



LOST IN TRANSLATION

Leveraging Language to Deliver an Exceptional Customer Experience



TABLE OF CONTENTS

Research Introduction & Key Findings	3
Study Demographics	4
Language Support Expectations	6
Language Support Challenges	9
Language Support Strategies	10
The Impact of Language Support on Metrics	13
Conclusion	18
About This Report	
About ICMI	
About GeoFluent	
About Lionbridge	

Research Introduction

Great customer experiences don't happen by mistake or incredible circumstance. They are meticulously designed, expertly planned and beautifully delivered. To believe that providing excellent customer service is simple is to underestimate grossly the complex systems, intentional processes and extensive training that's required to enable frontline employees and brands alike to efficiently meet and exceed the expectations of other humans. It's a difficult job and the complexity of people, process and technology resources only increases as our world becomes more connected than ever before.

Today we account for much of this in our design, planning, and delivery of these customer experiences. Many organizations have increased their channel offerings, implemented new technologies and evolved their agent training programs. We're in a period of exciting change, rapid growth and innovations that bring the contact center to the forefront of many executive level conversations. It's an excellent time that is full of opportunities for customer service leaders to experience, learn and grow from the day to day interactions in their contact centers.

For all of the challenges and advancements over the past decade, however, one topic has gone seemingly unaddressed and yet increases in importance year over year: the impact of language on the customer experience.

In 2013, ICMI conducted research on multilingual customer service to understand how contact centers support non-English language clients and whether or not offering multilanguage support improved the customer experience and positively impacted engagement and loyalty. This study, which focused primarily on the voice channel, gained a lot of attention and uncovered new data on the impact of language on the customer experience. Since launching that study, more research has revealed an evolution in customer expectations and rising demand for service in non-voice channels such as chat and social media. These monumental shifts in preferences require all organizations to re-visit and re-prioritize their customer service strategy.

In this new 2016 research, ICMI and Lionbridge partnered together to understand what direction and data would be necessary for contact center leaders to make informed decisions around their omnichannel multilingual support.

"This landmark research shows that omni-lingual support is the new battleground for contact centers," said Tom Tseki, VP & GM, GeoFluent and Customer Care Solutions, Lionbridge. "With voice giving way to self-service and agent-assisted digital channels, contact centers should evolve their language support. Providing OPI as the primary multilingual support option is no longer effective and positions brands as laggards in terms of CX."

Key Findings:

- 79% of contact centers have customers who are not native speakers of the primary language(s) that they serve.
- At least 60% of customers expect service in their native language when contacting a brand.
- 52% of contact centers expect their volume of non-primary language communications to increase over the next three years.
- The #1 way that contact centers provide customer service to customers that speak an unsupported language is to "simply apologize and attempt to handle in the agent's primary language".
- Only 19% of organizations can support customers of any language over the phone. The percentages decrease significantly when it comes to every other channel of service.
- One-fifth of contact centers doesn't measure the quality of their non-primary language contacts.

LOST IN TRANSLATION

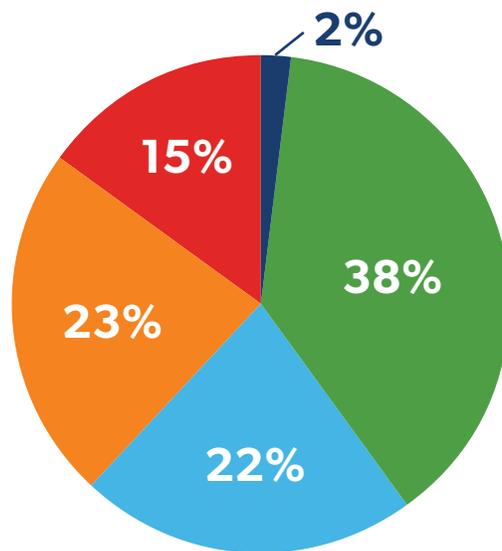
Leveraging Language to Deliver an Exceptional Customer Experience

Respondent Demographics

The individual respondents from the ICMI community represent virtually every role and level in contact centers and customer service organizations. The 526 respondents to this survey were primarily executives (23%), directors (22%) and managers (38%).

ROLE IN CONTACT CENTER

■ Manager ■ Director ■ Executive ■ Supervisor ■ Other



The United States and Canada accounted for the majority of respondents (91%), but individuals from Australia, Asia, Europe and South America were among those from around the world who contributed to this study. 89% of the organizations have a brand headquarters in the US, 7% are located in a country where English is the primary language and 4% are in a country where English is not the primary language.

Numerous industries were represented in this study with Healthcare, Financial Services (Banking), Insurance, Outsourcing and Retail accounting for the top verticals.

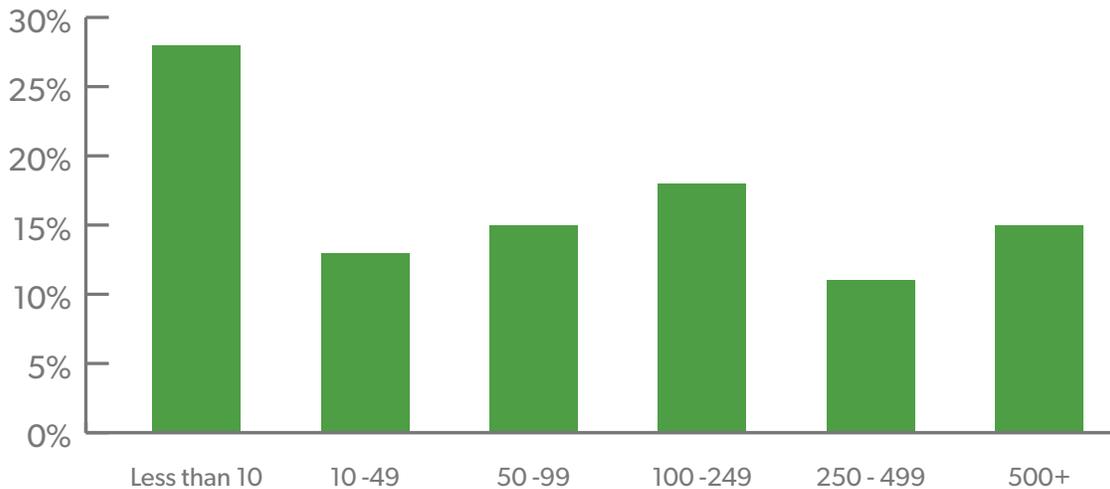
The majority of participating companies (62%) are serving consumers (B2C), while 28% are serving other businesses (B2B), 8% are serving internal customers and 2% are equally acting in B2B and B2C capacities.

