



## #Connected car



### IN 30 SECONDS

- In the era of the connected car, vehicle manufacturers (VMs) need to transform their customer support
- Our investigation of vehicle manufacturer performance shows most customer support is designed for a pre-digital environment
- A range of VM customer support teams may be underperforming in critical areas
- We present three recommendations for VMs in transforming customer support for a connected world

# Upgrade customer services, or risk falling behind

For the always-on consumer, car connectivity is a core part of the value proposition. Our investigation of 10 vehicle manufacturer customer service operations across the UK, France and Germany however found many failing to deliver the level of service that buyers expect.

There comes a point when a new technology stops being a diverting add-on or a 'nice-to-have' feature, and becomes instead a key differentiator for customers. We have reached that point with connected cars.

Today, more than three-quarters of connected car owners say they will look for connected features in their next vehicle – even if their current car has just one such feature<sup>1</sup>. By 2015, eight in 10 new cars will be connected<sup>2</sup>. Familiar with the convenience and entertainment

provided by their smartphones, consumers recognise the value in vehicles that render a similarly connected experience. Asked to choose between two similar cars, they will likely pick the one that supplies superior infotainment and a system that tells them about upcoming congestion or the availability of local parking.

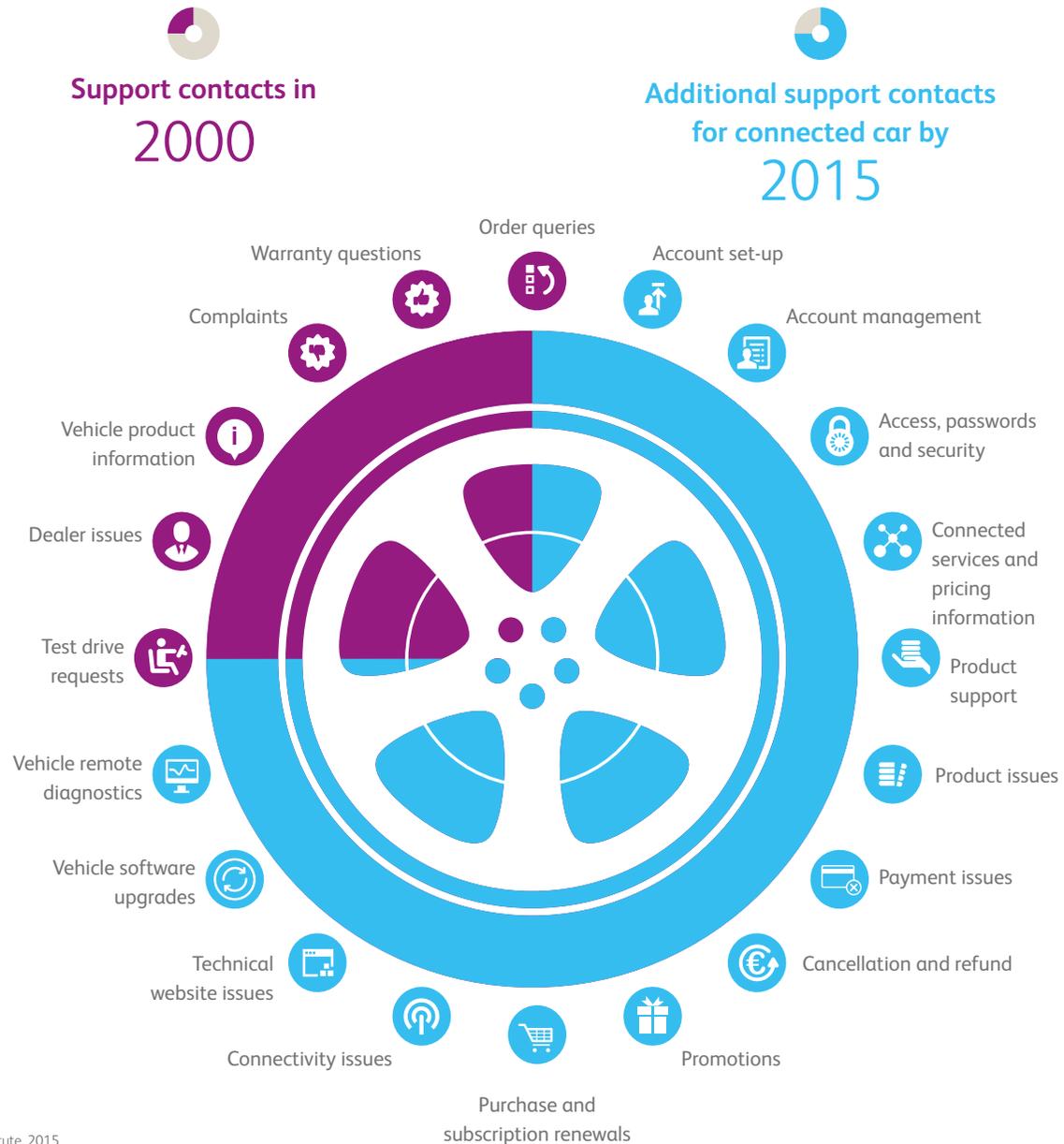
And yet, to build customer loyalty in this strategically important market, vehicle manufacturers (VM) need to do more than simply add connected features to their existing fleet.



