2014 REPORT

ICMI

THE GROWING NEED FOR MULTILANGUAGE CUSTOMER SUPPORT

Research Report & Best Practices Guide

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THE GROWING NEED FOR MULTILANGUAGE CUSTOMER SUPPORT

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EXECUTIVE SUMMARY & KEY FINDINGS

Imagine that it is summer and your refrigerator stops working, or that your heater goes out on the coldest day of winter. Perhaps you are simply trying to track down the birthday present for your child that has gone missing en route to your house. What do you do? You probably contact customer service. Now imagine that none of the self-service tools available are in the language that you speak, and the agent you finally get a hold of is unable to understand you.
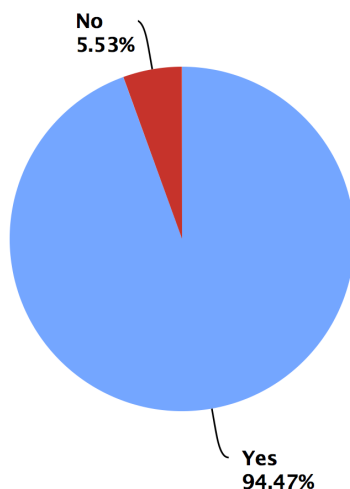
This is the situation for millions of people in the United States. Every day, customers are unable to effectively communicate with brands they do business with.

Even though most companies cite the importance of the customer experience, their non-English speaking population is often overlooked. How is your organization managing engagement, personalization, effort, and loyalty for this important segment of your customer base?

In a January 2014 report on customer experience management, the International Customer Management Institute (ICMI) identified that maintaining and improving customer engagement scores was one of the top 2014 challenges for contact centers. This was reiterated in results from our most recent survey, "The Impact of Multilanguage Support on Customer Experience," wherein the customer experience came in only behind implementing new technologies as a key focus area. Even more striking, 94.5% of customer service leaders said customer engagement and loyalty was an important priority for their overall organization.

Trust Journey Mapping Customer Experience Loyalty CXM CSAT Engagement Brand Differentiation Personalization Confidence Customer Effort

Is customer engagement/loyalty an important priority in your organization?

No
5.53%

Yes
94.47%

Even with that said, and with more and more companies recognizing a strong correlation between loyalty and the customer experience (83.6%), too few contact centers are aware of the explicit initiatives that truly differentiate their brands and customer service.

Has your organization recognized linkages between customer service (the contact center) and customer engagement/loyalty?

No
16.39%

Yes
83.61%
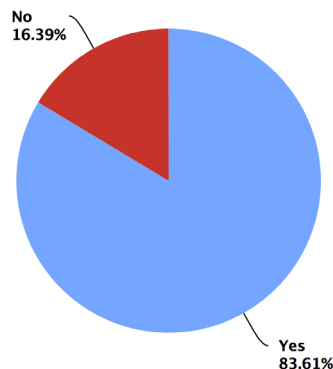
This new ICMI research, underwritten by Voiance Language Services, a subsidiary of CyraCom, focuses specifically on one such initiative – multilanguage customer service. ICMI was interested to know how contact centers were currently supporting non-English language customers and whether or not offering multilanguage support improved the overall customer experience and positively impacted engagement and loyalty.

Why the focus on multilanguage support? Research confirms that the United States is one of the most linguistically diverse countries in the world, with 80% of foreign-born Americans speaking a native language other than English. The U.S. Census of 2011 shows that 21% of the U.S. population aged 5 and over speaks a language other than English at home, and greater than 9% are unable to speak English well enough to transact business over the phone, which causes significant complications for both the customer and the agent in a service interaction.

The U.S. government defines this segment of the population as Limited English Proficient (LEP). These individuals do not speak English as their primary language and have a limited ability to read, speak, write, or understand English.

So what is that customer experience like? How does it feel to a user of a brand or service when they have a question or concern and are unable to communicate the need for assistance? How can companies expect loyalty from a customer if they are unable to converse with them in the time of need?

Although we didn't specifically ask about LEP people in this study, we did heavily concentrate on the 86.0% of contact centers that acknowledge they have customers who are not native English speakers.

Do you have customers who are not native English speakers?

No
13.95%

Yes
86.05%
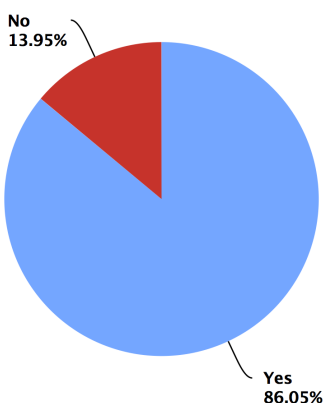
We were also curious about the familiarity of language interpretation services, specifically phone interpretation: a three-way call between a bilingual interpreter, an English-speaking agent, and a non-English speaking customer. According to this survey, 43.3% of contact center leaders say they are somewhat familiar with the concept, while 35.3% are very familiar and 21.4% have no knowledge of interpretation services at all. Anecdotally, the decision to utilize language interpretation often appears to be at the corporate level, which may be a reason the contact center is not as acquainted with the service.

How familiar are you with language interpretation services?
Specifically phone interpretation which is a three-way call between a bilingual interpreter, an English-speaking agent, and a non-English speaking customer.
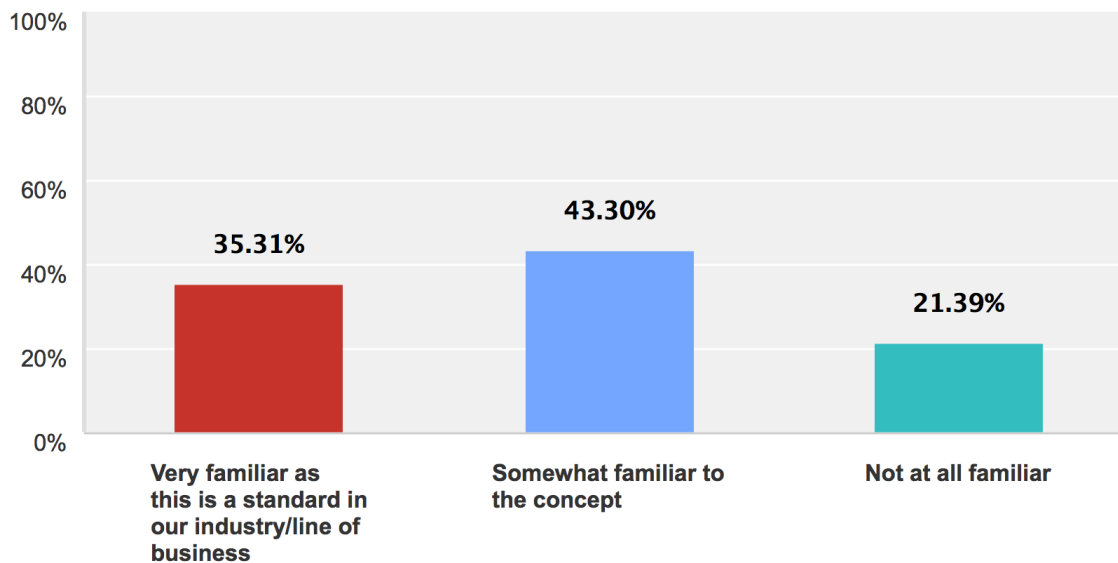
Language interpretation services should be a consideration in any multilanguage strategy, and this report will identify several reasons why. One important factor? 52.7% of organizations say their external interpreters receive equal or better CSAT scores than their internal bilingual agents!

KEY FINDINGS:

- 86% of contact centers report having non-English speaking customers.
- Only 66% have formal customer support options in a language other than English.
- Over half realize that offering support in a customer's native language is a competitive differentiator.
- 72% said support in a customer's native language increased their satisfaction with customer support, while 58% said it increased loyalty to the brand.
- 58% said their internal agent productivity and efficiency improved once they partnered with a language interpretation service.
- Over 70% said their multilingual customers were positively impacted by having language interpretation services.

STUDY DEMOGRAPHICS

The ICMI contact center community consists of nearly every role and level within a customer service organization. This not only provides an accurate representation of the sentiments and tactics currently being demonstrated in today's contact center, but also the anticipated trends and focus areas. The 443 respondents to this survey were primarily executives (17.7%), directors (18.8%) and managers (30.4%). Also participating were operational managers and analysts from training, product, human resources, workforce management, and QA (8.8%). Additional insight was provided by contact center supervisors (7.0%), and information technology (6.6%). A few agents (1.8%) and industry consultants (5.7%) rounded out the respondent mix.

Titles of interest included: VP Customer Care, Business Excellence Manager, Director of Operations, Manager of Workforce and Quality Management, Director of Contact Center Continuous Improvement, Director of Global Support, Director of Customer Operations - Americas and EMEA, Strategic Planner, Business Excellence Manager, and Customer Experience Analyst.

North America and the United States specifically, was the most represented region, although contribution to the study came from all over the world.

Participation spanned across all industries with financial services (banking and insurance), healthcare, and consulting accounting for the top verticals at 20.0%, 10.0%, and 8.0% respectively. Technology (hardware and software communications), education, and software each represented 4.6% with another 4.3% coming from both the business process outsourcer (BPO) sector and telecom.

Over 55% of the responding organizations operate primarily within the public sector, with 40.5% in private, and the remaining 4.5% saying they are either non-profits or have equal presence in both public and private.

60.4% of the participating brands report having end-users in the business-to-consumer (B2C) space, while 34.3% are business-to-business (B2B), and another 5.3% are either servicing government or both B2B and B2C markets.

Contact centers of every scope responded for an objective sample size, with those having 10-49 agents (28.4%) and 250 or more (21.3%) representing the majority.

How many agents work in your contact center(s)?

Category	Percentage
Less than 10	12.29%
10 - 49	28.37%
50 - 99	16.55%
100 - 249	17.73%
250 or More	21.28%
N/A	3.78%
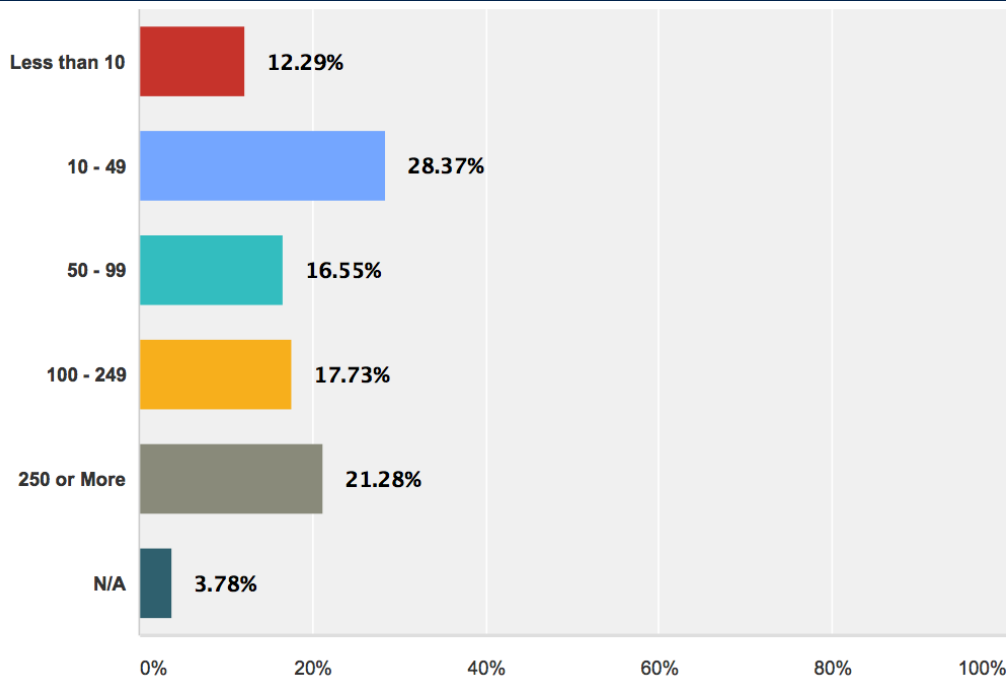
As is typical within the ICMI community, the majority (72.7%) report customer service as their primary function, with another 33.5% helpdesk, 28.0% a blend of service and sales, and 14.5% strictly telesales.

What is your contact center's primary function?
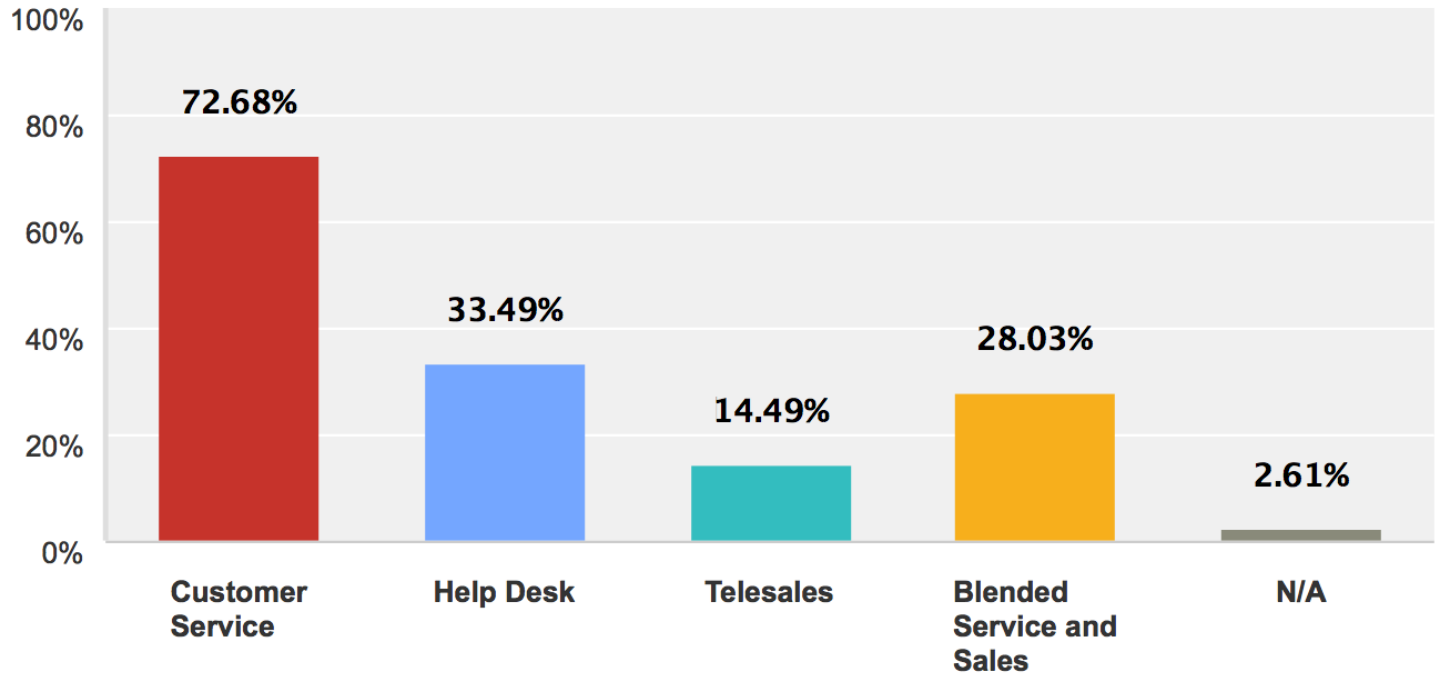
Of the survey respondents, about half (48.0%) are operating on a premise-based infrastructure, while only 14.6% are pure cloud. 29.1% have a blended mix of both and another 8.4% are uncertain.

What infrastructure is your contact center built upon?
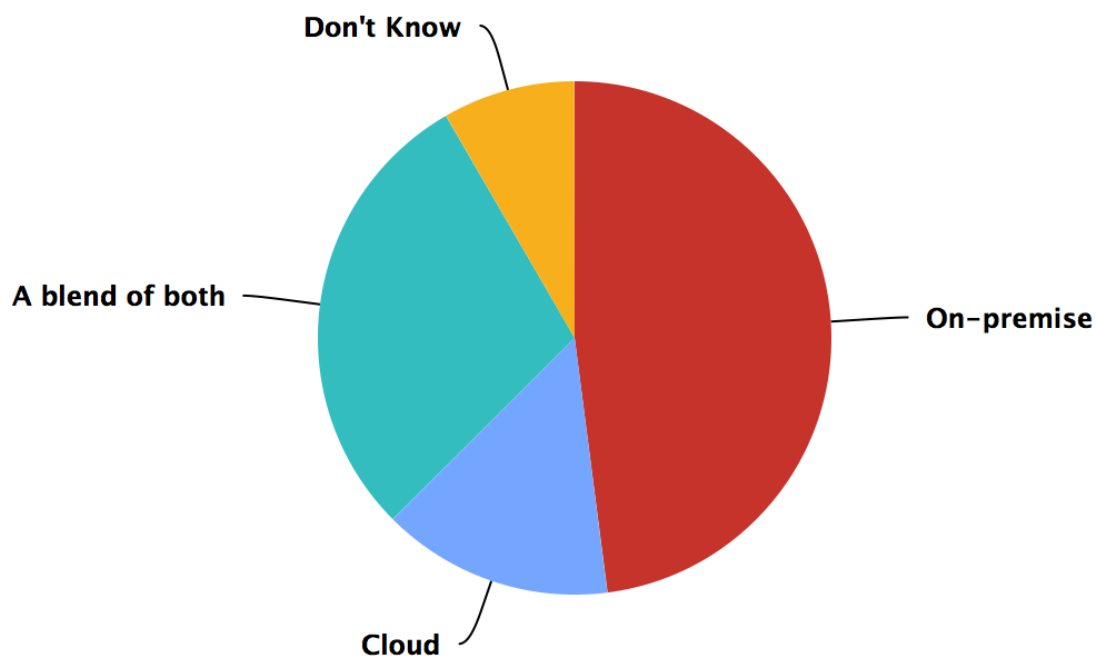
LANGUAGE IN AMERICA

Despite the predominance of English in the United States, many people speak languages other than English, and there is growing interest in how well this group is able to participate in everyday life and interact with the English-speaking majority.

According to the U.S. English Foundation Research there are 321 non-English languages frequently spoken within the United States. To complicate things even further, the languages are not evenly distributed and each state, county and metropolitan area has its own linguistic composition. Added to this is customer predilection — each culture and language represented has a different preference for customer service channels, method of communication, and brand.

Immigration is the primary driver around the diverse population and language mix, as 900,000 Limited English Proficiency (LEP) people come to the U.S. each year. Although the largest numeric increase, (26 million between 1980 and 2010), was for Spanish speakers, as of 2012 more immigrants came to the U.S. from Asia than from any other part of the world. Vietnamese speakers had the largest percentage increase of 599% from 1980-2010!

It's not solely about immigration though, as Brent Leary, co-founder of CRM Essentials, a management consulting and advisory firm points out. "A lot of companies don't think about potential foreign customers as they develop their businesses — until they suddenly discover that social technologies have given them a global reach."

What's unique about the latest Census study is the shift in question direction. Camille Ryan from the Education and Social Stratification Branch says, "The primary purpose of the current questions on language use is to measure the portion of the U.S. population that may need help in understanding English. These data are used in a wide variety of legislative, policy, and research applications as well as for legal, financial, and marketing decisions."

Most people who spoke a language other than English at home also reported that they spoke English "very well". Overall, the proportion was 58% who spoke "very well," with another 19% who spoke English "well," 15% who spoke "not well," and 7% who spoke English "not at all."

English-Speaking Ability for the Top Ten Languages: 2011
(Population 5 years and over who spoke a language other than English at home)

Legend: ■ "Very well" ■ "Well" ■ "Not well" ■ "Not at all"
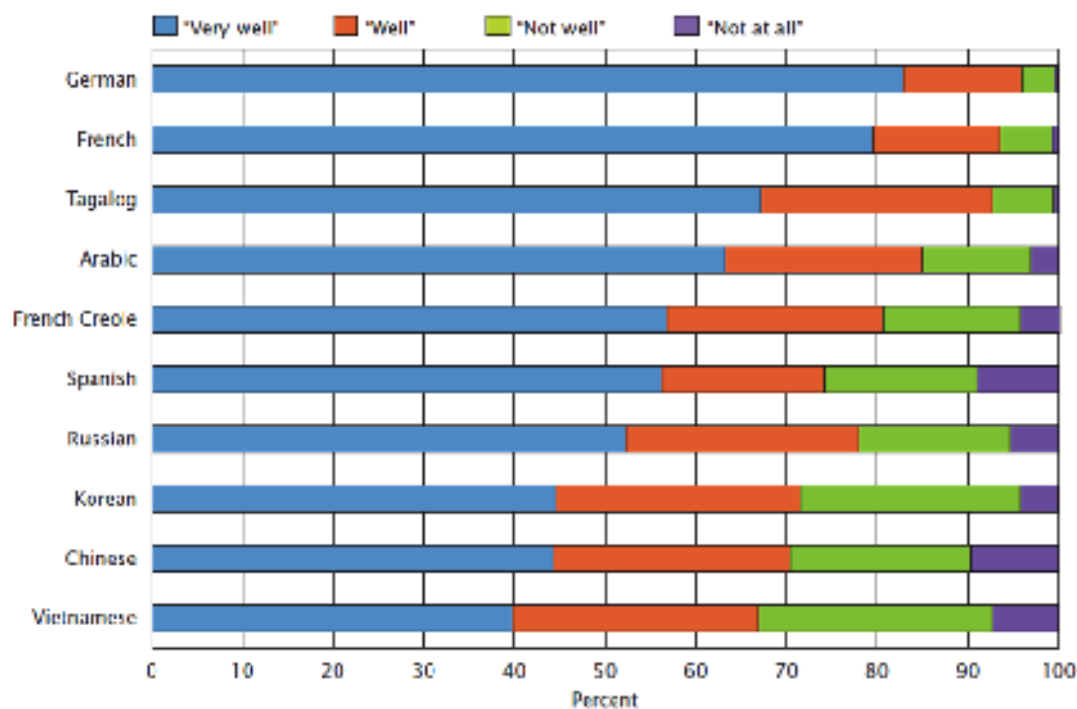
Source: U.S. Census Bureau, 2011 American Community Survey.