LOST IN TRANSLATION

Leveraging Language to Deliver an Exceptional Customer Experience

Contact centers of every size responded for an objective sample size, with those having 10-49 agents (28%) and 250 or more (26%) representing the majority.

OF FULL-TIME AGENTS



As anticipated, over half (60%) report customer service as their primary function, with 19% focused on sales, 16% on technical support and 5% that equally support sales and customer service.

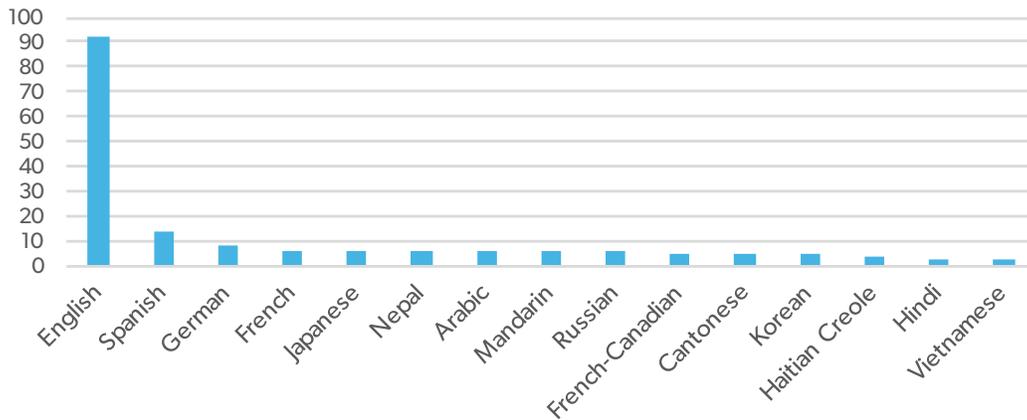
LOST IN TRANSLATION

Leveraging Language to Deliver an Exceptional Customer Experience

Language Support Expectations

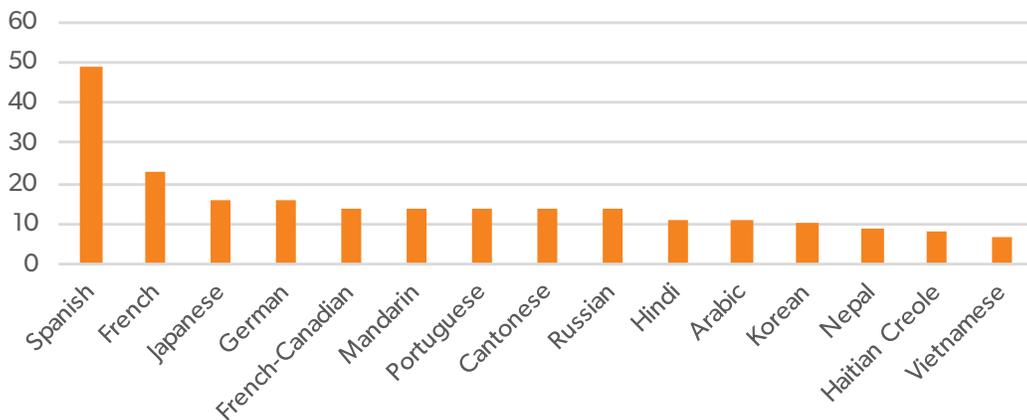
It should come as no surprise that 92% of the contact centers in this study cited English as a primary language that is spoken/written, considering that the majority of survey respondents are based in countries where English is the primary language. The second most common primary language is Spanish.

PRIMARY LANGUAGE(S) SPOKEN/WRITTEN



Supporting non-primary languages is important, as 79% of the contact centers surveyed for this study acknowledged that they have customers or prospects who are not native speakers of the primary language(s) that they serve. As a result, many of these contact centers are supporting at least one, if not several, additional languages. The most common non-primary language supported by contact centers is Spanish.

