

Take a modern approach to customer experience: empowering frontline employees and agents

Leveraging intelligent tools for maximum impact

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Summary

IN BRIEF

Ovum conducted a dual survey among customer experience managers and customer-facing employees across seven countries around the world. The surveys examined the role of support teams and how it is changing, the biggest pain points and frustrations faced by customer support teams, the way they handle customer engagement, and their use of technology. The survey also drilled down into the current state of artificial intelligence (AI) strategy and deployments in the customer engagement environment, and into future implementation plans. The findings were at times surprising and revealed a customer engagement that is making progress but is still in need of improvement - some of it urgent, particularly in the knowledge management domain. This report will help customer experience managers address the challenges revealed by the survey and also capitalize on the opportunities that intelligent technology can bring to customer engagement.

KEY MESSAGES

- High customer expectations are changing the role of support teams. Customer assumptions that agents have increasingly detailed product and service knowledge is the most important factor changing the role of customer support teams. Other significant change drivers are the greater use of technology across support functions, having to deal with multiple engagement channels, and more challenging routines.
- Agents know what makes customers happy but are not equipped to succeed. Customer-facing employees say the foremost factor affecting customer satisfaction is issue resolution on first contact with agents – but only 35% of agents can do this. Many employees are reliant on colleagues for help (29%) and report that one in five interactions require a callback while 13% of calls get transferred.

- The inability to meet customer expectations is spiking agent frustration levels. Customer-facing employees express a very high degree of frustration because they can't meet customer expectations (85%). There is a direct correlation between agent frustration and customer discontent, which has a negative impact on sales and repeat business. Another outcome is high agent churn rates and added costs as companies have to recruit and train new staff.
- Less than half of agents use a knowledge database, but those that do find them very useful. Knowledge gaps are the sharpest pain points facing support teams for example, lack of product or customer information and difficulties in accessing information. The use of knowledge database solutions can help address these issues, and where they have been implemented, customer-facing employees are either extremely or very satisfied with them (56%).
- AI implementations are early stage, and most agents still lack AI tools. Most managers in the survey are still formulating their AI strategy (38%) or have early-phase plans in place (28%) while almost a quarter admit to having no AI strategy at all. Fifty-seven percent of customer support staff overall do not yet have any AI tools, with those in physical locations worse off than their counterparts in call centers, at 30% and 44%, respectively.

RECOMMENDATIONS

Improve agent training – particularly ongoing training

 or risk negative impacts. The survey reveals that
 training in general is poor: only 44% of customer facing agents in total say that initial job training is just
 right and this falls to 35% for ongoing training. Training
 has a significant impact on the ability of agents to do
 their job well, which in turn affects both agent and
 customer satisfaction. Inadequate training can also be
 linked to the biggest pain points faced by employees:
 lack of knowledge and having to deal with more
 technology and more channels.

- Focus on knowledge database tools and prioritize
 ease of use. These tools are highly valued and address
 many of the pain points experienced by customer
 support teams, as noted. But there is still room for
 improvement. Support teams report that knowledge
 database solutions can be hard to search and that
 information can be disorganized and out of date. The
 implication of limited knowledge-base usage is that
 valuable time and resources are being wasted.
- Suggested actions for support teams are low tech and must be improved. The survey shows that support teams who need assistance with customer-handling decisions typically turn to colleagues for advice, an approach that can lead to highly variable outcomes. Technology is currently underutilized, but solutions enabling automated next-best actions (NBA) and/ or AI-driven automated system screen pops can help provide consistency in agent instructions and guidance, increasing both agent and customer satisfaction.
- AI solutions can bring multiple benefits act now or become an AI laggard. AI solutions can provide agents with guided assistance in real time, can drive more personalized customer engagement, and can enhance knowledge management. These and other potential benefits present a significant value opportunity, but despite this, many firms in the survey have yet to embrace AI at all or have only done so in an ad hoc way. Given how fast AI solutions are evolving and being adopted, holding back means firms will get left behind and lose competitive advantage.
- Think beyond low-hanging fruit scenarios for AI deployments. Current AI deployments prioritize automation of more-routine simple tasks, a focus that is understandable as process automation has immediate impacts with benefits that are easy to understand. Other high-value AI tools are less widely deployed and are in areas where there are weaknesses, notably AI solutions to improve knowledge management and to enhance personalization.

