

The Global Agent Focus Group Research Report





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Introduction

CustomerServ is proud to present our comprehensive global market research study of call center agents in over 25 countries. This "voice of the agent" report provides holistic analysis and an insightful view of the agent experience at BPO (business process outsourcing) companies across the USA/Canada, CALA (Caribbean and Latin America), Africa, Asia, and Europe.

The purpose of our report is to help companies that outsource to BPOs and BPO providers gauge agent sentiment and feedback in an unfiltered format, and to draw similarities in agent responses between onshore, nearshore, and offshore regions, including emerging countries.

The survey's findings could help validate known trends in agent experiences, and spotlight new ones to help BPO and client leaders improve agent engagement practices, achieve desired performance, quality, and customer experience (CX) outcomes.

Methodology and Objectives

CustomerServ conducted a 20 question, incognito online survey over a period of 60 days, enabling several thousand agents to respond anonymously. We distributed the survey link across the industry and invited agents to respond without providing any personal information, including their identities, names of their employer, or any client projects. Survey respondents consist of call center agents that work for BPO companies —in-center (at a physical site location) or work-from-home (remote).

Our study provides a gateway to how agents feel about their role and call centers in general. Particularly interesting are the commonalities and differences in regional responses, especially around agents' perspectives, preferences, expectations, needs, goals, objectives, and sensitivities. The survey also includes a comments section, enabling agents to give the type of raw insights that are essential for leaders to hear.



Why Survey Agents Anonymously?

To better understand a BPO's operation and agents' perceptions of the company, brands that outsource often conduct agent focus groups at the onset of a new vendor relationship. Focus groups are also implemented when vendor management leaders visit outsourced call center sites.

On-site or virtual focus groups and anonymous surveys are effective ways to help gauge agent sentiment. However, there are some drawbacks to live focus groups as agents may withhold feedback out of reticence or even fear of backlash if they share anything negative about their employer. There is also concern that BPOs might "pre-select" agents and seed client-focus groups only with agents who have been prepped, which defeats the purpose of obtaining a fair representation of agent sentiment.

Utilizing data, analytics, and accumulated expertise from many years of BPO due diligence, including agent-focus groups, our team compiled a list of relevant questions, which enabled us to accurately measure sentiment, extrapolate impromptu feedback, and share our findings with you.



Agent Sentiment and Customer Experience

The post-pandemic BPO industry has undergone tremendous change. Recruiting, retention, and management methods continue evolving, as BPOs and corporate brands that outsource, adjust to new challenges. It is more important than ever for leaders to have an accurate barometer of agent sentiment. And it is essential for agents to be given a forum to express their concerns.

In any focus group or survey, almost all agents will ask for higher wages, but they are also looking for a safe, welcoming, cohesive, inclusive, professional, and fair working environment where career advancement is attainable. Agents cross the industry, bring unique skill sets to the call center "job" that could be harnessed into leadership roles and upskilling. But too often agents aren't receiving the level of support and mentoring needed.

There is a direct correlation between a BPO's agent engagement culture and the experience delivered to brands and their customers. When brands experience challenges with their BPOs, such as high turnover, low performance, and other breakdowns, the leading causes are often a lack of agent engagement and frontline leadership issues.

Progressive BPOs consider the agent as the nucleus of their operation. These organizations understand that a people-centric culture is a catalyst for agent satisfaction, retention and overall success. BPOs that don't adopt these practices are often characterized as commodity operations with higher turnover rates and lower agent satisfaction ratings.

We must also be sensitive to cultural and societal norms in each country we operate in, as opposed to deploying cookie-cutter processes across the board. The world has 7 billion people, 195 countries, 7,000 languages and millions of call center agents. BPO is an extraordinarily diverse industry connecting people and cultures around the world one of the many things to celebrate about our industry. BPOs are particularly essential in global communities with persistently high unemployment rates and limited career opportunities for disadvantaged individuals.

The BPO sector, valued at \$260 billion worldwide, is projected to exceed \$500 billion by 2030. With the call center industry's frenetic growth, the role of the call center agent has never been more important.



Survey Results

HOW LONG HAVE YOU BEEN WORKING AT THIS JOB?



Asia/Pacific



USA/Canada



Average agent tenure in Arrica is lower, indicative of an emerging market where BPOs are hiring to meet growing demand from new and existing clients. CALA and Asia/Pacific agent tenure points to more mature outsourcing regions with more BPO operations. In general, average tenure across nearshore and offshore regions was slightly higher than expected. And surprisingly, North America, particularly the USA, had 70% of respondents at 120 days + tenure. This could indicate USA/Canada BPOs easing up on forced attrition due to staffing issues.