People who speak a particular language other than English or cannot speak English "very well" can often be helped with translation services, education or interpreters when needing to interact with the English-speaking majority. It is this demographic, and their need to receive understandable customer service, that we focus on in this report.

The Reality of Multilanguage Support

Although 86.0% of the survey respondents reported having customers who were not native English speakers, only 65.5% admit to formally offering customer support options in a language other than English.

Do you formally offer non-English customer support options?

No
34.48%

Yes
65.52%
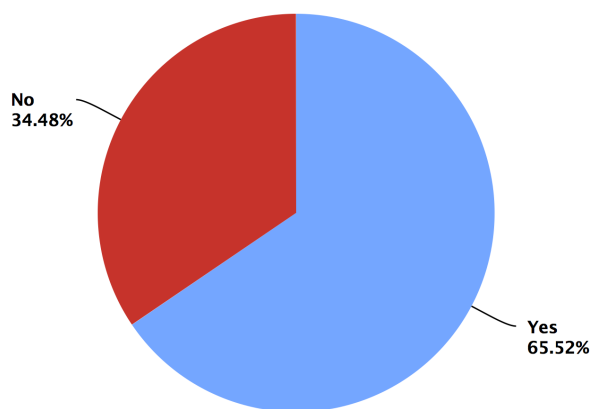
When asked what prohibited the other 34.5% from offering support in additional languages, the primary reason was volume of interactions (82.7%). To a much lesser degree, contact centers also cited a limited budget (32.7%), lack of customer expectations (28.2%), the inability to hire multilingual agents (21.8%), and internal constraints to manage operations (15.5%) or convert resources to another language – both for the customer (15.5%) and the agent (14.6%).

What reasons inhibit you from formally offering multilanguage support?

Reason	%
Volume is too small	82.73%
Customers don't expect it	28.18%
No budget for additional languages	32.73%
Unable to hire agents to speak the languages	21.82%
Unable to manage the multi-languages (QA, scheduling, KPIs)	15.45%
Unable to convert agent resources to multi-language (CRM, training materials)	14.55%
Unable to convert customer resources to multi-language (KB, website, email/chat templates)	15.45%

The service experience is not ideal for most of these non-English speaking customers as over half (54.1%) have agents simply apologizing that their language is unsupported and assistance is subsequently attempted in English. In just over a third of situations the agent either attempts to find someone in the company (36.7%) or the department (33.7%) that can translate or speak the language. In decidedly fewer interactions, the agent utilizes free online translation services (17.4%) or provides a scripted response that no further support attempt can be made (5.1%).

How do you provide customer service to customers that do not speak a language you formally support?

Category	Percentage
Simply apologize that this is a language we cannot support and attempt to handle in English	54.08%
Provide a scripted response and make no further support attempt	5.10%
Utilize free online translation services to translate dialogue	17.35%
Informally find someone in the department that can translate or speak the language	33.67%
Find someone in the company that can translate or speak the language	36.73%

In other cases, customers are transferred to a "pay-for-use" outsourcer or asked to transition to a different channel where support may be possible. "We have a voicemail set-up for customers to leave messages," said a retail call center director. "A non-dedicated bilingual agent will call back when call volume allows."

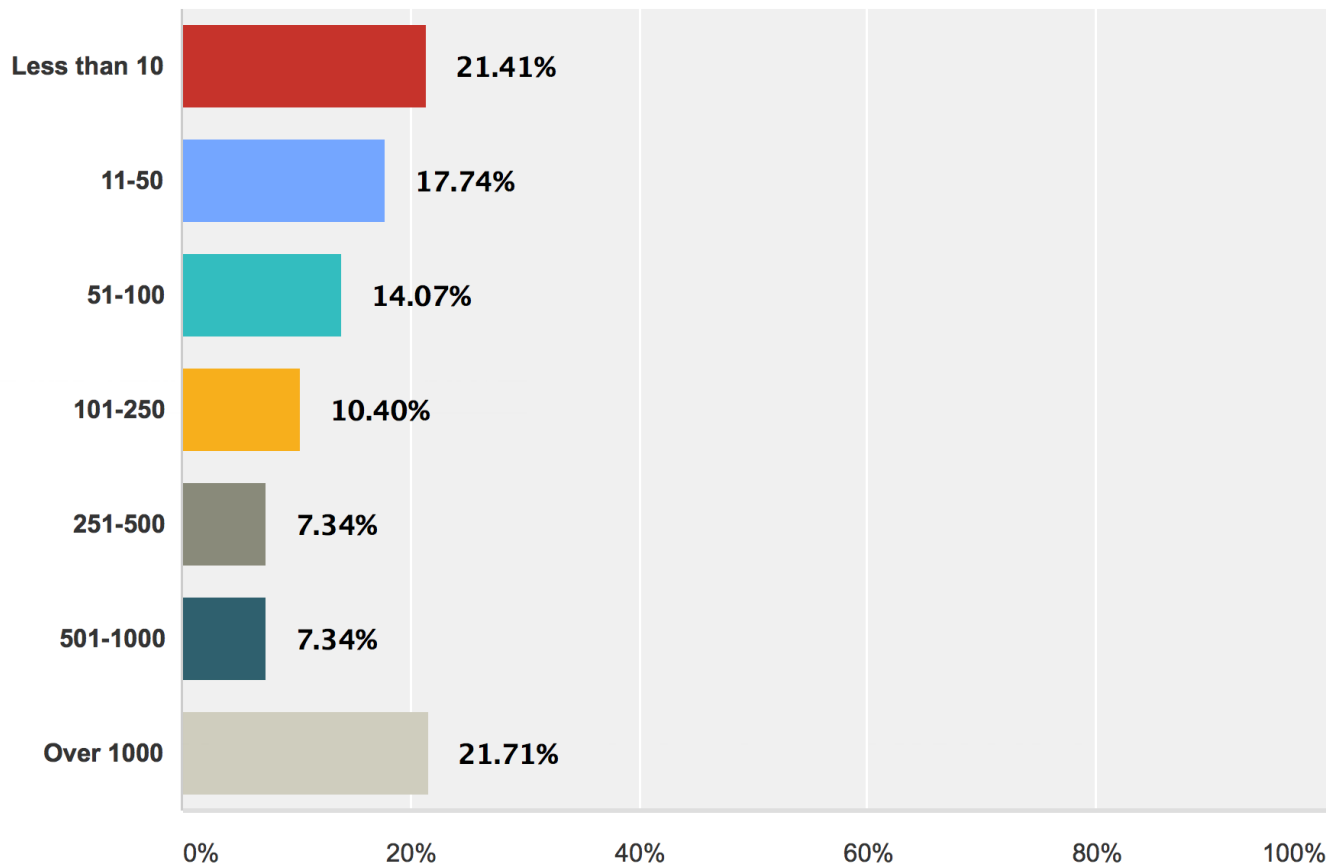For those that do offer language support options, the traditional channels of phone, email, web and self-service reign.

What multilanguage customer service channels are you currently supporting today?

	Spanish	Another Language(s)
Phone – Inbound	74.4%	45.8%
Phone – Outbound	49.8%	28.6%
Email	39.9%	21.7%
Self-Service Phone IVR	36.5%	12.3%
Web	31.0%	18.7%

When we inquired specifically about the non-English phone call volume, contact centers equally report either having very little volume – less than 10 calls per month, or quite substantial volume – over 1000 calls per month.

How many non-English inbound CALLS do you receive per month?

Category	Percentage
Less than 10	21.41%
11-50	17.74%
51-100	14.07%
101-250	10.40%
251-500	7.34%
501-1000	7.34%
Over 1000	21.71%

While providing multilingual service and support may be a relatively new concept to some organizations, it is already a common practice in many industries. Most government agencies or hospitals usually have dedicated staff on hand for most major languages, and interpretation phone lines are often available for others. This holds true for our contact center community, as 94.8% of the government or healthcare respondents say they have non-English speaking customers and are supporting them accordingly.

"Being able to communicate with a customer in their language and in great detail is a requirement in the healthcare industry," said a Sr. Telecommunications Engineer for a large regional hospital. "Having access to a variety of languages at any time the need arises could be the difference between life or death."

"Multilanguage support is a must for City customer service!" exclaimed an IT Analyst for a local government office in Texas. "In the case of an outage or an emergency we can't wait to find someone to speak a customer's language. Spanish is the second predominant language to English in our city, with Vietnamese growing. We have to support them, as they are our customers!"

Likewise for businesses that naturally attract large numbers of foreign customers, their staff is usually trained in basic conversational skills to match their customers' native languages.

That's not to say that multilingual support isn't imperative for other brands and industries, as over half (51.6%) realize that offering support in a customer's native language is a competitive differentiator.

Is the ability to offer support in a customer's native language a competitive differentiator for you?

No
48.40%

Yes
51.60%
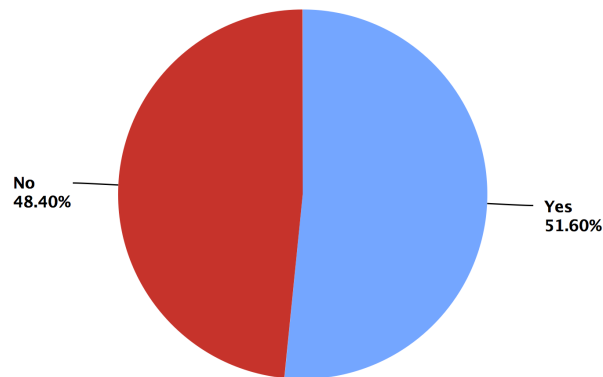
Multilanguage Support and the Customer Experience

When explicitly asked, "Does providing support in a person's native language improve the overall experience for the customer?" over three-quarters (76.0%) answered in the affirmative.

In "Driving Sales and Satisfaction with Multilingual Service," Michael Soon Lee, a diversity consultant and trainer, described the benefit of multilanguage support to the customer experience very well. "When problems occur, it always helps to communicate with customers in the language that is most comfortable for them. If they are already angry and upset, removing the stress and anxiety of speaking another language can help reduce their frustration."

A call center manager for a national non-profit put it simply as, "Our callers trust us more and think we are providing more accurate information when we speak to them in their native language."

The impact on the customer experience appears strong, as 52.8% rated it either a 4 or a 5 on a five-point scale. Only 3.2% said their inability to provide native language support would have zero impact on the customer experience.

How would you rate the impact to the customer experience if you are unable to provide support in their native language?

1	4.53%
2	13.27%
3	26.21%
4	30.42%
5	22.33%
No Impact	3.24%
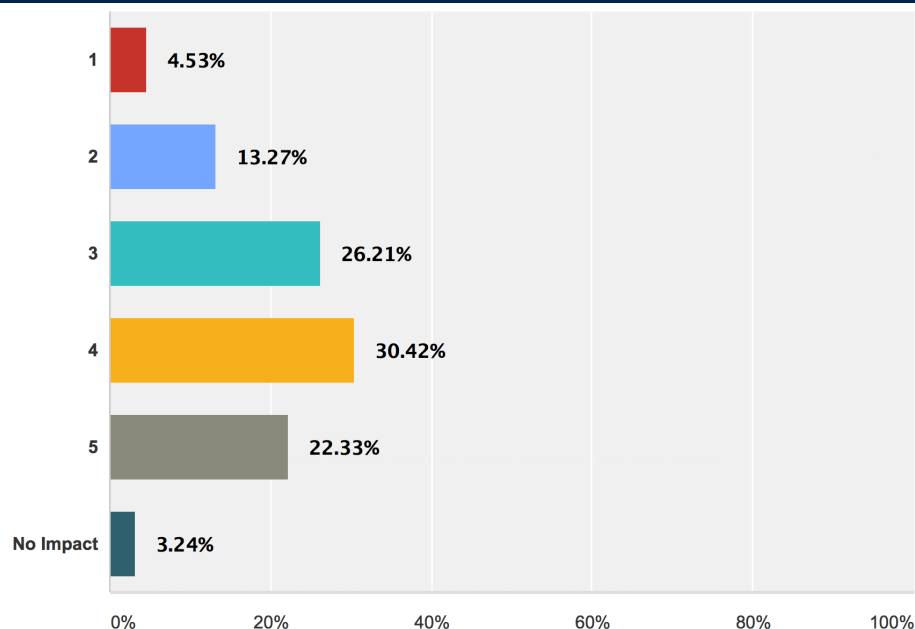
Similarly, 71.5% said support in a customer's native language increased their satisfaction with customer support, and 58.4% said it increased their loyalty to the brand. It's clear that multilingual support has a positive benefit on the customer, the company, and the contact center.

Does providing support in a person's native language increase their loyalty to the company/brand?

Not Sure 28.57%
No 13.05%
Yes 58.37%
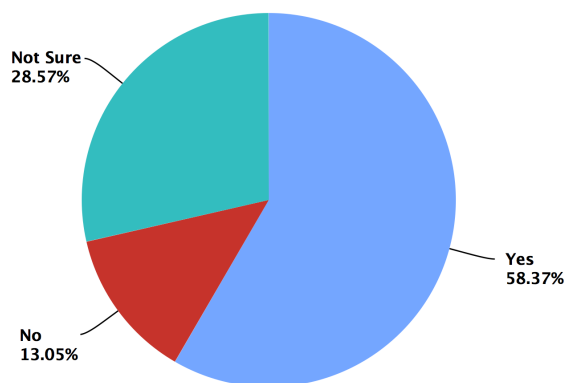
Does providing support in a person's native language increase their satisfaction with customer support??

Not Sure 21.16%
No 7.30%
Yes 71.54%
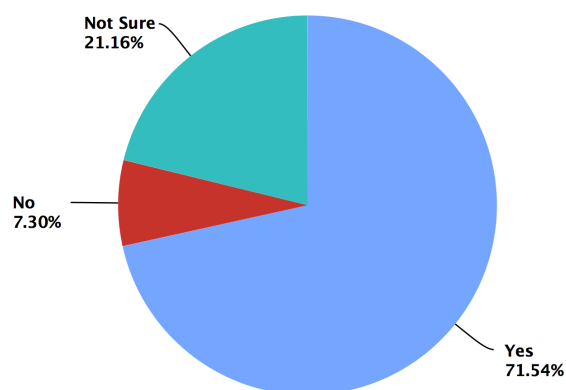
"It's a Good-to-Great differentiator that improves stickiness," says the Member Service Centre Manager of a large Canadian credit union.

What isn't so apparent is the precise influence on the customer satisfaction (CSAT) and net promoter score (NPS) metrics. 42.6% admit they don't know the exact impact that offering non-English support options has on NPS, and an almost equal number (42.9%) acknowledge the same for CSAT.

For those that are measuring it clearly, only 7.1% say multilingual options have NOT improved NPS and 4.4% claim the same for CSAT.

What impact has offering non-English language support options had on NPS?

1-3% increase	7.10%
3-5% increase	9.29%
5-10% increase	12.02%
>10% increase	6.01%
It hasn't increased NPS	7.10%
I don't know	42.62%
We don't measure NPS	15.85%
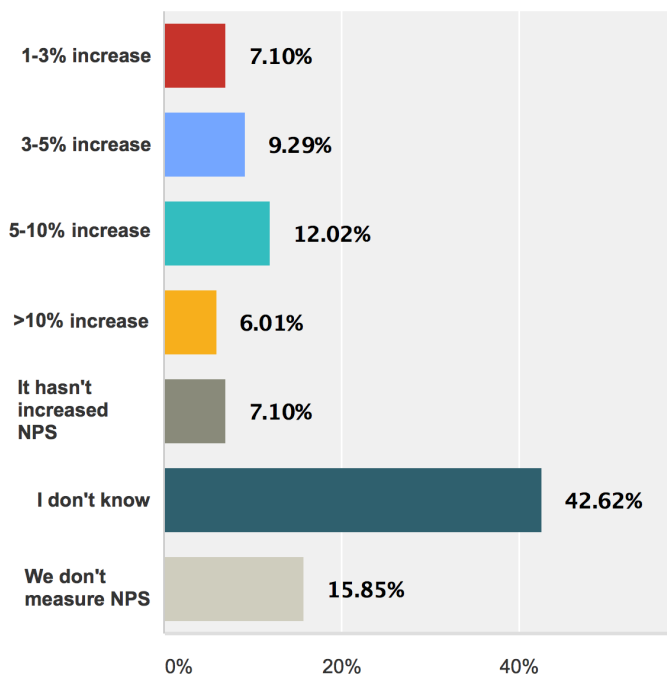
What impact has offering non-English language support had on customer satisfaction?

1-3% increase	7.14%
3-5% increase	13.74%
5-10% increase	12.09%
>10% increase	9.89%
It hasn't increased CSAT	4.40%
I don't know	42.86%
We don't measure CSAT	9.89%
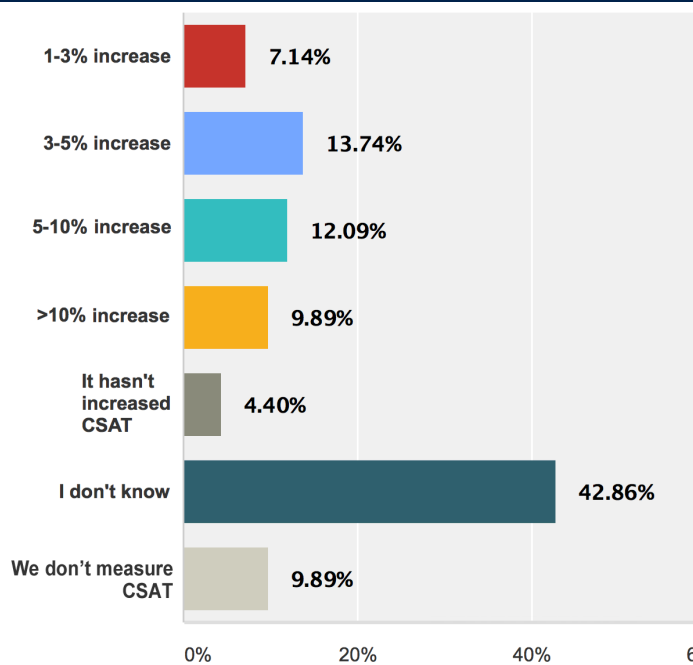
A financial services supervisor approached the benefit from a different angle, "Our customers expect native language support and therefore I do not believe it increases their CSAT. But, it WOULD negatively impact their CSAT if it was not available."

Of course, CSAT and NPS are not the only measurements that tell the customer experience story.

Centers WITH formal multilingual support: How do you currently measure quality of non-English support interactions?

Measure	Percentage
Customer Satisfaction (CSAT) surveys	56.50%
Net Promoter Score (NPS)	25.42%
Customer Effort Score (CES)	10.73%
Employee Engagement survey	19.77%
CRM reporting	23.16%
Quality monitoring scores reported by partner	21.47%
Quality monitoring scores done internally	52.54%
First Contact Resolution (FCR)	31.07%
Percentage of calls placed on hold	12.99%
Percentage of transferred calls	14.69%
Time-to-Response	25.42%
Number of complaints levied against outsourcer or interpretation partner	15.25%

Happily, 91.0% of contact centers with formal multilingual support are measuring the quality of the customer experience. As one can see above, this is primarily happening through CSAT surveys (56.5%), internal quality monitoring scores (52.5%), and first contact resolution (31.1%).