Agents face increasing complexity on multiple fronts

HIGHER CUSTOMER EXPECTATIONS ARE DRIVING SUPPORT TEAM CHANGE

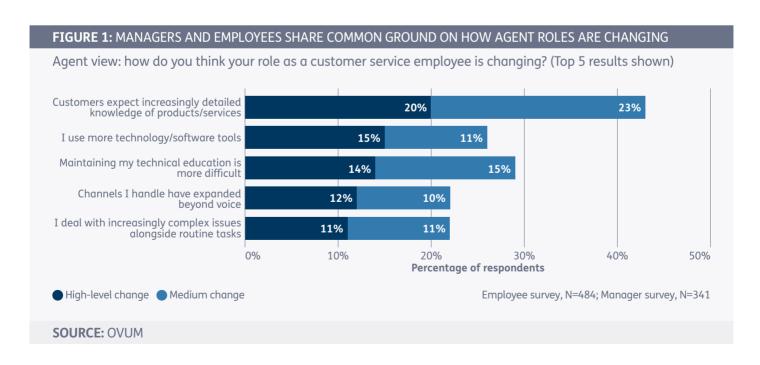
KNOWLEDGEABLE CUSTOMERS ARE RAISING THE STAKES

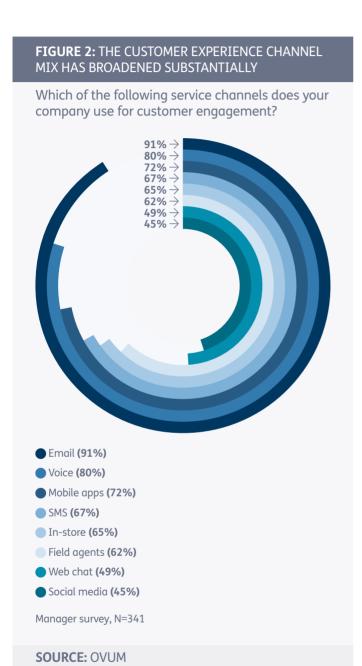
Customer expectations that agents have increasingly detailed product and service knowledge is the most significant factor that is changing the role of agents, with 42% of respondents citing this as a high- or medium-impact change driver. Alongside this, customer-facing employees are having to deal with more complexity on multiple fronts, including greater use of technology, dealing with multiple customer engagement channels, and coping with more-challenging routines, as shown in Figure 1. This signals a strong need for highly efficient knowledge management tools and also better initial and follow-on training that will enable customer-facing staff to keep ahead of changing customer dynamics and new technology.

MULTIPLE CHANNELS INCREASE AGENT DIFFICULTY AND MAKE CONSISTENCY A CHALLENGE

Although the established "must have" channels of voice and e-mail dominate customer engagement (91% and 80% respectively), managers confirm that dedicated mobile applications are increasingly important (72%), as shown in Figure 2. Contact centers have reported to Ovum that as much as 50% of interactions are arriving from mobile applications. SMS plays a significant role in the channel mix (67%), but web chat and social media channels have yet to gain the same level of traction.

This complex channel mix dramatically increases the difficulty of providing consistent support across channels, which can result in a fractured customer experience. Indeed, the survey reveals that only 19% of managers say their firm is able to provide consistent levels of responsiveness and quality across channels. Training can help address these issues, as can the use of customer journey mapping and smart routing tools.





