



# TRANSFORMATION

Strengthening Ireland's leading position as a customer solutions hub



## STRATEGY, VISION & ROADMAP 2019

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## Introduction and Definition

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The impact of new and disruptive technologies on business as we know it today, gives rise to the opportunity to capitalise on Ireland's position within the Cx sector through the creation of a new national vision, strategy and roadmap for the industry. This strategy is driven by the need to address the incoming wave of digital disruption that is currently impacting and will continue to impact and shape this industry sector for many years to come.

This report was developed by IDA Ireland, Enterprise Ireland and the Customer Contact Management Association (CCMA), with a core transformation working group of 11 indigenous and multinational organisations and providers, all located in Ireland. The group engaged over the course of the report development to build a strategic framework and a roadmap for the industry and guide for implementation.

**Definition -** There are a wide variety of terms to describe the business of looking after customers, for example; customer service, customer care and customer support being some of the more common ones. To reflect where this industry is moving in terms of technology and channels, and to reflect our aspirations for that industry in Ireland, we will use the term Cx (Customer Experience) throughout this strategy document.



## Executive Summary

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Although disruptive technologies are having a large impact across an array of industry sectors, Cx will arguably witness the greatest change and it will be shaped by several key forces.

The Cx function has witnessed many evolutions of change over the past number of decades from the establishment of the traditional call centre, to a shift into omni-channel customer engagement in more recent times.

The global Cx industry is currently undergoing a major revolution as a result of automation, artificial intelligence and machine learning impacting the way that the Cx activities traditionally operated.

Ireland has a unique opportunity to strengthen its position as the location of choice for companies looking to expand existing operations or establish new centres. Ireland has continued to be a leading location for Cx related activities due to its highly skilled and motivated multilingual talent base and favourable economic environment.

Capitalising on the global shifts in business models and emerging disruptive technologies, Ireland's Cx workforce can upskill into higher value roles, offering the opportunity to position Ireland as a globally recognised location where complex customer interaction meets technology, resulting in real enhancement of services, efficiency and customer satisfaction.

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*"IDA Ireland is pleased to publish this study and report in conjunction with our client companies and industry partners. Ireland has been the leading location for the establishment and expansion of Cx activities and we are confident that this strategic vision, development path and suite of IDA supports will serve as a valuable guide to support our clients in their evolution journey"*

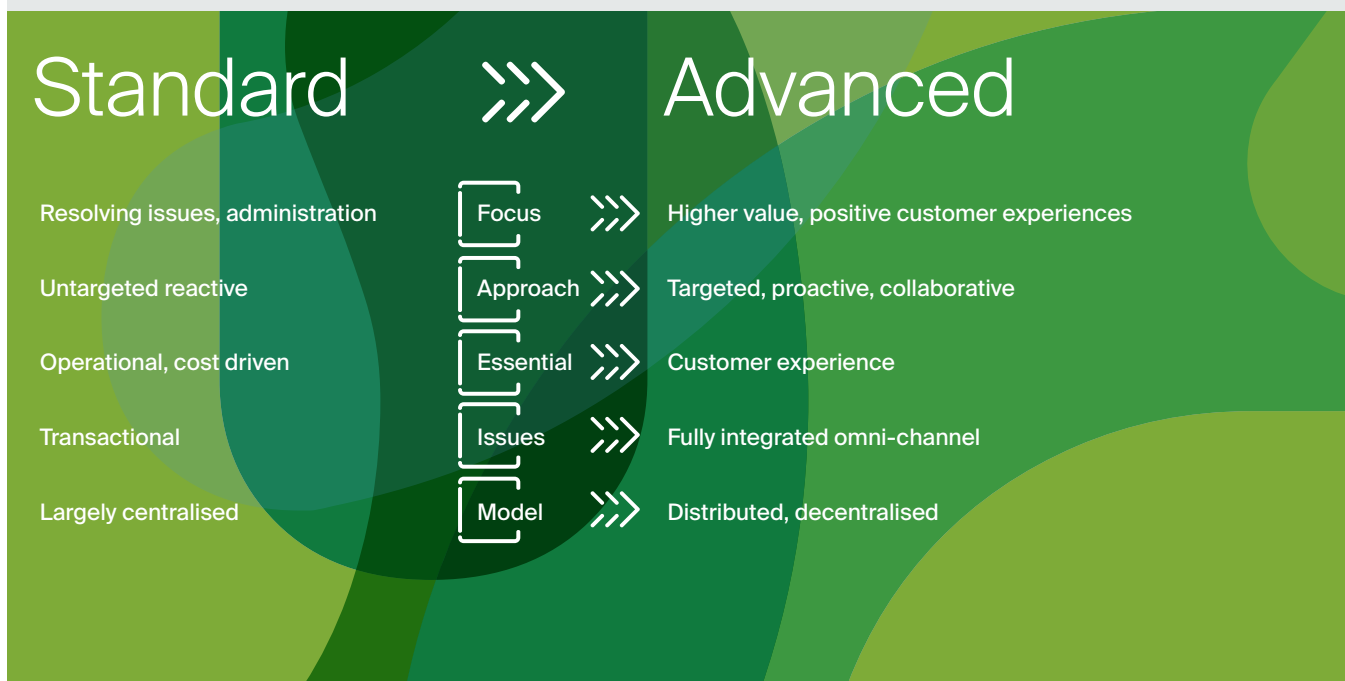
**Martin Shanahan**  
CEO | IDA Ireland

# Customer Experience (Cx) Evolution

Over the past number of decades, the Cx industry has witnessed an enormous shift in customer expectations – expectations of the service that they want and what insights a company should have on them and their behaviours. Many companies have and continue to respond to these expectations, that continue to grow as customers' endless appetite for high quality experience and services continue to increase. Cx has therefore witnessed many changes; from the introduction of call centres as a concept in the 1960's, to the introduction of customer relationship management tools in the 1980's, to the growth and adoption of omni-channel customer interaction in more recent times.

For the Cx function across all organisations, the requirement to respond and deliver on ever-changing customer expectations has been relentless. It could be argued that no other industry sector has needed to be as responsive, transformative and adaptive to new generational demands and an expanding number of communication channels. Times are changing, customer expectations are higher, technology is advancing, and organisations must adapt to provide an enhanced customer experience – beyond what has been traditionally offered. “The age of the customer is here” according to Forrester and consumers are inclining toward brands that meet and often times, exceed or predict their needs and expectations!

## Evolution of Service



The next wave of service technology is assisting Cx teams in achieving customer success. These tools have the means to improve workflow efficiency and allow the business to provide effective solutions to their customers. Adoption of new technology will help companies manage this increase in demand for superior Cx and differentiate themselves from other brands and competition.

There is much excitement about this new wave of technology - AI, real-time messaging, chatbots and video present great changes to how the Cx function would have traditionally operated however, it also presents many challenges. There is a lot to learn when planning for, implementing, managing and maintaining new technologies in terms of how it will impact the business and employees and there is much fear that these new technologies will replace roles across the business. Having said that, it can be argued that these new technologies will serve as a means to support employees – who will be relieved of the more mundane, transactional activities required of their role – to allow them to do their jobs more efficiently and effectively and take on more high value engagement.

Looking to the future, reports are suggesting that the traditional contact centre will evolve into a solution, or experience (Cx) centre and it will be viewed within the context of the overarching goals of the business. Compliance, data governance and data/predictive analytics will play an increasingly important role in helping companies troubleshoot issues and enable quicker knowledge sharing between technology, Cx employees and product teams – ultimately aiding the ability to anticipate, identify and rectify issues before the customer would ever have the need to engage.

*“Now, more than ever before has disruptive technology been so impactful on business delivery. The Cx sector is a significant employer in Ireland and we have a unique opportunity to harness our agile workforce, and research capability to continue to develop innovative technologies and deliver the next generation of high quality customer solutions that have the potential to transform how markets and businesses work”*

**Julie Sinnamon**  
CEO | Enterprise Ireland

## There are many factors influencing the shift to higher value Cx in Ireland:

The core working group on this Strategy has considered several key factors disrupting the Cx function. Beyond digital as the primary disrupter, there are four trends and macro environmental factors to consider:

### 1. Expectations

Users, both external and internal are demanding more from their experiences and expect access from everywhere, intuitive features and a personalised experience. This personalised experience includes options for customers to switch to other providers.

### 2. Competition

Increased competition from low cost economies is resulting in a shift in Irish and foreign owned multinationals to higher value-add activities (and 'ownership' of these activities is required in order to compete).