Africa



Europe



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WHY DID YOU APPLY FOR A CALL CENTER JOB?



Asia/Pacific



USA/Canada



As expected, in emerging markets like Africa, there is a high level of interest in new call center jobs and a penchant for careers in the BPO industry. Not surprising from a market with 17% of the current global market share of impact workers (call center agents employed by BPOs committed to impact sourcing practices). CALA and Asia/Pacific agent referral programs and incentives appear to be working. Both regions report an notable interest in long-term careers. In North America, 30% of agents express interest in a call center career, which is impressive given the prevailing headwinds with staffing and wage inflation. North American BPOs must do better at identifying individuals with the skills for advancement by offering career pathing and management training programs to cultivate future call center leaders.

Africa



Europe



IS THE JOB HARDER THAN YOU EXPECTED?

CALA/Latin America



Asia/Pacific



USA/Canada



In CALA, perhaps more complex work should be outsourced to BPOs as agents find the job easier than expected? North America data is unremarkable, however, 18% think the job is harder than they expected – this correlates with feedback received from onshore BPO agent exit interviews. Also coincides with client feedback that onshore agents perceive that working from home "answering calls" is an easy job. Responses also line up with attrition rates and other staffing issues in North America. Overall, data suggests that nearshore and offshore BPO agents have a better understanding of what is expected of them.

Africa



Europe



DO YOU PREFER WORKING FROM HOME OR AT THE CALL CENTER?





USA/Canada



In CALA, Europe, and North America, work-at-home preferences are clear. However, recent trends indicate that clients prefer agents working in-center. In fact, we are seeing more contractual requirements around ratios of in-center vs. work-at-home employees . However, a hybrid of in-center and remote will likely continue. In CALA, restrictions are easing, and physical call center operations are filling again as employers and clients impose return-to-office mandates. Agents in Africa favor a hybrid environment but are perfectly fine working inside a call center.

Africa



Europe



IF YOU ARE WORKING FROM HOME, WHAT ARE YOUR MAJOR CHALLENGES?

CALA/Latin America



Asia/Pacific



USA/Canada



In Asia/Pacific, most agents live at nome in multi-generational households where workspace, internet issues, and other distractions pose a challenge. This coincides with feedback from brands and BPOs in the region since the onset of the pandemic. In Africa, remote workers are likely tethered to the physical site, hence why feeling separated is less of an issue. In North America, CALA and Europe, the feeling of separation from co-workers is a growing concern for remote workers, although most work-at-home agents still prefer to work remotely.

Africa



Europe



HOW RELIABLE IS YOUR INTERNET WHEN YOU WORK FROM HOME?



Asia/Pacific



USA/Canada



Africa – where most agents work in-center. However, BPOs should extend corporate internet and network access to remote agents where possible. Asia/Pacific reported the biggest problem with broadband at home, which coincides with client and BPO feedback in this region during and post-pandemic.

Africa



Europe



WHO PROVIDES INTERNET AND COMPUTER EQUIPMENT WHEN YOU WORK FROM HOME?



Asia/Pacific



USA/Canada



1 out of 3 Asia/Pacific remote workers use private internetcontributing to work-at-home latency and connectivity issues as the internet is shared with other household members. North America, CALA, and Europe are generally on VDI (virtual desktop infrastructure) with most agents on their employer's network. In Africa, with most agents at physical call center sites, VDI and bandwidth at home are less of a concern.

Africa



Europe



DO YOU UNDERSTAND WHAT GOALS YOUR EMPLOYER HAS SET FOR YOU?



and performance management continuitication, collaboration, and performance management can be challenging. Survey results point to an improvement in agent collaboration since the early pandemic days. Kudos to frontline BPO training and supervision teams.

Asia/Pacific



USA/Canada



Africa





DO YOU FEEL THAT YOU RECEIVED THE RIGHT TRAINING?



Asia/Pacific

USA/Canada



Unremarkable feedback across each region and generally positive for new hire and ongoing training. Clearly, top level BPOs have invested heavily in remote worker training curriculums and technology, addressing one of the many challenges with managing a large remote workforce. 1 in 4 agents in CALA express concerns with training. Perhaps CALA BPOs should take note and re-evaluate training programs.

Africa







DO YOU RECEIVE ADEQUATE ONGOING TRAINING?

