

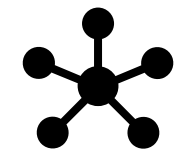


Customers Drive, You Navigate

Your Contact Center Roadmap to Customer
Care Success

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Introduction

In 2008, only 2.2% of contact centers used the cloud. Ten years later, that number has increased by a factor of nine, to 18% (Fluss, 2018). A 2013 assessment of contact center trends identified smartphones as “something to watch”; today, smart technology – such as wearables, phones, and the Internet of Things (IoT) devices – is a given (2018).

Today’s customers choose online as the primary channel for contacting a business (Microsoft, 2017). Technology changes quickly, and a successful contact center plans accordingly. By assessing customer experience and call center agent needs, contact center leaders can **use technology as a competitive advantage** in an increasingly digital and complex world.

Figuring out how to keep your contact center ahead of the curve can be a challenge. It requires an acute awareness of contact center technologies in use and those just being developed (Legget, Schoeller, Powers, & Ephraim, 2015). Leaders in the contact center sphere – from the CEO to the IT Director – are responsible for drawing that Roadmap for the future. The questions driving these decisions are complex:

- How do we **integrate the various technologies** for a seamless omnichannel experience for our agents and customers?
- How do we decide which technologies to **upgrade**, to **replace**, to **modify**, or to **stop supporting**?
- How do we **transition these technologies**, not just to minimize disruption, but improve the experience we offer?
- What does the future look like for our business, and how do we ensure we are in the **right place doing the right thing**?
- What **expertise** are we missing?



These are just the first in a series of questions business leaders might ask as they begin to examine a path forward. To make this process simpler and more precise, contact centers bring in technological expertise experienced in transitioning call center technology. A process-oriented assessment can make the difference between a mish-mash of disparate tools and a forward-thinking omnichannel experience customers can rely on.

That's where Mindsight's Contact Center Roadmap comes in.

SECTION 1

A CONTACT CENTER ROADMAP

A Contact Center Roadmap



The Contact Center Roadmap is a versatile service. Whether preparing the contact center to roll out a new mobile app, performing a contact center overhaul, or just fine-tuning certain processes, our team is ready to help deliver real world solutions to real world problems. The Contact Center Roadmap is generally organized under one of the following four umbrellas:

- **Business Process Improvements**
- **Contact Center Systems and Tools**
- **Custom Applications and Integrations**
- **Managed Services**

We prefer to talk candidly and work transparently, and by understanding your business goals, we can chart an achievable roadmap to meet them.

Business Review and Strategic Analysis

BUSINESS REVIEW

The Contact Center Business Review is a four-hour onsite strategy session with analyses and recommendations as deliverables. Our engineering consultants, who specialize in **contact center technology**, **strategy**, and **solutions**, will meet with your management team to gather as much information as possible to inform our analysis.

STRATEGIC ANALYSIS

The Strategic Analysis takes this one step further. It combines a 1- to 4-week onsite evaluation with a customized report and presentation on the findings. Our engineers will jump into the shoes of the customer, shadow agents, and observe the strengths and weaknesses of the department. Through these procedures, we gain the most insight and provide the best recommendations.



Omnichannel Considerations

One of our goals is to help contact centers meet the future head on. Today, the contact and call center must support multiple avenues of communication for their customers; however, that alone is not enough (Contact Centers Must Go Digital Or Die, 2015). In addition to calls, chat, self-service, social media, and other channels, your **contact center must create a seamless experience** between each of these platforms (Microsoft, 2017).

Seamless Communications

For example, if a customer chats with a representative on your website and then calls a few minutes later, that chat conversation should be at the immediate disposal of the agent. It's no longer about multi-channel. It's about omnichannel, and in an omnichannel contact center, there are **no silos of communication**.



Omnichannel Experience

You want to create a unified experience, regardless of channel, and we want to help you get there. We have experience integrating the following solutions into a seamless experience, both for your customers and the agents who serve them.

