguments against outsourcing: most notably the lack of customer proximity in this strategically important area. In order to prevent losses in the quality of service, with services that are outsourced, they must be controlled by means of suitable key performance indicators. Service level, processing time, first contact resolution and the abort rate are the central key performance indicators for controlling the service efficiency of an outsourcing operation.

Of the participating Ukrainian service center, 45 percent have already outsourced some processes and another 9 percent plan to do so. That's somewhat over the average compared with the overall European market where 33 percent have outsourced processes.



**Figure 35:** Outsourcing in Ukrainian service center

### 3.4 Outsourcing of processes

Companies outsource most of their business within their own country (onshore). Cultural differences, linguistic barriers as well as laws are also to be taken into consideration beside the technical aspects and the wage level. Domestic suppliers must play their strengths here because outsourcing abroad means that jobs are threatened. Simple and repetitive tasks, such as information or administrative requests, are most frequently outsourced.

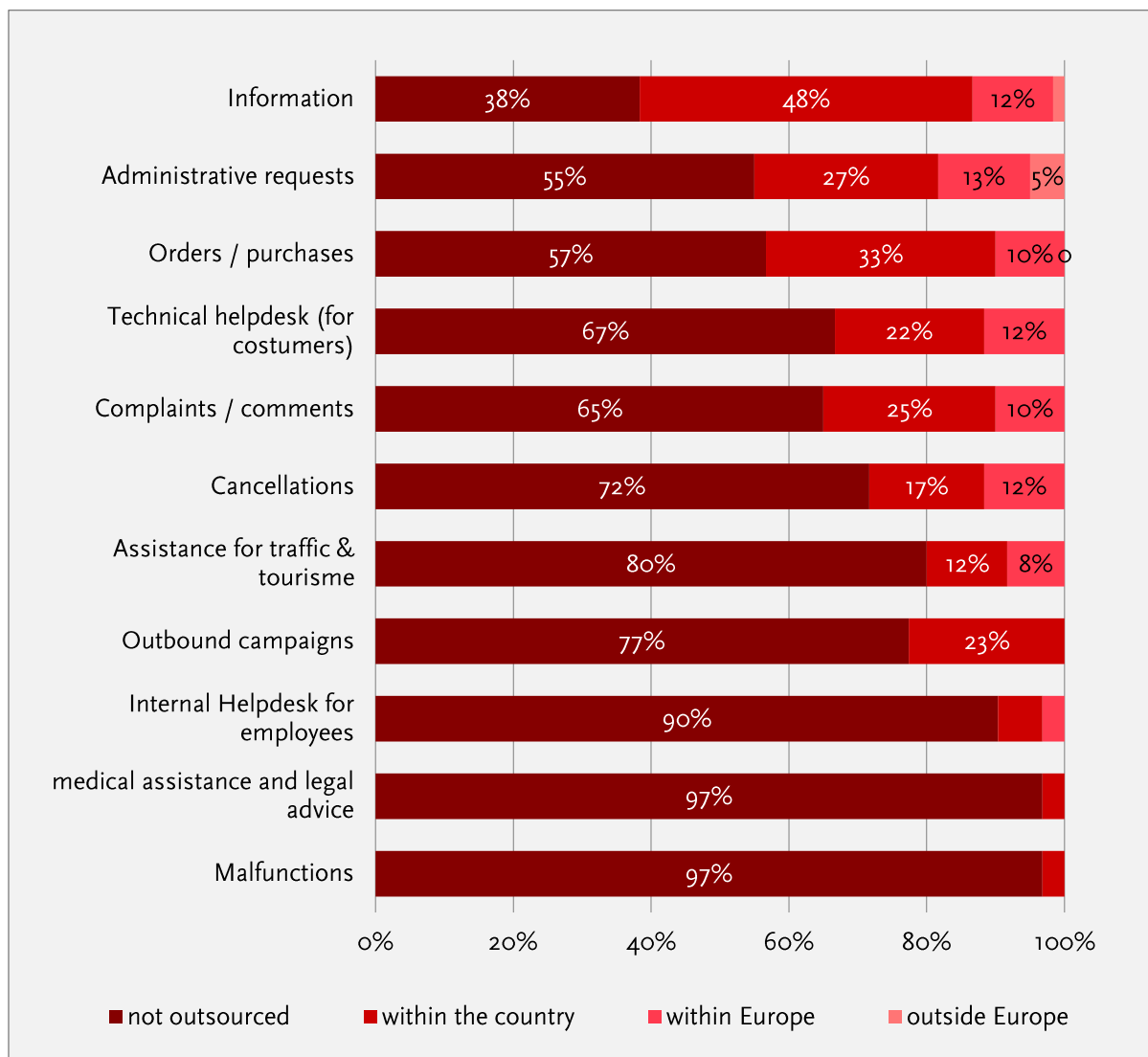


Figure 36: Outsourcing of processes (overall European market)

### 3.5 Criteria for or against outsourcing

The arguments for and against outsourcing depend on the respective overall conditions, the strategy and the industry characteristics. Service centers primarily focus on cost savings through flexibility and quality assurance. Cost reductions can be achieved by economies of scales at the outsourcing service provider. There are no notable differences compared to the previous year.