### 3. Complexity

Businesses now require real-time insights to make quicker decisions and operate at an increased volume and efficiency. Having the ability to react and adapt to new complexities is essential.

### 4. Lifecycle

Life expectancy for companies has fallen from 75 to 15 years in the last 50 years. Ongoing transformation and innovation have become an imperative for relevance and success.

## Ireland in Focus

For many decades, Ireland has been globally recognised as one of the key Cx capitals of the world. It provides a low-risk, quick start-up, high performance, knowledge economy for companies to deliver better customer and technical services and provide innovative business solutions.

There are several factors behind why many household names have established operations in Ireland. The availability of a highly-skilled, mobile workforce, a low-risk environment and crucially, access to multilingual talent both locally and from across the globe has made Ireland an attractive location for international companies looking to centralise their Cx and support activities. In addition, the ecosystem and support for start-ups in Ireland has also seen the emergence of indigenous Cx operations that have become global players.

Cx operations have been a significant employer in Ireland since the 1980's with an estimated workforce of approximately 56,000 people now employed in the sector. Cx centres in Ireland are serving multiple locations in multiple languages across the globe. Key markets served by Ireland's Cx operations include Ireland (92%), the UK (52%), Western Europe (37%), Eastern Europe (27%), and the US & Canada (22%). An increasing market of customers are also served in Asia Pacific, Africa, and Latin America<sup>i</sup>.

This wide global reach requires Cx operations to deliver a diverse range of languages as well as native/local understanding. Being ahead of the curve has enabled companies located in Ireland to push the boundaries for the next generation of services, introducing new concepts, services innovation, lean and centres of excellence to enhance best practice, productivity, customer satisfaction, quality of output and cost optimisation.

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Over **56,000** people work in Cx in Ireland.

Ireland has been **globally recognised** as one of the key Cx capitals.

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*"Cx has entered a digital age where organisations are driven to adjust how they interact and engage with their customers. Digital disruption continues to transform the role of customer contact centres, impacting on skills and technology required for employees to perform. It is therefore essential for centres to actively exploit these opportunities, move up the value chain and provide superior customer experience whilst driving business objectives"*

**Dorothy O'Byrne**  
Managing Director | CCMA Ireland

The strong track record of Cx activities in Ireland is supported by a unique and positive economic environment which has led to continued growth in the Cx industry to date. Some of these factors include:

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### Education

- A high proportion of Cx employees in Ireland have a 3rd level qualification
- 1st in the world for secondary school enrolment (IMD 2018)
- Third level education attainment is >20% above the OECD average
- Recent investment in post-graduate and vocational education courses in automation and AI

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### Talent

- One-third of the population is aged under 25; almost half aged under 34
- Ireland has the 3rd highest international workforce in Europe. Today, 15% of Ireland's workforce is international
- Several centres have a 50%+ non-national workforce coming from 20+ countries. These include China, Japan, the Nordics, Eastern Europe and the Middle East
- There is a sizeable and consistent movement of multilingual labour to Ireland, including an experienced cohort of native multilingual speakers

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### Economy

- Fastest growing economy in the Eurozone - GDP growth of over 7.4% in 2018
- Unemployment rate 5.1% in Q1 2019 - the lowest level in 11 years
- Year on year growth of 4.9% in Q3 2018 versus Eurozone average of 1.6%
- Ireland (Dublin) is ranked 5th in the world for innovation/digital, talent, infrastructure and quality of life<sup>iii</sup>

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### Culture

- Ireland is a stable, competitive, secure and pro-business country
- Ireland is ranked 2nd in the Good Country Index due to its global contribution to international peace and security, prosperity and equality, health and wellbeing and culture categories<sup>iv</sup>.

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### Cx Capability

- Over 250 companies operating with Cx activities
- Highly skilled and motivated Cx workforce of over 56,000 people
- Active promotion of continuous professional development and exchange of information and adoption of best practice for contact centre professionals through industry forums such as the Customer Contact Management Association (CCMA)

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### Technology

- Strong research capability - dedicated research institutes and centres of excellence in AI, Machine Learning and Analytics (ADAPT, INSIGHT, CeaDAR)
- Excellent collaboration between research and industry
- Irish IT specialists best educated in EU; 82% have third level qualification (EU average 62%)
- Ireland is ranked 10th in the world for innovation (The Global Innovation Index)

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### Productivity & Wages

- Ireland is one of the most productive economies globally. Ireland ranks 1st in the world for flexibility and adaptability (IMD 2018)
- Irish labour costs have remained relatively stable increasing 2.4% slower compared to several EU countries which have experienced increases in wages and salaries

With the scale and maturity of the Irish industry, there are significant opportunities to capitalise on Ireland's strengths and exploit the current technological disruption in Cx.

# Forces of Change

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As alluded to earlier in the report, the Cx function has seen many phases of change over the past number of decades from the introduction of call centres as a concept in the 1960's, to the introduction of CRM tools in the 1980's, to the growth of omni-channel customer interaction over the past decade. Over the next decade, Cx will arguably see the greatest change and it will be shaped by three key forces:

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## 1. Technology & Data Forces

**Data Centralisation and Trust** – As customers expect greater levels of personalisation and understanding of their needs while also using multiple channels to engage with brands and services, having a central repository of all customer data will become vitally important. Walking the tight-rope between privacy and personalisation will continue into the future - 21% of consumers trust brands with their personal information, while 45% want brands to hold their personal information to improve service experience<sup>v</sup>.

**Automation and AI** - The future of customer experience is all about AI. We've already seen brands be incredibly innovative and successful with many of the components of AI, especially with how they use chatbots and predictive analytics. AI opens so many doors for customer experience and allows companies to create authentic, personalised experiences, at scale. Customers will reach a point where they expect AI to be used in high-quality experiences. Even after companies have integrated AI into their customer experience, they should still be evolving it as the technology changes.

**Predictive Analytics and Personalisation** - In the future, we'll see that brands that succeed in standing out from the competition will be those that focus on this essential component of customer relations, (based on AI, bots, smart data and other advanced technologies). However, investing exclusively in automation isn't enough for brands to compete in the age of the empowered consumer.

It will continue to remain imperative that brands humanise and personalise the customer experience as much as possible through predictive analytics and using emotional intelligence as a competitive advantage.

**Messaging and Mobile** - As consumers become increasingly familiar with messaging brands they're looking to engage and do business with; the expectation will grow that this type of accessibility with businesses will exist across the board. This means the ability to connect via any of the major messaging platforms customers are using already, with experience and interfaces designed to make that simple and useful.

**Digital Assistants and Natural Language Processing** - 25% of Cx and support operations will integrate virtual customer assistant (VCA) or chatbot technology across engagement channels by 2020, up from less than two percent in 2017, according to Gartner, Inc. Organisations report a reduction of up to 70% in call, chat and/or email inquiries after implementing a VCA, according to Gartner research. They also report increased customer satisfaction and a 33 % saving per voice engagement. Also, while volumes of telephone-based voice interactions will continue to fall, voice interactions through digital assistants and new AI driven voice interfaces will continue to grow.

**AR/VR** - AR and VR have entered the stream of public consciousness, and it does not appear they will be leaving any time soon. Recent figures suggest that the global AR market, valued at \$11.1 billion in 2018, could reach \$60.6 billion by 2023. Meanwhile, the global VR market, valued at \$7.9 billion in 2018, could reach \$34 billion by 2023. Leading brands like Amex, IKEA, MLB and The Times are creating value for consumers by harnessing the immense potential of AR and VR, creating new products and newer experiences. Many more brands will follow suit, proving what was once far-fetched is now reality.

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## 2. Strategic Forces

**Marketing Merging with Cx** – Many marketing departments are realising that Cx is the next competitive battleground for their businesses. To be competitive, they have to make the transition from marketing to sales to service seamless. By thinking and acting more like Cx, Marketing has begun to get smarter about their customers.

**Growth in Subscription-Based Businesses** - The subscription e-commerce market has grown by more than 100% percent a year over the past five years, with the largest retailers generating more than \$2.6B in sales in 2016, up from \$57.0M in 2011 making it the fastest growing segment in e-commerce globally. Amazon Subscribe & Save, Dollar Shave Club, Ipsy, Blue Apron and Birchbox are the five most popular subscription sites in 2018. As subscription-based sales continue to grow, Cx become more important and customer satisfaction will be the primary determinant of how long a consumer subscribes to a service.

This trend is also very evident in the cloud services and software as a service (SaaS).