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**Connected features increase support complexity**  
 The modern customer service centre will require diverse skill sets due to an exponential increase and a shift in the nature of customer support requests



Source: BearingPoint Institute, 2015



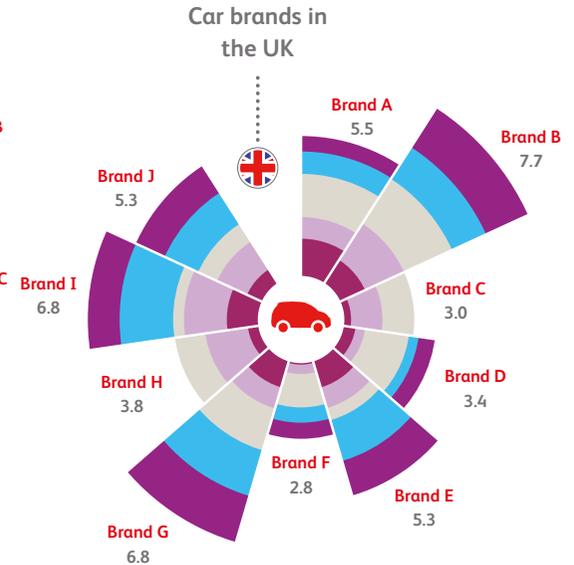
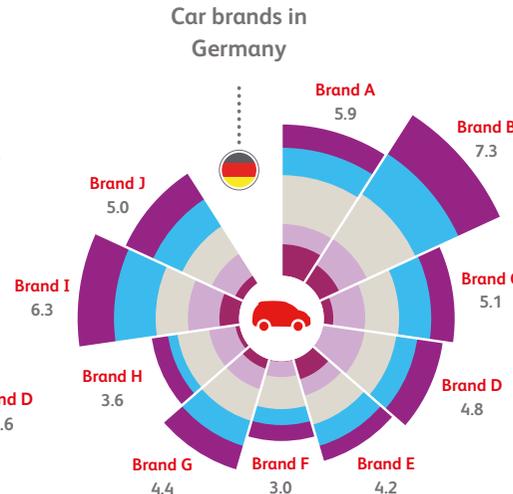
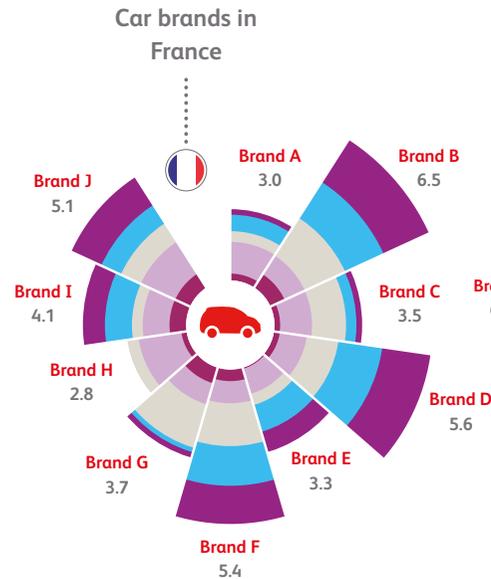
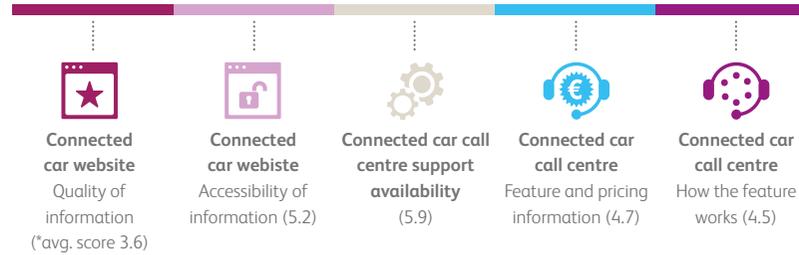
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## Customer support disconnect