NON-PRIMARY LANGUAGE(S) SPOKEN/WRITTEN

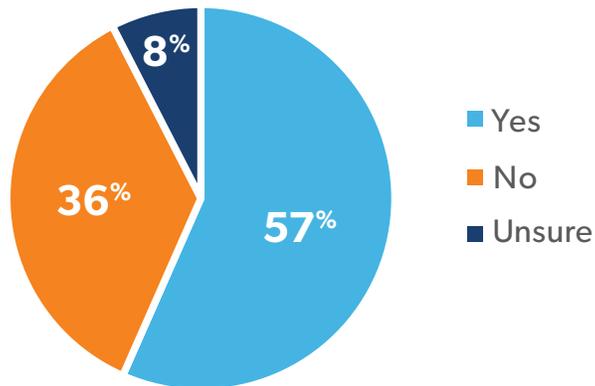


LOST IN TRANSLATION

Leveraging Language to Deliver an Exceptional Customer Experience

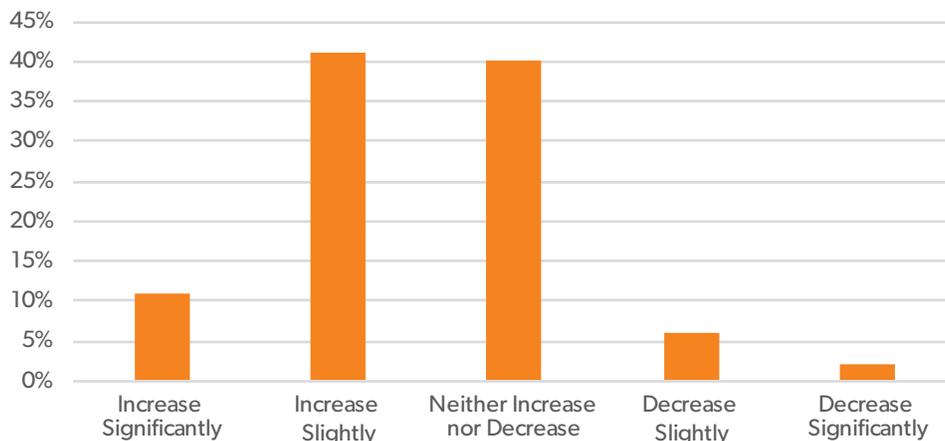
A majority of contact center leaders recognized that customers expect they will receive service in their native language when contacting a brand. It's important to note that customers don't typically think of brands in terms of geographies and, as more and more brands expand their global reach, it is unsustainable for leaders to simply ignore anyone who doesn't speak their brand's primary language.

Do customers generally expect service in their native language (non-primary to your contact center) when contacting your brand?



The importance of language support is growing and just over half of contact center leaders expect to see an increased volume of non-primary language contacts to their organization.

Do you expect the volume of non-primary language contacts to your contact center to change over the next three years?

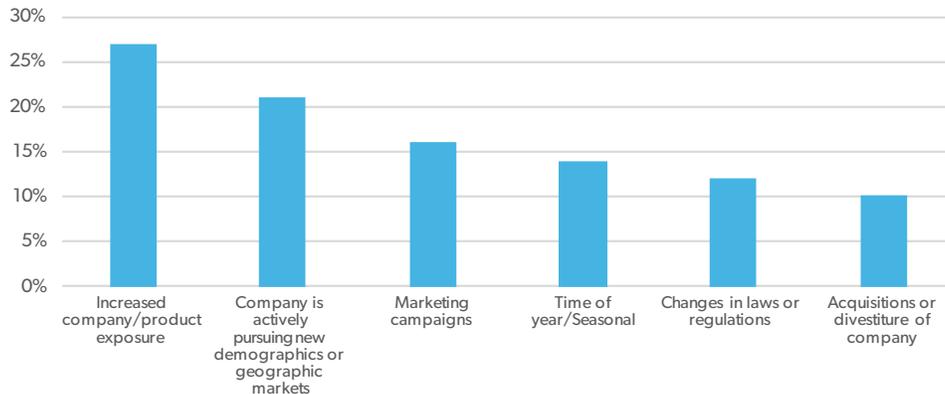


LOST IN TRANSLATION

Leveraging Language to Deliver an Exceptional Customer Experience

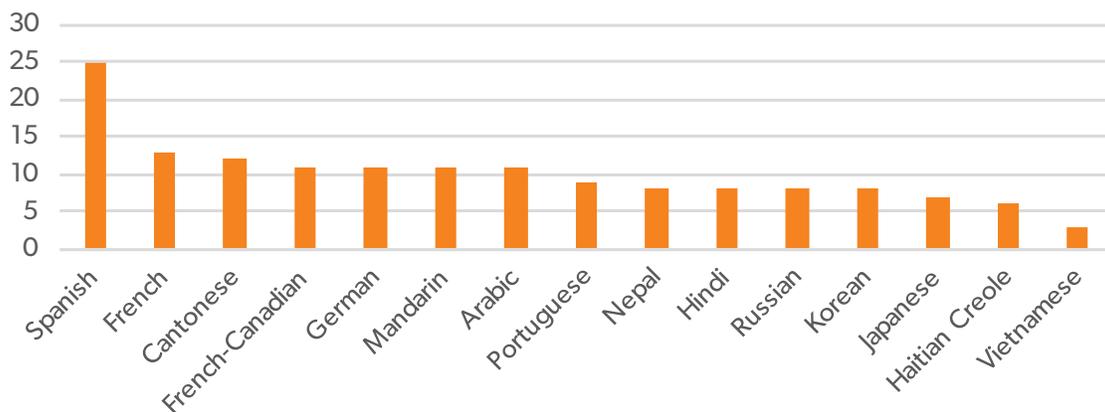
There are a variety of contributing factors to the volume of non-primary contacts into these organizations and respondents to this study cited the following as primary influences in their organizations:

What primarily influences the number of non-primary language contacts that are received by your contact center?



69% of organizations plan to support additional languages within the next 12 – 24 months with Spanish being cited as the most common language that will be added into the contact center.

What languages do you anticipate adding support for in the next 12-24 months?