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## 3. Generational Forces

**Interaction preferences (of Millennials and Gen Y)** – a 2018 study by PWC in conjunction with UCD Smurfit School of Business found that over half (54%) of customers prefer to use text-based communication when contacting a company with a query or complaint. This rises to 70% for 18-24-year olds. 47% expect a 24/7 response from service providers and this figure rises to 72% amongst 25-34-year olds. 61% of respondents under the age of 24 admit that they actively avoid calling businesses in order to sidestep frustrating automated menus. An overwhelming majority (88%) of respondents who are familiar with chatbots were under the age of 34.

**Peer support and user-to-user interactions** - The best person to help a customer in need may not be an employee of the company. A fellow customer may provide a better experience. As social media use continues to grow, peer-to-peer support does, too. Community peer-to-peer support is expected to replace almost 40% of existing phone support, according to Accenture<sup>vi</sup>. The growth of this engagement approach will create new responsibilities for Cx organisations around content moderation/supervision.

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**Conclusion:** Organisations carrying out Cx activities cannot be complacent in response to these forces of change. Digital disruption through automation - chatbot's, artificial intelligence, machine learning, natural language processing etc., are causing enormous impact on Cx delivery. It will be imperative to view these factors as an opportunity rather than a threat.



## The Vision

To enable Ireland to leverage these three seismic forces changing the world of Cx, the core Working Group has shaped a vision that will strengthen Ireland's position as a location for quality Cx activities, drive further investment in Cx and help to protect against disruption from technology and low-cost competitor locations:

The Vision is based on three key aspirations for the industry here that will be built or enhanced through the roadmap for the industry over the coming years:

### 1. Centre of Excellence for Technology Enabled High Quality Cx

- Transformation led from Ireland for global Cx organisations with operations here
- The Irish Cx community will be recognised for its thought leadership on transformation and the creative use of technology
- Data will be at the core of the next generations of Cx and Ireland will be known as an exemplar in the fields of data governance and trust
- Ireland's long track record in language technologies and natural language processing comes to the fore through utilisation of capabilities here (particularly in academic research centres)

### 2. Global Recognition and Positioning

- Creative centres in both AI, analytics and natural language processing
- Smart start-ups with enabling technology in messaging, Ux, AI, analytics and bots
- Supports for the transformation journey – development of financial and practical supports to accelerate transformation
- Unique collaborative environment – unique concentration of start-ups, multinationals, research support and a very active Cx networking group driving change and evolution
- Existing skill levels of the Cx community – with a large number of employees in Cx holding degrees, Ireland is poised to capitalise on the move to higher value more complex services for human-human interaction
- Diversity & Inclusion – leveraging Ireland's uniquely diverse and multi-cultural Cx industry.

### 3. Empowered and (continually) enhanced workforce

- Adaptive, agile workforce supported by defined career paths and a focus on priming the next wave of employees in the industry earlier in their education
- Availability of technical talent to facilitate the ongoing transformation to an AI enhanced offering – both for development and implementation
- Supports for re/upskilling and specific vocational and add-on courses developed for the industry leveraging initiatives such as Skillnet
- Broad language capability – and both promoting and leveraging the uniqueness of this in Ireland

### From Vision to Impact

A Cx transformation roadmap is needed to enable Ireland to adapt to the joint disruption of technology and additional competing locations. The impact of implementing the vision (using the roadmap) will be realised in both jobs protected/ redesigned and new job creating opportunities. Based on a number of third-party studies on the impact of technology on Cx roles in developed economies, we see the potential benefits as being threefold over the next 5 years:

**To be globally recognised as a leading location where complex customer engagement meets technology resulting in real enhancement of services, efficiency and customer satisfaction.**

Jobs Transitioned\*  
4,000 - 5,000

Move people to new higher value technology enabled roles

Employment Created\*\*  
13,000 - 16,000

Facilitate expansions of existing players and support and attract new entrants

Investment Attracted p.a.\*\*\*  
€104m - €126m

Based on value of jobs created

\* Based on 2017 ContactBabel study on the impact of automation on the UK Cx market (the most comparable to Ireland) which forecasts that the UK industry will lose 1.8% of roles p.a. because of automation. Based on the 56,000 currently employed in Cx in Ireland, this is 5-6,000 roles over a 5-year period.

\*\* Based on average growth rates over the past 5 years

\*\*\* Based on average salary costs plus overheads for potential new jobs created per annum over the next 5 years

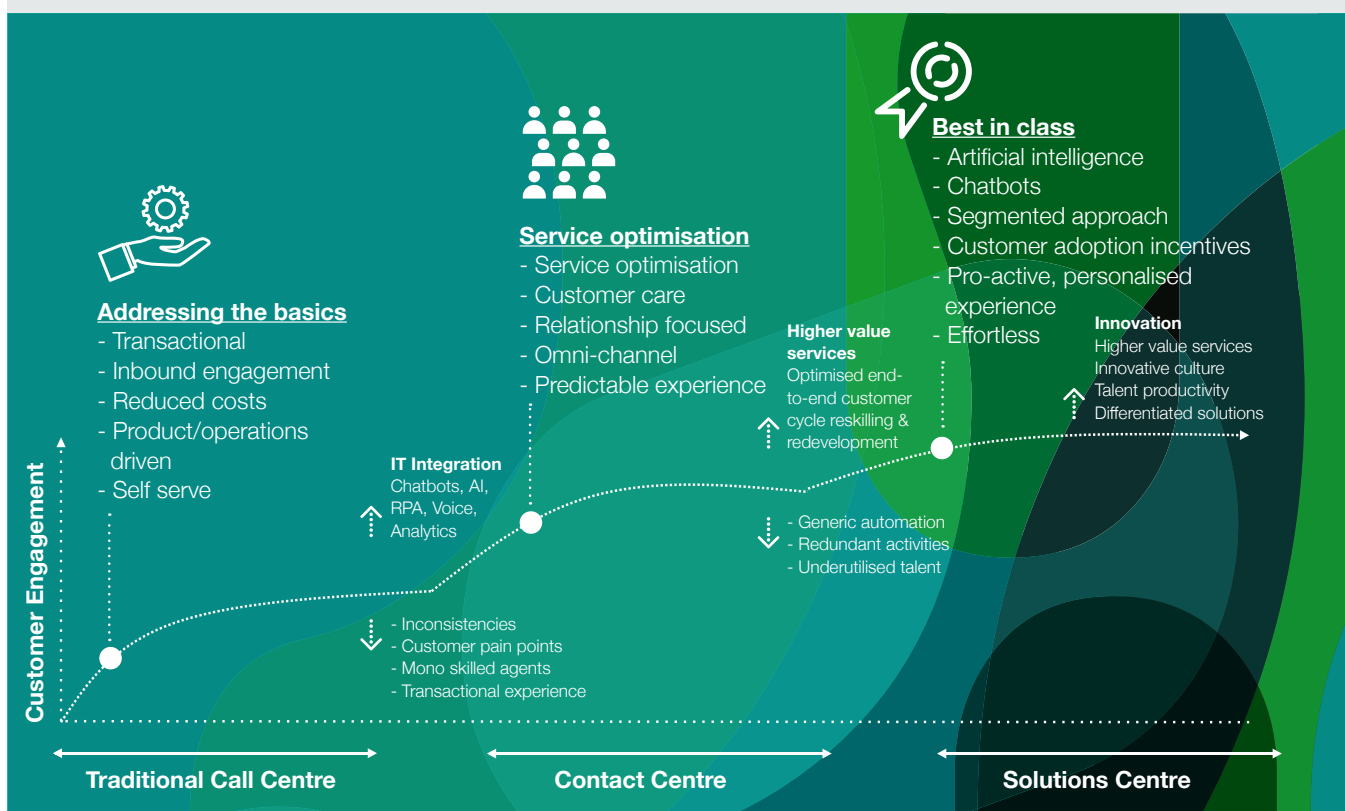
## The Opportunity - Cx Roadmap

Evolving from the traditional call centre to a customer centric solution centre will have positive implications for the call centre and Cx function – however it will be crucial to maintain the momentum of innovation on this journey.

Organisations that struggle to innovate and evolve beyond standard service will discover what may have been traditionally successful or effective is no longer so, and the likelihood of failing to deliver the best customer experience that customers demand will increase.

A well-defined roadmap and vision for your Cx function that seeks to continually evolve and drive innovation, is essential to avoid this stagnation trap. The roadmap is needed to protect Ireland from the disruption of technology and other competing locations.

The below illustration is a suggested guide evolution of the contact centre industry with the intention to assist organisations in understanding where they are on their own journey and identify the level of intervention required in order to move up the value chain into higher value customer experience activities.