Unfortunately, not all centers are measuring the experience, even when they do have non-English speaking customers. 20.4% of those without formal multilingual support options admit to not measuring the quality of the interaction with those customers. For those that are, it appears to be minimally structured, as while 34.4% use CSAT surveys, an almost equivalent percentage (33.3%) are relaying on anecdotal feedback.
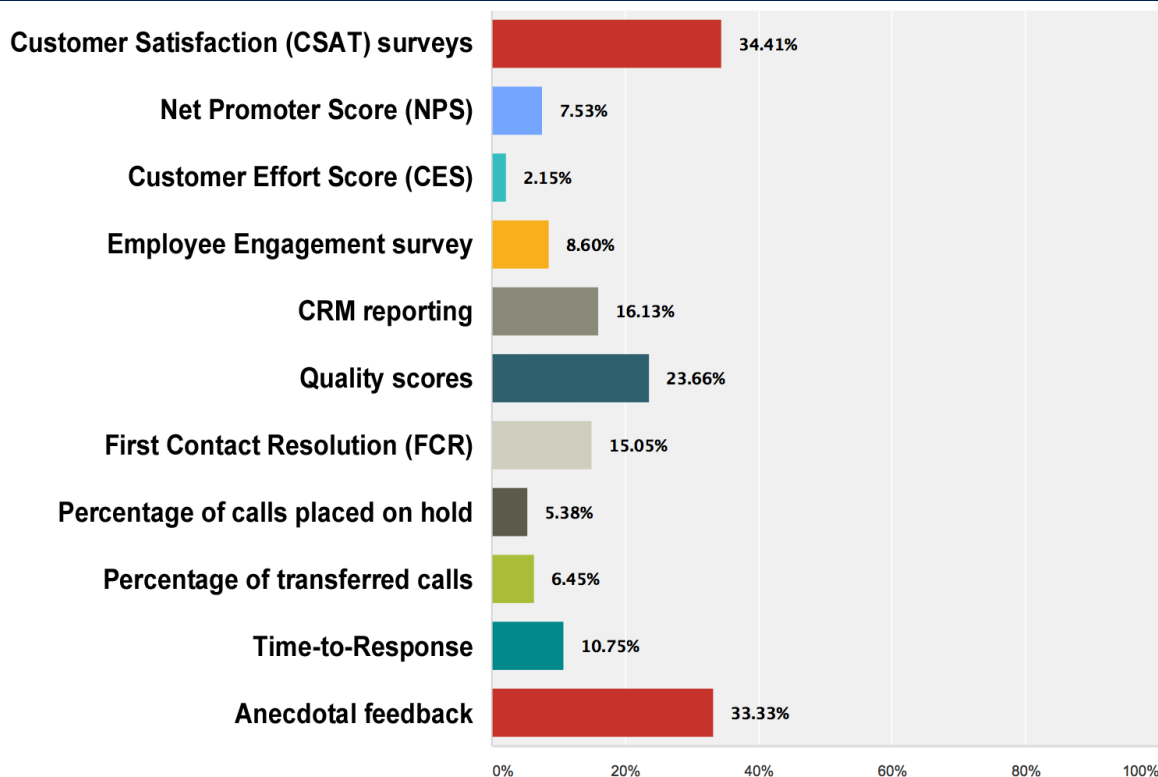
Centers WITHOUT formal multilingual support: How do you currently measure quality of non-English support interactions?

| Metric	Percentage
Customer Satisfaction (CSAT) surveys	34.41%
Net Promoter Score (NPS)	7.53%
Customer Effort Score (CES)	2.15%
Employee Engagement survey	8.60%
CRM reporting	16.13%
Quality scores	23.66%
First Contact Resolution (FCR)	15.05%
Percentage of calls placed on hold	5.38%
Percentage of transferred calls	6.45%
Time-to-Response	10.75%
Anecdotal feedback	33.33%

It's extremely important for any contact center to understand the experience a non-English speaking customer is having; regardless if they support multiple languages, or explicitly measure common metrics like NPS or CSAT.

Multilanguage Support and the Agent Experience

In a Q3 2013 research report that ICMI conducted with inContact on agent engagement in the multichannel contact center, 85.0% of contact center leaders acknowledged that happy agents make happy customers, and 65.3% identified linkages between employee satisfaction and a better customer experience. It may not be immediately obvious, but a lack of multilanguage support impacts the agent as well as the customer. We explicitly asked the contact center leaders that do not have a formal multilingual customer service in place if their agents liked supporting non-English customers, and almost half (48.7%) said no.

Do your internal agents like supporting non-English language customers?
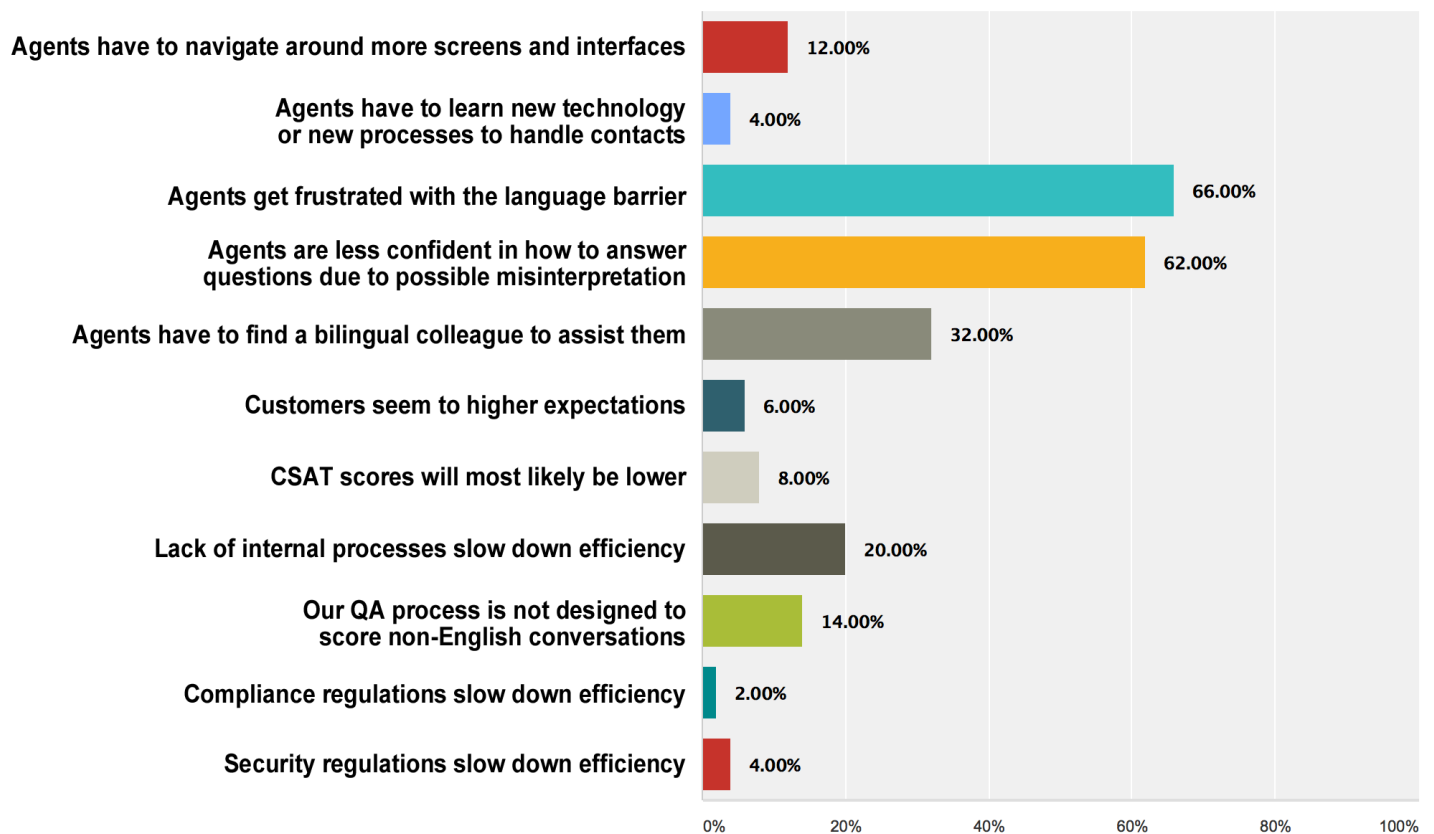
No
48.65%

Yes
51.35%
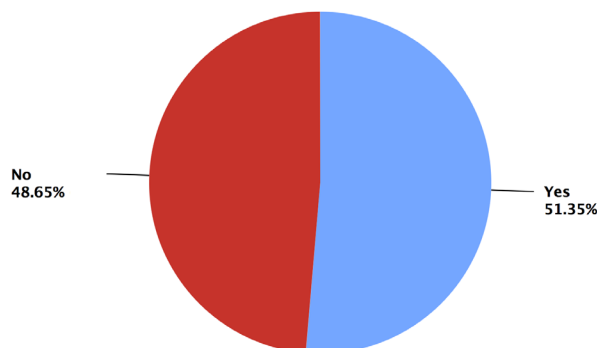
Why not? Unsurprisingly it is because agents either get frustrated with the language barrier (66.0%), or are less confident in answering questions as they are concerned about possible misinterpretations (62.0%).

In other situations, it is a time or efficiency hindrance — 32.0% cite the time needed to track down a bilingual colleague for assistance, the lack of internal processes when handling non-English speaking customers (20.0%), or the additional screens and interfaces they must navigate through (12.0%).

Why do your agents not like supporting non-English language customers?

Category	Value
Agents have to navigate around more screens and interfaces	12.00%
Agents have to learn new technology or new processes to handle contacts	4.00%
Agents get frustrated with the language barrier	66.00%
Agents are less confident in how to answer questions due to possible misinterpretation	62.00%
Agents have to find a bilingual colleague to assist them	32.00%
Customers seem to higher expectations	6.00%
CSAT scores will most likely be lower	8.00%
Lack of internal processes slow down efficiency	20.00%
Our QA process is not designed to score non-English conversations	14.00%
Compliance regulations slow down efficiency	2.00%
Security regulations slow down efficiency	4.00%

Productivity and agent satisfaction are directly linked, according to 66.2% of respondents from our 2013 inContact multichannel agent survey.

Multilanguage support, and specifically the addition of 3rd party interpreters, may be an investment worth pursuing for both agent and customer satisfaction. 57.6% of respondents to this survey said that their internal agent productivity and efficiency either improved somewhat (47.2%) or greatly (10.4%) once they partnered with a language interpretation service.

How has your agent productivity/efficiency changed with the addition of language interpretation services?
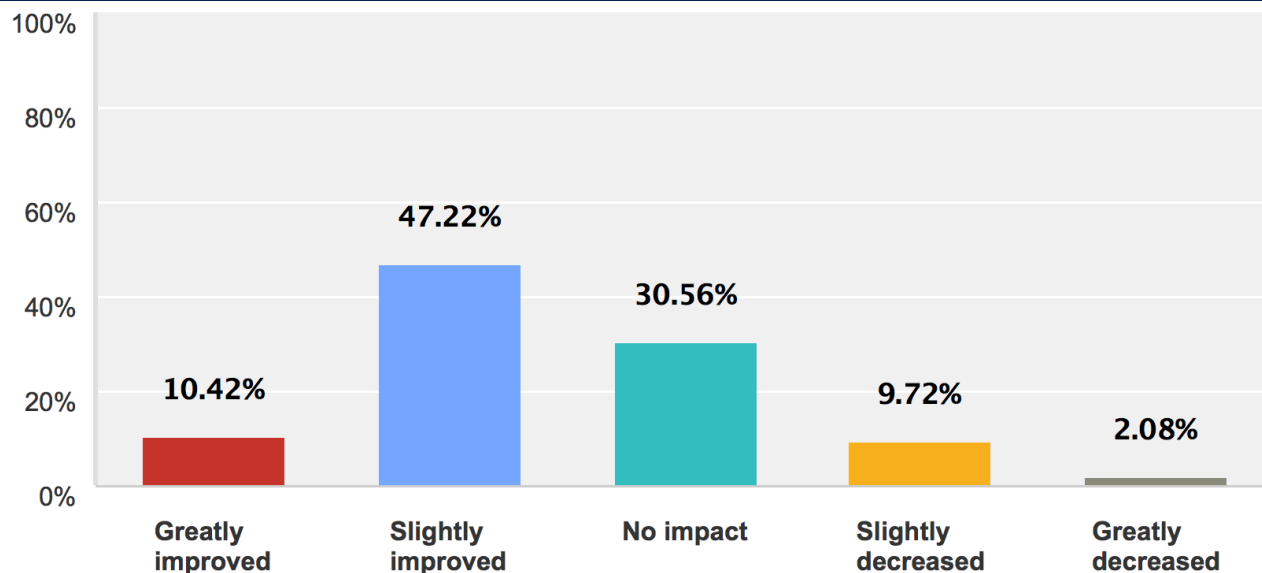
Language interpretation services also positively affected FCR say 35.7%, quality (32.5%), and AHT (20.4%). A lesser percentage also saw positive improvements in transfers/escalations, utilization and errors/rework from agents. Only a quarter (25.5%) of respondents did not see a progressive improvement to agent KPIs upon adding language interpretation services.

What agent KPIs/metrics have been POSITIVELY affected by adding language interpretation services?
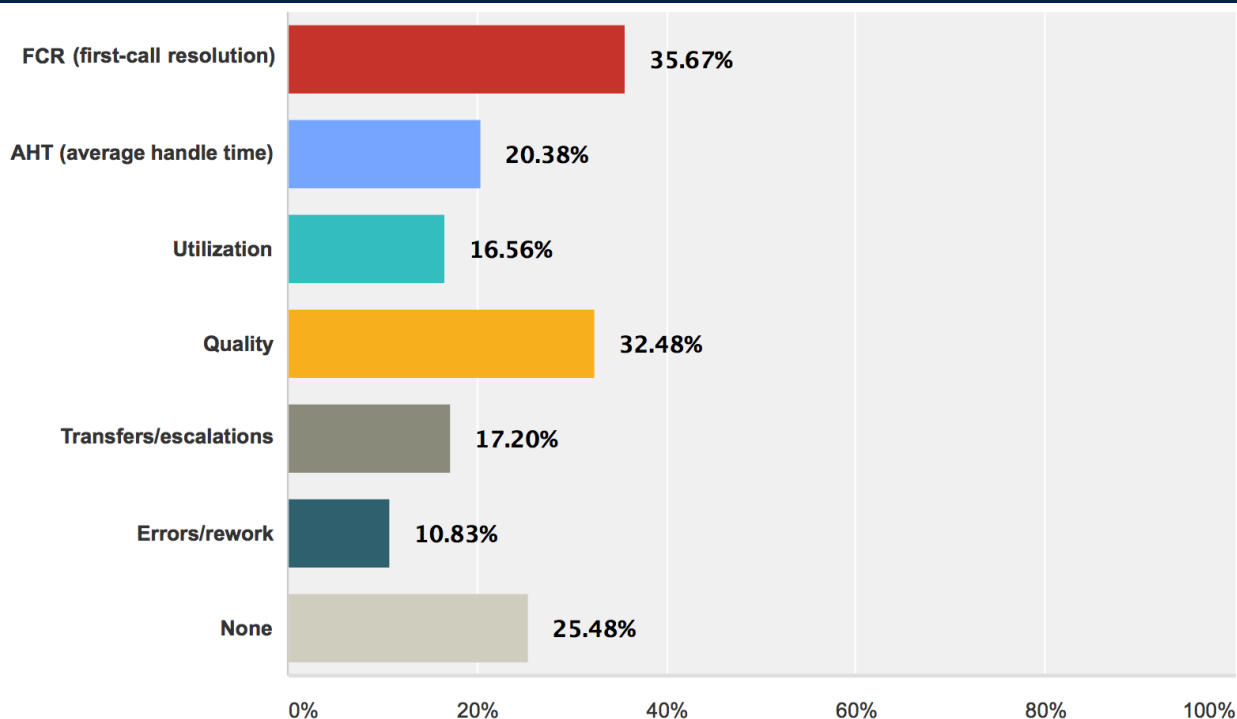

On the inverse, 34.6% saw no negative impact to their internal agents or KPIs. The only KPI that was affected to any degree was AHT due to the added connection time between the internal contact center and the interpretation service.

The Impact of Customer Expectations on the Contact Center

While customer expectations influence many organizations in their decision to offer multilingual support, it's also clear that expectations differ across industries, country of origin and culture.

Only a third (32.9%) of survey respondents unquestionably said that customers do not expect service in their native language when contacting an American brand, while an almost equal number (35.4%) said it depended on the culture or country of origin, and 31.7% felt that the expectation for multilingual support was there.

Do customers generally expect service in their native language when contacting an American brand?

Depends too much on the culture or country of origin 35.44%

Yes 31.65%

No 32.91%
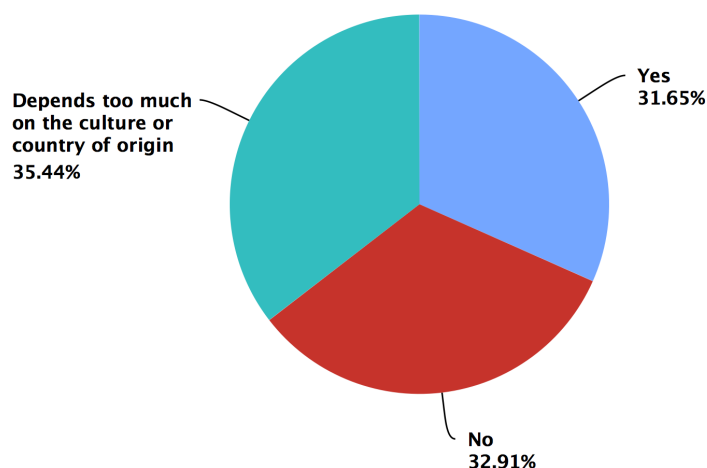
Industry outliers that indicated feeling heavier pressure from customers to offer support in multiple languages included:

- Automotive
- Banking
- Consumer Products
- Government
- Healthcare
- Insurance
- Retail
- Software
- Telecom

Not surprisingly, the BPO organizations are often required by their clients to provide additional languages to the end-user, and that was reflected in their responses.

In 2013, Aetna partnered with a language services provider to set-up multilingual over-the-phone interpreting. Tito Colon, head of Aetna's multicultural marketing said the intention was to, "reach audiences on their own terms, and to meet their specific expectations."

"The U.S. demographic has shifted, and so has our market," Colon said. "Aetna recognized that we needed better capabilities to connect with consumers in the way they want to be spoken to. We have to engage the customer through the lens of their culture and language."

Since integrating language services into its operations, Colon says, "We've probably touched on 90 languages, including Braille and Navajo. It very much affects the front line of our interaction with our membership." The meeting of customer expectations is already reaping both customer and company benefits. "It's helping us empower our customers to care for themselves. And it's also been a market differentiator for us that has positively impacted our acquisition and retention efforts, leading to potential growth."

Given the rapid evolution of customer expectations, it's essential to better understand the individual factors that drive customer perceptions and behavior—and shape multilingual services accordingly.

THE MULTILANGUAGE SUPPORT STRATEGY

Steps to Provide Multilanguage Support

With this research, we focused primarily on multilanguage support requirements for American companies and a predominantly U.S.-based customer market. That is not to say though, that these support preparations would not apply to organizations looking to expand out to entirely new international markets.

Step 1: Identify current and target markets

Step 2: Evaluate the scope of customer inquiries Step 3: Recognize customer expectations

Step 4: Assess Your Company's Customer Service Business Model

Step 5: Review government policies, laws, and regulations

Step 6: Leverage technology

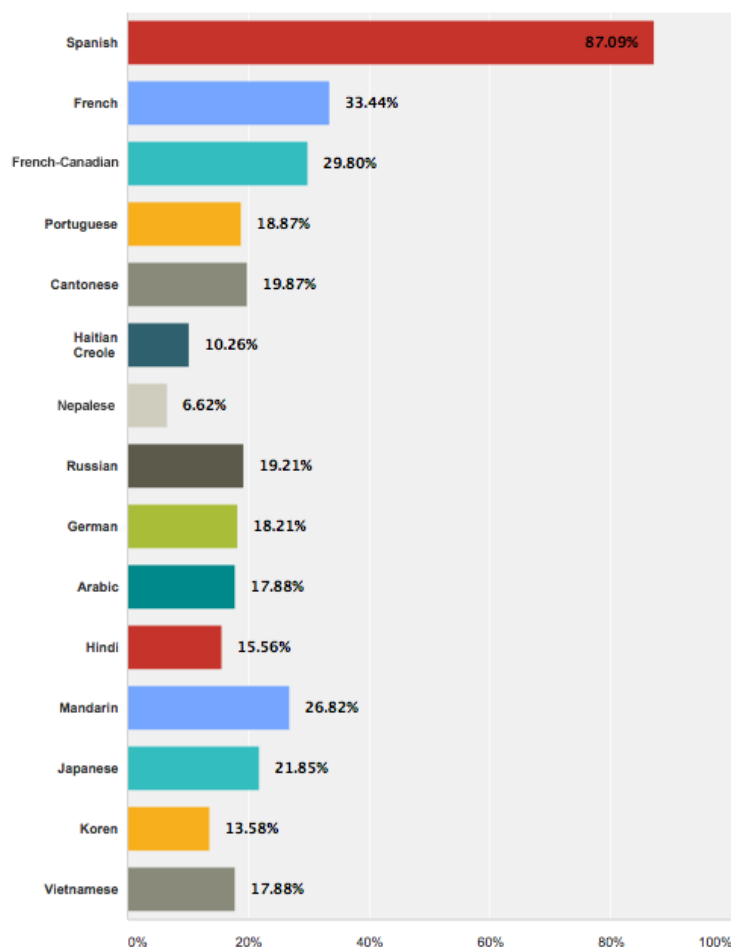**Step 7:** Gauge Internal Contact Center Structure

STEP 1: IDENTIFY CURRENT AND TARGET MARKETS

The first step is to clearly understand what countries of origin and customer segments constitute your current customer base and target market. This will help assess the need for multilanguage and ascertain which languages to support in your strategy.

