



Digital Customer Experience Services: How India Can Lead the World

Market Analysis
Report Abstract

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Who Is This Report For?

NelsonHall's "Digital Customer Experience Services – How India Can Lead the World" report is a comprehensive market assessment report designed for:

- Sourcing managers investigating "the art of the possible" in next generation customer service and looking to transform their customer interaction services
- Vendor marketing, sales and business managers developing strategies to target digital and service transformation opportunities within customer service
- Financial analysts and investors specializing in the IT services and BPS sector.

Scope of the Report

The report is based on interviews with CX Services providers and clients with delivery operations in India.

This purpose of the study is to identify the client requirements and providers' best practices to deliver CX services across the different stages of the customer lifecycle; the development and use of digital channels and technologies including omnichannel delivery, analytics, automation, RPA; and co-creation for digital transformation delivered from India for domestic and international markets.

In particular, the study uses senior executive interviewing to establish:

- The market size and projected growth of the CX Services market delivered from India
- The market size of the CX Services marked delivered from India by end user location, by service line, and industry
- The changing client requirement for CX services, both internationally and within the Indian domestic market
- Expected changes in the levels of voice and digital customer interactions over the next three years
- Expected changes in the level of use of CRM, domain-specific platforms, and NLP and cognitive technologies over the next three years
- The new approaches and the best practices to deliver enhanced value from CX services in India, as well as the expected levels of benefits
- Level of maturity of new CX business models and technologies in India
- Roadmap showing how India can lead the world in next generation digital CX services.



Key Issues & Highlights

Digital transformation is having a major impact on CX services, and the level and scale of analytical and technology expertise in India provides the country with a natural advantage. The move to digital channels and the increased need for digital transformation and analytics skills are likely to drive more work from onshore to India.

In particular:

- Organizations' requirements are changing from voice-enabled, low-cost handling of simple customer care and technical support queries to customer-centric shifts to digital channels, with increased emphasis on customer retention and sales
- Organizations are looking to introduce new digital customer service models with increased customer-centricity and a greater focus on customer retention and sales. India's CX value proposition is moving from agent scalability to digital customer experience centers of excellence
- Key success factors for vendors include the improved ability to identify and map key customer journeys; their capabilities to design the UX; their expertise in new customer service technologies and channels; and their ability to enhance customer service agents
- To take advantage of the digital transformation opportunities, India's CX delivery needs to move to a model of continuous co-innovation with its clients in the introduction and management of new digital delivery models.

Contents

1.	Executive Summary
2.	Market Size
3.	Changing Client Requirements
4.	Use of New Business Models and Technologies
5.	Best Practice Frameworks and Key Components
6.	Benefits from New Business Models & Technologies
7.	Industry Sector Requirements & Differentiating Factors
8.	Maturity of New Business Models & Technologies
9.	Roadmap for Growth in Digital Customer Service
10.	Case Studies of Customer Service Innovation
11.	Profiles of Leading Vendors

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