AGENTS KNOW WHAT MAKES CUSTOMERS HAPPY BUT STRUGGLE TO FULFILL THE BRIEF

FIRST CONTACT RESOLUTION (FCR) IS THE ULTIMATE OBJECTIVE

Customer-facing employees report that the foremost factor affecting customer satisfaction is issue resolution on first contact with agents: 43% of respondents say this is what makes customers very satisfied or satisfied. FCR is the holy grail of contact center key performance indicators, and rightly so because it

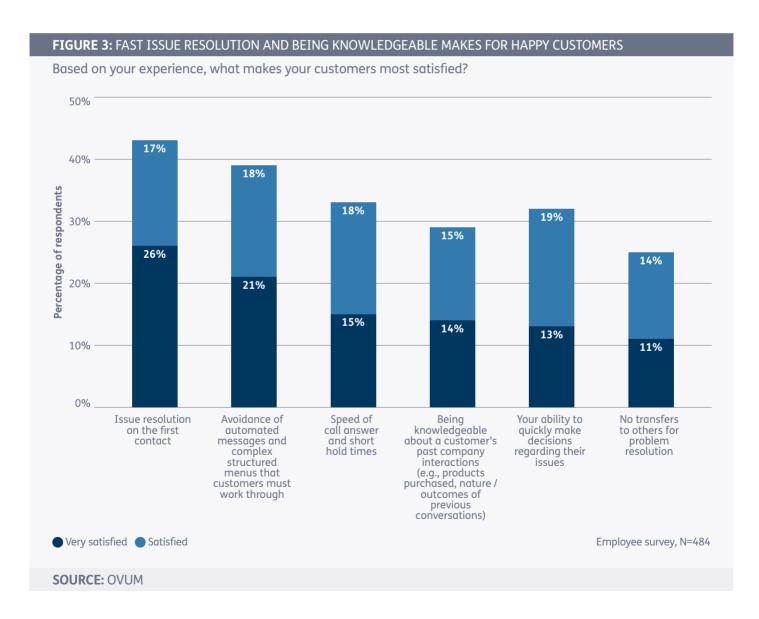
- raises customer satisfaction
- reduces company's cost of service
- minimizes call transfers/hand-offs a common source of customer complaints.

Customer satisfaction is also driven by avoidance of a complex or ineffective interactive voice response system, faster call pick-up times, and shorter or totally avoided call hold times during their interaction (see Figure 3). Rounding out the parameters of customer satisfaction are more knowledgeable agents (about the customers themselves and company products and services), the agent's ability to make decisions without higher-level approval, and the minimization of transfers to other agents during the interaction.

CUSTOMER SATISFACTION METRICS ARE FALLING SHORT

Although FCR is the holy grail of customer experience management, only 35% of agents say they can resolve issues on first contact, which is a startling and disappointing result, but perhaps understandable considering the increasing demands and complexities agents must deal with. Many employees are reliant

on colleagues for help (29%) and report that one in five interactions require a call back while 13% of calls get transferred, all of which only increases customer frustration. Additional research by Ovum indicates that many of these issues will be minimized, or even eliminated, by the introduction of AI-driven processes initially focused on direct agent support as opposed to agent replacement.