- Phone
- Chat
- Text
- Email
- Apps
- Social media

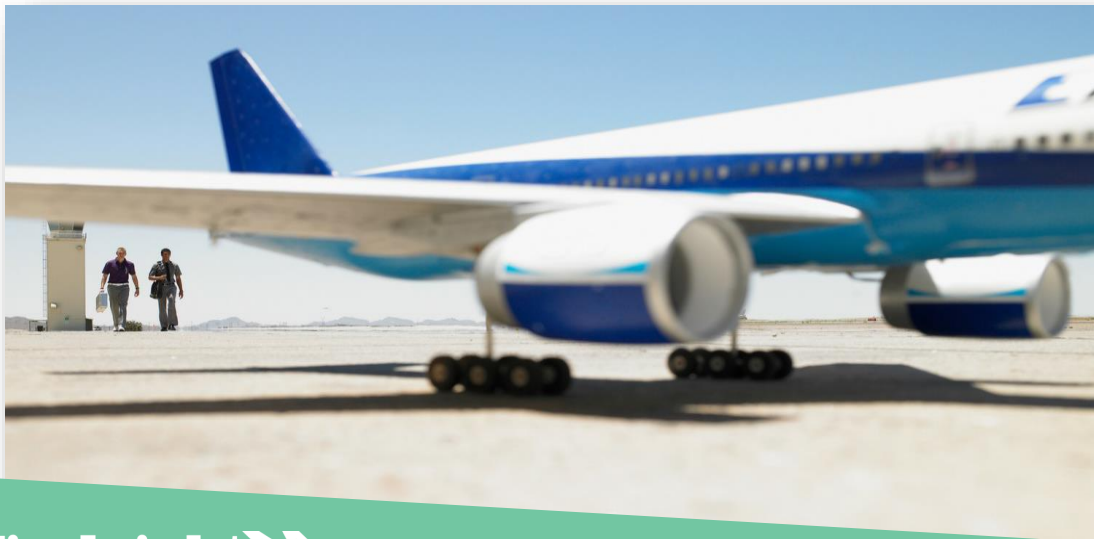
Customer Journey

Each channel needs to be intertwined so that the customer journey is seamless. We'll work to integrate the multiple channels into a customer experience worth writing home – or at least tweeting – about.

THE AIRPORT ANALOGY

Imagine if you called your friend on the phone to ask for a ride to the airport. The friend happily agrees, and you finalize your travel plans. Two days before your flight, you text that same friend if they can still give you a ride, and suddenly they have no recollection there was even a phone call in the first place. It would be irritating to say the least. It would seem like the friend simply did not care enough to remember that first phone call.

This is not far off from the customer's experience without the omnichannel approach.



Break Down Silos

Omnichannel breaks down the silos between channels of communication. If call recordings, chat histories, recent tweets, and emails are all immediately accessible to the contact center agent from one interface, the agent can respond with educated, informed answers. It creates the **experience of a continuing conversation regardless of the channel** in which each interaction was held.

Customers just want to get where they are going. Omnichannel makes that possible.

Your Airport Taxi Service Has Arrived

We've been building contact centers since 2004, and our engineers have a broad range of technical experiences. As we analyze your systems and create a Roadmap for your business, we will utilize our experience and knowledge of omnichannel processes to ensure your team remains agile and competitive.

SECTION 2

CURRENT STATE ANALYSIS

Current State Analysis



When you first enter the Zoo, you usually locate a map, either in a pamphlet or a large directory. On today's visit, everyone is begging to go see the giraffes – there's a newborn who is just walking! Staring at the map, the first thing you do is look for the big red dot that says, "You Are Here."

That makes sense. You have to know where you are if you want to know how to get to where it is you want to go.

Sound complicated? It isn't.

Find Where You Are

That's the basis of the Current State Analysis. The first step in developing your Contact Center Roadmap is determining where your contact center is at this very moment. What are the experiences of your current customers and call center agents? What is the current workflow for your IVR system? Are calls being dropped? Do you have high average handling times (AHTs)? Are customers transferred multiple times?

Current State Analysis

To go about answering these questions, our senior engineers will perform a series of tasks to gather the necessary information:

- Interviews
- Call Analysis
- Current Customer Engagement Operations Evaluation
- Data Gatherings Review
- Gap Analysis
- Customer Journey
- Business Process Improvements
- Quality Management and Survey Strategies

INTERVIEWS

Over the course of two days on-site at your contact center, our engineers will meet with everyone involved, from the **Director of IT** and the **Director of Contact Center** to **supervisors, managers,** and **agents**. These interviews provide valuable insight into the perspectives of the entire team.

We start with a kick-off meeting, which acts as a sort of public forum. Everyone involved is invited. Our senior consultants will review the agenda and open the floor to discuss concerns. This acts as a catalyst as the engineers dive into two days of individual meetings. Once everyone is on board to get started, next come the individual interviews.

Interviews Add Perspective

Contact centers work by focusing on communication and collaboration, which is why individual interviews play such a fundamental role in the Contact Center Roadmap. While our consultants will have a firm grasp on the broad concerns by this point, the **individual interviews provide nuanced insights** into the specific way each member of the team views the current state and the path forward.

All Members Are Vital

In each interview, we'll discuss specific concerns of both the contact center team members and the customers they serve. Our goal is to meet with anyone who interfaces with customers – from Human Resources to the Helpdesk – to better understand the full customer journey. By **isolating the component elements of the customer experience**, our engineers can better begin to formulate a path forward.

