A Need to Improve the Customer Journey: Opportunities for Telecommunication Companies in the Middle East
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Leaders in the telecommunications market in the Middle East are amongst the world’s largest. Between 2013 and 2018, revenue for telecoms services in the region will grow at a compound annual growth rate (CAGR) of 2.9%, reaching US $96 billion in 2018. Add this to the increasing penetration of social media usage across the region and telco companies have a lot of opportunity for growth. But to create sustained long-term growth, remain competitive, and improve customer loyalty, companies need to make sure they deliver a better customer experience across all touchpoints in their customer’s journey.

Using the Clarabridge solution, we examined Facebook and Twitter comments to understand how telecommunications companies across Saudi Arabia, the UAE, Qatar, Kuwait, and Oman are currently viewed by their customers. We applied Clarabridge sentiment scoring, a measure of positivity or negativity on an 11-point scale from -5 to +5, with 0 being neutral, to a mix of Arabic and English customer comments.

We specifically analysed online feedback for the following 8 companies:

- STC (Saudi Arabia)
- Mobily (Saudi Arabia)
- Du (UAE)
- Etisalat (UAE)
- Zain (Kuwait)
- Ooredoo (Qatar)
- Vodafone Qatar (Qatar)
- Omantel (Oman)

Between 2013 and 2018, revenue for telecoms services in the region will grow at a compound annual growth rate (CAGR) of 2.9%
A Look at the Data

Customers in Saudi Arabia and the UAE drive the highest volume of social chatter across Facebook and Twitter, with Saudi Arabia claiming 45.2% share of voice and the UAE garnering 34.8%. Qatar (10.4%), Kuwait (8.5%) and Oman (1.2%) follow in that order.

Breaking this volume down by company, Saudi Arabia’s Saudi Telecom Company (STC) has 32.4% of the share of voice by brand. Du and Etisalat, the two telco players in the UAE, follow STC’s share of voice, at 14.6% and 10.7% respectively.
Analysing Customer Feedback at Key Journey

In order to analyse the social data and make it relevant for telco companies, we used Clarabridge to build out a typical customer journey map. We categorised the social data for each of the 8 telco companies based on the key touchpoints along the customer journey map. (Refer to graph below).

This is a good way for companies to identify customer pain points and how to improve the customer experience at key moments of the customer journey.

In this research paper, we take a closer look at the following key touchpoints in the customer journey map for the 8 telco companies:

- Buying a Device
- Billing and Payments
- Call Centre Experience

This is followed by a Customer Churn analysis.

With Clarabridge, we can drill into each journey touchpoint to understand:

- what is specifically driving the customer sentiment score
- what the key themes are
- the positive and negative issues raised by customers, and why.

This helps businesses make more informed strategic and tactical business decisions.

Customer sentiment for the 8 telcos is quite low across the customer journey. Although the start of the customer journey is a bit more of a positive experience, sentiment dips later, especially when customers are at customer-support related stages. Unsurprisingly, the call centre experience and customer support touchpoints generate some of the highest volumes of chatter on social media. Customers also talk a lot about the retail experience and network service.

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Customer Journey Analysis: Buying a Device

Customers are more satisfied at the beginning of their journey, when buying a device. Customers are specifically very happy with the length of the purchasing process and the availability of certain phones, especially the iPhone 7. To continue delivering a positive experience, brands should look at ways to continuously streamline the purchasing process, ensuring front-line team members are trained and educated on the latest technology and phone releases.

<table>
<thead>
<tr>
<th>Sentiment</th>
<th>Date</th>
<th>Source</th>
<th>Sentences</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>08/19/2016</td>
<td>🍊</td>
<td>we got the phone note 7 with very nice package from Medhat Moussa he was very helpful and good educated</td>
</tr>
<tr>
<td></td>
<td>10/14/2016</td>
<td>🍊</td>
<td>Best phone ever</td>
</tr>
<tr>
<td></td>
<td>10/04/2016</td>
<td>🍊</td>
<td>Ooredoo Qatar thank you me Ayesha for your fast response and if there is any information about official releasing day of the iPhone 7</td>
</tr>
</tbody>
</table>
Customer Journey Analysis: Billing & Payments

The billings & payment process drives the lowest customer sentiment, with an average score of -0.37 out of -5.00. Customers are most frustrated by hidden or unexpected fees that show up in their bills. Once they see these charges, customers call into customer support, increasing call centre costs and further hurting sentiment scores for the call centre.

Companies can alleviate this customer pain point in several ways, for example, by having an FAQ page on the website that explains the charges. Companies can also ensure call centre agents are trained in how to effectively respond to customers complaining about their bills.