CALA/Latin America



Asia/Pacific

USA/Canada



Generally unremarkable and positive across each region. This could indicate that BPOs continue to invest heavily in training systems and technology to ensure that new hires are properly trained, and existing agents receive continuous coaching. CALA agents express concerns with ongoing training, similar to concerns with initial training.

Africa





DO YOU FEEL LIKE YOU ARE APPRECIATED AT YOUR COMPANY?

CALA/Latin America

11



Asia/Pacific Sometimes Yes 59.4%

USA/Canada

No

27.1%



or uncared for. North America/CALA/Asia/Pacific are very similar, coinciding with overall agent sentiment in each region. Europe's responses could mean that agents need less individual motivation and are more self-motivated due to educational or cultural differences with other regions.

Africa







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DOES YOUR COMPANY ASK YOU FOR SUGGESTIONS AND WAYS THEY CAN IMPROVE?





USA/Canada



Africa



Europe





IF YOU WERE NOT WORKING AT THIS COMPANY, WHAT WOULD YOU BE DOING?

CALA/Latin America



Asia/Pacific



USA/Canada



Except for agents in Africa, most respondents would be working at a different call center or a non-call center job. This is not unusual and indicative of how competitive labor markets are, especially in certain regions. Competition for workers is less of a concern in emerging markets, but over time (years), this could become a factor for BPOs seeking call center agent talent. There is heavy competition for both call center and non-call center jobs across most regions, which should motivate BPOs to offer competitive wages and a best-place-to work culture to help with agent recruitment and retention.

Africa



Europe



WHAT DO YOU TELL YOUR FRIENDS AND FAMILY ABOUT WORKING AT YOUR COMPANY?

CALA/Latin America





USA/Canada

Asia/Pacific



Generally positive sentiment about working for a call center company worldwide. BPOs should take note that you want agents who appreciate the opportunity to work for your BPO, provided that your operation is agent-centric. Disgruntled or transient agents can be found in every BPO's workforce, and they are the most likely to leave—this should be welcomed by BPOs. Negativity is contagious, especially inside a physical call center space. A positive and engaged workforce with work life balance and a cultural connection to the company and its clients is essential for the BPO's success. Unfortunately, not all BPOs put their agents first.

Africa



Europe





WHERE DO YOU SEE YOURSELF IN 6 MONTHS?



Asia/Pacific



USA/Canada



Agents in Africa overwhelmingly see themselves in management positions at their current employer. This is typical of newer and emerging BPO markets in which unemployment rates are very high and jobs are scarce. BPOs in emerging markets must offer a clear and attainable management training program and career path to harness hidden talent. More agents in CALA and Asia/Pacific express a desire for career advancement into BPO management roles, while North American and European agents are less interested in BPO careers. Agents who see themselves as agents 6 months from now could be a matter of preference. Not all agents have the will or skill to become managers.

Africa



Europe



WHAT IS THE MOST IMPORTANT THING THAT YOU WOULD CHANGE AT YOUR JOB?



Asia/Pacific



USA/Canada



A bit of a loaded question because the response overwhelmingly and invariably leans toward higher pay. Outside of this survey, higher pay often ranks at the very top of every agent's "suggestions for improvement" list whenever our clients, BPOs or the CustomerServ team implements focus groups. And we are certain the same request is made by workers across all industries. Aside from higher pay, flex scheduling ranked highly. This reminds us that remote agents likely prefer to remain remote or hybrid (in office + remote). And BPOs must be creative in ways to balance client headcount requirements with agent flex-scheduling preferences. Most BPOs, especially nearshore/offshore, require full-time hours due to the BPO's mandates coupled with labor laws in various countries

Africa





DOES THIS JOB PROVIDE YOU WITH SKILLS YOU CAN USE IN THE FUTURE?



Somewhat 20.8% No 5.2% Yes 74.0%

USA/Canada



Responses in North America coincide with the general sentiment that working for a call center is just a job. Whereas in other regions, it is viewed as a longer-term opportunity, perhaps even a career. Keeping in mind that in many developing countries, a call center job is aspirational and highly sought after. The training, education, and career opportunities accessible to workers in first world, or developed countries are not necessarily available for agents in emerging markets. Therefore, BPOs in all regions should endeavor to provide financial wellness or other skills training agents can use in the future. Many BPOs we work with provide advanced skills training, grooming agents for call center management and executive roles, or educational and other career pursuits.

Africa



Europe



ARE YOU RELYING ON THIS JOB TO HELP SUPPORT YOURSELF AND YOUR FAMILY?

CALA/Latin America





Asia/Pacific



USA/Canada



Africa



Europe





WHAT TYPE OF CUSTOMER IS THE MOST CHALLENGING?