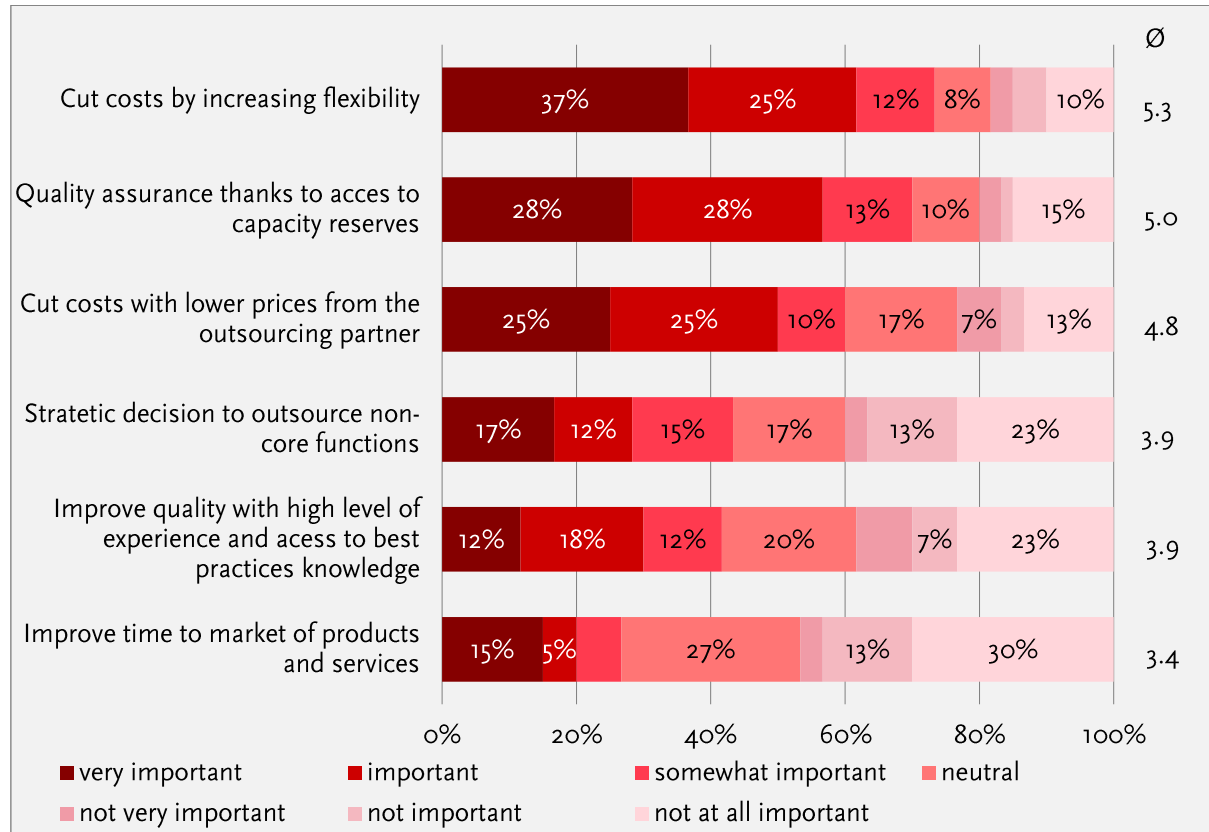


Figure 37: Criteria for outsourcing (overall European market)

Arguments against outsourcing are that the service center is a core function of the company for many of the survey participants and is therefore indispensable for customer loyalty. Moreover, the internal loss of know-how and the lack of customer proximity are arguments against. Another reason are regulatory barriers (e.g. data protection) or excessive risks (e.g. technological hurdles). Compared to the previous year, the evaluation only marginally changed.

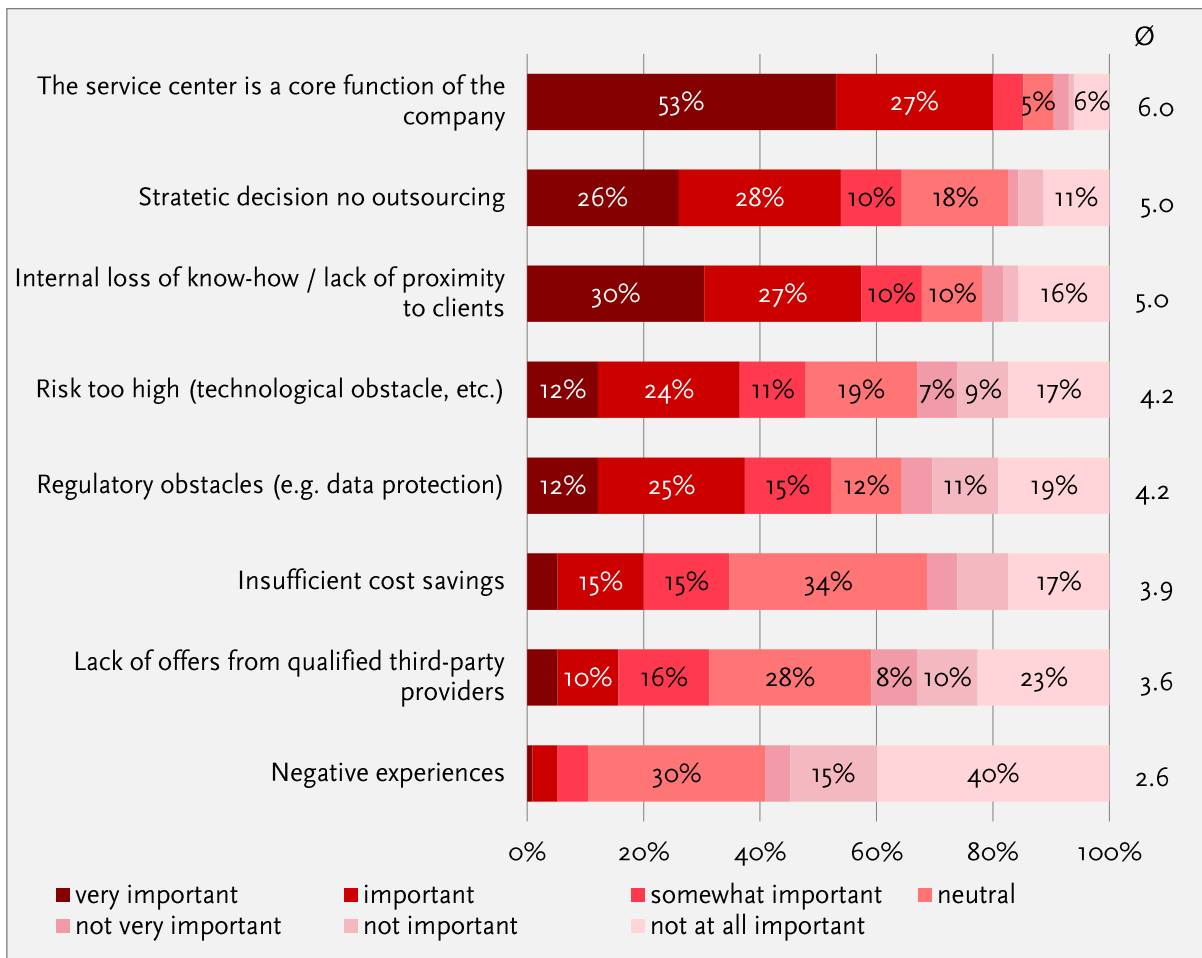


Figure 38: Criteria against outsourcing (overall European market)