What We Ask

Here are some examples of the kinds of topics covered in interviews:

- Inefficient/ineffective processes
- Common customer complaints
- Past system failures
- Response protocols
- System go-arounds, backdoors, or bypasses

Customer Service Representatives' Insight

Call center agents are an important part of this process. As you already know, **agents are the doorway for the customer journey**. By uncovering agent experiences, we can understand the nitty-gritty of what is working and what isn't. Call center agents know the anecdotal customer pain points that affect the businesses bottom line and reputation.

CALL ANALYSIS

Once our initial set of interviews are complete, our senior consultant team regroups and dives deep into the actual caller experience. We'll pull up a chair beside your agents, listen to calls in real-time, and examine recordings of past conversations. Our agents will even act as customers, calling the contact center to experience it from the customer point-of-view.

Why We Do It

Performing a call analysis gives our team hard data with which to work. We need to **understand the current functionality of the contact center** to move it forward. The calls you record give invaluable insight into the processes currently employed. By understanding what went wrong or what went right in a previous call, we can perform a process-oriented analysis to identify if current protocols are effective.

Call Analysis Steps:

- Analyze recordings
- Listen to calls in real-time
- Perform mock calls
- Test and verify system functions



CURRENT CUSTOMER ENGAGEMENT OPERATIONS EVALUATION

We take a holistic approach to evaluating customer engagement. The contact center is part of a complete business – from Human Resources to Marketing. Understanding how each of these components impacts customer engagement is important to determining a best path forward.

Strategic Customer Engagement

This analysis really comes down to understanding the multi-faceted ways your organization engages with the customer and whether those different methods are strategically aligned. For example, if your organization uses a twitter handle to market events, does your customer response team monitor comments and respond to customers on that same user platform? This is a strategic operational evaluation and provides a useful qualitative data set for developing customer care response protocols within your systems.





DATA GATHERINGS REVIEW

In this review, the senior engineering team dives deep into your technical system. They will look at **configurations and capabilities**, making sure your current system is doing the most it can do for you. To make any recommendations for how to move forward, our engineering team must understand the current state of your system(s).

Best Options Going Forward

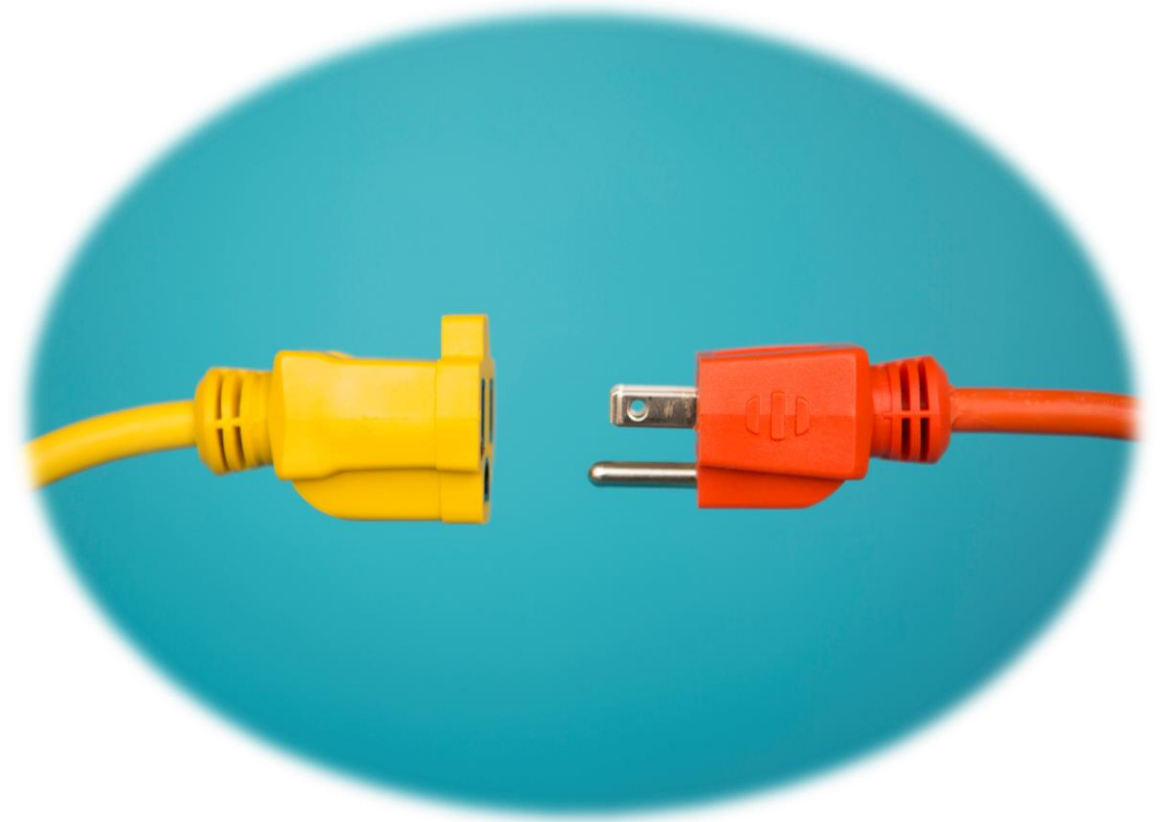
During this process, the engineering consultants gather the data that helps them determine what the best options are going forward. Is it better to upgrade? Switch platforms? Move a certain process to the cloud? Our team considers **what is best for your customer experience goals**, and how your current system supports – or interferes – with those goals. The data gathered in this process is documented in the Roadmap, so you have a clear picture of your current state. With your goals and analysis in hand, our team then examines what might be missing.