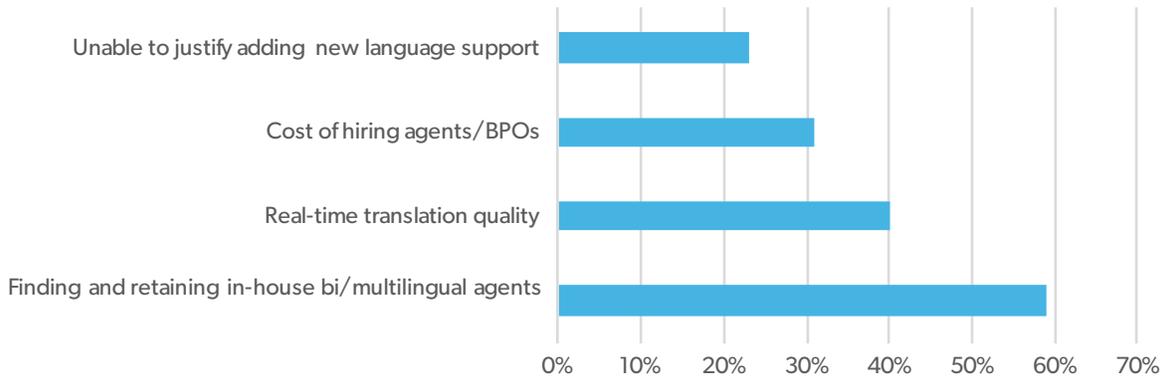
Respondents cited increased revenue as the most important criteria for a contact center to support a new language (39%), followed by increased language-specific value (31%) and better or improved customer experience (25%).

Language Support Challenges

This study also revealed great opportunity for organizations to improve their ability to support non-primary language contacts. Less than 25% of the surveyed contact center leaders felt that they do extremely well in meeting their customer’s language expectations. In considering the potential for growth in non-primary language contacts, it is important to understand and address the key language support challenges that are faced by contact center leaders.

The single biggest challenge in providing support beyond a contact center’s primary language is finding and retaining in-house bi/multilingual agents.

What are your biggest challenges with providing support beyond your contact center’s primary language?



When asked how they provide service in non-supported languages, here’s what respondents had to say:

“How do you provide customer service to customers that do not speak a language that is supported by your contact center?”

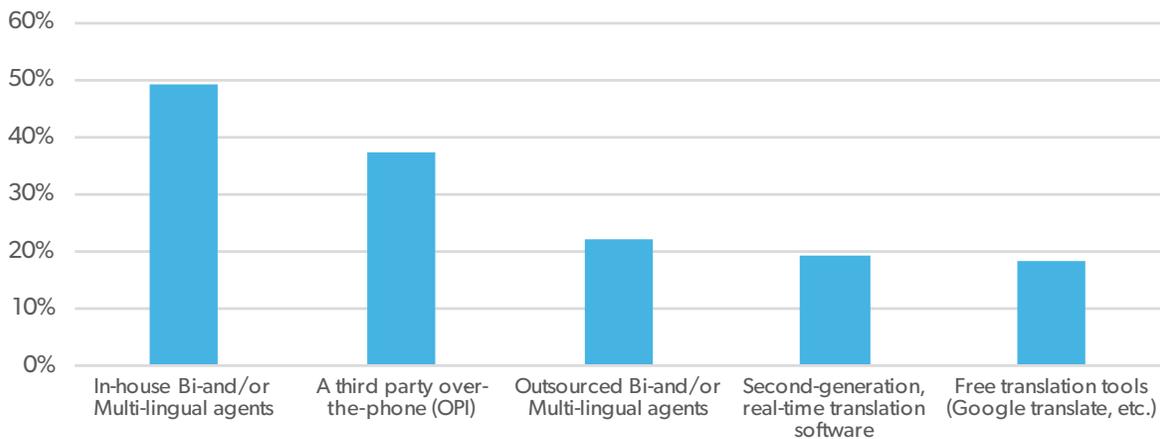
- 39%** Apologize that the language is not supported and attempt to handle in the agent’s primary language
- 32%** Informally find someone in the department that can translate or speak the language
- 28%** Utilize free online translation services to translate dialogue
- 22%** Find someone in the company that can translate or speak the language
- 17%** Provide a scripted response and make no further support attempt

The “strategies” to address these challenges are alarming and don’t address the root cause of the problem. If organizations want to thrive and see maximized revenue potential and increased customer satisfaction, they must move past apologies and toward solutions.

Language Support Strategies

There are several strategies for supporting non-primary language contacts. According to ICMI's research, the most common approach is to utilize in-house Bi- and/or Multi-lingual agents.

How does your contact center currently support non-primary languages?



As the most popular way for supporting non-primary language contacts also happens to present the greatest challenge to the contact center, it is important to identify an appropriate solution for your organization to overcome the problem. For the solution to be most effective, it needs to align with your overall customer service strategy. One of the best exercises for identifying customer needs and expectations and determining your organization's strategy for addressing them is to create customer journey maps.