### Billing & Payments

<table>
<thead>
<tr>
<th>Sentiment</th>
<th>Date</th>
<th>Source</th>
<th>Sentences</th>
</tr>
</thead>
<tbody>
<tr>
<td>📬</td>
<td>06/09/2016</td>
<td>🌐</td>
<td>but always they send hidden charges in my bill mostly I called to customer service they even do not know how to solve the problem when ever I call they spoke the system is down but if the customers service system is not working properly then how they handle the customer problem they all are uncompetant people please I have request to all are you do not use di services and even I will inform in my family as well they are charging you extra means for fake things</td>
</tr>
<tr>
<td>📬</td>
<td>07/07/2016</td>
<td>🌐</td>
<td>i had an issue for additional fee coming to my bill</td>
</tr>
<tr>
<td>📬</td>
<td>08/04/2016</td>
<td>🌐</td>
<td>I went with to cancel my du line as having issues in billing.</td>
</tr>
<tr>
<td>📬</td>
<td>07/26/2016</td>
<td>🌐</td>
<td>The only time DU gets in touch with me is when you send me my invoice bill.</td>
</tr>
</tbody>
</table>

### Heat Map for Billing & Payments Touchpoint

- Billing - Satisfaction / الفواتير - رضا
- Billing - Covering Amount Owed / الفواتير - سداد المبلغ
- Billing - Up to Date / الفواتير - تحديث الفواتير
- Billing - Accuracy / الفواتير - دقة الفواتير
- Billing - Late Payment / الفواتير - التأخير في الدفع
- Billing - Roaming / الفواتير - التجوال / الدولية
- Billing - Set Up Fees / الفواتير - رسوم تنظيم الخدمة
- Billing - Activation / الفواتير - استلام التميم
Customer Journey Analysis: The Call Centre

The call centre experience is one of the most talked about touchpoints on social media, but has one of the lowest customer sentiment scores. We drilled into this touchpoint to understand the key topics customers are talking about and found that “advisor personality” is driving the most feedback.

Looking deeper into this topic, we can pull out the exact customer comments related to “advisor personality”. Customers are most frustrated because agents are unable to resolve their issues over the phone. This is primarily because customers are unable to even speak to an agent and instead experience very long hold times. Frustrated, customers hang up and turn to social media to voice their complaints and request a call back.

Problems are further compounded when the customer never receives a follow-up call after requesting one, driving satisfaction scores even lower. Complaining on social media further hurts overall brand reputation. Customers are also more likely to churn, as detailed in the next section of this report.

One way that companies can improve the call centre experience is by using customer comments to identify the most common customer complaints or questions coming into the call centre. This insight can then be used to help improve training for call centre agents, create self-service offerings online, or guide the content for FAQ sections on company websites.

Customers bouncing across feedback channels demonstrate how critical it is for companies to listen to the voice of their customer across all feedback platforms. Oftentimes, when customers don’t get their questions answered through one channel, they will turn to a different platform instead. By listening across feedback channels, companies have a much better understanding of emerging trends, risks, and areas of customer concern across the entire business.
CUSTOMER COMMENTS PREVIEW

<table>
<thead>
<tr>
<th>Sentime...</th>
<th>Sentences</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>اتمت شركة غير جديرة بالاحترام ... موظفيكم أغلق الخط من غير ما ينفي الحديث معي</td>
</tr>
<tr>
<td></td>
<td>لن يصدر عنا غير سوء الخدمة وسوء التعامل</td>
</tr>
<tr>
<td></td>
<td>Your employee disconnected the call while I was talking to him.</td>
</tr>
<tr>
<td></td>
<td>موظفين 101 كل واحد يقول شي، ولا مر辄 اتصلت وكان في تطابق، هل هي عدم كفاءة؟</td>
</tr>
<tr>
<td></td>
<td>Only the issues when we need your Costumer care support nobody want picture the phone day before yesterday I call your costumer care since morning to evening 8:PM no one answer if you need more prove I will call your costumer care and I will record the video can be put social media do you want it let world come to know I can do it</td>
</tr>
<tr>
<td></td>
<td>Big name and worst speed and also their agents do not have manners to talk with customers</td>
</tr>
<tr>
<td></td>
<td>I pay 350 Saudi Riyals, I am not getting the service for free, some human response would be nice.</td>
</tr>
<tr>
<td></td>
<td>خدمة العملاء، لقاء من هنا</td>
</tr>
</tbody>
</table>

Word Cloud for the Call Centre Experience
Customer Churn Analysis

Poor customer service and better competitor deals drive customer churn for the 8 telcos analysed in this report. The data shows that customers are primarily unhappy with bad attitude from front-line agents and not having their questions answered. This is in line with the low satisfaction scores for the call centre experience.