GAP ANALYSIS

Now that our senior consultants know where you are and where you want to be, they can begin to determine what might be missing in the middle. The gap analysis **identifies if your current platform meets your goal-oriented needs**. Sometimes, this might mean activating an un-used capability within your current platform. Other times, it might mean switching platforms or adding a new piece of software. It all depends on where you are and where you want to be.

Mind The Gap

By figuring out what is missing from your current toolkit, our engineers can **assess how to fill in those gaps**. You may already have the tools at your disposal. Our team will know where to look. If those gaps can't be filled with the tools you already have, our consultants will be able to make smart recommendations based on best practices and years of experience.



CUSTOMER JOURNEY

How do your customers come to you? How do you communicate with them? Understanding the customer journey is really about **empathizing with your customers**. We put ourselves in your customers' shoes to best understand their needs. Then, we look at what your organization is doing to meet your customers where they are, with what they want.

A Wrong Turn Isn't A Dead End

Not every customer journey is straightforward or easy. Part of our job is identifying **where the journey may take a wrong turn**. In the contact center, this can mean many things. For example, perhaps the IVR of your system is complicated or frustrating for consumers. Or, maybe customers are upset when they are asked to repeat information they already shared with your chat system.

Engagement Drives CX

By identifying the journey your customers take to and within your business, we can **consider how the current system is – or isn't – helping your customers along the way**. Then, we can make recommendations to improve that engagement. In the end, this depends on the individual goals you have for your contact center.

240% INCREASE

In performance-related
business outcomes when
engaged customers interact
with engaged employees.*

*Gallop. Analytics and Advice About Everything That Matters, 2014

Mindsight 



Client Quote

"I want to share my gratitude for the **flawless execution, extreme patience, advanced technical knowledge, and support** provided to our team by Mindsight. It's for reasons such as these we have partnered with Mindsight for support within this critical business space." - Tony Valenti, IT Director at Superior Ambulance

BUSINESS PROCESS IMPROVEMENTS

Mindsight has over 15 years of experience in the contact center, so we know a thing or two about effective business processes. Our senior consultants can **examine the contact center processes** you have in place to see if and how those protocols are meeting the needs of your team and your customers. We know contact center best practices, and we can help ensure your contact center is utilizing this fundamental knowledge.

What Fix Will Work?

Perhaps your PCI Compliance Officer sees a system upgrade as an ideal fix for recent compliance issues; however, that effort is futile if a different department is still writing credit card numbers down on paper and walking them over to billing.

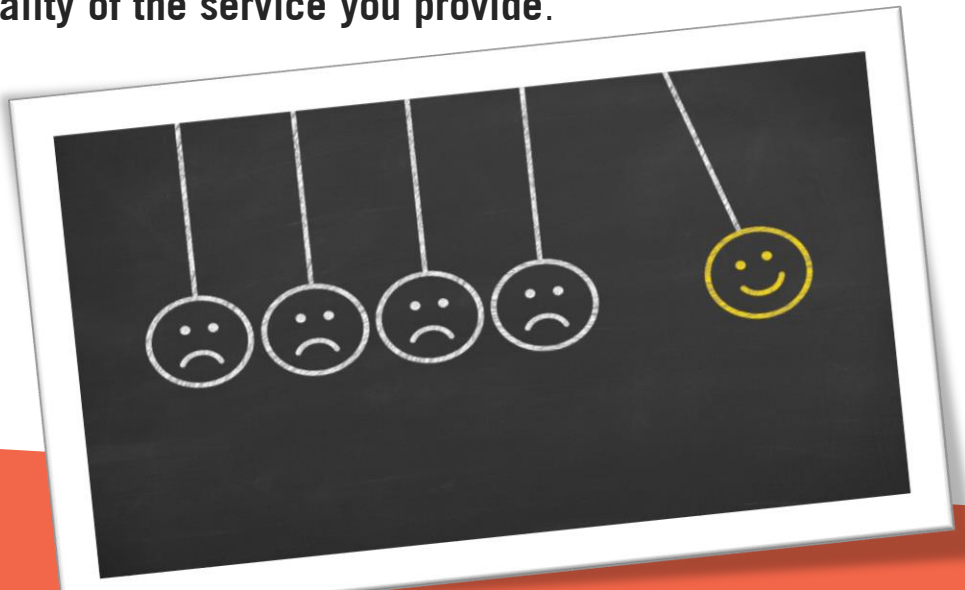
Streamline Protocols

Our team can make recommendations for how to streamline these types of protocols to improve data protection measures, business processes, and system security.