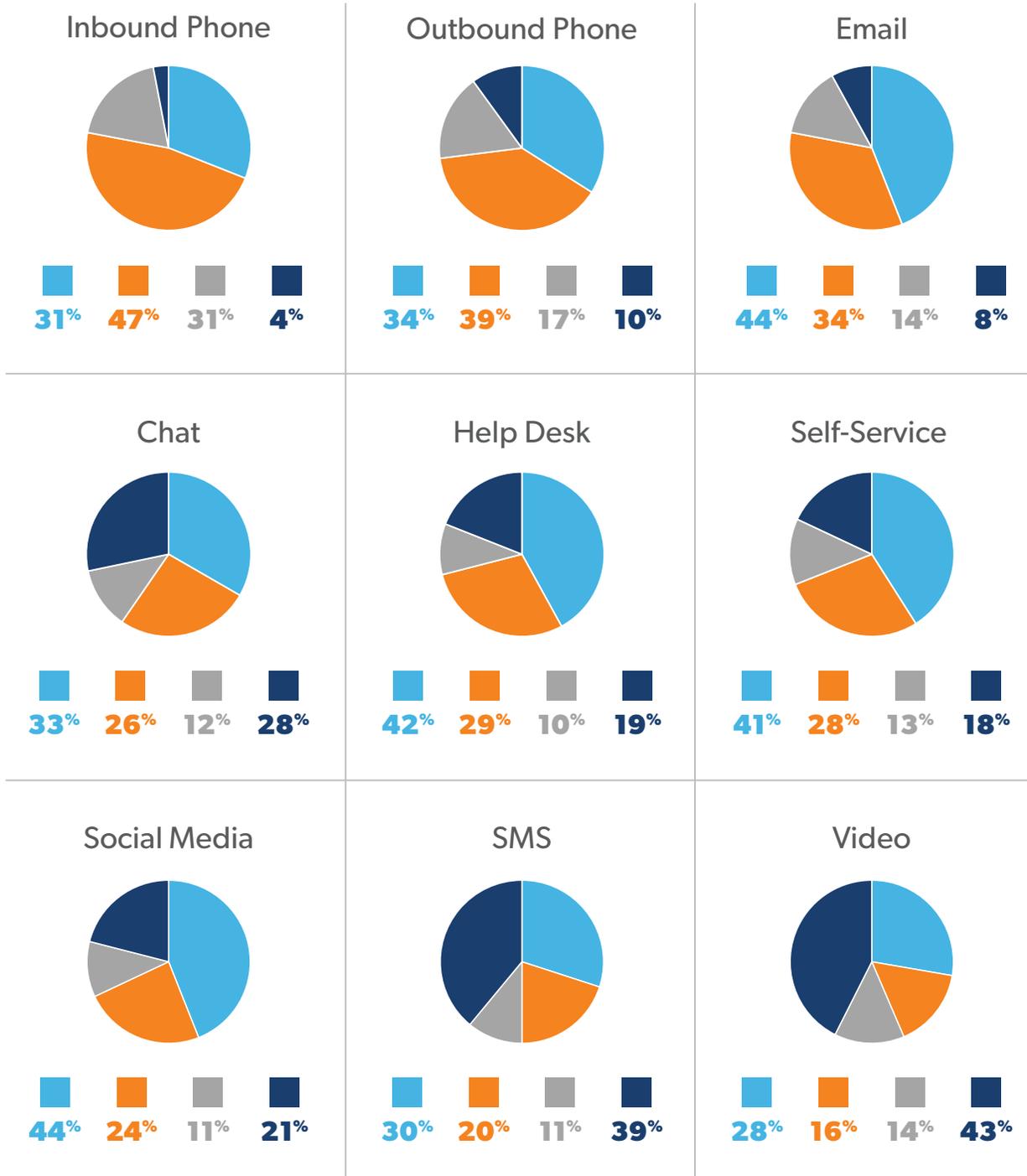
Despite the broad value of customer journey mapping, only 36% of contact centers surveyed create customer journey maps. Of that 36%, just over half create customer journey maps for customers fluent in a non-primary language. The result is a misunderstanding or assumption of customer expectations, a lack of insight into roadblocks or pain points in the customer journey and the inability to develop an effective strategy for improving the customer experience.

Previous studies by ICMI and others identify the robust organizational value of creating customer journey maps and as the complexity of contacts increase and the diversity of language needs expand, their value could not be greater. They will require cross-departmental collaboration, robust customer insights and a willingness to own the fact that some changes may be necessary. It will not happen quickly or easily but, when complete, they will provide clear direction, holistic understanding, and a meaningful strategy around how to best serve your customers across every touch point in your organization.

LOST IN TRANSLATION

Leveraging Language to Deliver an Exceptional Customer Experience

In looking at the languages offered across the channels supported by the contact centers surveyed, it was evident that the clients have very different experiences depending on the channel that they use and the language that they speak.



■ Primary Language Only
 ■ Some Non-Primary Languages
 ■ Omnilingual
 ■ Channel Not Offered

LOST IN TRANSLATION

Leveraging Language to Deliver an Exceptional Customer Experience

The majority of respondents in this study acknowledged that if they exclusively provide multilingual support for one channel, their customers want that same service support in other channels. Most contact center leaders also acknowledged that if they had a solution that made it easier for them to translate content into any language, they would use it.

“If solutions existed that made it easy to translate any content into any language, would you use it for your forums and communities?”

68% | Yes **32% | No**

“If technology solutions existed that made it easy to multilingual-enable your existing chat platform (and existing agents), would you use it?”

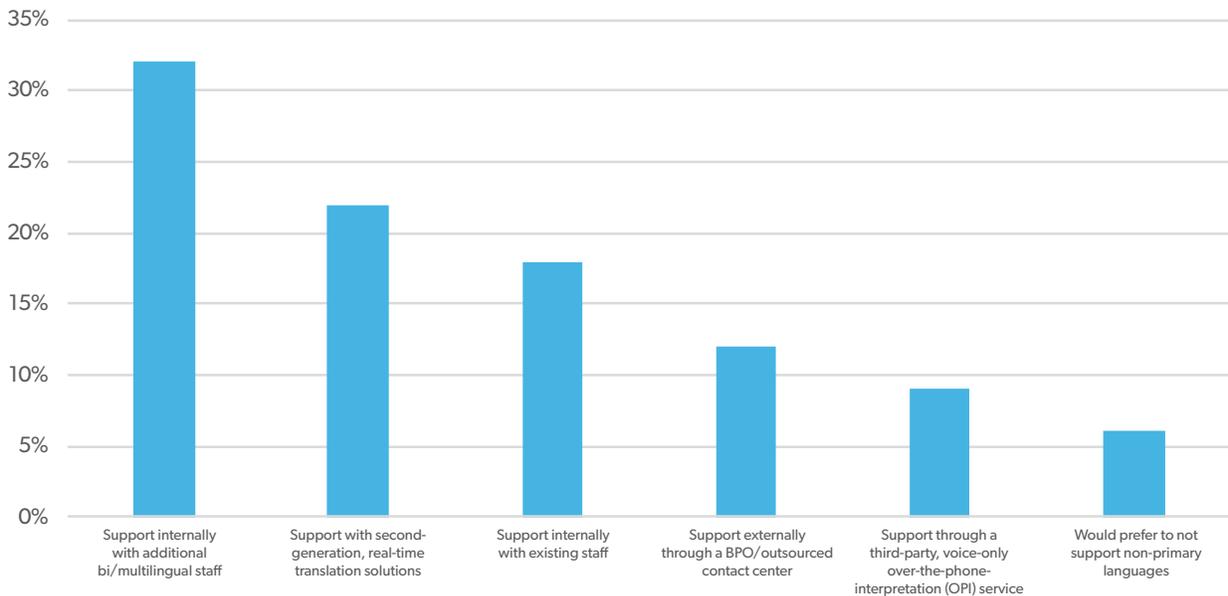
71% | Yes **29% | No**

“If solutions existed that made it easy to translate your internal training and knowledgebase content, would you use it?”