**What should be considered in this context:**

**Opportunities of an outsourcing**

- Does it allow for a cost reduction?
- Does it increase cost transparency?
- Can fixed costs be converted into variable costs?
- Does it increase innovation, service level and availability for clients?

**Risks of an outsourcings**

- How critical is the dependency on a third party service provider?
- What is the long-term value for money?
- What is the effort for reversing the decision?
- Can know-how be secured in the company?
- How difficult is the quality and performance control of the outsourcing service provider?
- How complex is the managing of the service provider?
- Are there sensitive data or systems that cannot be managed by third parties?

## 4 Quality



The quality of the customer service is dependent on countless factors such as channel offer, response time, competence of the employees and many more. Because the quality of services at service centers is very important, it is necessary to set up guidelines that outline the provision of the service. Therefore, service centers started to implement quality systems. These aim to make the service provision more professional and differ significantly between different companies. For the design of such guidelines, the general framework ISO 18295 can be used. The purpose of this framework is to define service quality requirements across the common processes of all service centers, regardless of the industry and the technical approach to providing the service. The standard applies to both internal and outsourced service centers.

### 4.1 Definition and documentation of the processes

Documentation of processes is important to ensure quality level in service centers. The trend is leading towards 100 percent process documentation. For all European participants we already observe a very high and ever-increasing share of 88 percent who have documentation in place. Of our Ukrainian participants, 67 percent have such documentation in place by now. But awareness seems to be high as well: another 22 percent already plan to implement documentation.

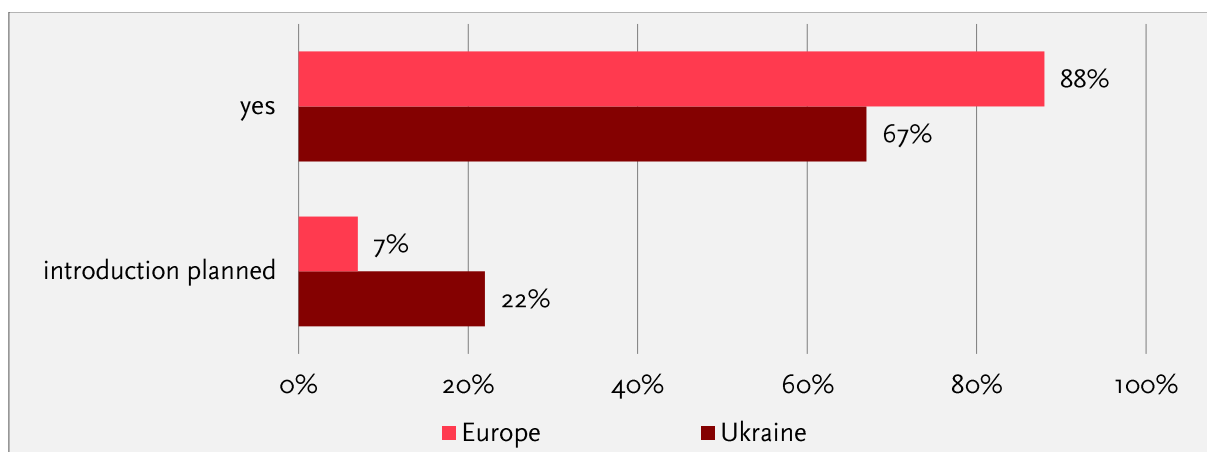
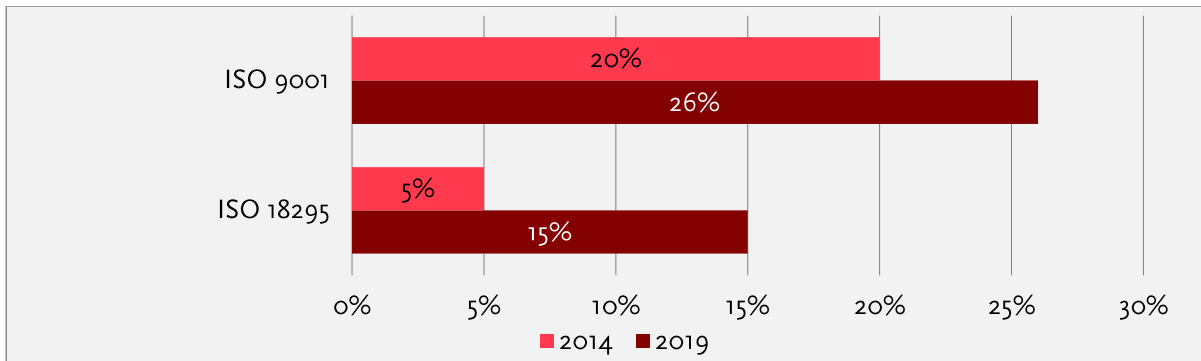


Figure 39: Definition and documentation of processes to ensure the quality level

### 4.2 Certificates

Various instruments and qualification models exist for measuring the quality of service centers. They all have in common a combination of quantitative and qualitative key performance indicators. The quantitative key figures can often be generated and analysed from the IT systems. It is more difficult to collect, evaluate and interpret qualitative KPIs such as friendliness, tonality or quality of advice.