### Addressing the Basics – Traditional Cx (The Call Centre)

Within the traditional Cx operation, activities are largely inbound and transactional with a focus primarily on cost. Engagements are generally routed through the operation with little interaction with the customer wider afield. The use of effective technology is not a key success factor.

#### Potential Pitfalls

- Less frequent interaction and lack of knowledge of your customer results in the increased likelihood of customer frustration
- Employees are responding to and dealing with customer queries and complaints, often transactional and repetitive in nature
- Customer experience is generic and not personalised

#### Suggested Solutions:

- Integrate a more optimised service offering through adoption or pilot of new technology platforms such as chatbots, etc.
- Seek implementation of pilot projects or larger scale deployment of automation through the use of chatbot, Analytics etc. to enhance the customer experience and centre efficiency
- Shift from a reactive to proactive customer approach

### Service Optimisation – The Contact Centre

Within the contact centre, focus is on understanding your consumer, building a good relationship and trust and optimising engagements across all communication channels. Approach is empathic, proactive and predictable with importance on delivering an excellent experience. It can be argued that many organisations are currently at this part of the evolution of the centre and are aware of the importance of remaining innovative and relevant.

#### Potential Pitfalls:

- Having undergone some chatbot, AI, ML or other IT integration, it is essential to ensure that the automation deployed is harmonious with your organisations culture and communication style
- With the impact of technology affecting organisations' workforce, talent can be underutilised or poorly engaged to move to higher value roles to manage these new systems and platforms to best effect

#### Suggested Solutions:

- Shift focus to effective workforce management ensuring employees are ready to address the changes and challenges brought about by the implementation of new technology, via re-skilling and re-design of staff
- Higher value activities enhanced by analytics, digital assistants and machine learning for example will predict customer needs and support optimised solutions.

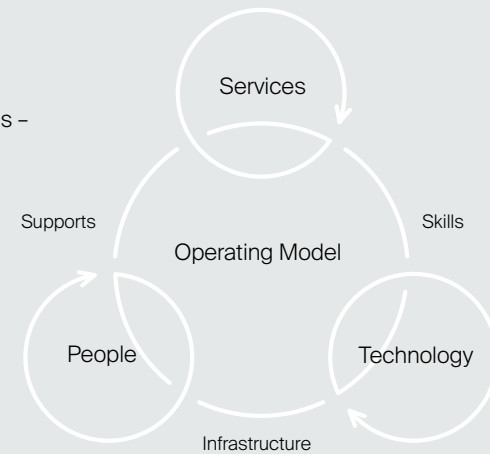
### Best in Class – Cx Solutions Centre

Within the solutions centre, focus is on the importance of implementing a fully optimised end-to-end experience which is effortless for the customer. Technology is an enabler through integrated, engaging and smart chatbots, digital assistants and AI. Employees are highly productive, motivated and reskilled to manage more difficult and complex queries and complaints and play a key role in analysis and predictive analytics projects to anticipate future needs and target new customers, thus leaving bots and other technologies to manage mundane, predictable queries. For employees moving into higher value activities, there is also an opportunity to move into other teams of the business for example, digital, change management or product teams.



# Implementing the Vision

IDA Ireland, Enterprise Ireland and the Customer Contact Management Association (CCMA) – along with other organisations – will support Cx operations in Ireland on their transformation journey and transition to becoming comprehensive customer solution centres. Aligned to the development roadmap for the industry discussed in the previous section, the focus will be on digital transformation around the three key factors of success for any centre: Services, Technology and People.



## Services

- Irish centres have already begun to shift away from traditional lower value simple customer interaction services to higher value and more complex services involving a myriad of native language capabilities. Automation, self-service design and chatbots are also freeing up customer engagement employees to take on higher value activities
- As Cx is at the forefront of engagement with the customer, there is a growing realisation that the insights gained during these types of engagements are highly valuable. Therefore, analytics is becoming more prevalent in Cx centres.
- This data centricity and leverage of customer insights is also driving a proactive trend within customer engagement where predictive analytics and data from a multitude of sources is allowing Cx teams to contact customers in advance of issues.



## Technology

- Irish organisations also have a long track record of embracing technologies in the Cx operation to drive efficiency - from intelligent call routing and IVR to VOIP to chat technologies and cloud-based PBX systems.
- The next phase of technology adoption will focus on automation/robotics and analytics/AI to drive further efficiency, improve experience and increase the value add from the customer engagement centre.



## People

- Ireland is in a very strong position to benefit from the structural and technology changes facing the Cx sector having a highly skilled digitally literate workforce to begin with.
- With a large portion of employees in the industry in Ireland having a third level qualification at present, the latent skills capability will be a key enabler of the ongoing move by the centres in Ireland to higher value activities.
- This latent skill set will need to be supplemented with training interventions both on the digital and analytics tools that will transform Cx but also on the newer higher value services that will define the industry in Ireland over the next 5 years.

As mentioned above, many operations in Ireland have already begun their journey to becoming solutions centres. Your centre needs to build and continue this momentum. Depending on the priorities within your global organisation, your transformation program may focus on some or all of the key areas of the operating model above. This section provides an overview and guidance around the implementation of the suggested transformation initiatives within each component of the operating model.

## i. Services

The evolution of Cx offers many opportunities for operations in Ireland to expand, evolve and diversify the services they provide. While many of these new and additional services have technology at the core, section 2 below will describe these technologies in further detail.

### - New Engagement Services & The Empathy Economy

To be successful, organisations must realise the value of human connection and provide emerging technologies to amplify employee capabilities. By investing in employee skills and human-empowering technology—and realising the significance of augmented intelligence—companies will provide better Cx offerings, increase brand loyalty, and support overall business success.

“As we streamline our businesses with tech to be more efficient, transparent, automated, the burden or opportunity for human relationships fall to customer support teams... Cx will emerge as the true heart and soul of the company, the avenue by which companies express their values”<sup>vii</sup>.

### - Digital CoE (Automation & Analytics)

The Digital Centre of Excellence opportunity for Irish centres here is threefold. Given the high skill levels and digital literacy in the Irish Cx industry, there is an opportunity for Irish centres to drive the development, roll-out and ongoing refinement of bot based automated

services. Supported by a suite of incentives discussed later in the strategy, Ireland can also become the pilot location for automation and bot projects. Secondly, given the breadth of analytics and machine learning activity undertaken in Ireland (both in business and academia) Irish centres can also evolve into Cx Insight Centres developing greater understanding of customer needs and behaviours sentiment/social analysis, engagement analytics driving proactive and personalised support and apportionment to sales. Again, outlined later in the document, there are a myriad of training/education supports and courses to develop and enhance analytics skills in Irish centres. Thirdly, and leveraging Ireland’s unique language spread and time-zone coverage, centres here also have an opportunity to become the Programme Management Hub for the transformation of Cx within their global organisations.

### - Forward/Backward Integration

With more and more services either being ‘digital-first’, or also having a digital interface, there is an opportunity in the future for Cx to use its understanding of customer needs and journeys to contribute to the development of User Interfaces (Ux). Also, the demand of current and future generations for greater self-service capabilities will drive the Cx centre of the future to forward integrate into the workings of Ux. This will also be complimentary to the work the Cx centres will do in automation and bot technology and these are digital interfaces also. In relation to backward integration, future Cx centres, will also engage in more activities that would be traditionally termed ‘Sales & Marketing’. With bots and automation looking after basic Cx interactions and also enabling better customer data, the Cx employees will be freed-up to find new solutions to customer needs and engage in cross/up-selling conversations.

## Voxpro

Cx Integration with Product Development

### Key Facts:

- Established in 2002, Voxpro - powered by TELUS International - is an international BPO with Irish operations in Dublin and Cork.
- With centres of excellence located in North and Central America, Europe and Asia, it employs over 34,000 team members worldwide
- Strategy - exceptional Cx through digital enablement, spirited teamwork, agile thinking and a caring culture that puts customers first

Partnering with some of the world's most disruptive brands in the tech industry, Voxpro's solutions cover customer experience, sales support, trust and safety, digital transformation and augmented services among others. Its partners include the likes of Airbnb, Robinhood and Wix.com.

Google Nest, which provides internet-of-things technology for the home, is another such partner. Nest's mission statement is to create a "Thoughtful Home" for its customers. Through this partnership, Voxpro ensures that if ever a Nest customer's "thoughtful home" doesn't live up to expectations, there's a "thoughtful person" available on the other end of the line, email, chat or social media channels.