As we identified in the Language in America section of this report, there are 321 non-English languages frequently spoken within the United States. If for example, your organization plans to heavily target new customers in California, it would be valuable to know that according to The U.S. English Foundation Research there are 207 languages recorded in that state. California's total was followed by New York (169), Washington (163), Texas (145), Oregon (138), Pennsylvania (135), Florida (134), Illinois (132), New Jersey (130) and Arizona (129). Wyoming has the fewest languages recorded (56), trailing South Dakota (62), Vermont (64) and North Dakota (66).

The 86.0% of our community with non-English speaking customers follow fairly in line with the U.S. Census statistics. The most common languages reportedly spoken are: Spanish (87.1%), French (33.4%), French-Canadian (29.8%), Mandarin (26.8%), and Japanese (21.9%).

Which non-English languages do your customers speak?

Language	Percentage
Spanish	87.09%
French	33.44%
French-Canadian	29.80%
Portuguese	18.87%
Cantonese	19.87%
Haitian Creole	10.26%
Nepalese	6.62%
Russian	19.21%
German	18.21%
Arabic	17.88%
Hindi	15.56%
Mandarin	26.82%
Japanese	21.85%
Koren	13.58%
Vietnamese	17.88%

For the purpose of this survey, ICMI broke out the non-English languages into two large 'buckets' – Spanish and Other Languages. This is not meant to imply that Spanish is more important than other languages; rather that Spanish is the second most-widely spoken within the U.S. and is the foreign language most often requested for customer service.

Spanish Language Support

Among the most common non-English languages in the U.S., Spanish has continued to steadily grow over the past several years. According to the 2011 U.S. Census, while the percentage of the total population age five years and over who speak Spanish increased from 2005 to 2011, the percentage of the total population who both speak Spanish fluently and speak English less than "very well" actually decreased slightly.

The U.S. Census also reports that whereas English is the most common language spoken at home in 3,103 of the 3,141 counties (98.8%) in the United States, Spanish is the most common language in 35 of the remaining 38 counties.

Other interesting statistics from that report include:

- In the United States, 1 of every 9.3 people age five and older speaks Spanish at home
- Spanish is the second most common language spoken in 43 states and the District of Columbia
- Spanish is the only language other than English to be spoken by more than 63 percent of the population in any county in the United States
- Spanish is the most common language spoken at home in 35 counties. Nearly three-quarters of these counties are located in Texas, with others in Arizona, California, Colorado, Florida and New Mexico
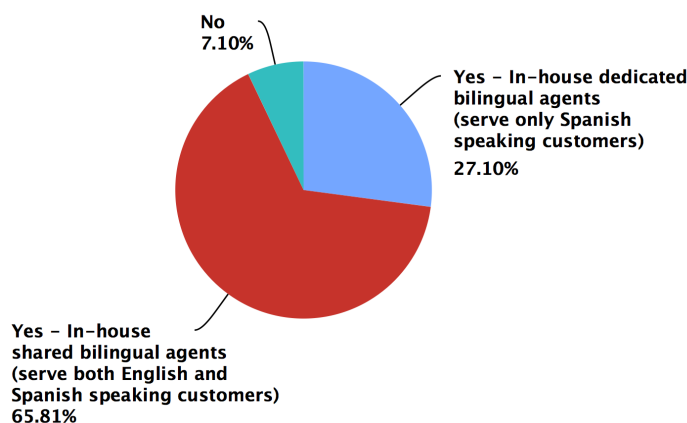
87.1% of our community contact center leaders say they have Spanish speaking customers and therefore 76.0% are formally offering Spanish customer support options.

Do you formally offer Spanish language customer support options?


No
24.02%

Yes
75.98%
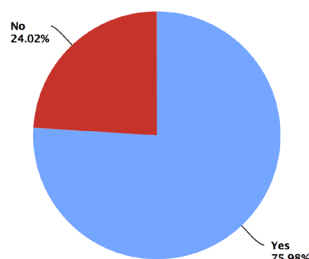
Of those, the preponderance (92.9%) offers at least a portion of the Spanish support internally within their own contact center. 65.8% use bilingual agents that serve both English and Spanish customers and 27.1% have bilingual agents that are dedicated to the Spanish speakers.

Do you formally support Spanish language customers internally within your own contact center?

No
7.10%

Yes – In-house dedicated
bilingual agents
(serve only Spanish
speaking customers)
27.10%

Yes – In-house
shared bilingual agents
(serve both English and
Spanish speaking customers)
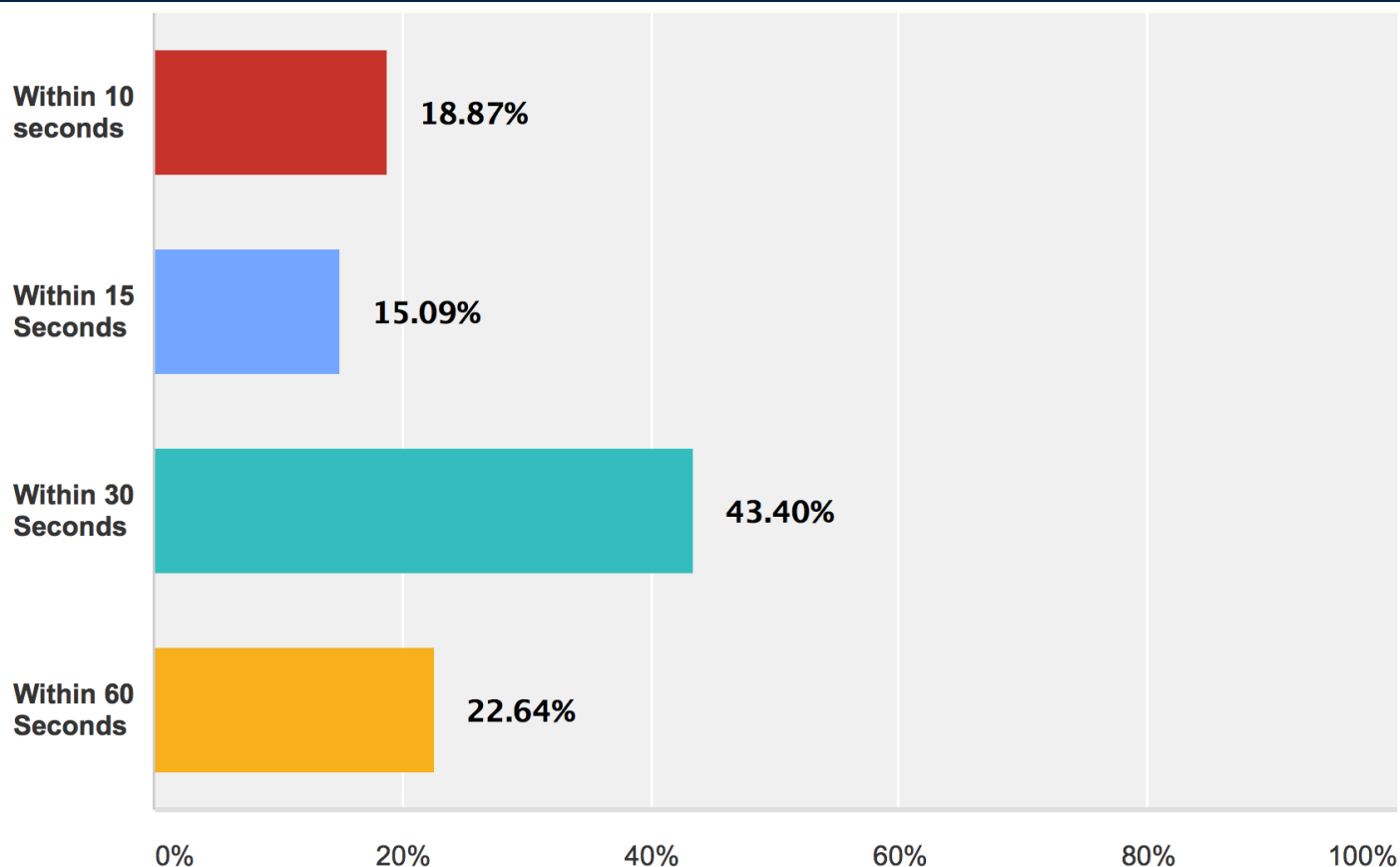65.81%

Over half (54.5%) also use an external organization to assist with Spanish – 36.4% use a language interpretation service while 18.2% have an outsourced BPO/contact center partner.

Do you use an external organization to formally support Spanish language customers?

Yes – an
outsourced
BPO/contact center
partner
18.18%

No
45.45%

Yes – a language
interpretation
service
36.36%
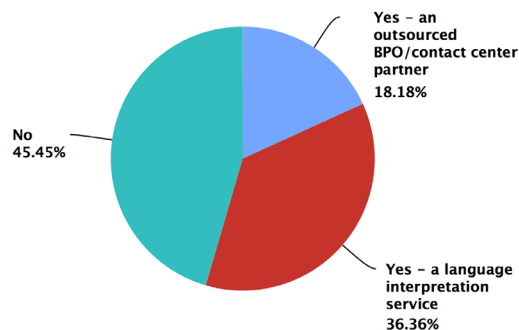
The expectations for phone connection time between the Spanish interpreter and the contact center agent range between 10 and 60 seconds.

What is your expectation regarding phone connection time for Spanish interpreters?

Category	Percentage
Within 10 seconds	18.87%
Within 15 Seconds	15.09%
Within 30 Seconds	43.40%
Within 60 Seconds	22.64%

For those using interpreters, 2/3 offer service level connection times equal to that of their English support.

Is this service level connection time similar to your English support?

- No – it is slower 28.57%
- No – it is faster 5.36%
- Yes – it is the same 66.07%
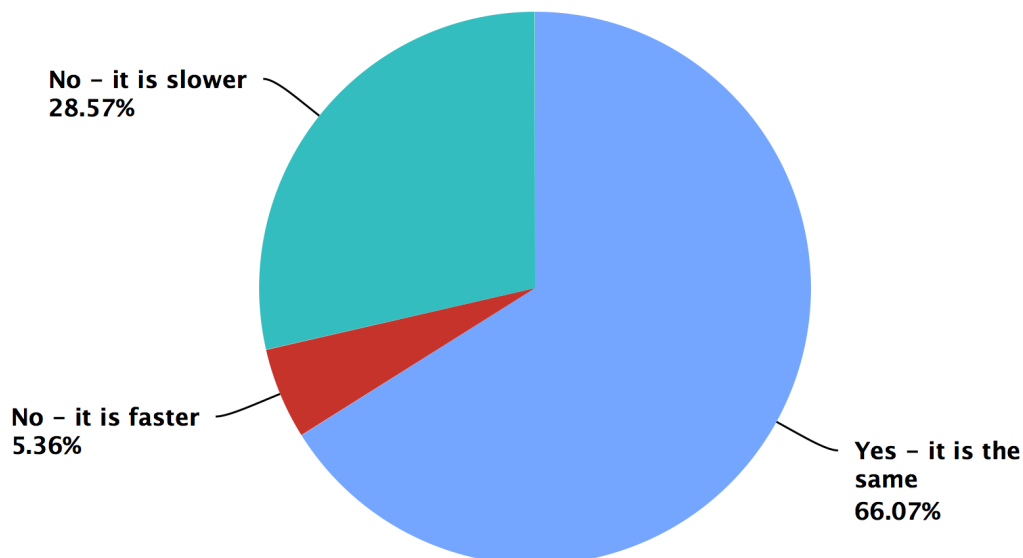
For those 28.6% that say Spanish language service levels are slower than they are for English, the primary reason (40.9%) is that their current volume is not high enough to warrant faster connection times.

Other reasons stated are as follows:

- This was the best connection time our Spanish language partner could provide - 27.3%

- This was the best connection time we could afford - 22.7%

- Spanish language customers are more patient and willing to wait longer - 13.6%

- CSAT is not improved with faster connection times - 2.3%

Other Language Support

Of those contact centers providing multilingual support, 51.0% are handling a language other than Spanish or English.

Do you formally offer customer support options OTHER than in English or Spanish?

No
49.01%

Yes
50.99%
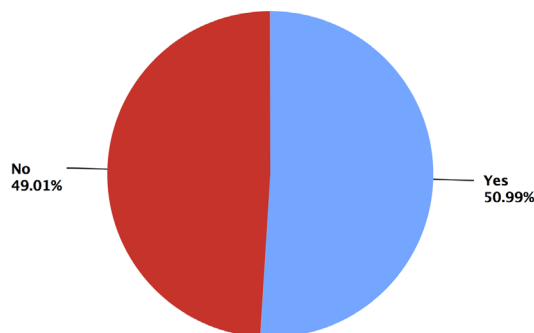
To break it down even further, of those that formally offer Spanish, 53.2% ALSO offer support in at least one other foreign language.

45.2% of contact centers utilize internal shared bilingual agents that also support English language customers, while 32.7% have dedicated agents that only service customers in that specific language.

Do you formally support languages other than English and Spanish internally within your own contact center?

No
22.12%

Yes – In-house dedicated bilingual agents (serve customers only through one other foreign language)
32.69%

Yes – In-house shared bilingual agents (serve both English and another language)
45.19%
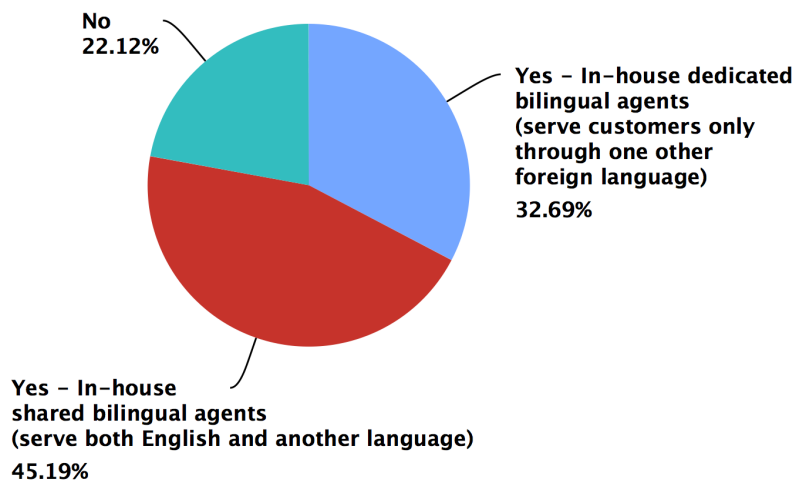
Even more so than with Spanish, 62.8% employ a language interpretation service (47.6%) or a BPO/outsource partner (15.2%).

Do you use an external organization to support customers through other languages (non-English or Spanish)?

Yes – an outsourced BPO/contact center partner
15.24%

No
37.14%

Yes – a language interpretation service
47.62%
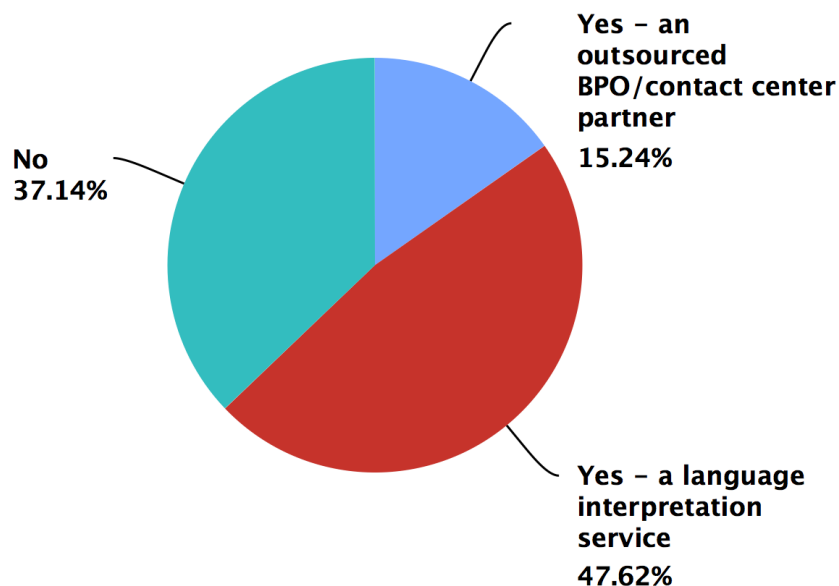
Phone connection times for other languages are similar to the service levels for Spanish – between 10 and 60 seconds.

What is your expectation regarding phone connection time for interpreters in all languages except Spanish?

Within 10 seconds	**20.00%**
Within 15 Seconds	**14.00%**
Within 30 Seconds	**42.00%**
Within 60 Seconds	**24.00%**

0%   20%   40%   60%   80%   100%
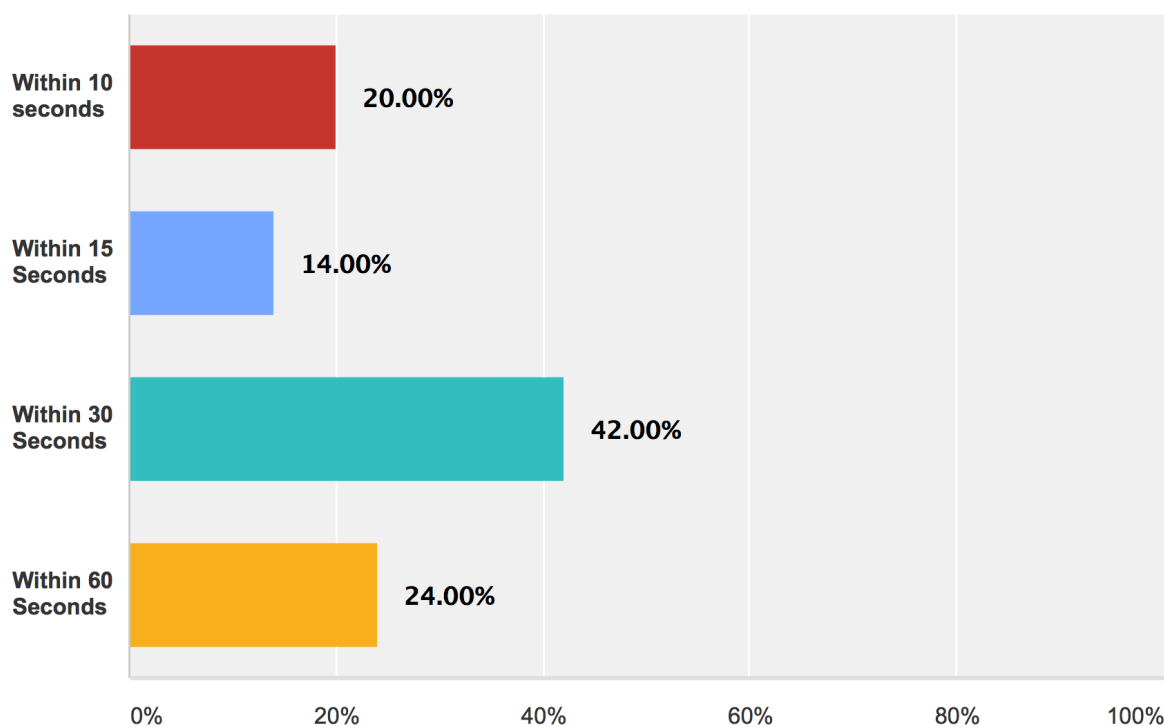
32.0% say that this is slower than their English support and many report that this is due to a deficiency in their in-house IVR or language identification capabilities. "The IVR system does not support selections for languages other than English or Spanish, so we have to personally iden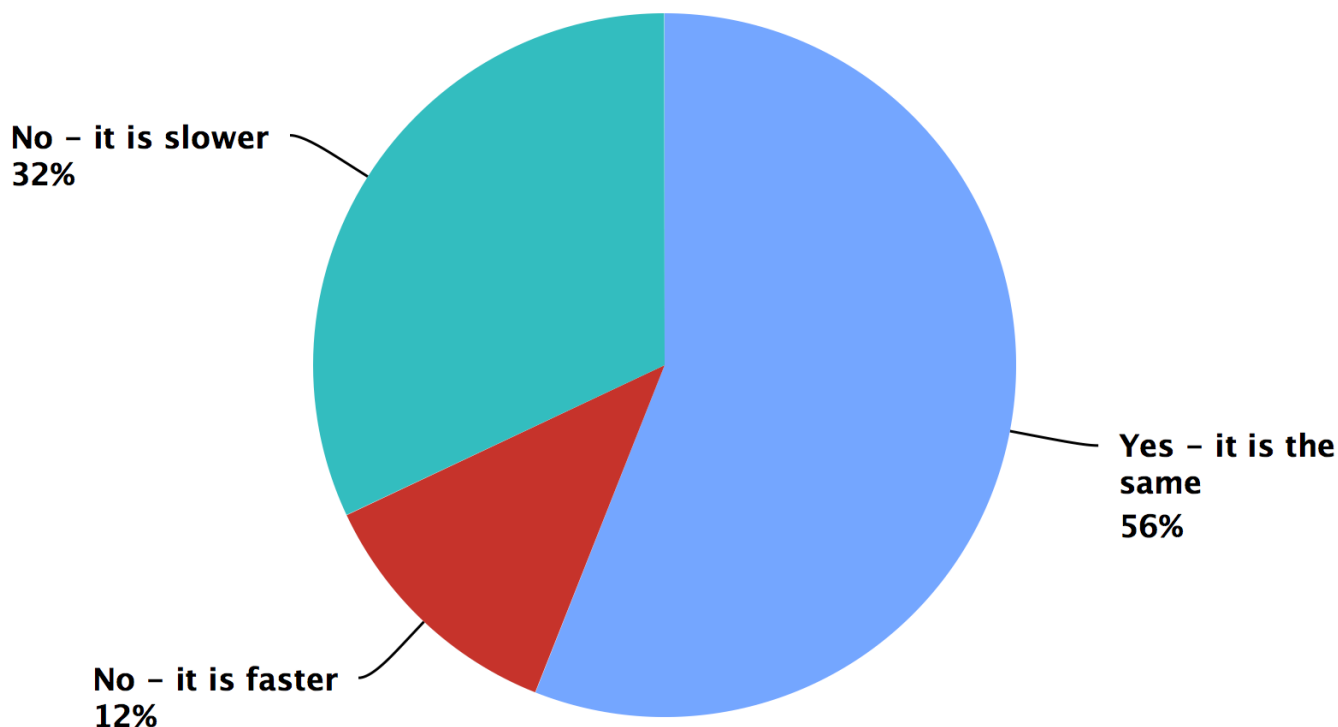tify if a person speaks a different language," explains one call center manager. "If a native speaker is available, we transfer the call. If the native speaker is not available, we have to conference in an interpreter."