Although service centers monitor and improve quality, the results show that only a minority of service centers have formal certificates. A significant increase is recorded for ISO 9001 and ISO 18295. The new ISO 18295 has replaced EN 15838, the standard for customer contact centers created in 2009 and should be established quickly. Our Ukrainian participants don't hold any certificates yet but planning for certification is ongoing among them.



**Figure 40:** Development of the most important certificates, 2014 to 2019

Although the application of such standards is voluntary, it offers the following advantages:

- Improving the quality of the customer contact, whereby the company can gain a competitive advantage and can prevent the risk of customer criticism about bad or missing services.
- Cost-effectiveness through better processes and a better understanding of the service, while maintaining the qualitative results and effectiveness.
- Optimisation of the knowledge and appreciation of the contribution of the employees to the customer service and the overall company results.
- Expansion and increase of customer satisfaction.
- A proof of quality as a selling proposition for service provider

**What should be considered in this context:**

- Do our customers ask for a certification or does the communication of the certificate increase customer confidence?
- Which certificates will contribute most value for the service center or the company?
- How can the value contribution of the certification be measured?

## 5 Employees



Service centers often have flat hierarchical levels with simple and transparent organisational structures. Mostly there are three hierarchies: managers, team leaders, and employees (agents) supported by supervisors and support units. Depending on the size and tasks of the service center, these roles are spread over several people. We notice, that on average 89 percent of all employees are agents. 11 percent are therefore managers, team leaders or support employees. This low share suggests efficient organizational structures.

### 5.1 Gender distribution

The ratio of female and male employees in service centers differs on the employee level. At the level of the employees, the proportion of women is two-thirds, at the level of the supervisors and team leaders about 55 percent. At management level, it is 32 percent. The shares have hardly changed compared to the previous year.

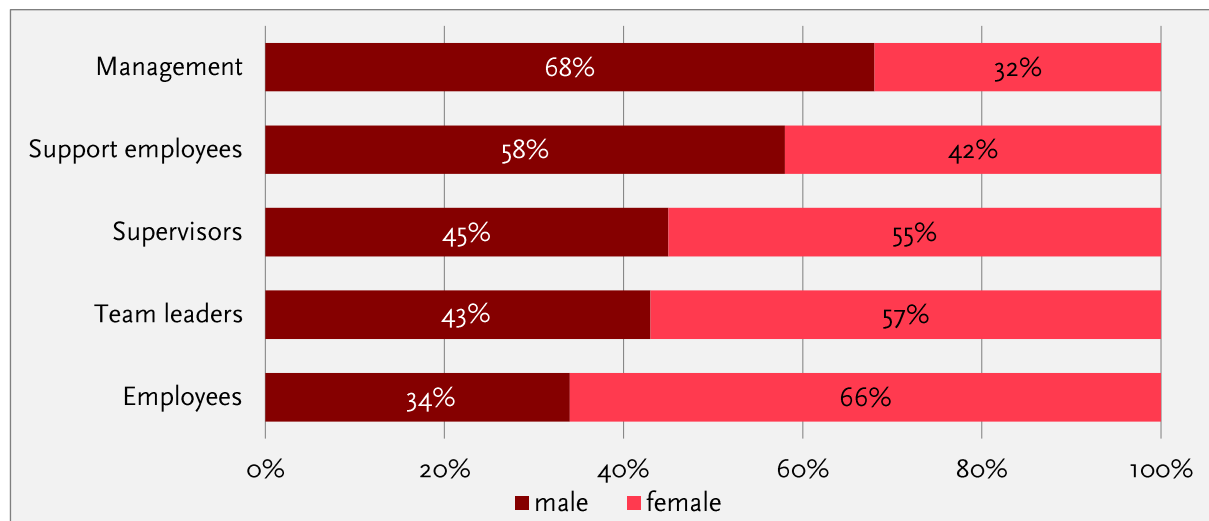


Figure 41: Ratio of female and male employees (overall European market)

### 5.2 Age structure

Service centers have the reputation of employing very young and little experienced staff. The data of the Service Excellence Cockpit raises questions about this. Without doubt, the working hours are very flexible. However, the service center is increasingly used as a steppingstone for a career in a larger company. This is reasonable because newcomers can thus acquire a feeling for customer requests in direct contact with the clients. Customer orientation will gradually become anchored into the company culture. The share of 30-year-olds, on the other hand, decreases with decreasing hierarchy.

In the last years we can report a significant shift in the age structure towards younger staff, not only for regular employees but also in leading positions such as team leaders or supervisors. In combination with the increased internal fluctuation rate, this is more evidence for our thesis that service centers are increasingly used as a steppingstone for a career.