However, it's not only about responding to customers' needs – product development plays an important role in CX too. Through a field trial team, Voxpro offers advanced technical preparation for Nest's next generation product launches. Additionally, continual improvement initiatives such as the creation of Voxpro's support engineering team in its EU Lab (as part of the Cx organisation) analyses faulty devices and provides actionable data to Nest engineers to ensure that all processes, hardware and software are debugged and optimised which, in turn, means more satisfied customers with thoughtful homes!

### - Omnichannel Management

Companies with the strongest omnichannel customer engagement strategies retain an average of 89% of their customers, compared with 33% for companies with weak omnichannel strategies," according to research by Aberdeen Group<sup>viii</sup>. A successful omnichannel strategy is more than just having multiple channels through which to engage with customers. It requires significant data integration, sales channel harmonisation, services integration, more sophisticated marketing approaches and ability to identify customers in real-time across all these channels. In short getting omnichannel right is a big and ongoing project and there is an opportunity for Irish centres to be the drivers of this project given existing capabilities here across the key elements of such projects. Over time, omnichannel management will move into opti-channel with increased focus on digital, personalisation and analytics.

### - (Customer) Data Governance

Since the arrival of the EU's General Data Protection Regulation (GDPR) and more recently the California Data Privacy Protection Act, the onus is on organisations to design and implement comprehensive data governance plans. Given that Cx is at the centre of customer engagement, both utilising and acquiring customer data and insights, there is an opportunity now to put the customer at the centre of Data Governance by making it a responsibility of the broader Cx function.

### - Customer as the Outsourcer

Not all Cx centres excel at good service or providing seamless multi or mini-channel experiences. This dynamic is likely to continue into the future which will represent an opportunity for Irish centres (particularly outsourcers) who 'get it right'. Customer patience with poor service is giving rise to a new crop of services (like Service<sup>x</sup> and Airhelp<sup>x</sup>) where customers who are frustrated with their experience can use a third party to engage with the provider causing the satisfaction on their behalf, thus outsourcing their issue to a third party.

## ii. Enabling Technology

### - Automation, Chatbots, AI & Digital Assistants

'Chatbots and virtual assistants are ripened fruits of AI, which organisations are actively and significantly utilising for automating their internal business processes<sup>xi</sup>. While sometimes confused as the same thing, Chatbots and Digital Assistants are very different tools. Chatbots are generally used as information acquisition interfaces, such as extracting product details. Virtual Assistants can assist in conducting business, like reminding you of meetings, managing your to-do lists, taking down notes and so on. Chatbots are not as intelligent as Virtual Assistants but are excellent for Q&A type interactions. Virtual Assistants excel where the automated engagement needs to more closely resemble human-human interaction.

### - IoT

While historically considered only relevant to hardware companies the Internet of Things (IoT) is poised to be a technology enabler in all aspects of life in the near future. Adding weight to this argument Gartner predicts 25 billion connected devices over the next 2 years<sup>xii</sup>. For Cx leaders, this trend will require a plan to integrate IoT related data into the Cx centre and a re-think of the suite or services provided by the centre as a result. IoT can therefore be a driver of proactive services and more context specific customer engagement.

### - eCommerce (will drive increased need for Cx)

While some commentators are suggesting the death of Cx on foot of rapid advances in automation and AI, it is likely that the opposite will happen. The biggest driver of growth for Cx, against a backdrop of automation and potential job obsolescence, is eCommerce. The growth of eCommerce has been astonishing over the last number of years and it looks like this growth will continue (in the short to medium term at least). According to Statista, eCommerce sales will more than double between 2017 and 2021 growing to over \$4.8 trillion in the process<sup>xiii</sup>. For Cx leaders, making sure the experience centre is at the heart of their organisation's eCommerce strategy will be key. For outsourcers, a focus on eCommerce in the medium term will be a smart growth strategy.

## Allied Irish Bank (AIB)

Establishing the Cx Centre of Excellence (CoE)

### Key Facts:

- AIB is a leading retail banking provider in Ireland with over 200 branch locations and leading mortgage provider with 33% market share
- 1st Centre opened 22+ years ago; 2nd location opened in 2008
- 8,000 employees; approx. 800 in contact centre roles
- 2.4m Retail, Business and Corporate Customers; 1.3m digital customers and 60% key products sold via digital channels

AIB has made great strides in its 'Customer First' Strategy – accelerating digital and positioning itself as #1 in the mortgage market. However, rapid growth, amongst other factors was affecting customer experience. AIB was aware it needed to invest and focus effort on improving the mortgage experience and created the Mortgage Customer Experience (MCX) Programme. Having engaged customers and colleagues, the MCX cross-functional team redesigned the experience with 7 design principles:

**Fast Decisioning, Omni channel Experience, Mortgage Community, Empathetic Communications, Inform Me, UI / UX Improvements, Metrics.**

### Results:

- 70% of customers will get an immediate decision
- Customers will always engage with highly trained mortgage experts
- Customers able to embrace digital (with proactive communications)
- AIB Customer Experience is significantly improving (NPS scores up over 20 pts & mortgage drawdowns are up 20%)

The CoE is located within AIB's Contact Centre and now has over 50 expert and highly experienced staff which (sourced across the business). Staff were upskilled for their new roles and responsibilities. A new operating model was designed to enhance and compliment the work undertaken by the centre. The initiative keeps AIB customers at the heart of the Company's strategic thinking.

## Case Study –

### WorkHuman

Leveraging technology and AI to empower and engage Employees

Workhuman® is the world's fastest-growing integrated Social Recognition® and continuous performance management platform. Workhuman's applications are shaping the future of work by helping organisations connect culture to shared purpose. Workhuman® Cloud is a critical AI enabled software engine for global companies seeking to motivate and empower their people to do the best work of their lives. Workhuman (formerly known as Globoforce) is co-headquartered in Framingham, Mass., and Dublin, Ireland

#### Key Facts:

- Year company established: 1999
- Numbers employed: 541
- Languages/Markets covered: 35 Languages/ Multiple Markets
- Nationalities employed: 27
- The Company has received 20 cultural awards (most recently the Best Workplace in Ireland by The Great Place to Work awards & Best Workplace in the Work Happy 100 awards).

While many AI projects in Cx are focussed on automation/enhancement of customer interaction, there is also an opportunity to leverage this technology for greater employee engagement.

Workhuman's goal is to educate employees as well as to sustain future learning through giving recognition and feedback. The Workhuman Cloud tracks the 'before and after' effects of these training efforts. Both within Workhuman and across the companies it serves, it has found that these learning moments carryover as leaders make other HR decisions such as hiring, base pay, promotions, bonuses and succession planning. Over nearly 2 decades of experience, Workhuman have found that where organisations use technology to connect their culture to a shared purpose, employees feel more connected to their peers and the wider organisation (ensuring no employee is left behind).

#### - Analytics

Successful Cx centres use advanced data analytics software to monitor and review performance, not only from a customer lens, also from the employee's perspective, as well as a business-owner view. The key to choosing the correct analytics combination lies in understanding the approaches, and how they can be used to improve experience and operations.

#### The most common analytics application areas in Cx are:

- Centre Speech Analytics** - is a pretty new and relatively rare field, but one that many early adopters are finding significant success with. Using a team of analysts to monitor calls in real time, a company can unearth inefficiencies in their current model, and make process improvements, such as moving to a call script, or developing systems for employees to utilise in order to achieve the desired call outcome.
- Centre Text Analytics** The last several years have seen an explosion in the social media universe, and most companies have developed a brand presence online. This paradigm shift has rendered text analytics ever more important. Omnichannel text-based analytics is vital in seeing any potential issues, comprehensively, through the customer lens.
- Predictive Analytics** The modern predictive analysis engine is an invaluable tool in the Cx environment. Using in-depth review of past performance in areas as diverse as call volume, service level, handle time, and customer satisfaction, predictive analysis makes it possible to apply past solutions to upcoming problems. Key benefits/outcomes include more accurate workforce planning and more proactive customer engagement.
- Self Service Analytics** Progressive businesses today are finding ways to incentivise self-service channels. While some customers can be resistant to this change, many are discovering that self-service is an efficient and hassle-free option. Unlike many other