Is this service level connection time similar to your English support?

No – it is slower
32%

Yes – it is the same
56%

No – it is faster
12%

Other reasons for the slower connection time include:

• This was the best connection time our language partner could provide - 37.21%

• Our volume is not high enough to warrant faster connection times - 37.21%

• This was the best connection time we could afford - 23.26%

• Other foreign language customers are more patient and willing to wait longer - 16.28%

• CSAT is not improved with faster connection times - 4.65%

EXPERT SPOTLIGHT & CASE STUDY

Multilanguage Support in the Contact Center

By co-editors of Call Center Weekly:
Sean Hawkins, Contact Center Manager and Brooks Webb, Manager of Technical Support

In today's business world, the desire to reach more consumers is a top priority. With global online purchasing easier to accommodate, and businesses expanding into new geographies, one can naturally expect a surge in non-English speaking customers. This is certainly having an impact on contact center strategies as we must determine how to provide support to these new clients. For enterprise level organizations with a global presence, the infrastructure may already be in place to address this. For those without, including the small-to-medium sized company, perhaps this presents a dilemma. How does a contact center without a formal multilingual support system handle non-English calls?

Before you answer, certain considerations must be made. It's worth determining the percentage of your client base that is non-English speaking. Are these high value clients? Where are they located? These are just a few areas that must analyzed; there are many, many more. In our mind, these questions should not be used to determine if baseline support will be offered to these customers; rather every customer deserves your assistance! The end goal is to develop a plan that works best for the company AND the customer while enhancing the overall experience.

One should never lose sight of the customer experience. There are numerous studies that highlight how significant the customer experience is to your bottom line, including several 2013 reports from ICMI that clearly link customer experience to customer engagement and to the customer's lifetime value. Are you still not convinced? Research also shows a rise in customer defections after only one bad experience! For those of us in the contact center, failing the customer is not an option.

We truly see the need for foreign language support. Not only are non-native English speakers moving to the US, but global markets are in need of services provided by US companies. If your product serves an international customer base, your support center needs to be able to handle it as well. While solely offering English support seems to do the trick for some companies, the lack of additional languages in the support center could ultimately be hurting long-term business.

Make no mistake; supporting additional languages is harder than one may think. For example, if you're offering technical support, not only are you in need of someone with strong technical skills, but you also must look for someone that can speak the necessary foreign language. Not to mention, they need to meet all other criteria that you're looking for. By simply adding that highly sought after foreign language as a criteria, your pool of applicants has nearly emptied. So what is one to do? Before we get to that answer, let's look at two case studies where companies have effectively implemented multilanguage support.

CASE STUDY: ONE OF THE TOP 10 BANKS IN THE U.S.

After a fine from a government agency, a large retail bank began undertaking stricter auditing procedures with its vendors. During this time, they also realized the need to have phone interpretation services. Regulatory pressures pushed the bank to look for support in dozens of languages from secure contact centers in the United States – with no exceptions.

After selecting a vendor that met all of their criteria, the bank began to implement the new service in two divisions. One division on-boarded within two weeks, while the other in four. Although the process was not very technical, internal employees still needed to understand how to interact with the external interpreters and how best to connect customers to them. Ultimately, each division created and documented language access processes to centralize operations in support of over a dozen distinct financial services units nationwide.

CASE STUDY: ONE OF THE TOP FIVE RETAILERS IN THE U.S.

A large retail company began their expansion into Canada, specifically the Quebec region, where they ran into several issues with Canadian regulations regarding French Canadian as a language.

In order to comply with these regulations, the retailer needed to develop a procedure to communicate with both employees and customers in French Canadian.

To resolve this issue, they worked with a language interpretation service to develop a custom French Canadian IVR to be used by both the store team members and English-speaking customers. Depending on the option selected in the French Canadian IVR, the customer or employee is simultaneously transferred to a French Canadian interpreter and an English-speaking representative of the retailer.

The French Canadian IVR greets French Canadian store team members and gives them prompts in their language in order to communicate with the retailer's U.S. headquarters. In-store employees can also use the French Canadian prompts to speak with English speaking customers.

Let's re-visit the initial question with a slight modification: How ideally would you like to offer multilingual support? When it comes to multilanguage support, not only is the language itself different, but the culture behind the language is too. Whoever your customer base may be, it's important to have native speakers, or highly fluent speakers familiar with the culture, ready to assist. They'll better understand the tone of the conversation, and can then easily provide a better customer experience.

STEP 2: EVALUATE THE SCOPE OF CUSTOMER INQUIRIES

Channel Preference

As noted earlier, those contact centers offering multilingual support typically do so through the voice channel – inbound and outbound phone. You may find though, that customers have different language preferences depending on the communication channel. Non-native English speaking customers may find it easier to communicate through email and chat in English, but require their primary language for phone interactions. It is also worth noting, that although only 12.8% are offering social channels in a language other than English, these channels are gaining in popularity and expectation.

Volume of Interactions

It is equally as important to know the volume of interactions that should be expected. This can easily be accomplished through CRM classifications, customer surveys, and anecdotal agent feedback. Of those contact centers tracking languages, and when they provide the following ones, English remains the majority of transactions – on average 79% of volume. Spanish averages 23%, French/French-Canadian 6%, Mandarin 6%, and Vietnamese, Korean and Arabic each averaged 2%. 'Other languages' are approximately 10% of overall transaction volume. (The percentages here are not intended to equal 100%.)

Growth of Customer Base

68.9% expect that within the next three years their non-English speaking customer base will increase either slightly (55.5%) or dramatically (13.4%). While 28.7% don't anticipate a change, less than 3% actually expect a decrease.

Do you expect the number of non-English speaking customers to change over the next 3 years?

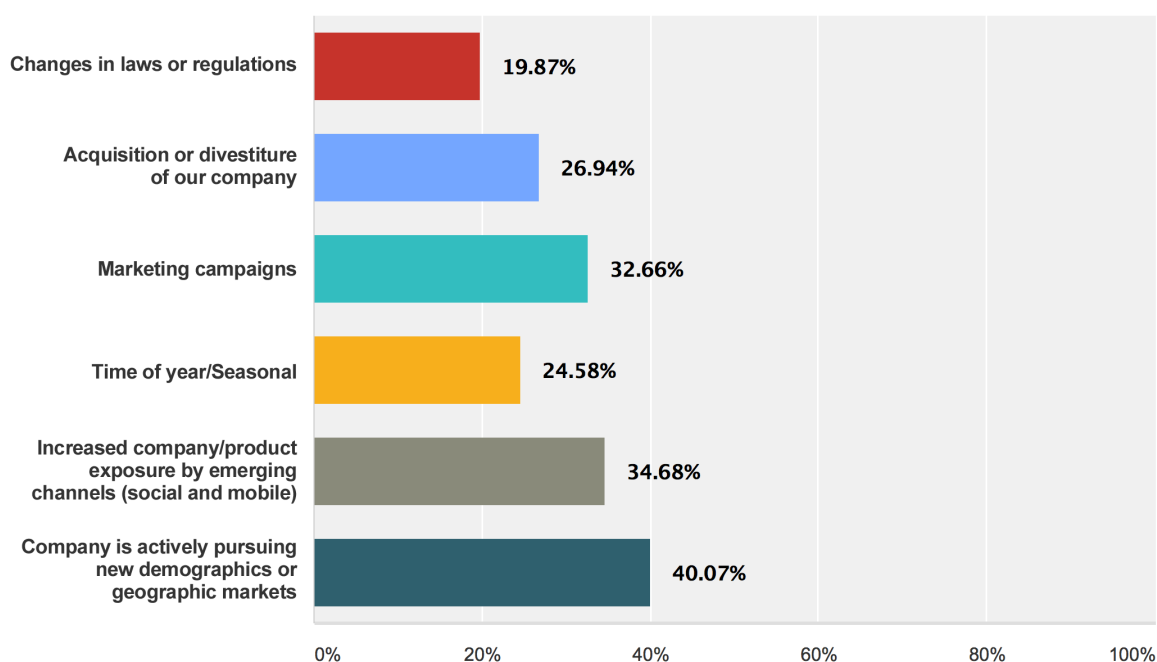|	
Increase dramatically	13.40%
Increase slightly	55.45%
No change	28.66%
Decrease slightly	1.87%
Decease dramatically	0.62%
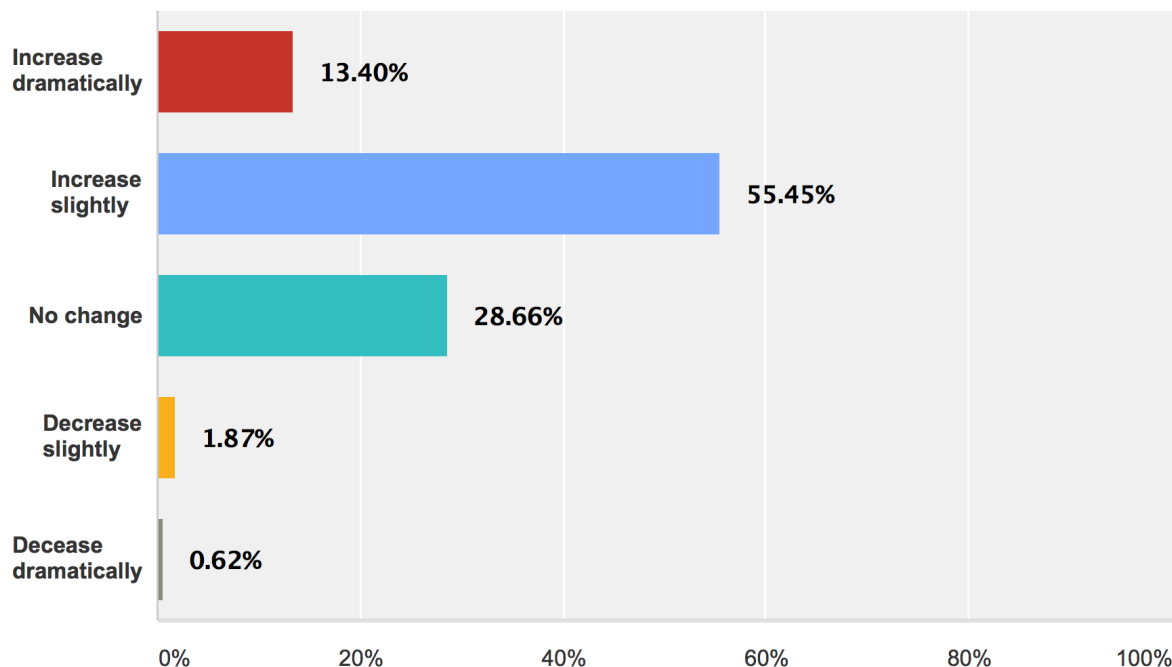
The growth influencers are not surprising. 40.1% say that it is intentionally being driven by their company actively pursuing new demographics or geographic markets, or through corporate marketing campaigns (32.7%). 34.7% believe it is due to the emerging channel platforms (like social and mobile) increasing their company and product exposure, while 24.6% see it solely as a seasonal spike. An interesting revelation was the 26.9% who anticipate non-English customer growth due to an acquisition or divestiture of their company within the next three years.

What influences the number of non-English contacts you receive?

Changes in laws or regulations	19.87%
Acquisition or divestiture of our company	26.94%
Marketing campaigns	32.66%
Time of year/Seasonal	24.58%
Increased company/product exposure by emerging channels (social and mobile)	34.68%
Company is actively pursuing new demographics or geographic markets	40.07%

Of those 19.9% that are influenced by changes in laws or regulations, the Affordable Care Act (ACA) was most cited as it is introducing health insurance to a previously uninsured base that is also not native to the English language.

CyraCom's (parent company of Voiance), Chairman and CEO, Jeremy Woan, cautions companies not to overlook the growing multilanguage needs associated with the ACA. "We are seeing growth for interpretation services driven by the requirements of the Affordable Care Act," he says. "Current pricing points mean that companies that might have considered telephonic interpretation as too expensive in the past are now looking at it as a very efficient, necessary, and cost effective service."

Composition of Customer Queries

As described within a 2011 article in Business News Daily, customer queries fall into four broad categories of varying complexity and interaction depth: informational, transactional, advice-related and diagnostic.

The more complex the queries are, the greater the need is for support to be presented in a customer's native tongue. On average, transactional, diagnostic, and advice-related queries present more service differentiation opportunities through multilanguage than informational ones.

STEP 3: RECOGNIZE CUSTOMER EXPECTATIONS

Customer expectations can and should be recognized when determining the need for multilanguage support. As mentioned earlier in the report, almost a third of survey respondents realize that their customers expect service in their native language, while another third believe it depends on the culture or country of origin.

"We can always do better," shared one manager of a national nonprofit. "Callers in our region speak more than 100 languages and finding qualified help to assist all those callers in their language is a challenge. For those that we are able to help, I think we meet their expectations well."

It's not solely about the language expectancy though. Other expectation factors that need to be addressed include cultural nuances and hours of operation.

34.4% say customers generally expect their cultural nuances to be recognized when contacting an American brand for support, while another 36.5% say it is dependent upon the specific culture or country of origin. Cultural nuances may include time sensitivity, gender preferences of the agent, or grammar and spelling variations.
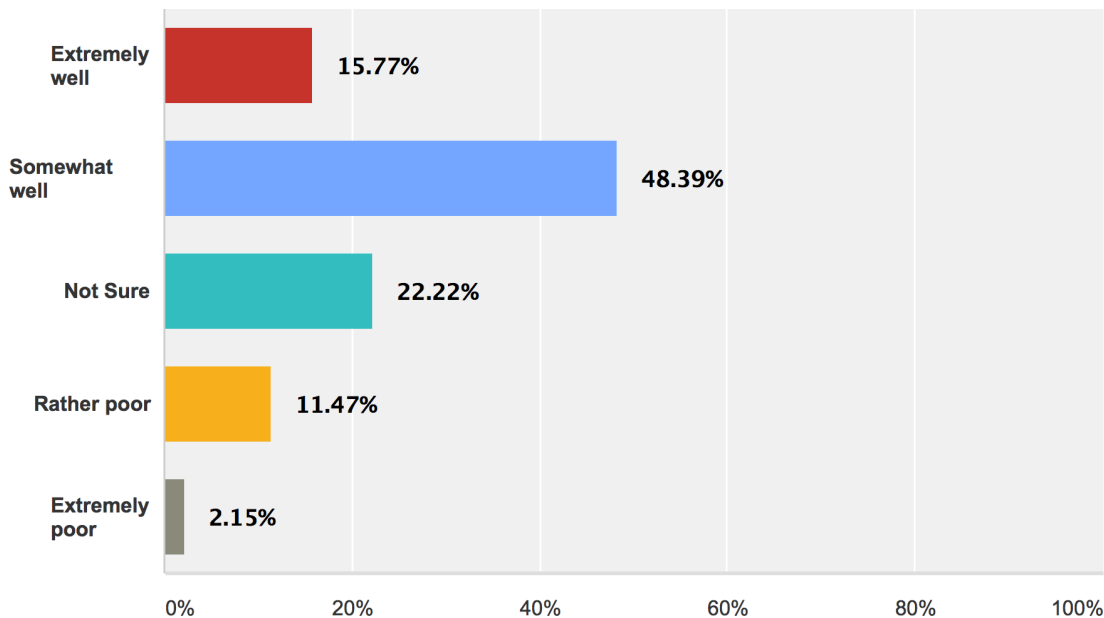
Do customers generally expect their cultural nuances to be recognized when contacting support of an American brand?

Depends significantly on the culture or country of origin
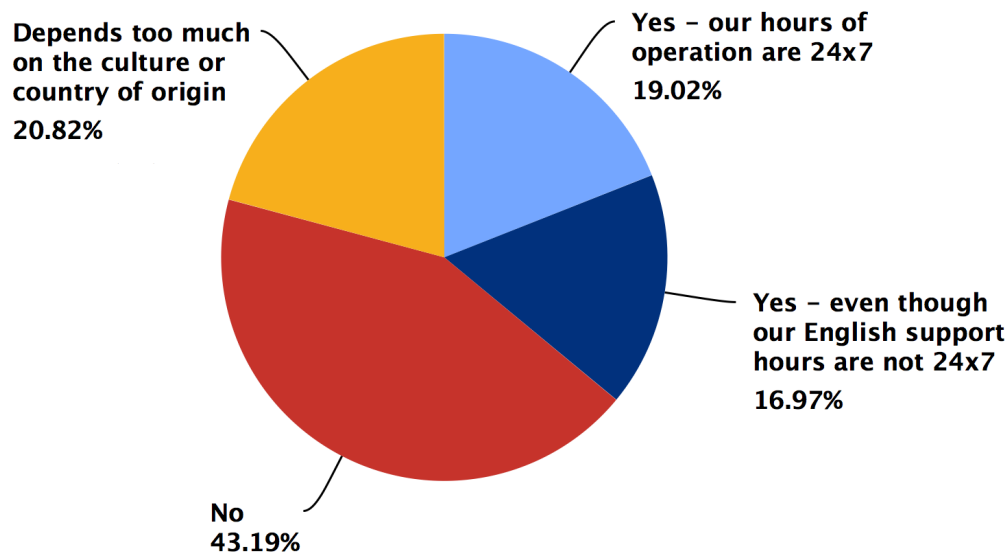36.48%

Yes
34.44%

No
29.08%
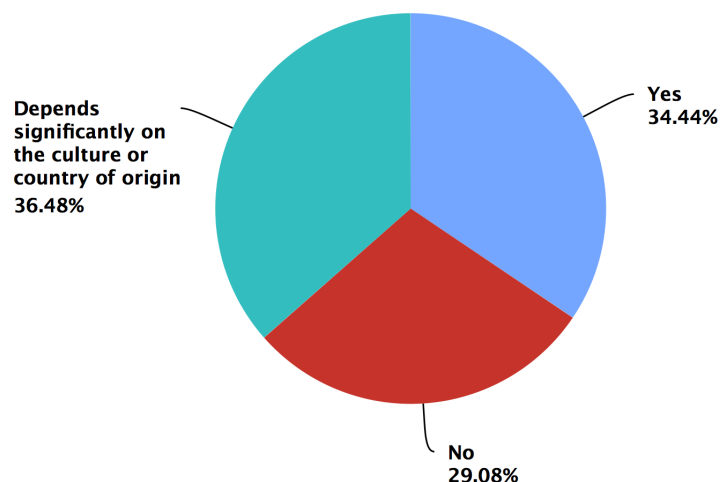
Only 15.8% of the respondents feel that their organization meets the cultural expectations of their customers extremely well, with another 48.4% saying somewhat well. 13.7% say they are doing a poor job and 22.2% are unsure as they are not tracking or measuring this expectation.

How well do you feel your organization meets those cultural expectations?