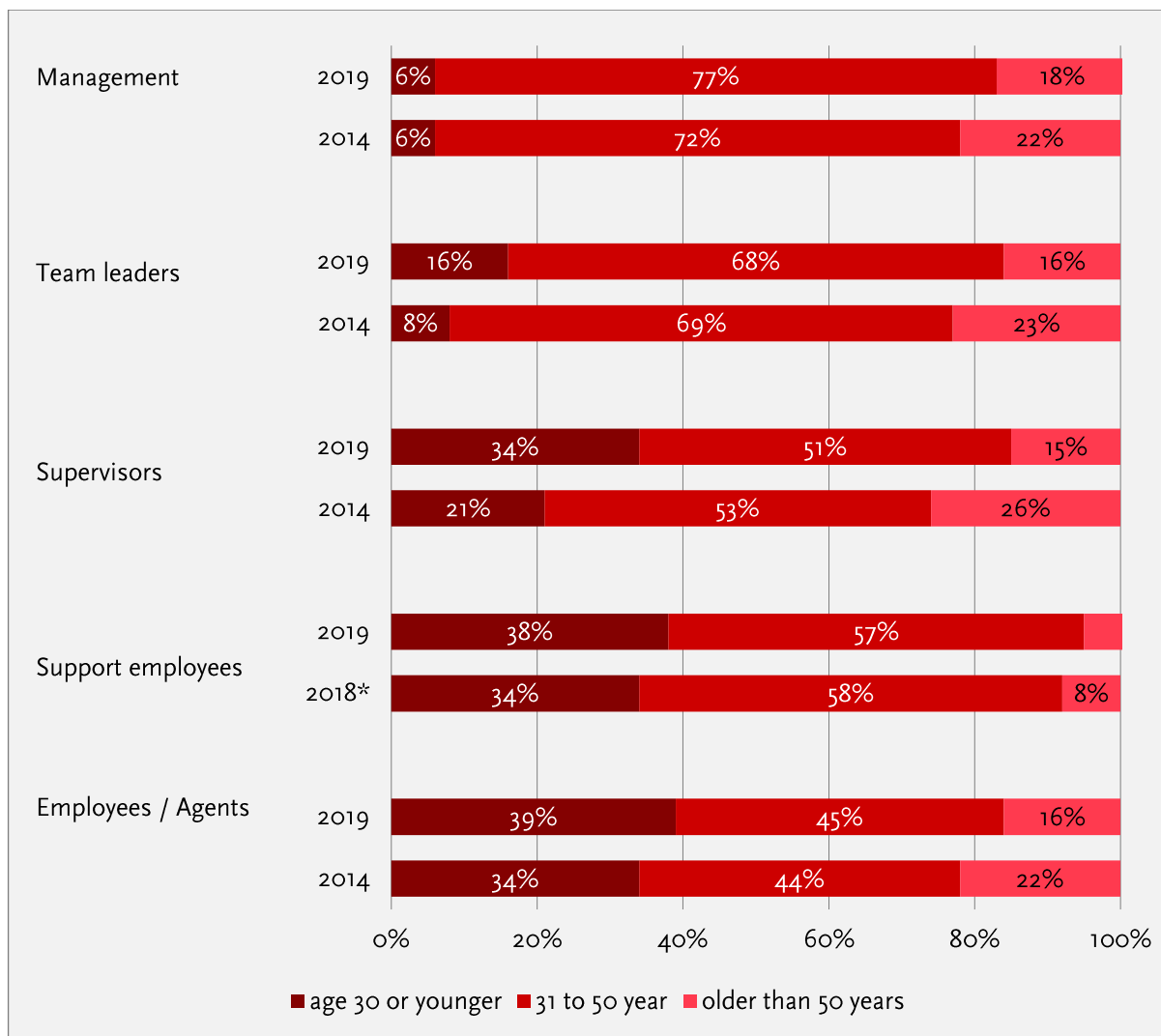
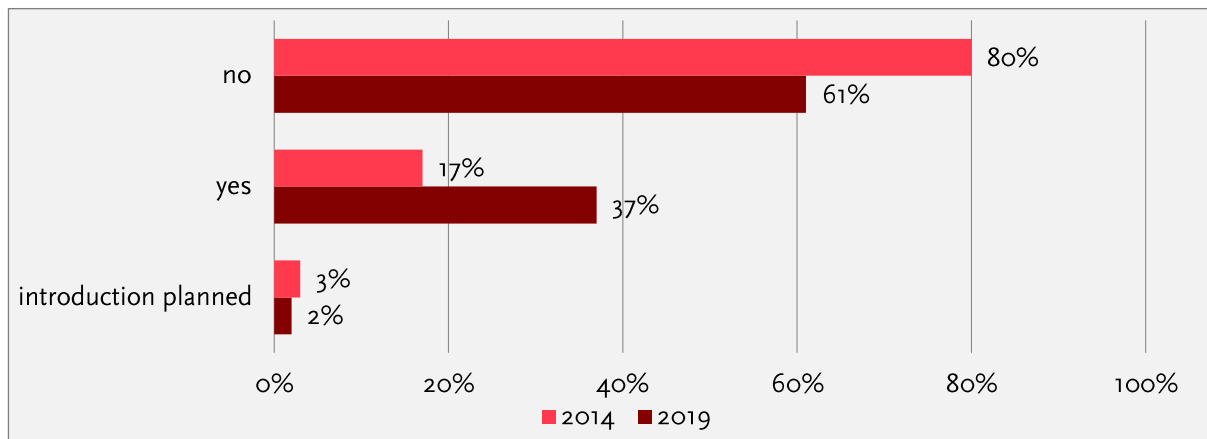


Figure 42: Age structure (overall European market)

### 5.3 Diversity code

Diversity management is a modern management concept and not only aims to respect the diversity of employees, but furthermore to shape it positively. The focus lays on the optimal use of human resources and thereby on achieving possible economic benefits. This includes the planning and implementation of organisational systems and processes to maximise the potential benefits of diversity while at the same time minimising the potential drawbacks. Thereby, a market-related differentiation is sought, striving to hold a unique position vis-a-vis competitors. While so far, only about a third of European service center participating in our survey defined such a code, all our Ukrainian participants have a diversity code in place. They seem to be ahead of time in this field, as the share in the overall market has been rising significantly in the last years as well.

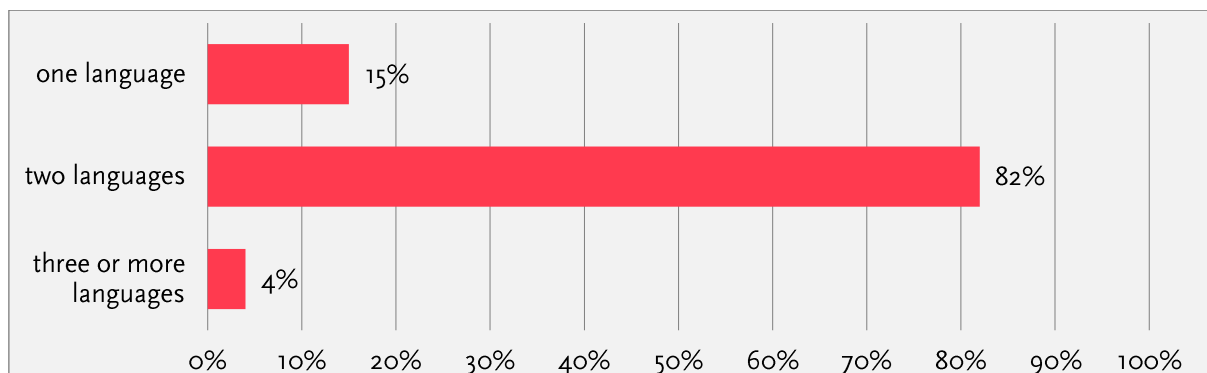




**Figure 43:** Diversity code, year-to-year comparison 2014 and 2018 (overall European market)

## 5.4 Languages

The languages offered by the service center determine the required language skills of the employees. Appropriate recruitment of employees is therefore important. Employees who speak several languages can be used more flexibly. The Ukrainian service centers indicated that 15 percent of the employees speak only one of the officially offered languages. A clear majority, 82 percent on average, speaks two languages. 4 percent of the staff speak three or more of the languages offered in the service center.