CALA/Latin America



Asia/Pacific



USA/Canada



Agents across most regions ranked inbound costoner care as the most challenging contact type and this is somewhat surprising. It is entirely possible that pandemic-related service issues linger, fueling customer angst toward agents. Even normally straightforward and short calls like "Where is my order" or "WISMO" could turn out to be an odyssey for both customer and agent. Brands and BPOs alike should take note of which BPO in which regions are the best fit for specific contact types. A one-size-fits-all approach is not advisable. Not surprised that outbound sales programs rank high on the difficulty scale in emerging markets—this is to be expected. Also not surprising is that agents ranked inbound sales and retention or cancel/save calls as challenging. BPOs should pay close attention and re-evaluate the agent profile, as well as training and coaching for sales and retention programs.

Africa



Europe



WHEN YOU ARE APPLYING FOR A JOB, WHICH OF THE FOLLOWING ARE MOST IMPORTANT?

CALA/Latin America Company culture Safety and security 21.8% 26.7% None of the above Enviromentally 2.7% - conscious Community 19.3% service 10.7% Diversity and inclusion 18.8%

Asia/Pacific



USA/Canada



As they should be, agents in every region ranked safety and security among their most important considerations. Pandemic-related concerns are top of mind for workers globally, and employers must ensure health and safety of their employees. Company culture also ranked high, coinciding with our advice to BPOs to strive for a best-place-to-work culture. Negative reviews of BPOs by employees are just as prevalent as negative reviews of all companies and their products and services. Diversity and inclusion are of great importance along with the environment and social responsibility. In 2023 and beyond, for BPOs to attract and retain top quality talent, it is essential to invest in diversity & inclusion (D&I) leadership and practices, as well as corporate social responsibility (CSR) and environmental social governance (ESG).

Africa





Top Comments from Agents

Africa

- As much as I appreciate the opportunity offered, I would like to suggest better forms of appreciation (instead of food stuff/snacks/merchandise). Maybe we can be offered cash directly or vouchers which are more valuable for our daily use. Thank you!
- A happy employee equals to a happy customer as it is crucial for employers to take care of their employees in order to have a healthy work environment.
- The leadership should be better and the pay should be more. Lack of bias especially in promotions. Better communication from leaders is needed.

I am having a great experience being here! I am looking forward to learning more, growing and being a major contributor to the growth of the company at large.

- A culture of equality and appreciating the employees more often should be a prioritized.
- Overall I don't have any major complaints, however I do think we should have an option when going into a certain campaign. Incentives regularly to keep agents motivated. Acknowledge when agents are trying. Transparency between leadership and agents.
- Please provide transportation door to door, if possible, especially for females working night shift.

Asia/Pacific

- A lot of us are now complaining about the 30 minutes lunch provided to us. A good Healthcare insurance, I'm already a regular worker, but we haven't given any Medical Insurance Cards yet. This could mean my job, I know. I just hope the efforts of the silent majority will be appreciated.
- The salary should depend on the experience of the agents and how long have they been working in this industry. Those agents who have less experience are receiving higher salaries comparing to those who have higher experience in this industry.
- Watching tenured agents leave their jobs is demotivating for us new hires.
- Hopefully, I can find a better company with higher salary and benefits so I can save for myself. I'm still looking for that place where I feel appreciated, the management is not selective/playing favorites, and it feels like home.



I am working in the call center industry since 2009 and I found this industry very dynamic and my job very satisfying as I get opportunity to learn something new every day, I get to interact with people, help customers and colleagues with their queries. Every day is a new day a new learning a new experience.

- If possible, to provide enticing benefits for employees, yearly appraisal, earning monthly leave credits or any programs that would make employees to stay in the company.
- We don't feel that we have a manager. Seems like our concerns are not being heard.
 For us, seems like the management just takes us for granted.

CALA

- If I were to speak my mind here it still won't change a thing. We will always be over worked and not appreciated. I receive non-stop inbound calls and I get very little help from my leaders. And it is very frustrating to do more work, take more calls, for the same pay.
- Working for my company have made a huge impact positively from the past experience
 I had with a call center. I feel comfortable, appreciated and encouraged on a daily basis.
 Our opinion actually matter here, and training have been more than adequate for us
 to perform at a high level. I would choose no other place to be and have referred a
 number of family and friends.

I love the working environment and the TLs are very friendly and always willing to help, but the account is challenging and some days it can be very frustrating to the point where I consider leaving. Customers can be very rude and offensive and but also, we have customers that break your heart when they start to explain their situation because you have been through a similar situation.