Category	Percentage
Extremely well	15.77%
Somewhat well	48.39%
Not Sure	22.22%
Rather poor	11.47%
Extremely poor	2.15%

Offering 24x7 support can be a challenge for many organizations, and it is further complicated when additional languages are introduced. Although 43.2% say non-English speaking customers do not expect 24x7 services in their native language when contacting an American brand, a full 36.0% say they do, even when their English hours of operation are not (17.0%).

Do customers generally expect 24x7 support in their native language when contacting an American brand?

- Depends too much on the culture or country of origin — 20.82%
- Yes – our hours of operation are 24x7 — 19.02%
- Yes – even though our English support hours are not 24x7 — 16.97%
- No — 43.19%

It is here that organizations frequently cite the usage of language interpreter services or outsourcers to assist in the volume and hours of operation expectations. "We primarily rely upon our own multilingual agents to assist customers in their native language, and use the interpretation service as a back-up so that we can provide assistance round the clock," says the CSO Quality Service Coach Lead for a B2B fleet management company.

When using 3rd-party language interpreters, it is vital to share customer expectations with them so that service levels and quality are on par. For example, as previously discussed, only 13.6% of Spanish speaking customers and 16.3% of other foreign language customers are considered more patient and willing to wait on hold longer than their English speaking counterparts. Therefore having consistent service levels across all queues, regardless of language is necessary.

STEP 4: ASSESS YOUR COMPANY'S CUSTOMER SERVICE BUSINESS MODEL

The decision to provide multilanguage support is not one that should be made in isolation by the contact center or solely driven by your customers. An informed comprehensive analysis of your existing customer base and target markets, as well as the level of importance of customer support to your brand's product or service also needs to be taken into consideration.

Is customer support your point of differentiation or integral to your product or service? If so, you probably need to provide comprehensive support across all languages in all key target markets.

Even if customers expect it, the contact center also needs to know from a corporate perspective if round-the-clock, time zone-based, or on-demand multilingual support is feasible, and if there is budget for the investment.

Answering these questions will help determine whether you utilize multilingual outsourced call centers, language interpreters, or your own in-house team.

Contact centers should expect that providing even informal multilingual support may inadvertently increase their non-English speaking customer base. That was the case for one contact center director in the financial services space. "Customers seem to really like speaking to an agent in their own language! They have a good experience and then they tell others. As we add more native speakers to our growing list of employees, we find that callers speaking that language increase within 6-12 months."

Customer service on a base level is obviously important; knowing the extent to which, will help you decide how instrumental bilingual services are.

STEP 5: REVIEW GOVERNMENT POLICIES, LAWS, AND REGULATIONS

Most of the ICMI contact center community reports not feeling influenced by laws (77.2%) or regulatory bodies (79.6%) in relation to provisioning multilingual support.

Have any industry, state or federal laws impacted the way you provision multilanguage support?

Yes
22.78%

No
77.22%
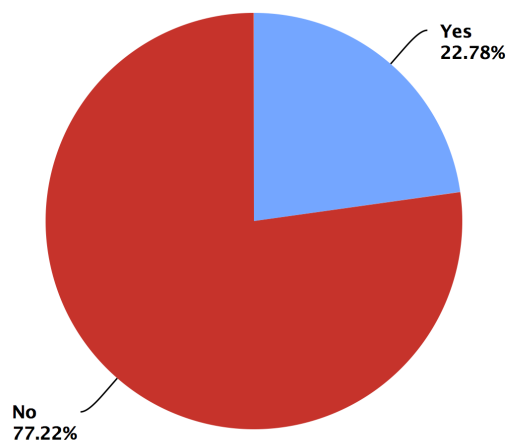
Have any government or regulatory bodies impacted the way you provision multilanguage support?

Yes
20.45%

No
79.55%
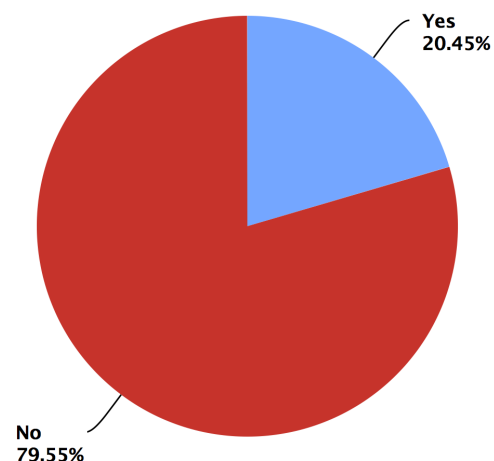
With that said, it's still necessary to review government policies and laws — industry, state or federal, and regulations that may require you to provide multilingual support for certain demographics or geographies. This is particularly true for healthcare, financial, or legal organizations. "We have to provide access to all languages our customers speak," said a customer care director for a healthcare insurance company. "Otherwise, we are not in compliance with Federal Regulations." Another healthcare manager echoed that, "We are required to include a language block on all materials as well as options in three primary non-English languages spoken in our region (Spanish, Somali and Hmong)."

Of the small percentage that acknowledges a law impacts their multilanguage provisioning, the following were most often cited:

- HIPAA

- Title VI of the 1964 Civil Rights Act

- The Affordable Care Act (ACA)

- Sarbanes Oxley

- Gramm Leach Bliley

For those that mentioned a government or regulatory body, those included:

- Centers for Medicare and Medicaid Services (CMS)

- The Federal Health and Human Services Department (HHS)

- The Consumer Financial Protection Bureau (CFPB)

- The Federal Department of Justice (DOJ)

STEP 6: LEVERAGE TECHNOLOGY

While multilanguage support can differentiate customer service, it can also add to the cost of service. It is therefore important to leverage technology-enabled automation, where possible, to curb costs. Language-aware customer query IVRs and routing, multilingual user interfaces and content, business rules, knowledge-guided customer interactions and culture-aware interaction tools and portals can help in this area.

STEP 7: GAUGE INTERNAL CONTACT CENTER STRUCTURE

When we asked contact centers without multilingual customer service options how they would prefer to support customers in a perfect world, 68.1% said through an internal bilingual staff. While that's all well and good, it obviously isn't reality for most.

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

Response	Percentage
We would prefer not to support other languages	12.39%
Support internally with bilingual staff	68.14%
Support externally through a BPO/outsourced contact center	4.42%
Support through a language interpretation service	15.04%
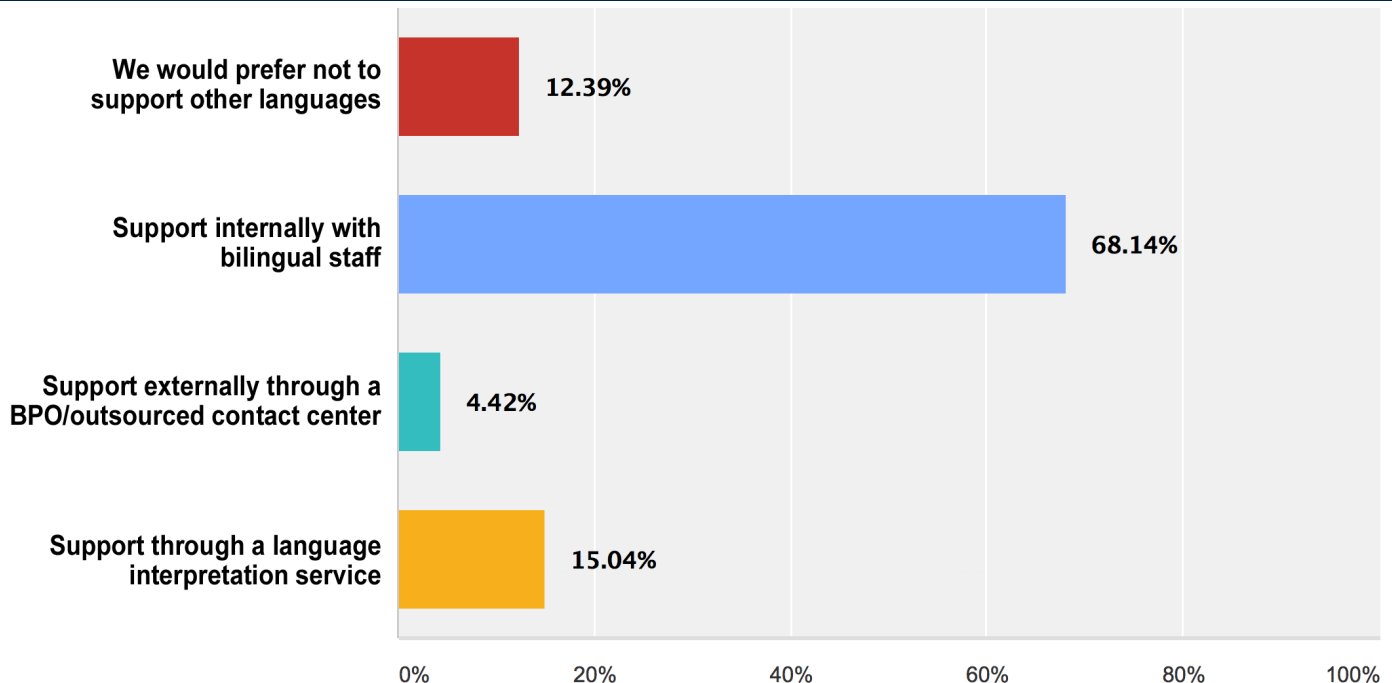
That's why it's necessary to look candidly at the contact center and truly acknowledge if a multilingual staff is practicable and logical. Can you source the right languages? Do you have multilingual management? Will the pay scale be different? Do your current processes accommodate different languages and cultures? In the next section, we'll walk through some of the components of building an internal multilanguage center.

BUILDING AN INTERNAL MULTILANGUAGE TEAM

The below guidelines to build out a multilanguage team are by no means exhaustive, but they will provide a good launching pad when considering the internal option versus partnering. Of course, all other factors specific to your organization, technology, brand, and contact center practices apply.

Hire true bilingual and multilingual agents - to ensure quality multilingual support means that you must hire agents who speak other languages in a fluent and conversational manner. You should also be sure that the team is able to understand and speak nuances of dialects and knows to stay away from slang that could be appropriate in one region, but offensive in another. It goes without saying, but both the recruiter and the interviewer need to be able to conduct the process in both English and the additional language.

Provide cultural training – cross-cultural communication has become a vital part of many training curriculums, but is even more important in the multilanguage environment. A customer will often assume that if an agent knows the language, they will also understand the associated cultural nuances. It's important to cover topics such as vocabulary, geographic familiarity, tone and cultural etiquette.

Offer ongoing agent development – by ensuring that agents are continually updated on cultural differences and backgrounds, you empower them to simply do better. Also, it is important to stay apprised of what is happening regionally, so they can be sensitive to how it impacts the customers they support. Again, this is an ongoing effort so that agents are empowered to handle cultural variances in a positive way.

Adopt culturally nuanced policies and practices - customer service policies and practices should be implemented with consideration to the cultural aspects that relate to the language. For example, in some cultures it may not be polite to cross-sell or ask to do a survey at the end of a customer service interaction. In other cultures you may need to adjust response times and realign contact center policies with cultural expectations.

Provide a multilanguage support system – it's important to give multilingual agents the same support system that English-speaking agents have. That means training, QA and technology may all have to be adapted or created to function in the language provided to the customer, and spoken by the agent.
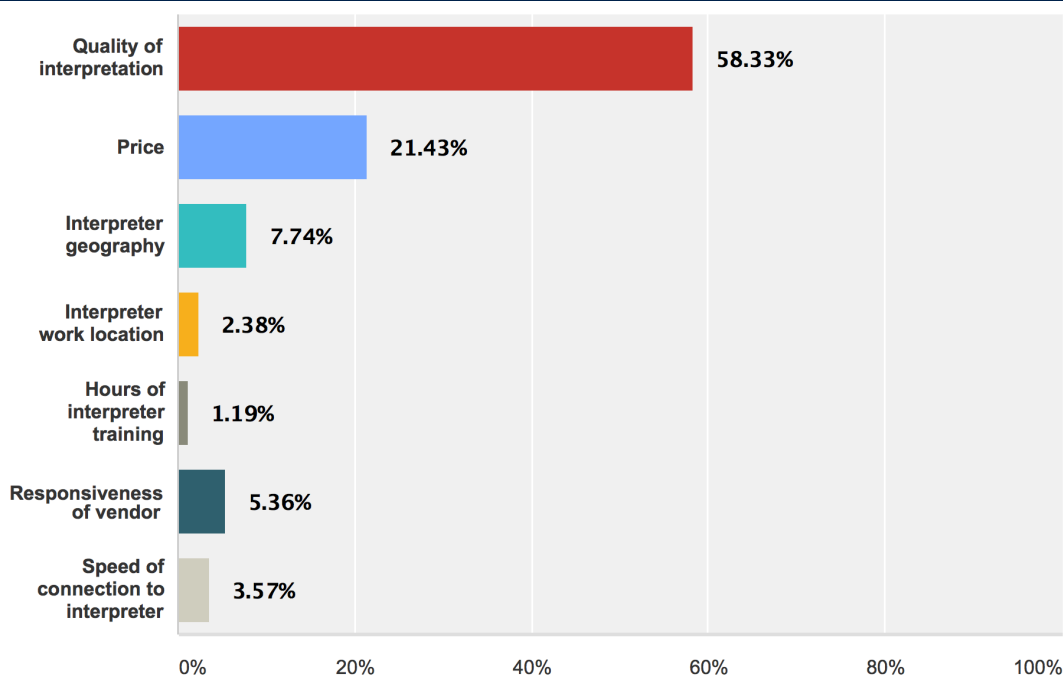
PARTNERING WISELY

If building your own multilanguage team isn't feasible, there are several options for the contact center leader to choose. Dedicated language interpretation services, outsourced bilingual agents, translation software, or pay-as-you-go interpreting services can all provide a good multilingual customer experience. For the purpose of this research, we focused on the language interpretation services option.

Contact centers that are already partnering with a language interpretation provider have great insight and advice for those considering such a service.

Language Interpreter Selection

The most important factor when selecting a multilanguage partner is the quality of interpretation says 58.3% of respondents. Price is the second consideration (21.4%) with interpreter geography a distant third (7.7%).

What is the most important factor you considered when choosing a language service provider?

Factor	Percentage
Quality of interpretation	58.33%
Price	21.43%
Interpreter geography	7.74%
Interpreter work location	2.38%
Hours of interpreter training	1.19%
Responsiveness of vendor	5.36%
Speed of connection to interpreter	3.57%

Geography is very important to some organizations though, as reflected in the commentary. "We try to find a balance in all of these areas," explains a customer support manager in the education field. "But normally where they are located is the first priority."

71.1% have partnered with an interpreter service located only in the U.S./onshore or a combination of U.S./onshore and nearshore. Only 12.7% have interpreters located offshore.

Where is your language interpreter service located?
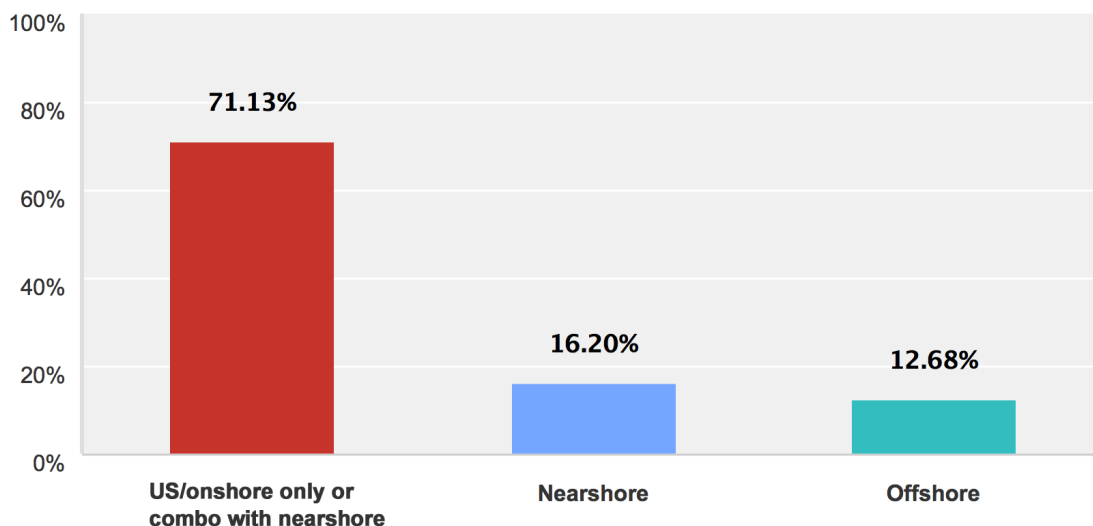
When asked why, over half (52.5%) said it was because there was greater familiarity with the culture of their brand's customer base. Information security (35.8%), responses to needs and pricing (27.5%) and the interpreter's ability to use the same dialect as the brand's customer base (21.7%) also generated strong responses.

Why did you choose a US-only or nearshore interpreter service?
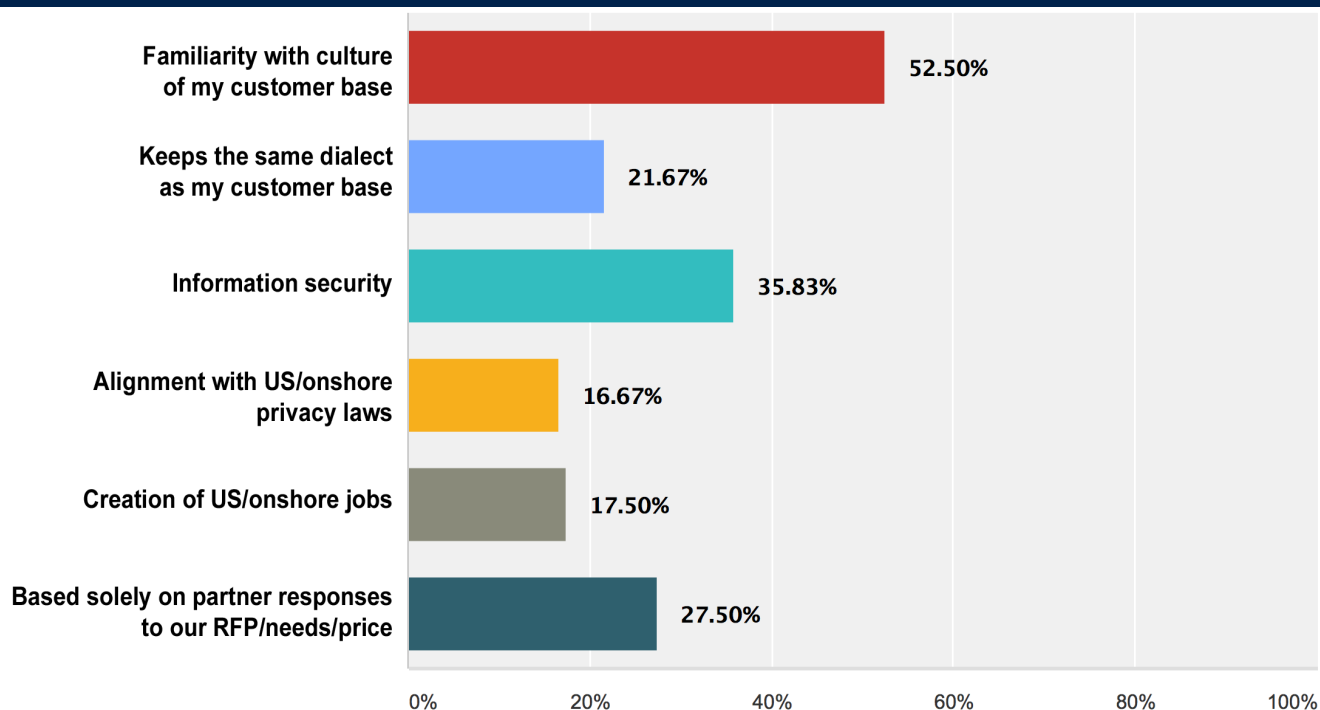
"Some of our clients have found it essential that our interpreters reside in the United States," echoes Best Ihegborow, the VP of Contact Center Operations for Voiance. "Instead of outsourcing to an offshore provider, a domestic interpreter service enables cost-effective service while ensuring those handling customer calls are familiar with U.S. cultural practices or our insurance, financial, or healthcare systems."

Those respondents presently considering an interpretation partnership also prefer a U.S./onshore or U.S./nearshore combination (77.3%). Interestingly enough, while they also rated familiarity with culture of their customer base (50.0%) and information security (42.9%) highest, they equally ranked (35.7%) keeping the same dialect as their customer base, alignment with U.S./onshore privacy laws and creation of U.S./onshore jobs.

Why do you have a preference for US/onshore or nearshore?