QUALITY MANAGEMENT AND SURVEY STRATEGIES

“This call may be monitored or recorded for quality assurance purposes.”

Quality assurance purposes falls under quality management, which is really about the customer journey. Quality management is all about consistency and the customer experience. The best data you have for measuring your success is right at your fingertips – whether you analyze recordings, “whisper” or “barge” into agent calls, or examine chats, emails, and social media – **every customer interaction is a chance to assess the quality of the service you provide.**



Using Recordings To Support Business Objectives

It isn't just a matter of collecting the data, though. Using the data to effectively measure and target business goals is another matter. Our consultants can help you **utilize your resources**, so you can provide the quality for which you strive. Not only do we comb through recordings in our call analysis, but we recommend quality management strategies that will support your business objectives.

Surveys Gather Data Seamlessly

Survey strategies support quality management by providing yet another tool to **collect customer feedback**. Our engineering consultants can help integrate survey strategies into your system seamlessly to gather additional data without interrupting the customer journey.

BENEFITS

No matter what path you choose, the current state analysis provides valuable information to your leadership team. At the end of this process, you will have a **succinct, cumulative report** that dictates precisely what is happening in every facet of your contact center. The path may veer, but knowing where you are now is the only way to move forward.

Data To Use How You Want

The data we collect is yours to use. Interviews might bring to the forefront concerns that previously lay hidden. By analyzing calls, we gather critical data you can use to make informed decisions about protocols, customer care management, and response processes. We will **identify exactly how your system is configured** presently, and **whether it is optimized for your business objectives**. We'll make **expert, data-driven, process-oriented recommendations** that prioritize what you want and what you need.

Plan-Of-Action

Not only do our engineers analyze every aspect of your contact center, from business strategy to technical capabilities, but we also **develop and offer you a specific plan-of-action** – a Contact Center Roadmap – that will take your organization from where it is to where it needs to be.



SECTION 3

CONTACT CENTER ROADMAP IMPLEMENTATION PLAN

Implementation Plan

After performing a Current State Analysis, our team will create a Roadmap for your contact center. The Roadmap combines all the data gathered during the analysis and aligns it to your business objectives. Our engineers then develop a plan of implementation, complete with a timeline. The implementation design is based on **critical technologies**, **efficiency**, and **best practices**.