62% | Yes **38% | No**

If all things were equal (no budget, resource or implementation restrictions), contact center leaders would most prefer to support non-primary language customers internally with additional bi/multilingual staff.

If all things were equal (no budget, resource or implementation restrictions), how would you MOST prefer to support non-primary language customers?



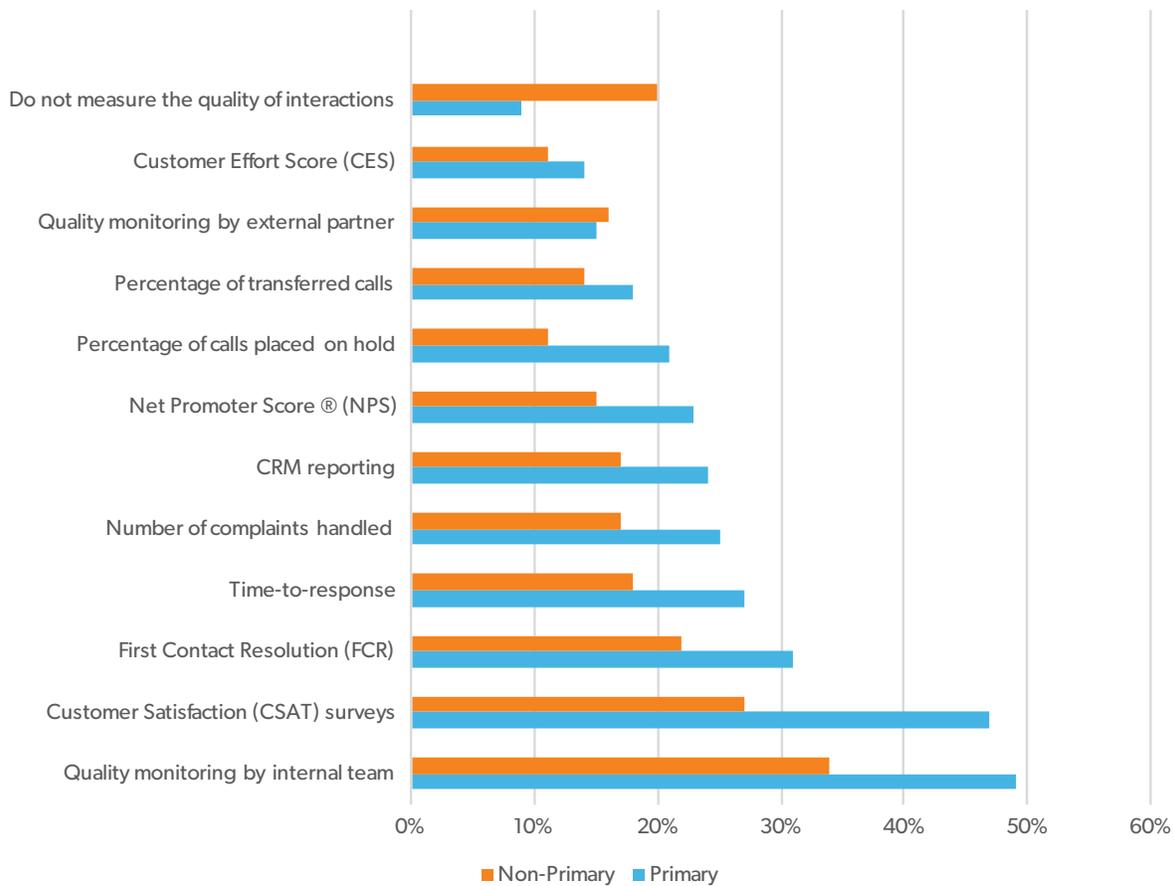
LOST IN TRANSLATION

Leveraging Language to Deliver an Exceptional Customer Experience

The Impact of Language Support on Metrics

When it comes to measuring the quality of interactions, ICMI's research revealed a key opportunity for contact centers, as their non-primary language contacts receive far less quality control than their primary language counterparts. In almost every category, primary language engagements are measured in more dimensions than non-primary language contacts. In addition, 20% of contact centers do not even measure the quality of their non-primary language contacts.

How do you currently measure the quality of your primary & non-primary language service interactions?



This is concerning (although understandable considering the people and technology resources that are typically required for such efforts), but it is nonetheless ill-advised to leave unaddressed. If we don't measure quality, it is impossible to effectively manage it. If we can't control quality, then we are putting our organizations at an incredible risk that is unsustainable long term.