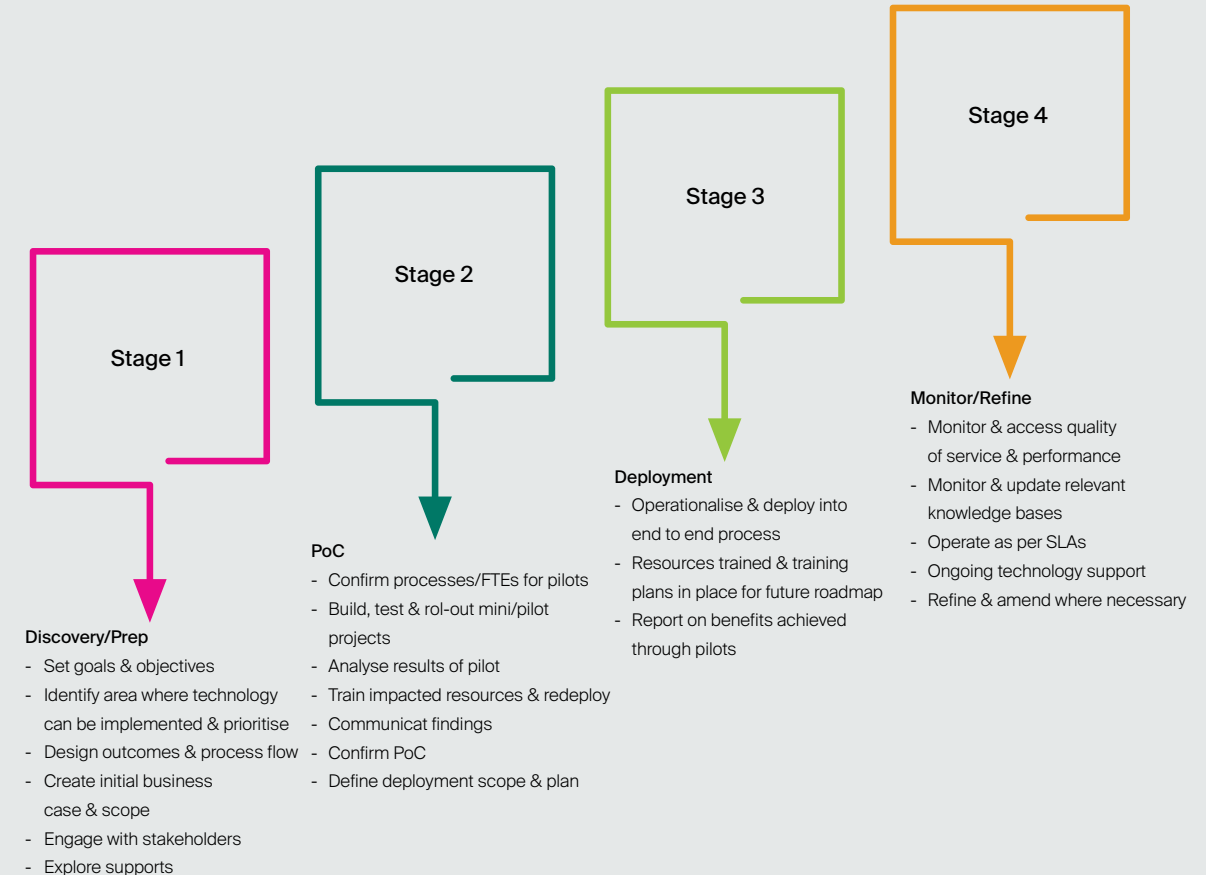
analytics tools, self-service requires minimal human involvement. Cx centres, however, must ensure that their self-service analysis software is compliant with their current technological structure.

- Centre Desktop Analytics** A comprehensive desktop analysis program can go hand-in-hand with real time call monitoring to capture inefficiencies, improve Cx centre security, and explore potential coaching opportunities for phone based employees. By not only viewing the employee's activity during the call, but also capturing all activity on their desktop, a company can ensure that the employee is using their systems most effectively, and that the systems themselves are functioning properly.

- Omnichannel Analytics** A well-managed Cx centre needs to have a way to determine what channels any of their customers are using at a given moment, and tailor their service options toward that. If an employee has this information at their fingertips, they can provide a more personal, pleasing customer interaction. Does a customer do most of their banking online? A real-time script update can alert the employee to let the customer know that their problem can also be solved using that channel in the future.

#### Implementing and Leveraging Enabling Technologies - Getting Started

One of the recurring themes emerging from conversations with Cx leaders and technology vendors alike when it comes to transformation in the Cx Centre is the correct setting of expectations. Amid the rich promise of AI, automation and chatbots are some harsh realities and practicalities around readiness for this type of transformation. The model below outlines a 4-stage process for leaders to leverage the aforementioned technologies in the Cx Centre:





# Case Study – Cartrawler

From Call Centre to Digital Contact Centre

## Key Facts:

- Year company established - 2004
- Numbers employed - 450
- Languages/Markets covered - 20 languages – Global Reach – 24/7 Support
- Nationalities employed - 42

Cartrawler is the largest online market place for car hire, processing over 900M hires per year across the globe. Up to April 2018 Cartrawler's support for its customers was 80% voice contact. However, supporting multiple languages in countries across the world 24/7 presented scaling challenges prompting the company to begin a journey with its Customers to more digital channels.

Cartrawler has utilised self-service portals to automate the basic actions a customer would have traditionally have required voice support on, and implemented Chat Tooling incorporating AI and machine learning [through Irish Cx software provider, Edgetier]. This has allowed Cartrawler to maximise the time the advisor spends solving the customer issue by: starting off the conversation; pulling in the data for the advisor to better answer the query; and removing all wrap up time. This has both increased the productivity of the advisor but also removed the more basic contacts allowing the advisors concentrate on key issues.

Cartrawler have also moved to a single interface between chat and email meaning it can move more seamlessly from one contact type to another, emailing chat transcripts etc. to provide a more omni-channel experience for Customers. The result has been that now in April 2019, less than 40% of customer contacts are voice and falling as Cartrawler's customers become more comfortable with the service they receive over Chat.

## iii. People

The Cx operation of the future must create a flexible and multi-skilled workforce that works seamlessly with technology such as automation, chatbots and analytics. These operations must decide how best to use such technologies to support their teams. There is a myriad of benefits for the Cx organisation and the employee: greater productivity, enhanced experience and more satisfying and less monotonous work. There are 3 key considerations in enabling and supporting Cx employees to adapt to a very different future for the industry:

### - The CX Specialist of the Future & Career Paths

As a greater proportion of customer contact will be handled by automation and bot-based technologies Cx employees will need a different set of skills and capabilities in the future. The Cx employee of the future will have three key attributes for success: good communication skills, analytical and problem-solving capabilities and deep product/service expertise. The enabling or transforming technologies that will change the world of Cx also present a number of career opportunities for Cx employees. Given the knowledge of the Cx employee of customer issues, and roadmaps there will exist opportunities for upskilling and movement into roles such as chatbot implementation and management, customer data analytics, UX design, customer journey road mapping and social media management. For employees who wish to remain in customer engagement roles, their jobs will evolve from more transactional engagements to more complex case management roles involving deeper levels of understanding of the organisation's operations and interdependencies.