The 10 car manufacturers, renamed car brands 'A' to 'J' for this exercise, were marked out of 10 for the following criteria in France, Germany and the UK. In general, connected car support was found to be very poor. Call centres lack knowledge of connected car features, pricing and working principles, whilst websites use outdated technology to present substandard information.

Customer experience is a critical area of differentiation. However, according to a recent investigation by the BearingPoint Institute – which reviewed the customer service provided by 10 leading VMs across their UK, French and German operations – the majority of VMs may be underperforming in this area. In the UK, for example, we found only one VM offering anything more than a standard call centre and only two that offered a full seven-day service, with many closed on the weekends. (For more on our investigation methodology, see 'Disconnected? Assessing Customer Support Performance' on page 09 of this article.)

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Source: BearingPoint Institute blind test, 2015  
 Car manufacturers were assessed on volume and quality of connected car related information only. Where zero values are marked, or chart data missing, no information was available.



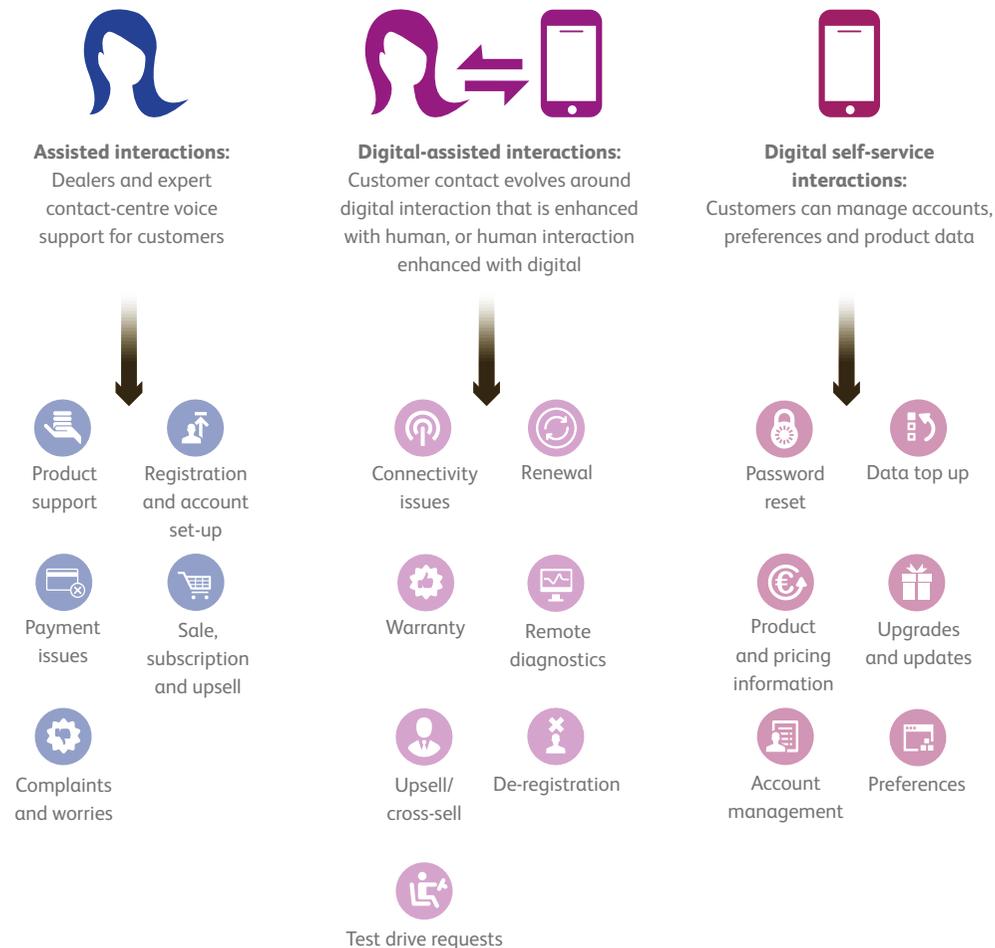
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## Going digital but embedding the human touch