LOST IN TRANSLATION

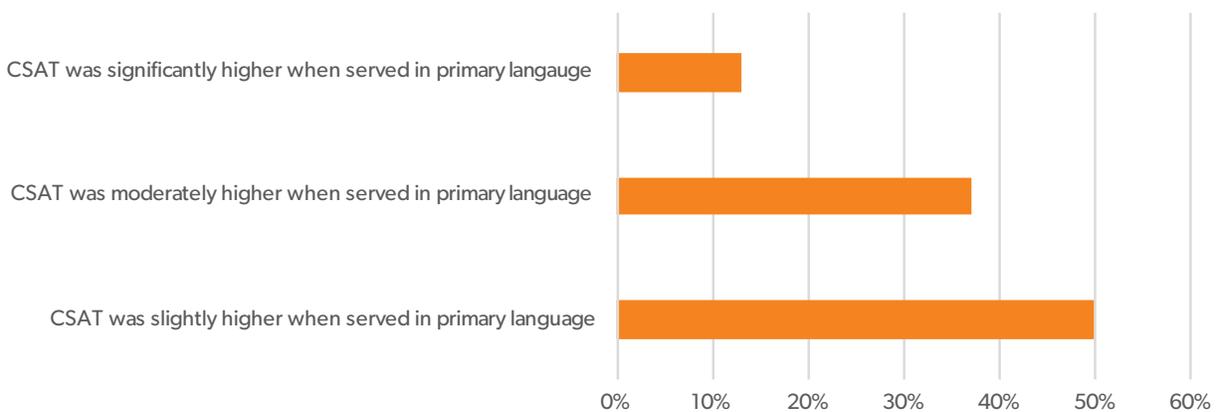
Leveraging Language to Deliver an Exceptional Customer Experience

ICMI's research was able to uncover the positive impact on several quality measures when customer service is delivered in a customer's native language. The metrics most closely studied were Customer Satisfaction, Net Promoter Score, First Contact Resolution and overall quality monitoring scores. These findings reinforce the value of delivering service across all languages (not just the primary language supported by an organization) and strengthen the importance of measuring the quality of service.

Have you identified improvements in customer satisfaction (CSAT) when customers receive service in their native language versus those who do not?



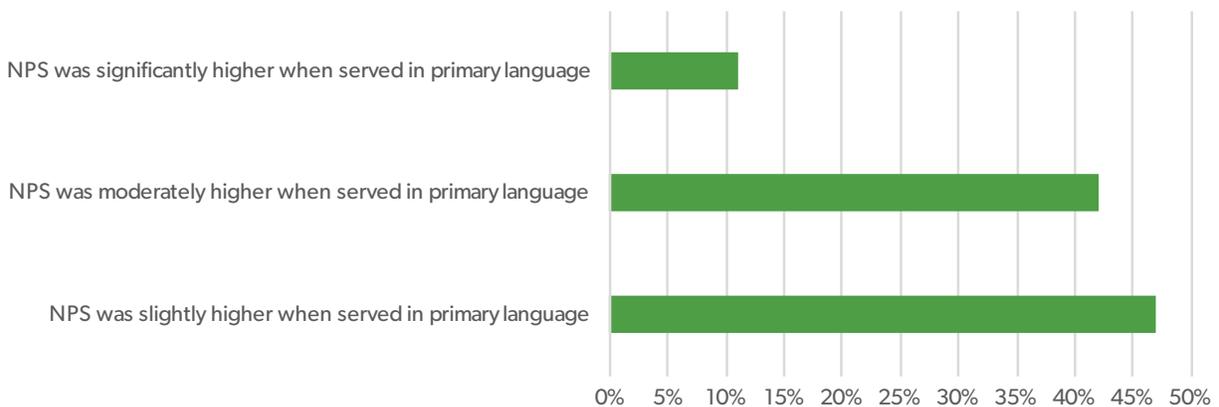
What was the difference in CSAT between customers served in their primary language and customers who were not served in their primary language?



Have you identified improvements in Net Promoter Score® (NPS) when customers receive service in their native language versus those who do not?



What was the difference in NPS between customers served in their primary language and customers who were not served in their primary language?



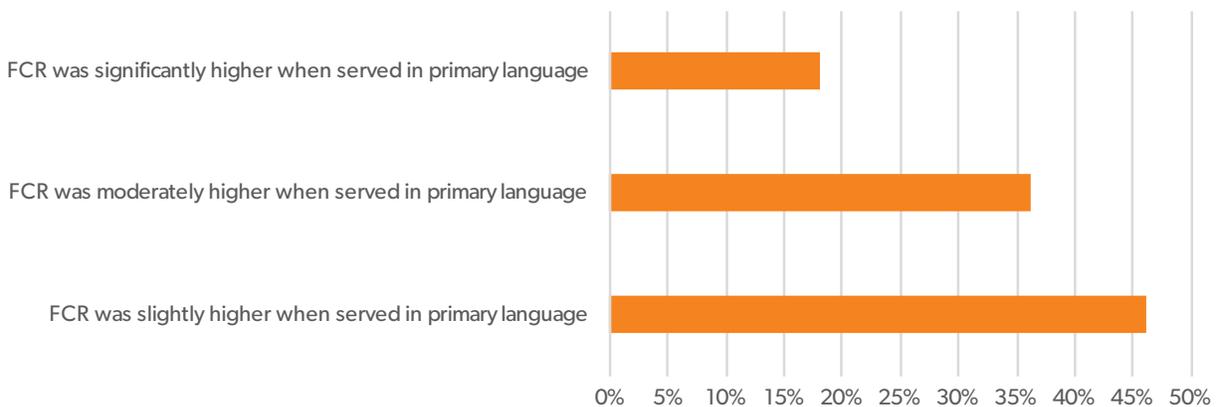
LOST IN TRANSLATION

Leveraging Language to Deliver an Exceptional Customer Experience

Have you identified improvements in First Contact Resolution (FCR) when customers receive service in their native language versus those who do not?



What was the difference in FCR between customers served in their primary language and customers who were not served in their primary language?