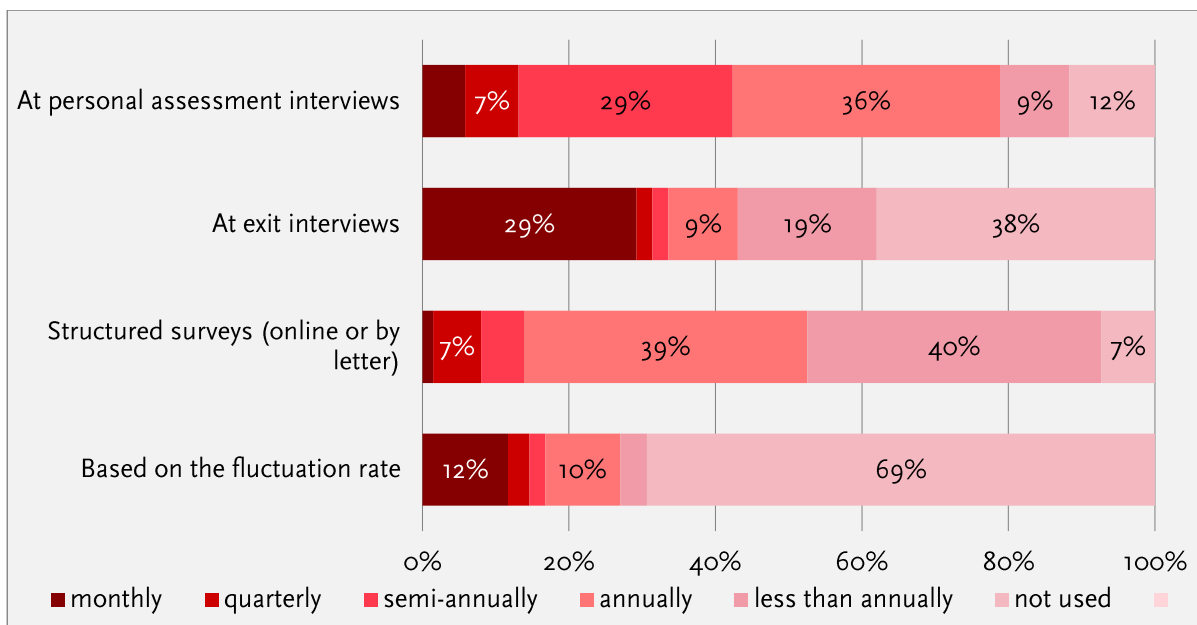


**Figure 44:** Spoken languages by the employees in Ukrainian service center

## 5.5 Measurement of employee Satisfaction

Employee satisfaction is a value driver for the company. The basis for meaningful results on employee satisfaction is the application of adequate measurement methods. The employee survey for example is an established method, which can be applied in different time periods. Independent of the method of measurement, factors that lead to dissatisfaction (wages, colleagues, supervisors, working conditions) and factors that lead to satisfaction (good performance, work scope, employment, responsibility, career opportunities, further development) need to be identified.

76 percent of the service centers in the overall European market measure employee satisfaction, which corresponds to the situation in the previous year. The surveys are conducted within the context of personal assessments and structured surveys. The service centers rely less on the fluctuation rate or on questions raised at exit interviews. Of our Ukrainian participants, nobody measures employee satisfaction today. Some are planning an implementation.



**Figure 45:** Measurement of employee satisfaction (overall European market)

## 5.6 Gross salary

Clearly the remuneration system is the starting position for employee recruitment and employee retention. It largely reflects the recognition and appreciation of the company for its employees. This appreciation is an important factor influencing employee motivation and the attractiveness of the company.

The salary structure is differentiated for employees, supervisors, team leaders and manager in the service center and differs largely per country and industry. For detailed analysis, we therefore refer to the Service Excellence Cockpit.

### What should be considered in this context:

- The most important factor for customers beside the quality of a product or service itself is the direct contact with the employees of the company. These contacts often influence the customer experience in a lasting way; either positively or negatively. However, these important employees with whom the customer actually comes into contact are generally the least paid. And often they are also the least informed about relevant developments in the company.
- In the future, service centers will gain in importance as they contribute significantly to a functioning customer relationship. This will also have an impact on the salary system. Wages will depend not only on the volume, but increasingly on customer satisfaction.