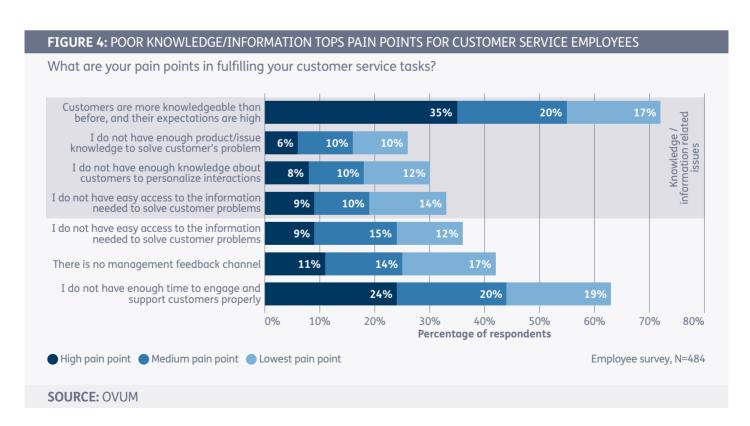
KNOWLEDGE GAPS ARE THE BIGGEST PAIN POINT FOR AGENTS

BETTER KNOWLEDGE MANAGEMENT TOOLS ARE NEEDED

Taken together, a range of related knowledge gaps are the sharpest pain points facing customer agents when fulfilling their tasks, as shown in Figure 4. The most pronounced challenge is posed by product-savvy consumers with high expectations of what they will get from customer services interactions (high and medium pain point, 55%). This is followed by closely clustered knowledge and informational shortfalls: lack of product knowledge to solve problems, lack of customer knowledge to personalize interactions, and poor access to information in general. Customer experience managers in the survey also concede that information-related issues are the key cause of employee

frustration. The key take out from these findings is to give customer-facing employees better-quality information management tools that enable, among other things, easy access to information in real time and integrated data sets that are well organized and up to date.

The research also revealed that the lack of management feedback channels is causing additional frustration on the part of customer-facing employees. A surprising 25% of agents said that they did not have a management feedback system in place to advise management of issues they are facing during the course of their working day. Also mentioned in their list of pain points in performing their job were the agents' inability to make decisions in response to customer requests and the lack of time they had to engage and support customers properly, presumably due to the requirement to meet other company measurement key performance indicators.



FAILURE TO MEET CUSTOMER EXPECTATIONS IS ERODING AGENT MORALE

AN ENVIRONMENT CHARACTERIZED BY HIGH DEGREES OF FRUSTRATION

Employees in the survey express a very high degree of frustration/demoralization because they can't meet customer expectations, with 63% either extremely or very frustrated, as shown in Figure 5. Managers in the survey are aware of this, but more broadly there is little evidence that much is being done to address the problem.

It is important to monitor agent sentiment because there is a direct correlation between agent frustration and customer discontent, which, if high, has a negative impact on sales and repeat business that can be costly to a business. Another result of agent frustration and low morale is high agent churn rates. It can cost between \$3,000 and \$6,000 (or more, depending on the type of business or required expertise) to replace and train a new agent, which can narrow contact center operational margins significantly. This can result in major issues across some businesses. Ovum has discovered that many contact centers experience agent churn rates of more than 100% per year.





Agents must be better equipped to attain success

TRAINING NEEDS TO IMPROVE, NOT JUST TO START WITH BUT OVER TIME

INADEQUATE TRAINING HAS FAR-REACHING CONSEQUENCES

Training is mediocre in general. Only 44% of customer-facing agents in total say that initial job training is just right, and this falls to 35% for ongoing training (see Figure 6). This is disappointing – we would hope to see the majority of employees saying they receive optimal training. Training is even more of an issue for agents in physical locations (e.g., retail stores), with only 40% in this group saying initial training is just right, slipping to 31% for ongoing training. Training has a significant impact on the ability of agents to do their job well, which in turn

affects both agent and customer satisfaction. Lack of investment in training can be linked to the biggest pain points faced by employees: lack of knowledge and having to deal with more technology and channels.

Training efforts do vary considerably from industry to industry. Managers in financial services companies and telcos devote the most time to training. Across the telco marketplace, 100% of managers say they train agents for one month or more before they interact with customers. And an impressive 94% of financial services managers also estimate that they devote one month or more to agent training before they interact with customers. Next in line was the travel industry where 55% of agents are trained for a month or more. In sharp contrast, the hospitality industry reported that 96% of new agents were trained for only one week or less.