### - Centre Management

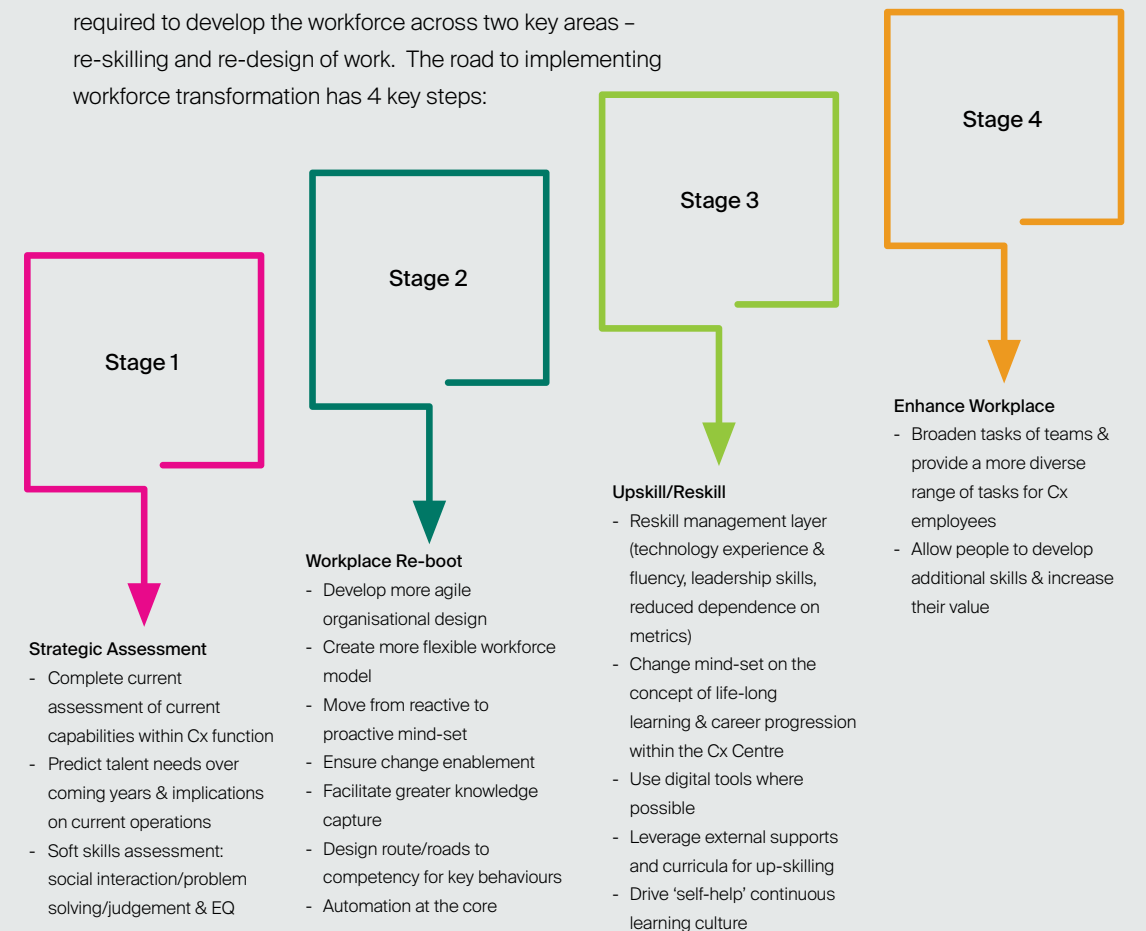
Centre managers will need to completely re-orient their understanding of performance and KPIs as what has been traditionally supervised and measured will be undertaken by autonomous and automated systems in the future. Technology will also simplify planning, monitoring and reporting performance thus freeing up managers' time to focus more time on people management, team coaching and learning. In the Cx operation of the future, managers will augment AI and decisions will be made collaboratively.

### - Decentralisation

Cx teams of the future don't need to be in one location. Most future looking studies on Cx and the role of the Cx function see a world where employees are decentralised, distributed and take a pro-active approach to customer care. The US is taking the lead in this trend where according to ContactBabel, 52% of Cx organisations are choosing the 'home-agent' route<sup>xiv</sup>. According to NICE, these employees are mostly home-based, digital-savvy, social-media experts able to deliver exceptional Cx across all channels<sup>xv</sup>.

## Implementing Workforce Transformation

In order to ensure the Cx organisation is positioned and ready to address the changes and challenges brought about by the aforementioned 3 forces we covered earlier, a clear plan is required to develop the workforce across two key areas – re-skilling and re-design of work. The road to implementing workforce transformation has 4 key steps:



# Case Study – Virgin Media Ireland

Cx Upskilling (Lean & Six Sigma Training)

## Key Facts:

- Part of Liberty Global – the world's largest international cable company
- Cx Centre established in 2006 when Liberty Global acquired and merged NTL and Chorus.
- Approx. 400 employed in the centre:
- 437,700 customers supported

Customer Experience is a top priority for Virgin Media Ireland and is embedded in the culture across the business. To support this, a continuous improvement methodology has been in place for the past three years in the Cx Centre. Over 30 team members from managers to front line have completed a Lean Six Sigma program, achieving Green and Black Belts through a program with the University of Limerick.

Project identification comes from Voice of the Customer (NPS) and Voice of the Agent. Agents have a direct route to the business through line management to highlight common trends or new issues they encounter in their interactions with our customers. Low complexity issues involve the agent designing the resolution with their team. For bigger ticket items, Kaizen events, cross functional process mapping, and collaborative brainstorming sessions are set up to define and implement solutions. These teams are led by process improvement specialists and include front line colleagues and technical experts leveraging a variety of continuous improvement tools and methodologies.

A customer council is in place, which is led by the CEO and senior management team to embed Customer Experience as a priority for the business and ensure alignment of priorities and goals to achieve this. Improved NPS and employee engagement scores have been achieved as a result of this approach.

## iv. Connecting the Dots

While there is temptation, and indeed value, in just 'kicking-off' transformation through a series of quick pilot initiatives, the most effective approach will be in taking a more holistic approach – taking the broad view of site capability and then shaping an integrated strategy and business case that creates a compelling case for change that can also be communicated up and down the organisation. Pilot projects can be part of this but should not be the starting point. This approach can be achieved through 5 phases:

### Stage 1 – Strategy Development:

Stakeholder mapping and communication - Cx transformation vision - Set the desired outcome - Develop business case for Cx transformation

### Stage 2 – Assessment:

Assessment of current situation  
 - Benchmark performance vs. best practice - Assess capabilities vs. level required (i.e. processes, people, etc.)  
 - Identify key gaps and opportunities - Identify function and activities where technology can support

### Stage 3 – Analysis & Planning:

Define outcome (including revised operation model)  
 - Develop training requirements and train/upskill/source resources - Technology pilots as 'quick wins' - Develop detailed implementation plan across work streams

### Stage 4 – Implementation:

Rollout implementation plan - Identify and confirm resources - Ensure operating model, people and tech are in place to support new function(s) - Rollout new services to organisation - Target quick wins - Employee learning / training plans in place and aligned to future roadmap  
 - Report on benefits achieved through pilots

### Stage 5 – Review & Monitoring:

Continuous improvement (based on data) - Monitor and assess quality of services - Monitor and update knowledge base - Ongoing technology support

## v. Challenges in Transformation

No change or transformation process is easy and there are a number of common barriers that will be present on all projects, namely:





## vi. Components of Success

- a. Leadership Mandate - Leadership involvement and support are critical to the success of the Cx transformation. Mandate from C-level Executives should be obtained with sponsorship and agreement for the project.
- b. Phased Planning - The transformation journey should be carefully planned with detailed phasing and prioritisation of projects to ensure value is realised quickly, using a piloting approach to prove success before committing significant investment. The plan should be also aligned to the corporate appetite for change.
- c. Change Management & Communications - Regular communication should be established between all stakeholder groups to ensure alignment across the organisation and buy-in to the Cx transformation agenda.
- d. Capability and Governance - A strong and capable transformation team should be established with accountability and responsibility for delivering the Cx vision including the creation of the governance framework.
- e. Entrepreneurial Thinking - Driving transformation will require thinking like business leaders, operating with the same commercial drive, awareness and technology mindset as other business divisions.
- f. Strong Business Case - Formulate a strong business case clearly outlining the value case for transformation of the Cx process/service. There should be clarity on the value created - the organisation must be clear on the value-drivers of change (strategic, quality, cost, service levels).

## Supports

IDA Ireland and Enterprise Ireland offer a comprehensive suite of supports from practical advice to financial assistance to guide organisations on their Cx evolution.

### IDA Ireland

IDA Ireland is Ireland's inward Investment Promotion & Development agency and is responsible for the attraction and development of foreign investment in Ireland. Over 1,200 overseas companies have chosen to invest in Ireland as their European base and are involved in a wide range of activities in sectors such as engineering, technology, pharmaceuticals, medical technologies, financial and international services. For more information, please visit: [www.idaireland.com/how-we-help](http://www.idaireland.com/how-we-help)

### Enterprise Ireland (EI)

Enterprise Ireland is the government organisation responsible for the development and growth of Irish enterprises in world markets - supporting sustainable economic growth, regional development and secure employment. Enterprise Ireland work closely with a number of indigenous contact centres, providing support and financial assistance for future growth and innovation. For more information, please visit: [www.enterprise-ireland.com/en/funding-supports/](http://www.enterprise-ireland.com/en/funding-supports/)

### Practical

- Specialist **advisory on using data for competitive advantage**.
- **Innovation capability development** (I4G) programs in conjunction with MIT Boston.
- **Peer learning** through EI management (M4IG) and leadership (L4G) development programs.
- Specific and focussed **advisory services** on Strategic HR, Lean/Competitiveness and Technology/ Innovation to support transformation

### Practical

- **Strategy & vision** for the contact centre industry with development path and relevant supports
- **Introductions** to practitioners and reference sites
- **Support with corporate targeting** for additional mandate
- Advise on **preparing for opportunities and challenges** - in light of the recently published strategic initiatives on the future economy through Future Jobs Ireland, Project Ireland 2040 and Global Ireland 2025

### Financial

- Financial assistance to support **training plans, pilot and wider transformational projects**
- Funding for **advisory support for site transformation**
- Funding for **R&D feasibility studies** for technically complex projects

### Financial

- **Innovation funding** to support scoping of larger innovation/digital transformation projects.
- **Business Innovation** funding to develop new business processes involving automation
- **Operational Excellence Funding** to offer holistic support to Digital Transformation initiatives including Business Innovation, Training and Capital grants.
- **SME Consultancy funding** towards Strategic initiatives in CX/AI/BI/RPA/ Data Analytics or Digital Transformation.
- **Funding towards new Graduate roles** in CX/AI/ BI/RPA/ HR/L+D/Data Analytics or Continuous Intelligence Gathering.
- **Support for key new Strategic roles** in HR, Operations, Work Force Management, Business Intelligence, Data Analytics or Customer Journey Mapping.