## 6 Customers



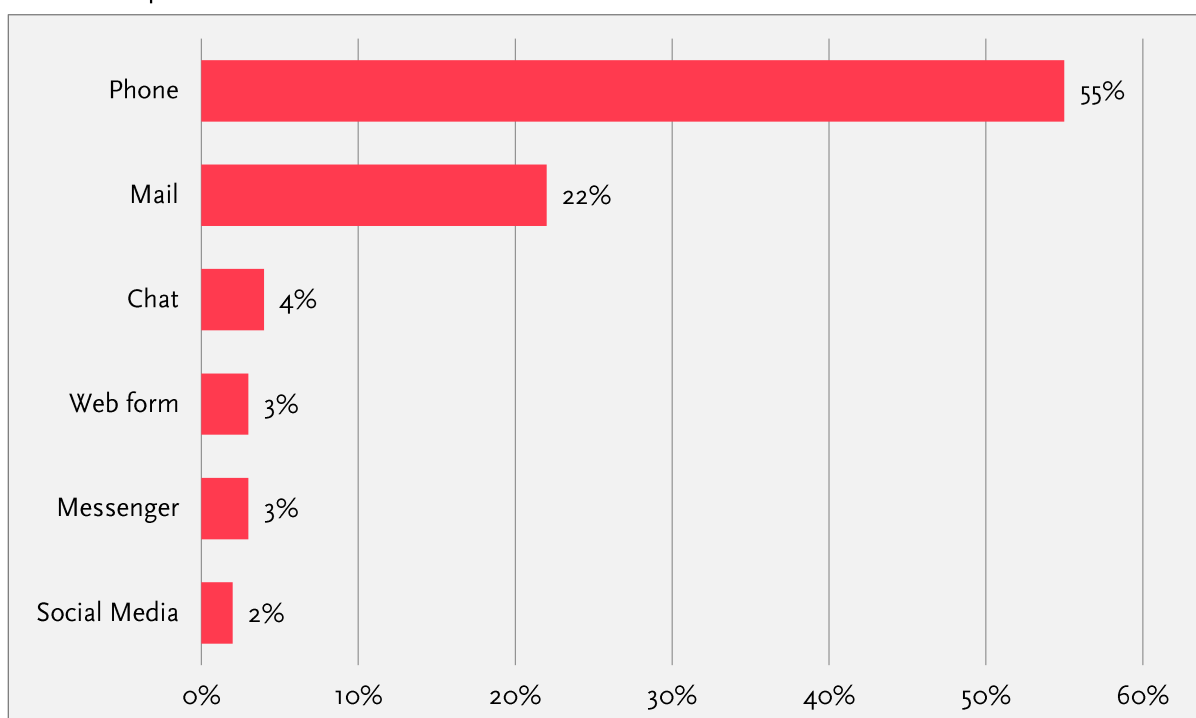
In markets with increasingly interchangeable products, services provided by service centers are becoming increasingly important for achieving high customer satisfaction.

Service centers are an important asset for strengthening the customer relations, as they handle all sorts of customer requests and often most contacts to the clients. Service Centers deliver (or not) according to the perceived or even promised customer experiences and in doing so greatly determine customer satisfaction and customer loyalty. Ensuring customer satisfaction is the primary goal of a service center. Customer satisfaction is the basis for long-term customer loyalty, because satisfied customers are also more profitable customers as they purchase more frequently and even at a higher price. To emphasise customer satisfaction, customer focused companies increasingly create the position of a Chief Customer Officer (CCO) (Kreutzer & Land, 2013).

### 6.1 Complaints

Feedback includes both customer praise and customer complaints. A professional handling of customer feedback and complaints is increasingly resulting in a competitive advantage. The increasing strategic awareness of customer service is also evident in complaints management.

A large part of the feedback is channelled through the service center, where different feedback channels are offered and used. The telephone channel is by far the most used for complaints in Ukraine and in the overall European market as well.



**Figure 46:** Distribution of complaints on channels (Ukrainian market segment)

The incoming complaints are categorized and processed differently based on its type. On average, 75 percent of the complaints are considered justified in Ukrainian service center. Justified means, that there was an error in the products, processes or services offered. In this case, it's important for the companies to learn from the mistake and use complaints as inputs for a continuous improvement process. This share is the same as in the overall European market.

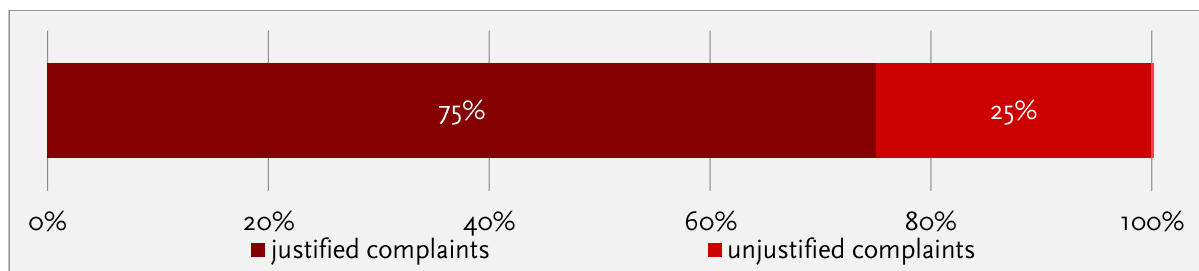


Figure 47: Ratio of justified and unjustified complaints in Ukrainian Service Center

Complaints are critical to success because they pose a risk for customer disaffection, with all its negative effects on sales and profit. In addition, complaints have an impact on employee satisfaction, as dissatisfied customers have a negative impact on employee motivation.

Significant differences can be reported in the proportion of complaints to customer contacts. Nearly 60 percent of service centers surveyed have a share of less than one percent. On the other hand, the complaints account for more than 10 percent of all customer contacts in 14 percent of the service centers surveyed. Those differences can to the most part be explained with the different types of service center (B2C and B2B). For more detailed data and peer groups we refer therefore to the online Cockpit. Compared to the overall European market, our Ukrainian service participants have a somewhat lower share of complaints on average. For more detailed analysis, we refer to the online Cockpit.

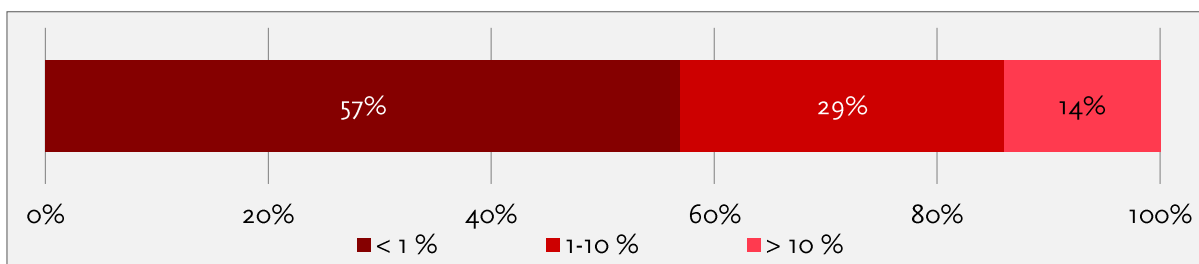


Figure 48: Proportion of complaints to customer contacts (Ukrainian market segment)

## 6.2 Defined response times on complaints

The satisfaction of customers after a complaint is largely determined by the response time of the company. The process from receiving the complaint to the complaint solution shall be monitored carefully.