Automobile manufacturers should optimise support channels, shifting more requests to digital-assisted or self-service channels.

At the other end, high-value commercial questions or situations where customers need reassurance should retain a personal touch.



Source: BearingPoint Institute blind test, 2015

*One of vehicle manufacturers' first priorities should be to introduce 24/7 service as standard*

## Customer support for a different era

If a customer is buying a more sophisticated vehicle, he or she will expect a more sophisticated customer service, whether online, face-to-face or through a call centre. Despite this, customer support at many VMs is set up for a different era. Today's call centres do not meet the lifestyles or channel preferences of consumers in the digital world. Their employees are also far more comfortable handling traditional calls – relating to warranty terms or dealer complaints – than technical enquiries about connectivity requirements and system upgrades. Indeed, BearingPoint's investigation found that most VMs lacked the expertise required to give customers the support they needed.



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‘Whether it’s more expertise from customer care agents, shorter wait times or a seamless omnichannel experience, there is a clear opportunity for brands to better use technology’ – NANCY COLLINS, GROUP PRESIDENT: HIGH-TECH, COMMUNICATION AND MEDIA, XEROX GROUP

The stakes are high. Whilst car dealerships have traditionally acted as intermediaries in the relationship between VMs and consumers, VMs today have the opportunity to build direct, meaningful relationships with their customer base through their call centres. If they do not improve their customer experience, this opportunity could be lost. On a more immediate level, there could also be a negative impact on customer brand loyalty and the potential to upsell add-on services.

To address this issue and improve performance, VMs should take action in three key ways: learn to satisfy connected consumers; bring digital experts into call-centre teams; and work with dealers to educate and inform customers at point-of-sale.

### 1 Keep up with ‘always-on’ consumers

We recommend that one of the VMs’ first priorities should be to introduce 24/7 service as standard - or at least extend standard support hours to evenings and weekends. A recent survey by Xerox found that over 54% of consumers would pay more money for better customer care.<sup>3</sup> They need to adopt a wider range of tools (such as video chat and call back) to give consumers the experience they get from other retailers of digital technology. In addition, they should explore sophisticated ‘no-touch’ digital tools (such as dynamic FAQ) to help customers find answers to their questions themselves. Furthermore, VMs should create – and maintain – dedicated support areas, forums and FAQ for connected car customers. This is because research suggests that around half of all

consumers are ‘always-on’ – they rely on several connected devices and go online multiple times a day<sup>4</sup>. As connected car customers are, by definition, buyers of digital technology, we could expect an even greater proportion of their number to use digital channels throughout their personal and professional lives.