Analysing social media data is a good way to measure why customers are churning and how to improve loyalty. This insight also guides competitive benchmarking by helping brands leverage their competitors’ weaknesses for marketing campaigns and strategic decision making.
**Competitive Benchmarking**

Using Clarabridge, we conducted a competitive benchmark analysis specifically for the 8 Middle East telco companies, and ranked their performance using customer sentiment scores. This is a snapshot view of the competitive insights we uncovered:

<table>
<thead>
<tr>
<th>Company</th>
<th>Sentiment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobily</td>
<td>A+</td>
</tr>
<tr>
<td>Zain</td>
<td>A+</td>
</tr>
<tr>
<td>STC</td>
<td>A</td>
</tr>
<tr>
<td>Omantel</td>
<td>B+</td>
</tr>
<tr>
<td>Etisalat</td>
<td>B+</td>
</tr>
<tr>
<td>Vodafone Qatar</td>
<td>B</td>
</tr>
<tr>
<td>Du</td>
<td>B</td>
</tr>
<tr>
<td>Ooredoo</td>
<td>B-</td>
</tr>
</tbody>
</table>

**WHAT ARE THE TOP 3 BRANDS DOING ESPECIALLY WELL?**

**Network Coverage:** Easy access to data across the world is a big driver of positive customer sentiment.

Sentiment: “There is no problem of my WiFi because I am using 4G stc router”

Sentiment: “It is really a great experience to be able to use same Qatari number for calls and internet in the whole world especially in GCC countries where the data package is 2G which is quite sufficient for extensive internet use.”

**Buying a Device:** Well-trained, helpful staff make the purchasing process much easier for the customer.

Sentiment: “we got the phone note 7 with very nice package from Medhat Moussa he was very helpful and good educated”

Sentiment: “I got an answer within seconds.”

Sentiment: حب جوالي الجديد! تحدثت مع مصطفى في الفرع، وخبرني عن السعر الجيد الذي قام به

“the data package is 2G which is quite sufficient for extensive internet use.”
The Middle East telecommunications market is at a crossroads. Companies have benefitted from a period of rapid growth over the past ten years. However, as markets mature, especially in high income countries such as Kuwait and Saudi Arabia, brands need to differentiate themselves in the marketplace. Prioritising an improved customer experience and delivering on customer needs can help telcos stand out from the crowd and win customers.

Understanding the customer journey can help brands pinpoint the areas with the most opportunity for improvement. For telcos in the Middle East, the early stages of the journey have better satisfaction scores. Brands can take advantage of this by ensuring they always have the latest technology in stock and that front-line team members are trained up on key features and new releases.

Once a customer purchases a product, however, customer satisfaction declines drastically. Key opportunities for improvement lie in creating more transparent billing processes and improving customer service, especially in the call centre.

For the call centre, priority needs to be placed on decreasing hold times and improving first touch resolution. Currently, one of the biggest threats to brand reputation is that customers leave the call centre unsatisfied and turn to social media to publicly air their frustrations. Companies can use customer feedback comments to identify key topics of complaints or questions. These insights can then be used to improve the customer service, for example through improved training for agents, more focused FAQ content, or self-service solutions.

Listening to the voice of the customer offers telecommunication companies in the Middle East the opportunity to truly differentiate themselves from the competition. By analysing customer feedback data, brands are able to identify and alleviate pain points across the customer journey, conduct competitive benchmarking, decrease customer churn and call centre costs, inform marketing campaigns, and ultimately, improve customer loyalty and win new customers.

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About Clarabridge

OUR MISSION
Our mission is to help businesses win the hearts of their customers through emotional intelligence. An emotionally intelligent organization will develop lasting and positive relationships with its customers that transcend momentary challenges and threats.

FAST FACTS
- SaaS provider of customer intelligence and analytics
- 450+ global brands served
- Founded in 2006
- Headquartered in the Washington DC metro area with offices in San Francisco, London, Barcelona, and Singapore
- Led by CEO and founder Sid Banerjee, named as Washington Business Journal’s most admired CEO in 2014
- 250+ employees worldwide
- Offers the world’s most comprehensive customer intelligence platform, powering customer experience management programs
- Served customer experience professionals, marketers, customer care leaders, and operations managers
- Key clients include ADP, Cisco, Dell, G.E. Healthcare, Orbitz, PetSmart, Red Roof Inn, Unilever, and Verizon

OUR SOLUTION
Clarabridge helps you find, understand and use customer feedback that is hidden in silos across your organization and in other public forums. Putting customer intelligence to work empowers your business to make big and small decisions and drive your customer experience management programs.

Clarabridge offers the world’s most sophisticated customer intelligence platform. This platform connects to all sources of customer feedback and analyzes it to detect emotion, context, and root causes, as well as predict future customer behaviors. The analysis is presented in dashboards and reports and can be used for driving action with customer engagement, case management, and alerts.

WHY CLARABRIDGE?
Connect to every source of customer feedback.
Clarabridge is the only technology platform that can analyze feedback data from all sources, all in one centralized hub. Clarabridge analyzes data from social media, online chat, call center recordings, agent notes, surveys, online review sites, and many other sources, in more than 10 languages, including Arabic, French, Chinese and English.

Smash silos, and empower your entire organization.
See customer feedback come to life in user-friendly dashboards, reports, and alerts. Share this information through your entire business, and create a customer-centric culture.

Tune the solution to meet your specific business needs.
Even though we offer out-of-the box industry templates to get you started, you can tune the system to your exact business needs to ensure that the information is relevant and actionable.