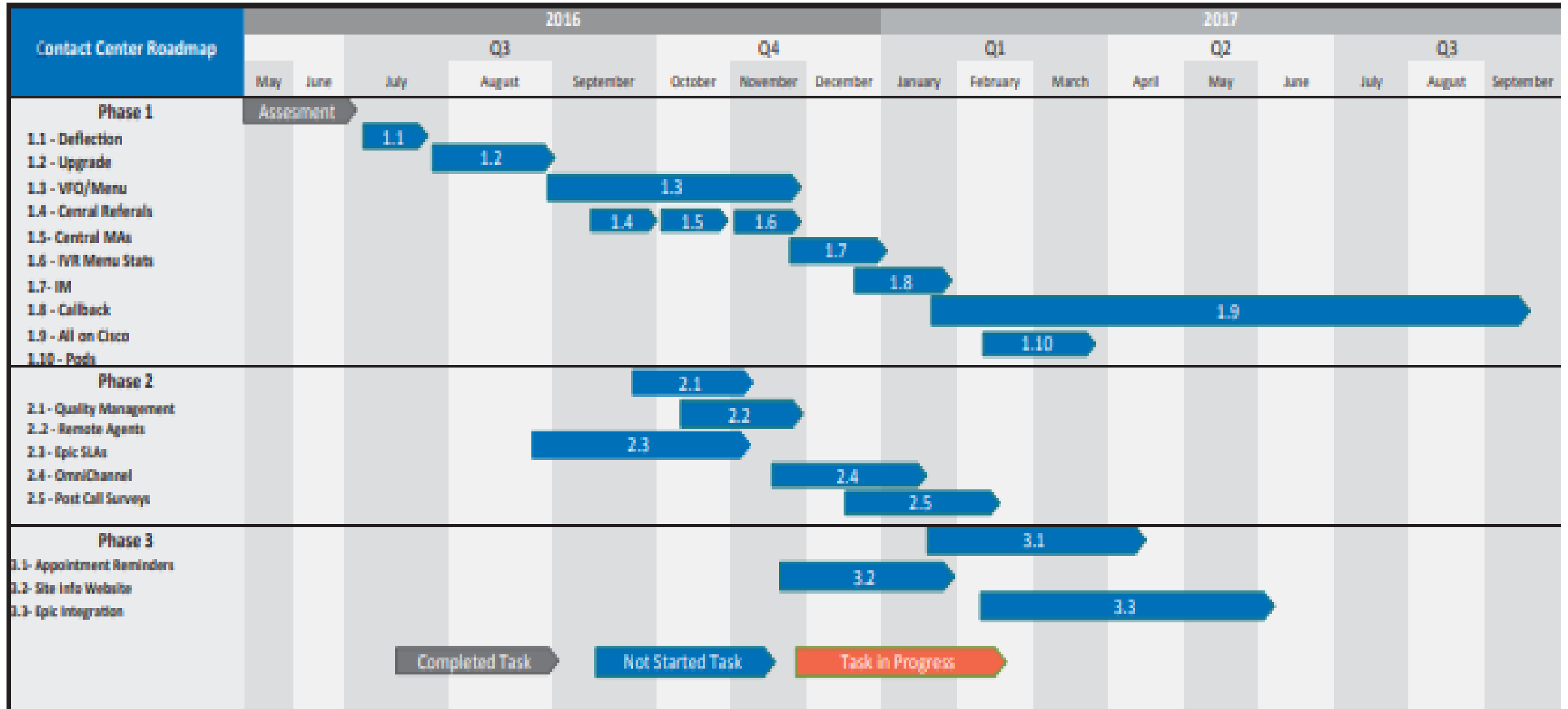
PRIORITIZE CRITICAL TECHNOLOGIES

Certain aspects of your contact center systems are vital to your everyday business; without them, your team cannot work. It is therefore necessary to ensure that in updating, upgrading, and transitioning contact centers you maintain these critical functions.

We Create An Efficient Visual Timeline

In designing an implementation timeline for your contact center Roadmap, our team **prioritizes the functions of your contact center**. Your Roadmap is a GPS set to “fastest time”. By critically analyzing the tools needed and obstacles in the way of reaching your goals, our team develops an efficient timeline that puts your contact center at its destination as soon as possible.

SAMPLE VISUAL TIMELINE



CONTACT CENTER BEST PRACTICES

Technology hurtles ahead, and the regulations that govern how technology is used safely come up right on its heels. Staying up-to-date on large-scale industry changes can be a challenge. New contact center innovations and emerging technologies can greatly affect your center. Our team pays attention to changes in regulations, from HIPAA compliance to GDPR, and everything in between. We'll work with your team to ensure it is **meeting compliance standards**.

Process-Oriented Excellence

Best practices also apply to **how we implement technologies** in your contact center. Process-oriented excellence rests on a firm foundation of verification and testing, so there is no doubt as to your systems' functioning. This ensures your contact center not only continues to provide great customer care engagement but is also prepared to transition to even better support options.



THE APIs OF MINDSIGHT: ANALYZE, PLAN, AND IMPLEMENT

Formulating your Roadmap takes careful consideration, as hundreds of factors are analyzed and coordinated to determine the best path forward so you can reach your business goals. We gather data from the people and systems that keep your business running and analyze it to define the current state.

Now we know where you are and where you want to go. Next, we determine a plan for how to get to your destination. Let's go back to our zoo example.

- We found the “You Are Here” dot on the map – your **current state**.
- We found the giraffe’s enclosure on the map – where you want to go, or your **business goals**.
- We created a path that is efficient, effective, and obstacle-free – how you are going to get there, or your **Roadmap**.

Next up, we need to take the journey, follow the Roadmap, and see the view from the giraffe exhibit in person. And, maybe even pick up some cotton candy on the way.



SECTION 4

ENGAGEMENT DELIVERABLES

Engagement Deliverables

The data we gather in the Current State Analysis and organize into your Contact Center Roadmap is only helpful if you can use it - see it - understand it. That is why we ensure the Roadmap produces the following hands-on deliverables that you can use, share, and implement:

- Executive Summary
- Roadmap
- Full Formal Presentation of Data and Recommendations

In any technological transition, there are three rules you must follow. First, **data is only useful if it is actionable**. That means it needs to be accessible, both in its depth and its presentation. Second, **balancing innovation and business continuity is of the utmost importance**, so even highly technical system changes to the contact center need to be carefully aligned to business strategy. Third, **sometimes less is more**. A 500-page report likely contains dozens of invaluable nuggets of information, but what good is that if you can't find it? Can't use it? If it's buried within useless dribble?