50.00%	**35.71%**	**42.86%**	**35.71%**	**35.71%**
Familiarity with culture of my customer base	Keeps the same dialect as my customer base	Information security	Alignment with US/onshore privacy laws	Creation of US/onshore jobs
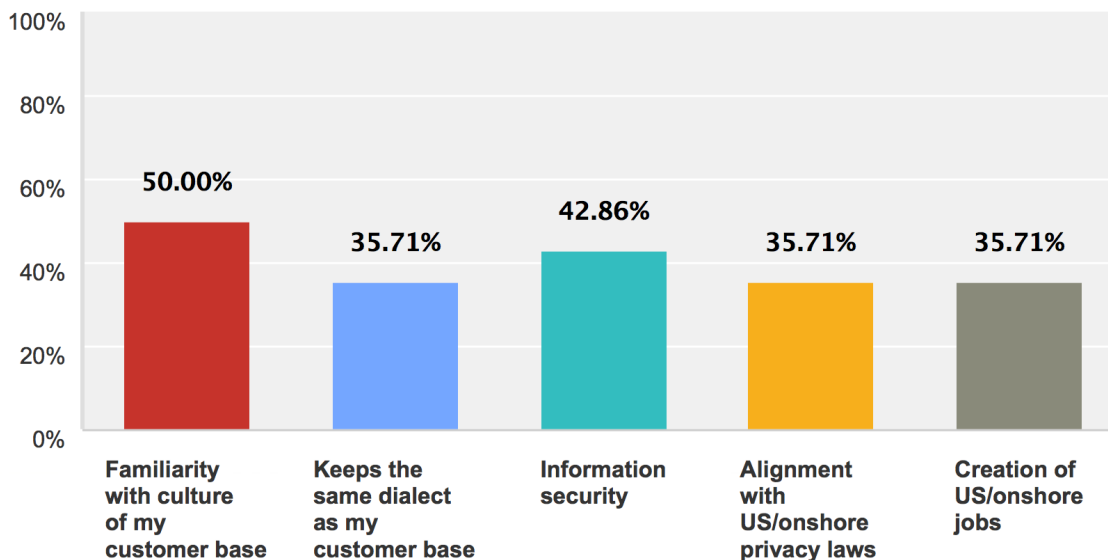
That's not to say that industry, vertical, or company familiarity isn't necessary for the interpreters to know. "Knowledge is the most important!" proclaimed the Director of Call Center Operations for an automotive brand. "They have to know auto parts for us. That's part of the 'language' too."

In fact, 72.9% deemed specific nuances of their business to be either very important (39.6%) or somewhat important (33.3%) for the interpreter to be trained in.

How important is it to have a language interpreter trained specifically in the nuances of your industry/vertical?

39.55%	**33.33%**	**20.34%**	**3.39%**	**3.39%**
Very important	Somewhat important	Neutral	Somewhat unimportant	Not important
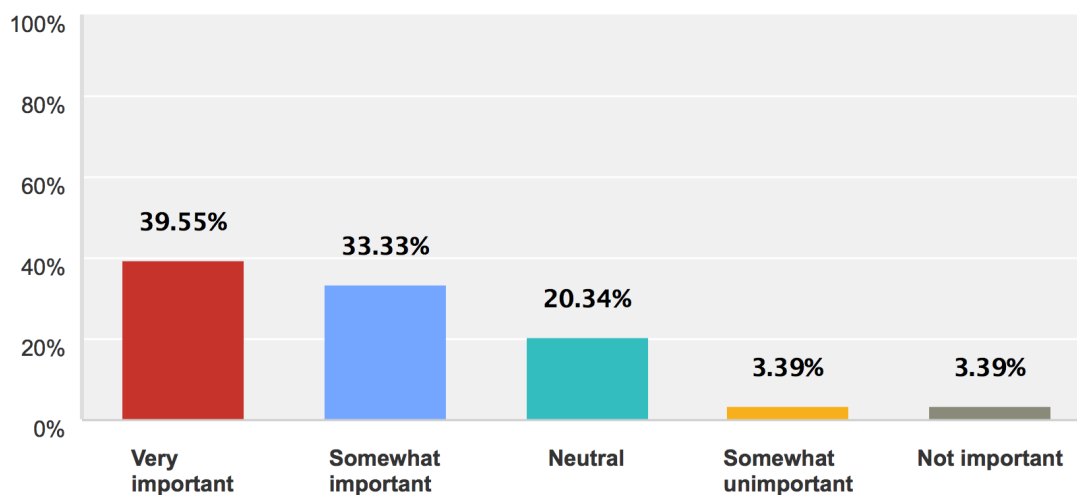
All of these preferences relate back to the customer experience. When we asked the group of respondents still in the language interpreter consideration phase, "What is the primary reason you are considering language interpretation services?" a solid third (33.3%) of them responded with 'higher customer satisfaction'.

1. Higher customer satisfaction (CSAT)

2. Ability to scale customer base AND competitive differentiation (tie)

3. Higher agent satisfaction

As mentioned earlier, price was the second most important factor when companies chose an interpreter partner. 39.6% say they are on a pay-per-call structure; while an almost equal amount (34.3%) are on pay-per-minute. Just over a quarter (26.1%) of respondents pay a monthly flat rate for interpreter usage.

What is the payment structure you have for language interpreter services?

26.12% — Monthly flat rate for unlimited usage
39.55% — Pay per call
34.33% — Pay per minute
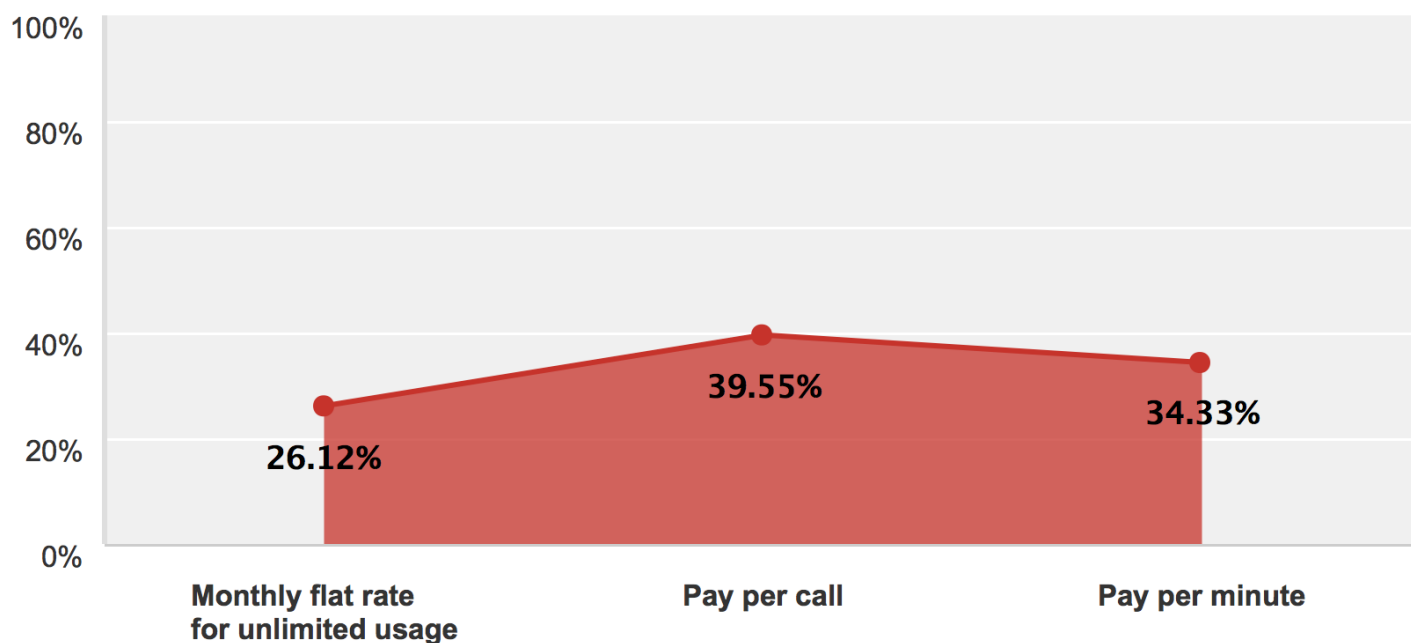
Processes and Policies for Language Interpreters

In order to provide a consistent level of service across all channels, sites and languages, it is recommended that contact centers share their internal practices, customer expectations and KPIs with their language interpretation partner.

While a surprising 32.7% say they do not hold their language interpretation service to any service level agreements (SLAs), those that do are focused on important components of the customer experience – quality (38.1%), percentage of calls handled in the required timeframe (37.5%), CSAT (32.1%), average speed of connection/ASA (31.0%), call completion rate/ABA (25.0%) and customer complaints (21.4%).

What types of SLA's do you have in place with a language service vendor?

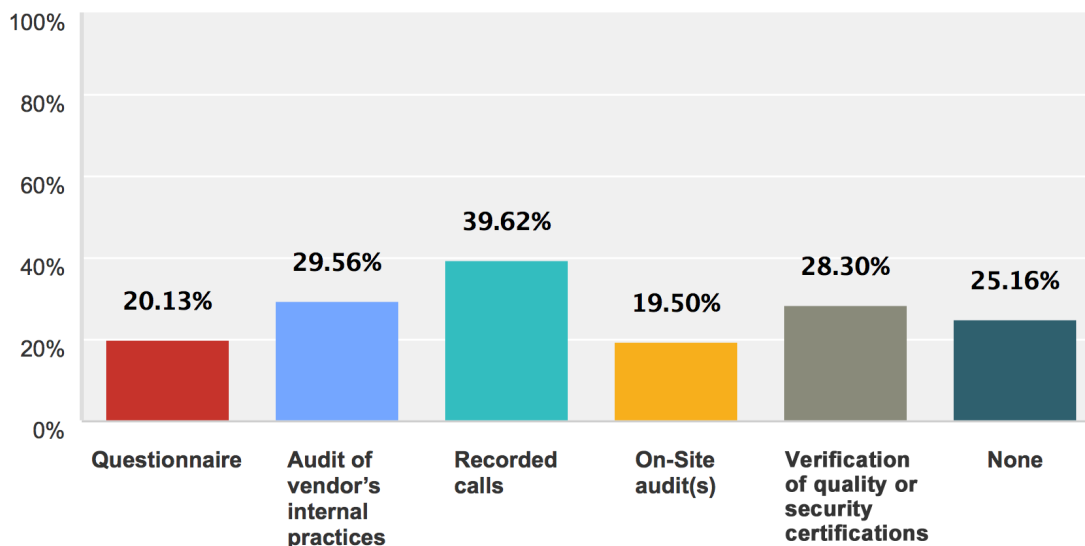| Category	Percentage
% of calls handled in X seconds	37.50%
CSAT	32.14%
Quality	38.10%
Average connection or speed of answer	30.95%
Call completion rate/ abandon rate	25.00%
Complaints (number or percentage)	21.43%
System uptime	7.74%
No SLAs	32.74%
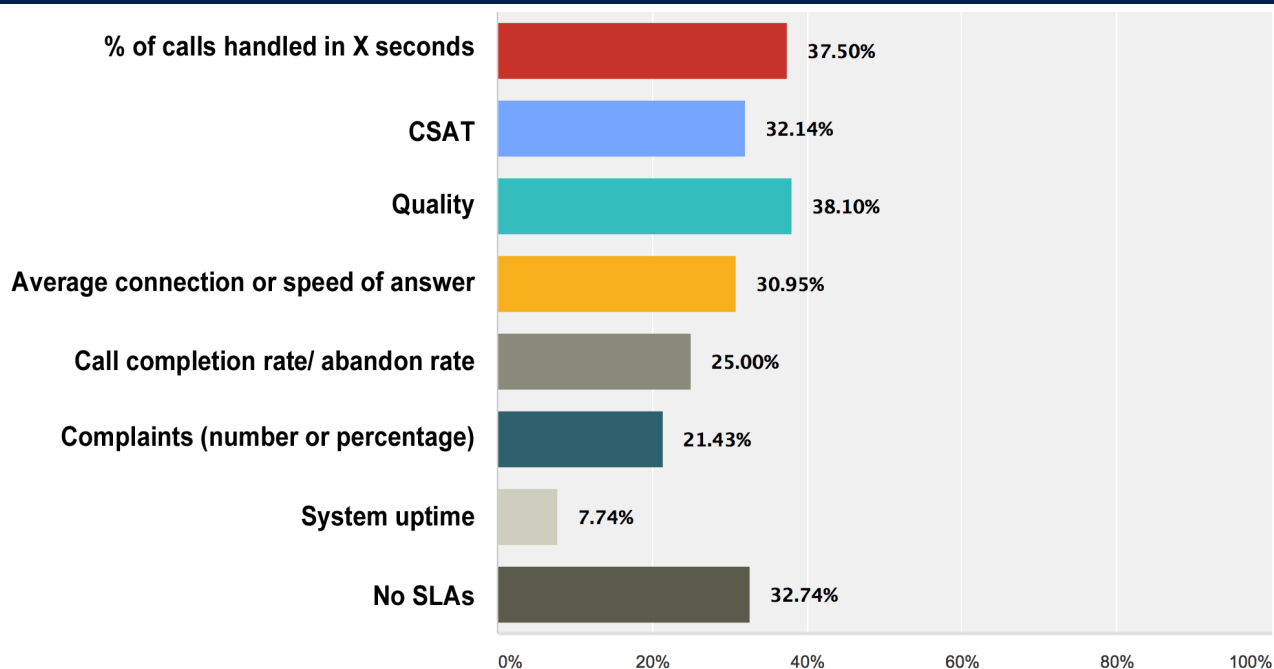
In some cases, the KPI attainment may not be identical between a brand's internal contact center and the interpretation service, but that may be acceptable. "Ultimately, providing an interpreter service to our non-English customers helps to resolve the issues, as the nature of our work requires extensive training that would cost more to train bilingual reps," explains a Customer Experience Analyst in the telecom space. "The KPIs negatively affected by using a language service is acceptable to resolve issues for these customers. They are nominal; not detrimental."

It is also important that a 3rd party service uphold all compliance requirements, including those pertaining to security or privacy laws. 39.6% say they audit their language service vendor through recorded calls, while 29.6% do so through an audit of the vendor's internal practices and 28.3% require verification of quality or security certifications. A quarter of respondents do not conduct any audits with their supplier.

How do you audit your language service vendor for compliance with security or privacy laws?

Category	Percentage
Questionnaire	20.13%
Audit of vendor's internal practices	29.56%
Recorded calls	39.62%
On-Site audit(s)	19.50%
Verification of quality or security certifications	28.30%
None	25.16%

63.4% of contact centers say their language partners record calls, and 52.8% say this is an expectation in order to do business with them. 17.8% say it is not expected, although preferred, and 5.5% do not think it is necessary. 23.9% of contact centers do their own recording, regardless of whether the interpreter service does or not.

What is your expectation of a language vendor recording calls?

|	
Expected	52.76%
Not expected, but preferred	17.79%
Not expected and not preferred	5.52%
We prefer to do our own recording of their calls	23.93%
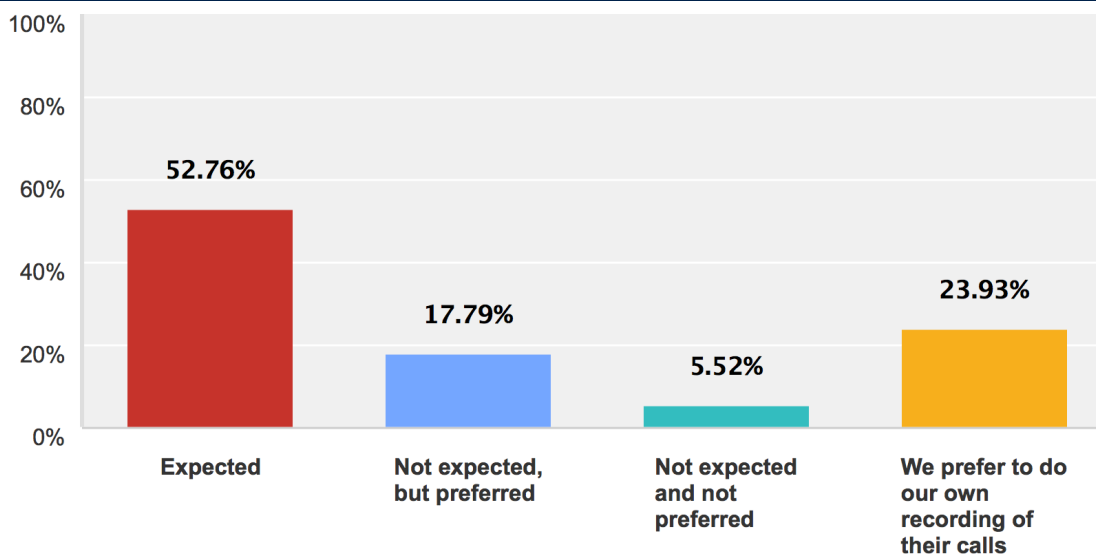
Monitoring the Customer Experience

A positive customer experience is imperative in all customer interactions, and those handled by a language interpreter are no exception.

Unfortunately, 35.8% of contact centers that utilize a language interpreter are not measuring CSAT consistently across their internal and external agents. For those that do, a full third (32.7%) say that CSAT scores are equal between the two groups and 20.0% say that interpreters score significantly or somewhat higher! Only 11.5% find interpreters scoring lower than internal bilingual agents.

How do the CSAT scores for external interpreters compare to those for your internal agents?

Significantly higher	7.88%
Somewhat higher	12.12%
About the same	32.73%
Somewhat lower	10.30%
Significantly lower	1.21%
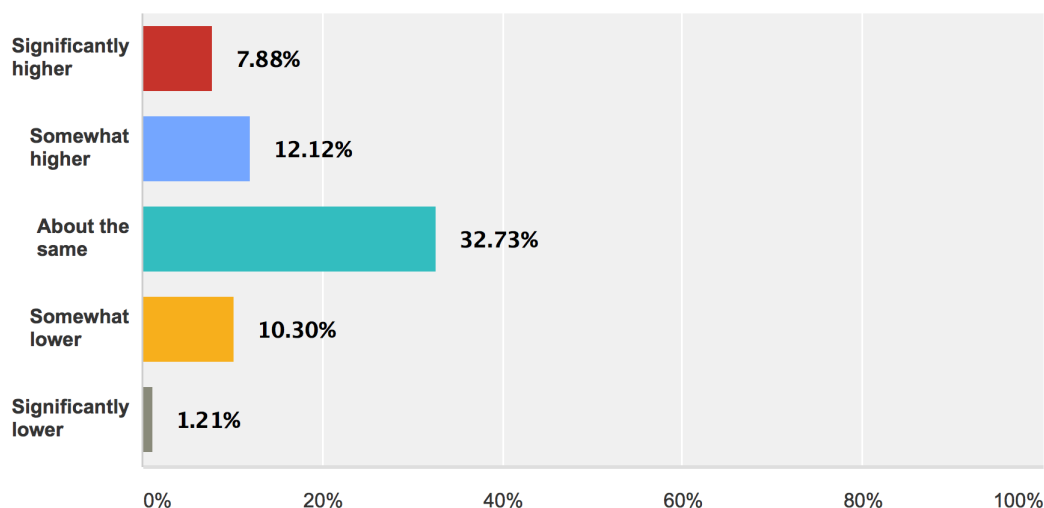
Respondents to this study appear hesitant to allow the language interpretation service to send out their own post-call surveys to capture CSAT and other quality data from the non-English callers. When directly asked, just 29.6% responded with 'yes, definitely!' and only 10.1% said they already allowed it. The remainder was either against it (20.7%) or on the fence (39.6%).

Regardless of who is collecting the data, the value to the customer experience is evident. Over 70% of all respondents said their multilingual customers were either somewhat or significantly impacted in a positive way by having language interpretation services:

- Increased FCR – 70.2%
- Quicker response times – 72.0%
- Fewer transfer and escalations – 75.0%

THIS IN TURN TRANSLATED TO:

- Higher customer retention – 70.9%
- Greater customer loyalty – 73.0%
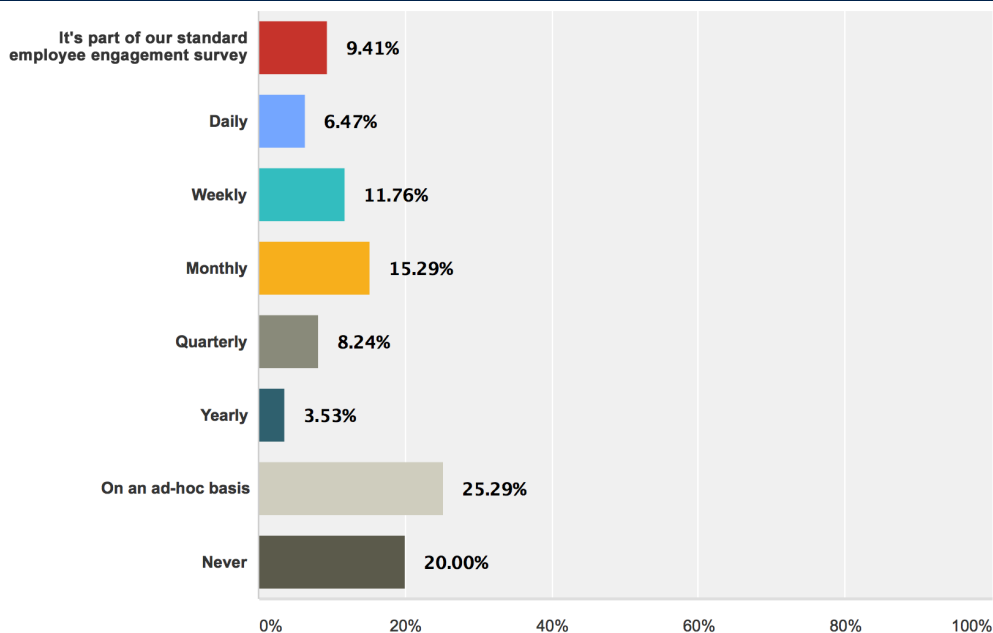
Managing the Agent Experience

One facet that is often overlooked when entering into a language partnership is the satisfaction of the internal agent team with the interpreters. 20.0% of contact centers are regrettably not gauging that satisfaction at all. Of those that are, it is often (25.3%) occurring on an ad hoc basis with half (51.3%) doing so through informal means – anecdotal agent comments (29.6%) or one-on-one manager and agent meetings (21.7%). The remainder is using post-call surveys (29.6%) most of the time; with lesser usage of CRM notes (5.9%) and written employee surveys or complaints filed against the language partner (6.6%).