- It would be nice if flexible working hours were provided. For example, for working parents; like working only 4-5 hours for the day. Because of being a mom and currently expecting next year this will force me to resign. It would have been nice is flexible hours where provided. Or if we could do emails/ text / chat. But I understand this is a new campaign/ company so maybe this is something they consider doing down the road.
- Due to the ongoing issue, we're facing in our country (inflation), I believe a "salary adjustment" needs to be made to correspond with the cost of living. The price for everything is increasing and our pay remains the same. If the agents are truly appreciated, the idea would at least be taken into consideration.
- I would wish that when a position is open, they really consider how well you work rather than just choose their favorite.
- On the BPO Market I have been able to notice how a good management from TL can impact the agent performance in a real good way. Management with the proper touch is the best we can do for the best agent performance.
- Regarding working in a call center, it is the most draining and depressing job ever. You feel like you're in jail most of the time, we aren't even able to go to the bathroom sometimes. Customers are usually rude and sometimes receiving call after call makes you feel exhausted. But since there is no better opportunities at our countries, we have no choice more than staying here. I swear if money wasn't a problem, absolutely no one would ever work at a call center.

Please treat your agents as your priority, don't forget that we are on the bottom, but weare the base of the business. Keep us happy.

- I love the work I do and people I work with. The only reason I would leave is for more money. I have 3 kids and a wife so for me financial stability is most important. Also, I do not make enough to go back to the site so travel expenses also play a part
- I think working at a call center over works and under pays their agents. You can barely
 make it through the following weeks until pay day because your salary is not enough.
 and working this many hours does not provide an opportunity to have a second job.

USA/Canada

 Getting very worn out from sales and service as I am a Hybrid agent but great workspace and great people in the company feels like they sups and trainers really care.



- Just that working from home has been so great, and i really hope it continues. Makes life so much easier and I save so much money on gas and food it's a really big help. Thank you :).
- I'm a universal customer service agent and I have all the trainings also I'm bilingual that means that I can take all type of calls and there is some agents that are trained just for an specific area I think I should receive higher payment.

Create opportunities for proper career progression for employees.

- I love my job and my management. I feel very comfortable with them. I love to go to the office, but every day is expensive if it was a hybrid system (somedays from home and some days in the office would be better) and also, I was hired to work from home.
- Greatly hoping for more flexible schedule, part-time positions available for full-time students, and sustainable salary that will go with the inflation going on.
- Change the way we get scored when receiving bad surveys. It takes way too many more good surveys to qualify for a bonus after receiving a survey that is not a 4 or 5.
- The 40-hour workweek is outdated and was based on the idea of only men working, with women doing all of the housework and life maintenance. Companies are going to be forced to pay a full-time wage for part-time work or else employees will keep burning out quitting due to low incomes and a lack of personal time. That's a reality that a lot of companies are coming to terms with as an inevitable change.
- When I am searching for a company to work for, the most important thing to me that I look for is advancement opportunities. I do not feel that this company offers that. And that is a big problem for me because I have a master's degree that I am currently not utilizing.

Europe

- We have no financial assistance from the company for the charges, such as electricity, internet, etc., lack of flexibility in schedules. Base salary can be higher
- I was fired from my agent position, along with 47 of my co-workers. Just because the management failed to measure how many people will they actually need.
 I left a great job offer for this. That sucks.
- Working as a call center agent feels like being a bot. If the company does not provide career opportunities or other motivations, the agents burn out in less then a year.

Every day I'm thankful that I found this job, and I can be part of this team. The trainings are very helpful, and the leaders are always supporting and encouraging us.







Nick Jiwa Founder & President

About CustomerServ

CustomerServ is the BPO industry's authentic outsourcing ecosystem founded in 2006 by Nick Jiwa, who helped pioneer business process outsourcing (BPO) as we know it today. CustomerServ crystallizes the rapidly changing BPO landscape, to help brands and CX leaders select the right outsourcing partnerships from our community of vetted, certified, and proven mid-sized BPOs. CustomerServ brings years of frontline expertise, data, market analysis, and real-world know-how on effective sourcing practices, rising trends, emerging outsourcing markets, impact sourcing, and elite BPO providers. CustomerServ is responsible for over \$3 billion in successful outsourcing relationships, and over 100,000 call center jobs worldwide.

From Fortune 100 companies to emerging enterprises, experienced buyers to newcomers in outsourcing, CX leaders at all levels rely on CustomerServ for transformative solutions and thought leadership.



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