You're In The Driver's Seat

The Contact Center Roadmap evolved over time to incorporate this knowledge. It's **actionable, technically-sound, business-friendly**, yet **succinct** enough to review, share, consider, and use. Everything we learned in our review of your systems will be included, putting you in the driver's seat as you decide which road to take to reach your destination.

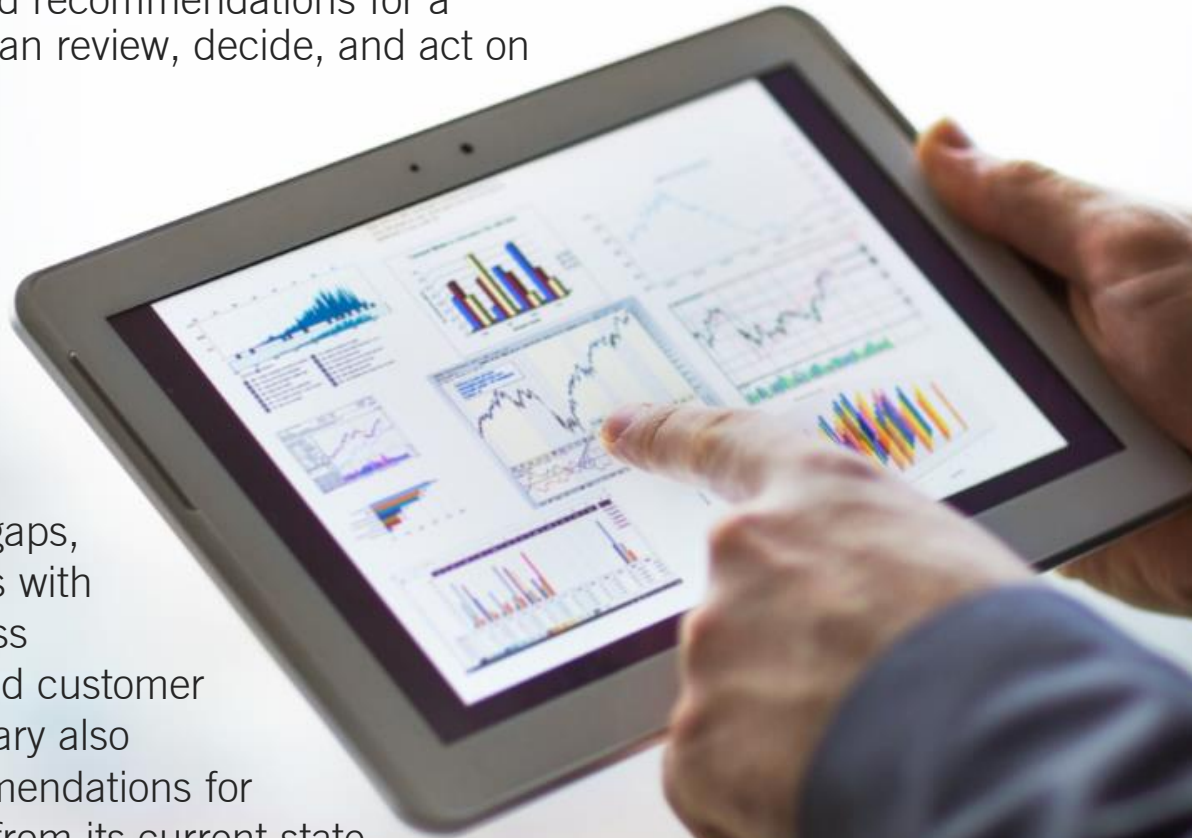


EXECUTIVE SUMMARY

An Executive Summary is, by **definition**, meant to summarize a report with key findings and recommendations for a leadership team, who then can review, decide, and act on that information.

One-Page, Key Findings

This summary is a one-page document that captures the essential findings from our analysis. It will include current system information gaps, current features, integrations with third-party products, business processes, known issues, and customer journey findings. The summary also includes the primary recommendations for moving your contact center from its current state to where you want to go.



Business Review and Strategic Analysis

Your Contact Center Roadmap is unique, since it is based on your current state and business objectives. After reviewing the nuances of your business processes, our engineering consultants determine which **strategies, technologies, and software needs** should be implemented for you to reach your goals.



They will also identify what **Key Performance Indicators** (KPIs) you should be using to measure success and how to get started on your main objectives. Within the report, this information will be organized under the following categories:

- Situational Analysis
- Feature Comparison and Known Issues
- Technology Recommendations
- Business Process and Strategy Recommendations
- Quick Wins and Next Steps
- Implementation Timeline and Strategy

Whole-Team Engagement

The report speaks to both the business and technically-inclined members of the leadership team, putting everyone in a position to engage, consider, and make informed decisions about the business journey.