How do you poll your end-user agents or employees on their satisfaction with the language service?

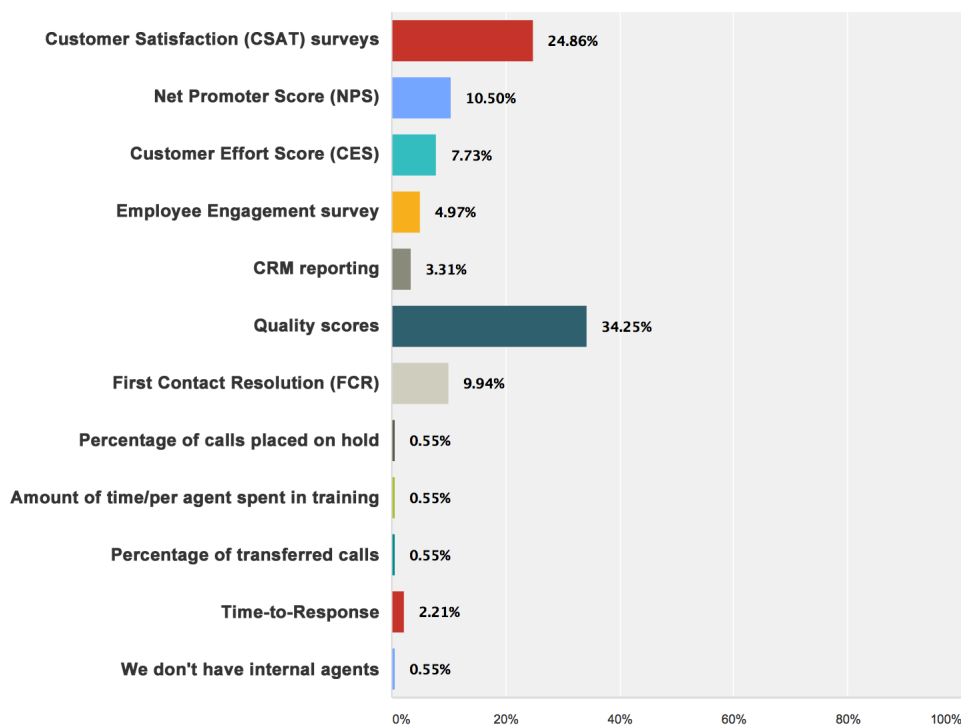| Category	Percentage
Anecdotal	29.61%
One-on-one manager and agent meetings	21.71%
Post-call surveys	29.61%
Written employee surveys	6.58%
Number of complaints filed against partner	6.58%
Notes extracted from CRM	5.92%
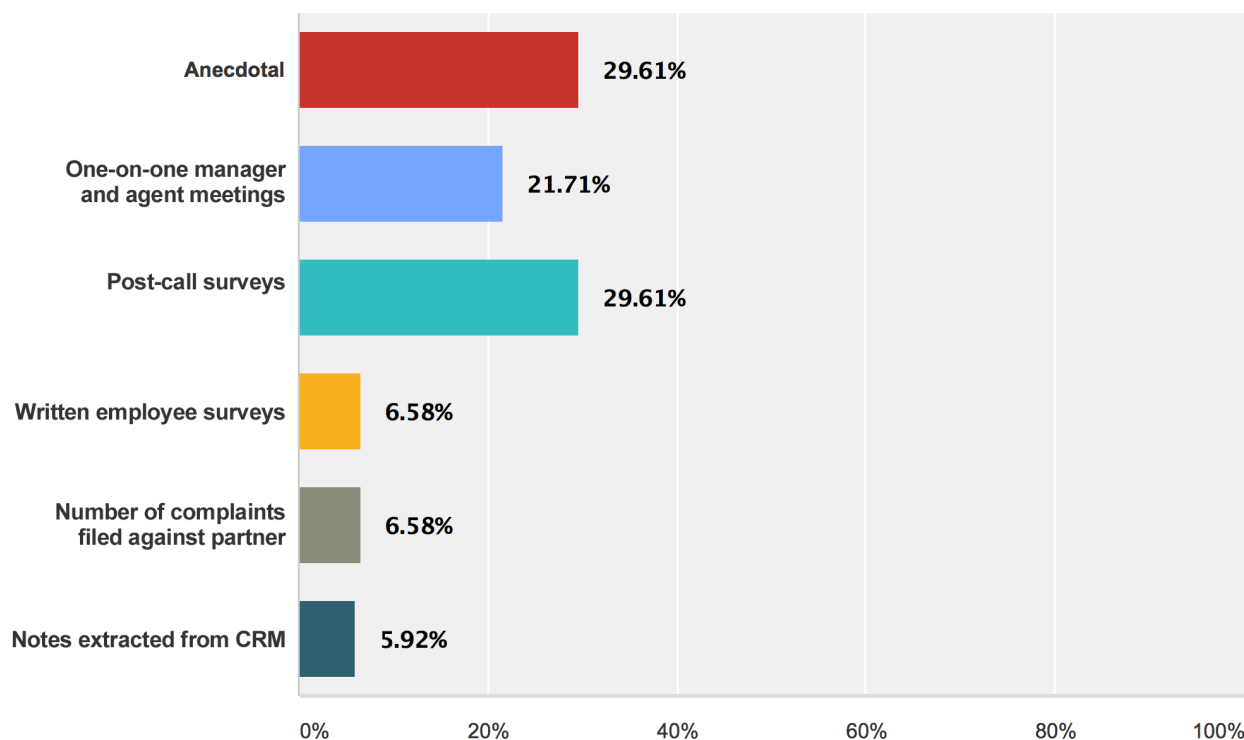
As mentioned above, the polling of internal agents on their interpreter satisfaction is quite inconsistent. Only 6.5% formally query agents on a daily basis, 11.8% weekly, 15.3% monthly, 8.2% quarterly, and 3.5% annually. 9.4% say it is part of their standard employee engagement survey.

How often do you poll your internal agents/employees on their satisfaction with the language service?

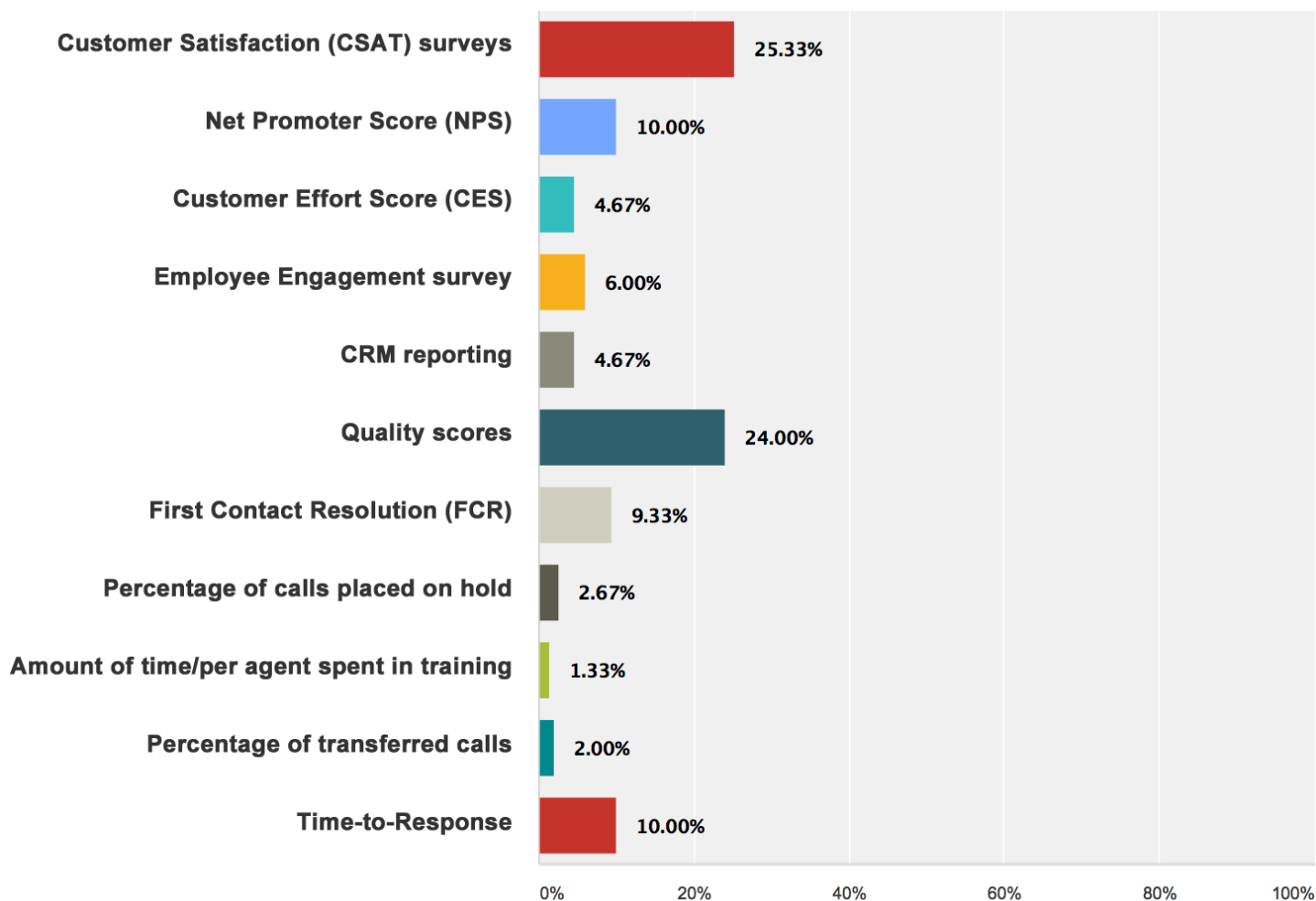| Category	Percentage
It's part of our standard employee engagement survey	9.41%
Daily	6.47%
Weekly	11.76%
Monthly	15.29%
Quarterly	8.24%
Yearly	3.53%
On an ad-hoc basis	25.29%
Never	20.00%

The significance of consistently monitoring, reporting and comparing quality and CSAT across all centers, regardless of location and ownership should be clear. But not only does this data have implications to the customer, it also does to the contact center and the agent. When asked which customer experience metric best helps the contact center leader manage their internal agents, 59.1% said either quality scores (34.3%) or CSAT (24.9%)

Which customer experience metric helps you best manage your INTERNAL AGENTS?

Metric	Percentage
Customer Satisfaction (CSAT) surveys	24.86%
Net Promoter Score (NPS)	10.50%
Customer Effort Score (CES)	7.73%
Employee Engagement survey	4.97%
CRM reporting	3.31%
Quality scores	34.25%
First Contact Resolution (FCR)	9.94%
Percentage of calls placed on hold	0.55%
Amount of time/per agent spent in training	0.55%
Percentage of transferred calls	0.55%
Time-to-Response	2.21%
We don't have internal agents	0.55%

The same holds true for the contact center leader who manages outside language interpreters (25.3% CSAT and 24.0% quality); again showing the necessity for reliable CSAT and quality collection and reporting.

Which customer experience metric helps you best manage your LANGUAGE INTERPRETERS?

| Metric	Value
Customer Satisfaction (CSAT) surveys	25.33%
Net Promoter Score (NPS)	10.00%
Customer Effort Score (CES)	4.67%
Employee Engagement survey	6.00%
CRM reporting	4.67%
Quality scores	24.00%
First Contact Resolution (FCR)	9.33%
Percentage of calls placed on hold	2.67%
Amount of time/per agent spent in training	1.33%
Percentage of transferred calls	2.00%
Time-to-Response	10.00%

CONCLUSION

Why Multilanguage Support?

Interestingly enough, most contact centers do not see multilingual support as an added revenue generator, but more of a necessity. Only 10.6% said they already charge non-English speaking customers more for customer service in their native language, while 47.6% said their customers wouldn't pay additional, and 41.8% haven't attempted to do so.

Would your non-English customers pay more for support in their native language?

Yes – they already do
10.61%

No
47.58%

Possibly – we haven't tried this yet
41.82%
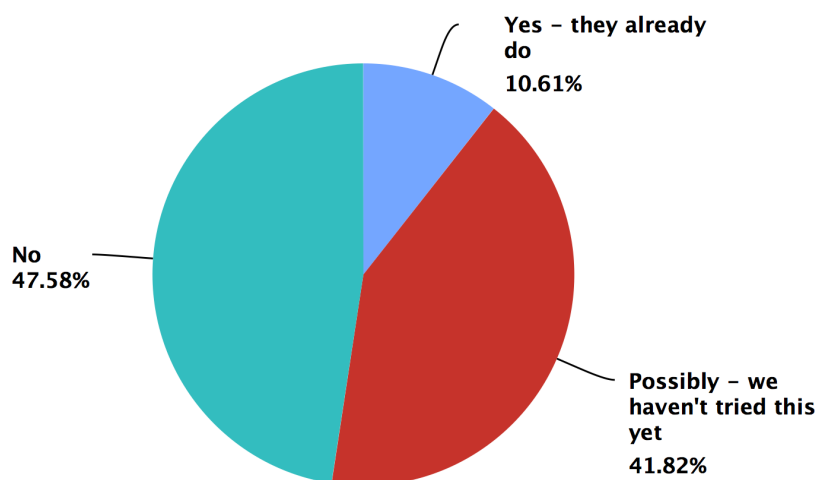
When asked why non-English speaking customers wouldn't pay more for support in their native language, the responses suggested customer expectations led the decision-making:
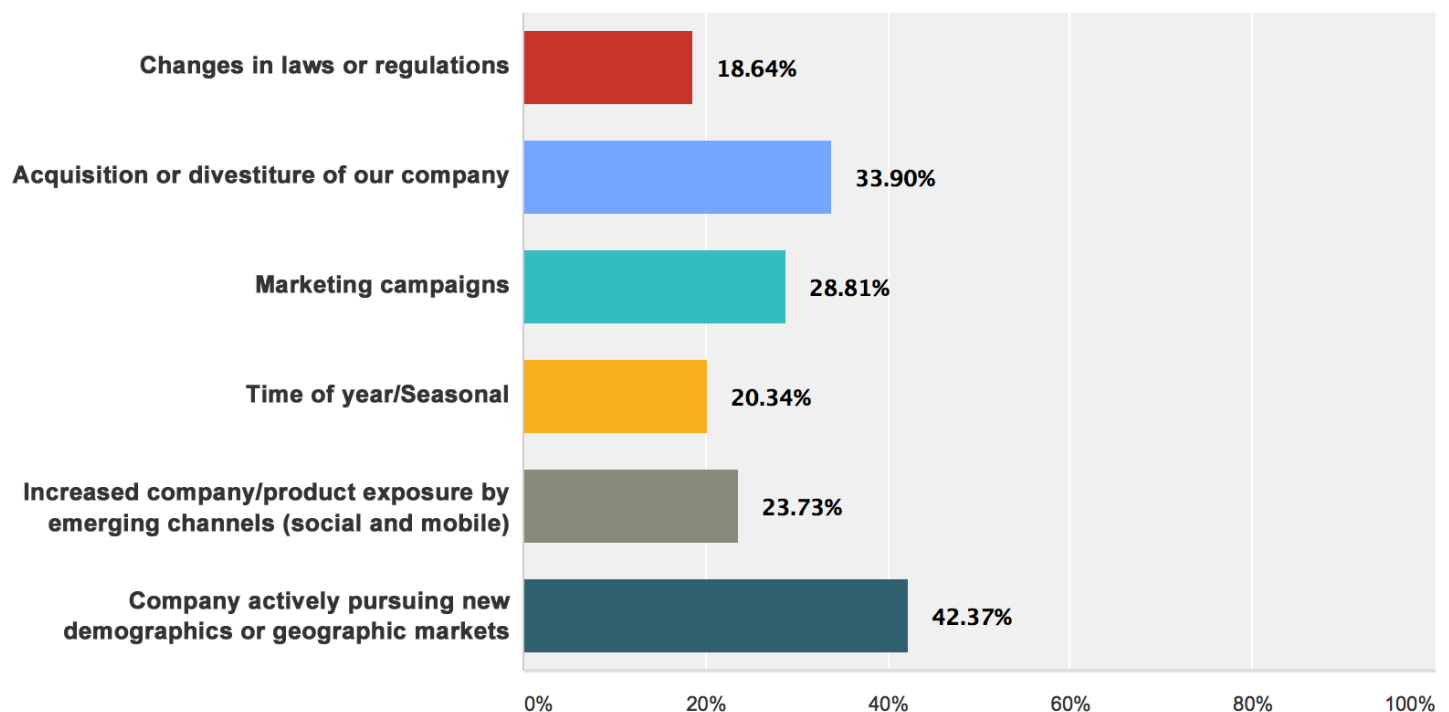
• "This really depends. We have a U.S.-based business with some multilanguage requests, but we also have a euro entity and those clients would expect support in their native language. Because of this, we haven't separated out the language requests."

• "Overall I don't think so; I think they are starting to expect us to speak their language, regardless of the cost to us."

• "If we don't? They'll just go to a brand that speaks the language."

• "We are global - we could not charge additional for this."

It's true that customer expectations around multilanguage may be changing, but it goes beyond that. It comes back to the pure underlying fact that the need and demand for multilingual support is growing.

"When you first hear about businesses that need language services, you probably think of companies selling goods and services abroad," says Voiance's Chairman and CEO. "You'd be right, but don't overlook demand for interpreters and translators right at home."

Even those survey respondents that reported not having multilingual customers at this time anticipate that to change, as over 47% believe they will have non-English customers within the next three years. And they are seeing that change occur largely because their companies or brands are instigating it; and there is a desire to benefit from the massive multilingual market. For 42.4% of call centers, the increase in non-English customers will be because their company actively pursues new demographics or geographic markets. 33.9% claim it will be due to an acquisition or divestiture of their company and 28.8% because of marketing campaigns.

What would influence the number of non-English contacts you receive?

Category	Percentage
Changes in laws or regulations	18.64%
Acquisition or divestiture of our company	33.90%
Marketing campaigns	28.81%
Time of year/Seasonal	20.34%
Increased company/product exposure by emerging channels (social and mobile)	23.73%
Company actively pursuing new demographics or geographic markets	42.37%

"The domestic market is surprisingly robust—and growing," continues Woan. "U.S. multicultural and non-English speaking markets represent trillions in purchasing power — larger than most countries. Since customers overwhelmingly prefer service in their native language, organizations have every market incentive to provide high-quality language support."

Customer support is a people business, after all. Contact centers already invest heavily in agent knowledge about their brand's product or service, technology, and customer service training. So why not complete the customer experience and offer support options in the customer's native language? As America becomes more diverse and our economy becomes deeply entrenched in the global community, being able to field a multilingual customer service team will not only be a competitive advantage, but an absolute necessity.

Benchmarking and guidance such as this report is intended to help provide contact center leaders with the direction and data needed to make informed decisions around multilingual support.

ABOUT THIS REPORT

This research was made possible by the underwriting support of Voiance Language Services (www.voiance.com). 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 contact center operations, empower contact center employees and enhance customer loyalty. ICMI's experienced and dedicated team of industry insiders, analysts and consultants are committed to providing uncompromised objectivity and results-oriented vision through the organization's respected lineup of professional services including training and certification, consulting, events and informational resources. Founded in 1985, ICMI continues to serve as one of the most established and respected organizations in the call center industry.

ABOUT VOIANCE LANGUAGE SERVICES

Voiance Language Services, LLC is a leading Phone Interpretation provider to contact centers. Operating a network of secure interpreter contact centers with over 1,000 seats, Voiance offers 24/7 Phone Interpretation in over 200 languages, Translation and Localization in over 100 Languages, and Video Remote Interpretation. Voiance's parent company CyraCom International, Inc. has been in business since 1995 and is the largest provider of Phone Interpretation with operations solely in the United States.