Customer support is clearly an area where VMs are failing to live up to expectations. BearingPoint’s analysis of leading players in the VM market indicates that most VMs are not catering for digital-savvy customers. Of the 30 call centre operations reviewed, just one offered 24/7 service, and one offered seven-day operations between 8am and 8pm. In the UK, only one offers seven-day operations between 8am and 8pm. Furthermore, the VM’s main communication channel is the telephone call with call centre staff, yet uptake of advanced tools was poor. For example, web chat and call-me-back was utilised sporadically, whilst only one call centre used dynamic FAQs. And, in cases where a social media presence had been established, BearingPoint discovered only one created dedicated channels for connected car users.

**1** Only one in 30 call centre operations offered 24/7 service, and one offered seven-day operations between 8am and 8pm.



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## 2 Bring digital experts on-board

VMs should ensure their call centres contain digital experts with the skills and knowledge to handle complex queries. As the market matures, these teams will increasingly need to be multi-lingual to reflect the dispersed background of the consumer base. On a more proactive level, VMs could seek to train and educate customers rather than waiting for them to make contact first.

In a recent *Which?* survey, ‘poor staff knowledge’ was used as a key indicator of customer frustration.<sup>5</sup> For VMs, having the right expertise will be vital as they provide support around connectivity, compatibility and data security. But, as BearingPoint’s investigation suggests, today’s VM call centre employees remain far more comfortable handling traditional enquiries and complaints.

When BearingPoint contacted the call centres of leading VMs, we tested their employees’ basic knowledge. Relatively straightforward questions included: ‘Will this feature work in Europe?’, ‘Do I need

Less than  
**1/3** of the manufacturers provided informed answers to straightforward connected car questions in our test

to put a SIM in the car for this feature?’ and ‘How much will that cost?’ The results were striking. Less than one-third of the VMs investigated could give informed answers to all the questions; and less than half could furnish answers to just some of the questions – and, even then, only after consulting other people first. Most worryingly of all, some VMs gave information that was factually incorrect or misleading.

## 3 Build a stronger presence on the ground

Where dealers remain the sole first point-of-contact, VMs must ensure their employees have a good understanding of the product and timely information about upgrades and compatibility issues. VMs should offer training and education to ensure dealer knowledge is sufficient.

VMs could also learn from Apple’s ‘Genius Bar’ approach, through which Apple maintains a presence at larger retailers to interact face-to-face with customers. In practice, this would mean establishing mini VM operations within dealerships to talk directly to potential and actual customers, walking them through the connected features and anticipating any future queries they are likely to have.

Today, the connected car buyer’s first point of contact is still with dealers, whose focus is inevitably on sales as opposed to educating customers about the connected features in a new vehicle. At worst, customers may drive away without understanding how to operate these features. Some may not even realise they will work only if correctly activated and registered.



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### Conclusion: Sharing the passion

VMs should remember that there is a wide range of customer understanding and knowledge of connected technology. Not all callers will be tech-savvy. Many will be frustrated by their inability to get to grips with the technology that attracted them to the car in the first place. Others will not view their queries as being particularly advanced or difficult to answer. Coming from a generation that lives and breathes digital technology, they will assume call centre employees will share their enthusiasm and provide valuable insights to enrich their experience of their new car. After all, this is what they expect

from the other technology companies – such as Google and Apple – that are also expected to enter the connected car market in the near future.

For VMs, this means doing even more than introducing 24/7 service, bringing in tech-savvy workers and reaching out to customers at point-of-sale. They need to ensure their employees are passionate about connected cars to the extent that they can inspire sceptical or inexperienced customers, on the one hand, whilst talking the language of digital natives, on the other. Beyond creating the right environment for their employees, turning them into evangelists may entail giving them their own connected vehicles to drive and experience. ●