Other Networks and Forums to support you and your organisation on best practise and learning opportunities include:

#### Customer Contact Management Association (CCMA)

CCMA Ireland champions customer experience excellence and advocates for the CX industry in Ireland. Our mission is to promote collaboration, shared learning and best practice for customer contact and shared services organisations with operations in Ireland. We provide a forum for knowledge sharing and networking through showcasing best practice, networking events, Industry Awards, Shared Learning and Development, Member User Groups, Facilitation of Organisation Collaboration & Partnerships, Industry Insights & Benchmarking and Executive Exchanges.

For more information, please visit:  
[www.ccma.ie](http://www.ccma.ie)

#### Skillnet Ireland

Skillnet Ireland is the national agency dedicated to the promotion and facilitation of workforce learning in Ireland. The agency currently supports over 15,000 companies nationwide and provides a range of valuable learning experiences to over 50,000 trainees. Skillnet Ireland has an excellent track record in efficiently developing and delivering high quality, relevant courses that responds to industry needs; for example, the first ever suite of Diploma to Masters qualifications in Global Business Services.

For more information, please visit:  
[www.skillnetireland.ie/our-networks/](http://www.skillnetireland.ie/our-networks/)

## Conclusion



Ireland has a **unique opportunity to capitalise on the next wave of digital disruption** in the Cx industry and is well positioned to deliver next generational Cx activities to support global business. Ireland can be a location in which to drive this innovation.



There are several factors attributing to **Ireland's competency in delivering on this strategy** including; a highly skilled and motivated workforce, a strong track record of customer support activities and a vibrant and open technology ecosystem for both collaboration and community.



If organisations do not **act at local and international level**, there will implications for Irish based Cx operations- where the impact of automation will lead businesses to look to competing locations to carry out these activities and erode Ireland's leading position.



The Cx transformation roadmap is needed to **protect Ireland from the joint disruption of technology and competing locations**. The impact of implementing the vision (using the roadmap) will be realised in both jobs protected/redesigned and new job creating investments.



Irish based organisations must ensure that they **remain competitive** by focussing on the three models for Cx evolution; technology adoption, people change and services transformation.



There are a wide range of **practical and financial supports** available to assist organisations on their Cx evolution journey.



There are **valuable case studies across existing Cx operations in Ireland** demonstrating best practice on Cx transformation

## Appendix 1

### Acknowledgements

Our sincere thanks to the following organisations who have generously provided their time, experience and insights (as part of the Core Working Group) to shape this vision and strategy for the Cx industry in Ireland:

- **Abtran** – Headquartered in Cork and employing over 2,300 in Ireland and Asia, Abtran is one of Ireland's largest providers of customer and business process management. [www.abtran.ie](http://www.abtran.ie)
- **AIB** – Founded in 1966, Allied Irish Banks p.l.c is one of the largest banks in Ireland providing a full range of business and personal banking services. [www.aib.ie](http://www.aib.ie)
- **Blizzard Entertainment** – a subsidiary of California headquartered leading games and film holding company Activision Blizzard. Blizzard Entertainment operates an international support centre in Cork. [www.blizzard.com](http://www.blizzard.com)
- **Cartrawler** – Headquartered in Dublin, Cartrawler is the world's leading B2B travel technology platform providing multimodal transport solutions to almost one billion passengers annually. [www.cartrawler.com](http://www.cartrawler.com)
- **CCMA** – CCMA Ireland champions customer experience excellence and advocates for the CX industry in Ireland. Our mission is to promote collaboration, shared learning and best practice for customer contact and shared services organisations with operations in Ireland. [www.ccma.ie](http://www.ccma.ie)
- **CeADAR** – CeADAR is a market-focused technology centre for innovation and applied research in Artificial Intelligence and Analytics. [www.ceadar.ie](http://www.ceadar.ie)
- **Enterprise Ireland** – Enterprise Ireland is the Irish Government organisation responsible for the development and growth of Irish enterprises in world markets. Enterprise Ireland works in partnership with Irish enterprises to help them start, grow, innovate and win export sales in global markets. [www.enterprise-ireland.com](http://www.enterprise-ireland.com)
- **IDA Ireland** – IDA Ireland is the Irish Government's Inward Investment agency and works with multinational organisations to help them to leverage Ireland as part of their international growth. [www.idaireland.com](http://www.idaireland.com)

- **PayPal** – Headquartered in San Jose CA, PayPal operates a worldwide online payments system that supports online money transfers and serves as an electronic alternative to traditional paper methods like checks and money orders. The company has two operations centres in Ireland in Blanchardstown and Dundalk. [www.paypal.com](http://www.paypal.com)
- **Shopify** – Shopify is a Canadian e-commerce company headquartered in Ottawa, Ontario. It is also the name of its proprietary e-commerce platform for online stores and retail point-of-sale systems. The company employs over 400 people in Ireland all of whom work from home. [www.shopify.com](http://www.shopify.com)
- **Skillnet Ireland** – Skillnet Ireland is the national agency dedicated to the promotion and facilitation of workforce learning in Ireland. [www.skillnetireland.ie](http://www.skillnetireland.ie)
- **Sky Ireland** – Sky Ireland Limited is a subsidiary of Comcast-owned Sky Group and is a leading supplier of television, internet and telephony services in Ireland. [www.sky.com/ireland](http://www.sky.com/ireland)
- **Virgin Media** – Virgin Media Ireland is Liberty Global's telecommunications operation in Ireland. It is the largest digital cable television provider within the Republic of Ireland. [www.virginmedia.ie](http://www.virginmedia.ie)
- **VoxPro** – Founded in Cork 2002 and with operations in Ireland, Romania and the US, Voxpro is a leading global provider of customer experience and technical support solutions. Voxpro became part of TELUS International in 2017. [www.voxprogroup.com](http://www.voxprogroup.com)
- **Workhuman** – Headquartered in Dublin and Framingham MA, Workhuman is the world's fastest growing social recognition and continuous performance management platform. [www.workhuman.com](http://www.workhuman.com)

## Appendix 2

### Additional Irish organisations that can support the digital transformation journey

- **Ceadar** – CeADAR is a market-focussed on the application of Big Data Analytics and Visualisation. Our focus areas include: Intelligent Analytic Interfaces- The goal of this theme is to create innovative approaches and tools to aid non-analytics specialist users in exploring datasets and performing customer segmentations.
- **Learnovate** – Learnovate is a research and innovation centre focused on EdTech and learning technologies. With over twenty full-time researchers and practitioners, Learnovate has one of the richest concentrations of EdTech expertise in Europe.
- **Insight Centre** – The Insight Centre for Data Analytics is one of Europe's largest data analytics research organisations, with 400+ researchers, more than 80 industry partners and over €100 million of funding.
- **Adapt** – Research areas at the Adapt research centre include; analysing media, content and customer interactions, enabling global reach through innovative machine translation, transforming and delivering personalized content.
- **IVI** – IVI's mission is to research, develop and disseminate empirically proven and industry validated IT best practice through a unique open innovation and collaboration between leading academic and industry practitioners.
- **Lero - The Irish Software Research Centre** – Lero is the Irish software research centre. It brings together leading software research teams from Universities and Institutes of Technology in a coordinated centre of research excellence with a strong industry focus.
- **Digital Marketing Institute** – The Digital Marketing Institute sets the global certification standard for digital marketing and selling having qualified more professionals to a single certification standard globally than any other body. The Digital marketing Institute equip professionals with the most up-to-date and in-demand digital skills and globally recognized certification needed to thrive in today's digital economy.

## Appendix 3

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