Situational Analysis

This is the summation of the Current State Analysis as it relates to business objectives. The analysis examines the **current state of your systems**, CRM, customer engagement channels, agent data, the customer journey and pain points, and gaps.

Feature Comparison and Known Issues

Oftentimes, inactivated capabilities are present in the tools you already use. We will lay out the different features, how they compare, and how they relate to both your business objectives and known issues in the contact center.

Technology Recommendations

After performing the Gap Analysis, we can determine **what tools might be missing** from your current system. We will make recommendations on the different features, capabilities, software, and platforms available and strategically assess how best to move your contact center towards its goals.

Business Process and Strategy Recommendations

Mindsight believes firmly that business and technology must work hand-in-hand to improve processes throughout your organization. As we examine your current platforms, we will also consider:

- Workforce management
- Onboarding procedures
- Reducing agent attrition rates
- Increasing agent satisfaction
- Gamification strategies
- Remote/work-from-home agent capabilities
- Relevant customer personas

Our Roadmap contains an analysis of these elements and recommendations for strategically aligning these metrics and capabilities with your objectives.

Quick Wins and Next Steps

Recommendations are only useful if you do something with them. We will not only provide a long-term Roadmap – the one that takes you to the newborn giraffe calf everyone is so excited to see – but also quick wins – a snow leopard tanning on a cliff, a gibbon monkey swinging from a pole, an elephant bathing in a pool. Every part of the journey should be relevant, quantifiable, and valuable.

Implementation Timeline and Strategy

The Roadmap will contain a visual portrayal of the Roadmap that lays out precisely how the recommendations, strategy, and objectives will unfold. We understand that as contact center leaders, you need to **minimize risk in any transformation**, digital or otherwise. The Roadmap's timeline and analysis enables you to assess how to meet your goals and how to prepare for change.





Presentation of Data and Suggested Improvements

Our consultants, who have followed you through the process – from broad goal-planning to the nitty-gritty of your response protocols – will present the Roadmap to your team in a formal presentation, providing your team a chance to disseminate the data and assessment, ask questions, and discuss implementation and next steps.

Individual Component Cost Estimates

We recognize that there is value in each piece of your Roadmap, so we provide monetary estimates for the individual Roadmap components, whether it's installing a new feature or transitioning everyone to a new platform. As you plan strategically, this information gives the power to adjust for your own business needs.

SECTION 5

NEXT STEPS

Next Steps

Follow The Roadmap To Your Destination

We are prepared to implement the recommendations we make, so once you and your team are ready to get started, we'll be at your side. Over 90% of Mindsight's engineers have advanced certifications. We earn our claim to expertise.



Got The Keys?

Once you have your Contact Center Roadmap, you are in the driver's seat. Every bit of data from your contact center, from metrics around customer call times to qualitative analysis of your business protocols, is yours to use. We trust that our expertise and transparency will speak for itself. With our analysis in hand, you are ready to take the next step and journey successfully to your destination.

You just have to put the car in 'Drive'.

Get started on your
Contact Center Roadmap journey today

Get To The Finish Line

Once your team completes its review and analysis of your Contact Center Roadmap, you can trust Mindsight to see it through to the finish line. You'll get a photograph with the giraffe calf and maybe even feed her a few green leaves!



To Your Destination And Beyond

Plus, you'll be ready for your next big contact center adventure. Technology is changing constantly, and by keeping up, you put your business in position to take full advantage of every innovation as soon as it hits the market. **Emerging technologies impact the customer experience** and your customer care initiatives every day. By focusing on providing seamless experiences to those who rely on your business, you are preparing strategically for the future.

Mindsight: Technology, Transparency, Trust

We rely on our own expertise and honest nature to speak for why working with us to implement the changes your contact center needs makes sense. Our clients – some of whom have been with us for 15 years – trust us to **monitor their systems, keep their businesses running, and protect mission critical data** that drives business continuity.

Partners In Technology And Cotton Candy

For us, your Roadmap is the first step in developing a partnership that works to put your business where it needs to be. We're ready when you are. We'll even pick up the cotton candy.

About Mindsight

Mindsight is a technology consulting firm that provides thoughtfully-crafted and thoroughly-vetted perspectives to its Chicago area clients' toughest technology challenges. Mindsight's recommendations come from its experienced and talented team, and are based on a solid understanding of its clients' unique business and technology challenges. Mindsight believes in being transparent and candid, which means more productive interactions and less pretense. The company provides the best thinking to achieve the best result. When you need a different point of view, you can count on Mindsight.



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Start Your Contact Center
Roadmap Journey

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