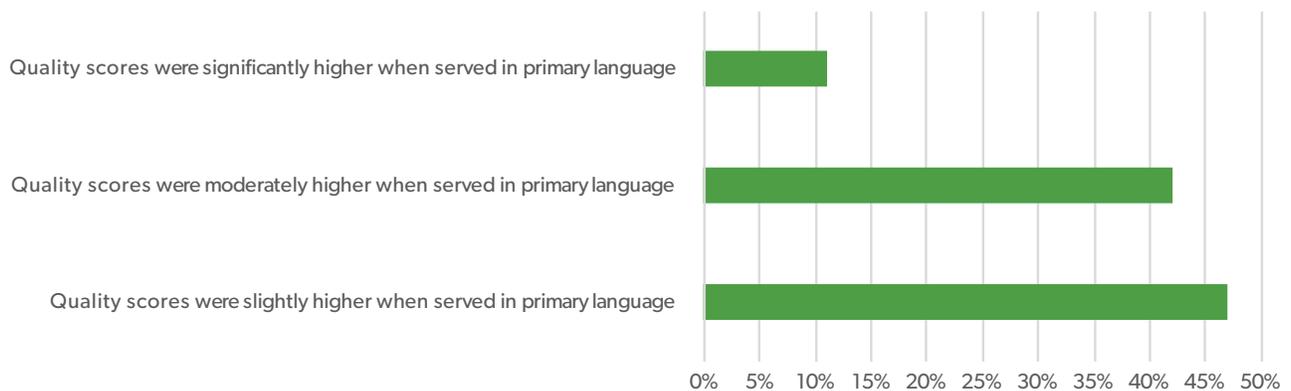
LOST IN TRANSLATION

Leveraging Language to Deliver an Exceptional Customer Experience

Have you identified improvements in quality scores when customers receive service in their native language versus those who do not?



What was the difference in quality scores between customers served in their primary language and customers who were not served in their primary language?



LOST IN TRANSLATION

Leveraging Language to Deliver an Exceptional Customer Experience

It should come as no surprise that people are more satisfied when they're able to communicate in their native language but, is that enough to inspire organizations to invest in providing an omnilingual experience? It would seem advantageous in an era that sees an increasing number of companies using their customer service as a competitive differentiator. The findings from this study reinforce that there is a definite need for contact centers to develop a strategy to support their non-primary language speaking customers that go beyond just offering an apology.

"Omni-lingual support doesn't need to be hard," added Tom Tseki, VP & GM of GeoFluent and Customer Care Solutions at Lionbridge. "By taking a phased approach, contact centers can scale their efforts to meet customers' expectations. For example, begin with over-the-phone interpretation, which will be used to build and customize linguistic assets to multilingual-enabled digital and self-service channels. As the digital channels are added, this will reduce the amount of inbound calls which in turn drives down OPI costs. That's a win for consumers and for brands."

Conclusion

For a majority of organizations, their global footprint is growing, and the diversity of their customer base is expanding. As such, the need for these brands to deploy a more strategic, scalable, and cost-effective approach to language support is inevitable. Those who serve both their primary and non-primary language speaking customers equally as well across all channels of service will see improvements in contact quality, customer satisfaction, net promoter score, first contact resolution and much more.

57% of the organizations surveyed in this study would consider the ability to offer service in a customer's native language across all contact channels as a competitive differentiator. They recognize that it presents a challenge but would be willing to invest in the right translation solution to ensure that they're able to deliver on customer needs and preferences. The most significant benefit that they expect from a translation solution is better translation quality. As this study revealed, however, organizations must also ensure that they have a method of measuring quality equally across all channels and languages of service.

Over the past few years, the emergence of new channels and an increased emphasis on the customer experience has captivated the attention of contact center leaders. They've gone to great lengths to ensure that their people, processes, and technologies are aligned with the new normal of conducting business in the contact center. There have been incredible efforts to deliver exceptional experiences, but they've been focused on the contact center's primary language of service and have left many non-primary languages speaking customers with a subpar experience.

It is imperative for this emphasis on language to shift to include non-primary languages considering that this study revealed over three-fourths of contact centers have customers who are not native speakers of the primary language(s) that they serve and that a majority of customers expect service in their native language when contacting a brand. The expected increase of non-primary language contacts will only further amplify the disparity if little to nothing is done.

There is great opportunity ahead for those who choose to seize it. Don't miss this chance to improve the quality of your customer experience and increase your effectiveness in serving a global customer base.

LOST IN TRANSLATION

Leveraging Language to Deliver an Exceptional Customer Experience

About This Report

This research report was made possible by the underwriting support of Lionbridge (www.lionbridge.com/geofluent). ICMI research sponsors do not have access to research participant information, including individual survey responses.

About ICMI

The International Customer Management Institute (ICMI) is the leading global provider of comprehensive resources for customer management professionals -- from frontline agents to executives -- who wish to improve customer experiences and increase efficiencies at every level of the contact center. Since 1985, ICMI has helped more than 50,000 organizations in 167 countries through training, events, consulting, and informational resources. ICMI's experienced and dedicated team of industry insiders, trainers, and consultants are committed to helping you raise the strategic value of your contact center, optimize your operations and improve your customer service. ICMI is a part of UBM plc (www.ubm.com), a global events-led marketing services and communications company.

About GeoFluent

GeoFluent, a SaaS offering from Lionbridge, eliminates language as a barrier between contact centers and consumers. By providing omni-lingual support across the omni-channel, brands improve CX, increase revenue and decrease cost and risk. GeoFluent integrates with leading contact center communications platforms to maximize customers' existing investments, enabling them to support 95% of the world's GDP languages. To learn more, visit www.geofluent.com.

About Lionbridge

Lionbridge enables more than 800 world-leading brands to increase international market share, speed adoption of products and effectively engage their customers in local markets worldwide. Using our innovative cloud technology platforms and our global crowd of more than 100,000 professional cloud workers, we provide translation, online marketing, global content management and application testing solutions that ensure global brand consistency, local relevancy and technical usability across all touch points of the customer lifecycle. Based in Waltham, Mass., Lionbridge maintains solution centers in 27 countries. To learn more, visit www.lionbridge.com.