67 percent of the Ukrainian participants define a response time and monitor it. That's the same share as in the overall European market (70 percent). The defined response time in the overall market is 5 days on average. About a third of the service centers surveyed defines a target of one day or less, another 22 percent try to solve complaints in a maximum of two days.

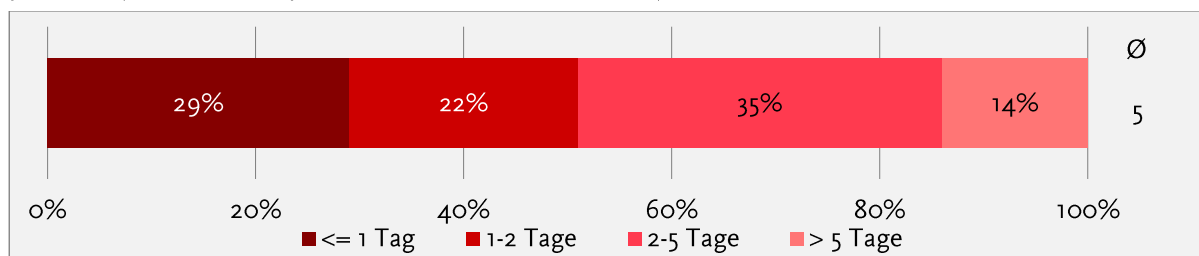


Figure 49: Defined response times on complaints (overall European market)

The majority of the respondents regarded their defined processing times as realistic, since 82 percent of service centers surveyed met their defined processing time for more than 80 percent of the complaints. Compared to the previous year, this share increased significantly.

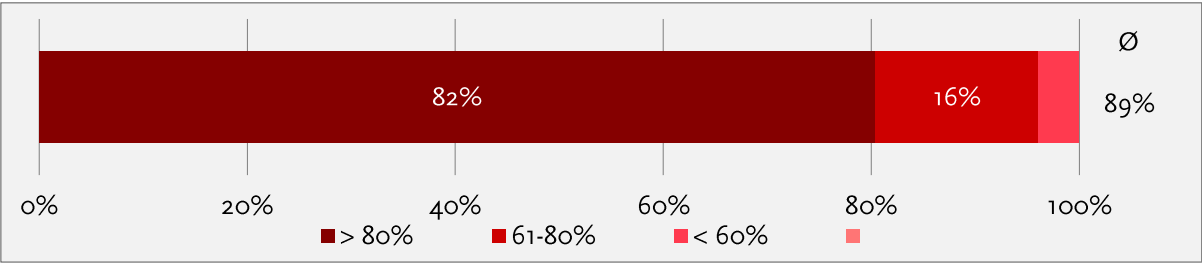


Figure 50: Adherence to defined processing time (overall European market)

**What should be considered in this context:**

- How easy can customers place complaints?
- Has the company set up a recovery management for complaining and other unsatisfied customers?

6.3 Loyalty programs

Today, everybody is talking about loyalty programs – both nationally and globally. We therefore included questions on the use of customer loyalty programs. After all, 50 per cent of respondents said they offer such a program. Among our Ukrainian participants, they are still less common. It will be interesting to observe the respective developments in the next few years.

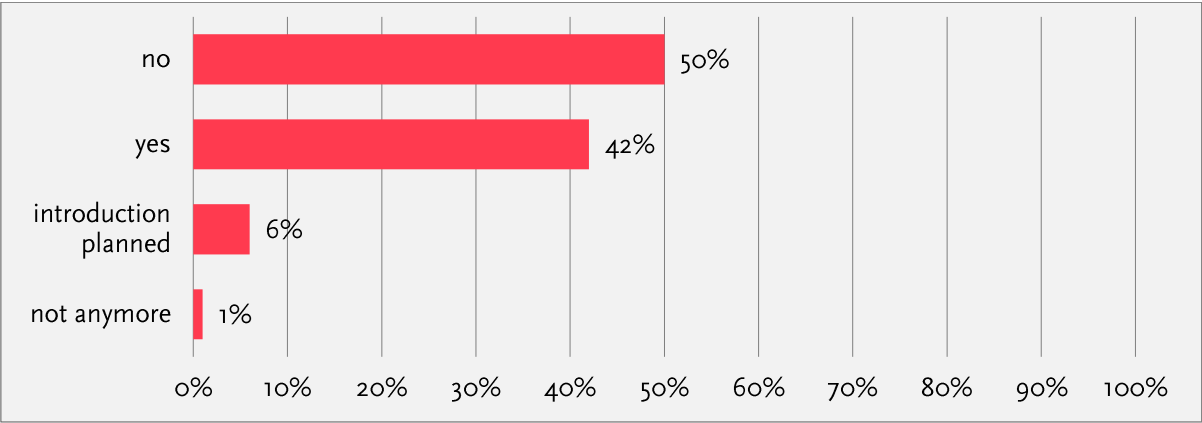


Figure 51: Use of loyalty programs (overall European market)

# Methodology

**Survey method**

Online survey on [www.service-excellence-cockpit.org](http://www.service-excellence-cockpit.org)

**Duration of the survey**

January 2018 to middle of May 2018

**Participants**

200 service center in Europe

**Calculation of averages**

For some of the questions, the average values are shown in addition to the relative information. For the calculation the answers opportunities were assigned to scoring values from 1 to 7. (e.g. "Very dissatisfied" = 1 to "very satisfied" = 7). For the calculation of the averages, the scores were weighted based on the number of entries.

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