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### KEY TAKEAWAYS

- Consumers are increasingly looking for a seamless and convenient connected experience: more than three-quarters of connected car owners say they will look for connected features in their next vehicle
- For VMs, building customer loyalty and differentiation will require more than adding features – it will require excellence in customer support
- However, after an investigation of customer support performance across 30 VM call centres in Europe, BearingPoint found concerning levels of underperformance
- When buying a digital vehicle, customers expect a sophisticated service, but customer support at many VMs is set up for a different era
- Today's call centres do not meet the lifestyles or channel preferences of digital-savvy consumers and employees often lacked the expertise required to give customers the support they need
- To improve the customer experience, VMs need to address three critical areas
  - First, they must learn to satisfy today's connected, always-on consumers, introducing 24/7 service as standard and adopting a wider range of tools
  - Second, they need to bring digital experts into call centre teams with the skills and knowledge to handle complex queries
  - Third, they should work with dealers to educate and inform customers at point-of-sale, including the use of mini VM operations within dealerships to talk directly to potential and actual customers about connected features



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### METHODOLOGY

## The customer service offerings of leading vehicle manufacturers

### Disconnected? Assessing customer support performance

Before writing this article, we investigated the customer support offered by 10 leading VMs, ranking their call centres and customer-facing websites for ease-of-use, reliability and quality of information. For each VM, we compared how their support differed across three European markets: the UK, France and Germany.

Specific points of differentiation:

- Do VMs support customers through an all-purpose call centre or do they have a dedicated facility for connected car enquiries?
- What are the VM call centres' opening hours? Do they provide a 24/7 service that caters for 'always-on' consumers?
- How accessible is the quality of information on the VM's regional customer-facing website? And is the information reliable and helpful?

We also contacted each call centre with the kind of technology questions that a relatively well-informed customer would likely expect it to be able to answer. As well as queries about SIM cards and potential usage overseas, questions included: 'Does this vehicle have Apple CarPlay?', 'If not, when will it?' and 'If so, can my partner use CarPlay with an Android phone?'

An overview of our results across the three markets follows:

### France lagging behind...

UK and Germany are at approximately the same stage of development, with respect to their overall customer support programmes, while France is clearly lagging. The mean UK score was 5.0, in Germany it was 4.9 and the mean in France was 4.3 (see figure on page 3 on how 10 VM brands score against key customer support metrics in France, Germany and the UK)

### ...but may improve as its connected car market grows

France's lacklustre customer support can partly be explained by its relative immaturity as a connected car market for VMs. Many VMs have yet to roll out their connected car services into the region and there is a lower appetite for the vehicles in the country.

### Just one VM is credible across each market

Only one brand – 'Brand B', a German VM that already has a strong reputation as a connected car manufacturer – has developed a credible customer support programme across all three markets. Even so, its programme is notably more advanced in the UK and Germany than it is in France.

### VMs' call centres are stronger than their websites...

Our 10 VMs have made more progress in developing their call centres than they have their website support. Almost all have built stronger call centre capabilities than website capabilities, a trend observable across the three regions. Nonetheless, four in 10 still have at least one 'poor' call centre that scores an overall of three or below.

### ...yet call centre employees still don't have the knowledge they need

The quality of responses to the standard technology questions varied significantly, particularly in terms of depth of knowledge. For example, typical assessments from our reviewers were 'not very helpful' to 'the agent was polite, but had no knowledge of the product'.



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Sarah-Jayne is a Partner at BearingPoint and leader of the Digital Customer Management practice. Specialising in Automotive, she works closely with OEMs and automotive leasing providers alike to design and deliver digital strategies and connected car services. Sarah-Jayne has published work on digital customer behaviours and world-class digital organisations; she co-authored the book *Addressing customer paradoxes in the digital world*, published by Pearson. She is also a former winner of the Management Consulting Association's award for Marketing Consultant of the Year and a joint team winner, with Jaguar Land Rover, for the 2015 Management Consultancies Association Digital and Technology Project of the Year for Connected Car.

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At the BearingPoint Institute, our ambition goes beyond traditional ‘thought leadership’. We aim to contribute original ideas to the science of business management whilst equipping decision makers with practical advice gained in the field and through our research projects.

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### About BearingPoint

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