SUGGESTED ACTIONS FOR SUPPORT TEAMS RELY ON OLD-SCHOOL WAYS

TECHNOLOGY COULD BE BETTER LEVERAGED

Automated next-best actions (NBA) can be a complex, resource-heavy process to develop. So it is understandable that many companies are not using true NBA, but what is worrying is that many are not using technology of any sort to enable consistency in agent instructions and guidance. Advice from colleagues and assistance from supervisors are the most-used methods to inform support teams with customer-handling decisions when they require assistance, with 56% of customer-facing employees relying on this approach (as seen in Figure 7). France, the UK, and the US score well above average in supervisory and colleague assistance for such agent support. This approach is dependent on the knowledge and expertise of those providing the advice, and this can be highly variable – or even non-existent if

the person is not available for some reason. It could also detract from the productivity of the person being relied upon for agent support. A third of respondents formulate NBA based on their own personal experience. This can be effective if the agent has the requisite experience but the opposite if they do not.

Technology solutions to enhance NBA are underutilized. Less than half of customer-facing employees use a knowledge database (47%), while only just over a third depend on automated pop-ups for NBA (36%). This could be because many enterprises are unaware of the benefits such solutions can bring.

AI-driven automated system screen pops in support of NBA agent assistance are most evident in the telco and financial services industries, where just over 50% and 40%, respectively, make use of these automated services. The retail industry is a laggard; with only 27% of respondents in this sector using automated screen pops, it falls well below the total sample average of 36% utilization.

FIGURE 7: A LOW-TECH APPROACH TO SUPPORT NEXT-BEST ACTIONS DOMINATES

During customer interactions, when you have a question regarding the next-best action in handling a customer's request, how do you get/receive assistance?



Seek supervisory or fellow employee assistance



Refer to a knowledge database



Receive an automated system screen pop



35 %Do what you believe is right,

based on experience



19%

Look in a manual

Employee survey, N=484

SOURCE: OVUM

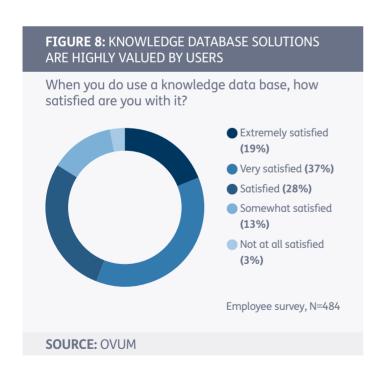
KNOWLEDGE DATABASES ARE HIGHLY VALUED BY THOSE THAT USE THEM

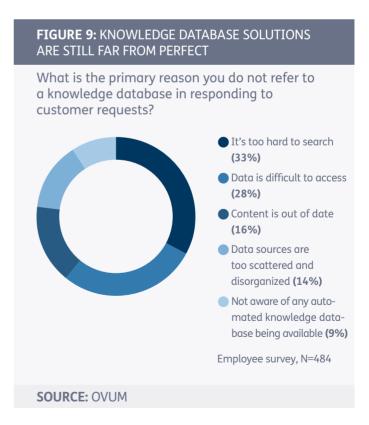
Knowledge management is like the dental flossing of the support operations world: everyone knows they should do it but not everyone does. Difficulties in the implementation and use of knowledge management related issues is a recurring theme across both manager and agent surveys, and only 47% of customer-facing employees in the survey use a knowledge data base solution. But the 47% of employees that do use knowledge bases clearly find them very useful: 56% are either extremely or very satisfied with their knowledge database, as shown in Figure 8.

BUT THE EXPERIENCE MUST IMPROVE TO DRIVE FURTHER UPTAKE AND USAGE

Although useful and valued, customer-facing employees report that knowledge databases are far from perfect. There are several factors behind non-usage, with a third of agents saying knowledge bases are too hard to search while 28% report that data is difficult to access (see Figure 9). Other deterrents for usage include data being out of date or disorganized.

The implication of limited knowledge-base usage is that valuable time and resources are being wasted during customer interactions, and customers are not likely to get fast responses, first contact resolutions, or accurate and consistent information across channels. These are the exact things affecting high satisfaction ratings and loyalty, along with repeat business and improved agent morale.





AI can transform customer engagement, but impact is still early stage

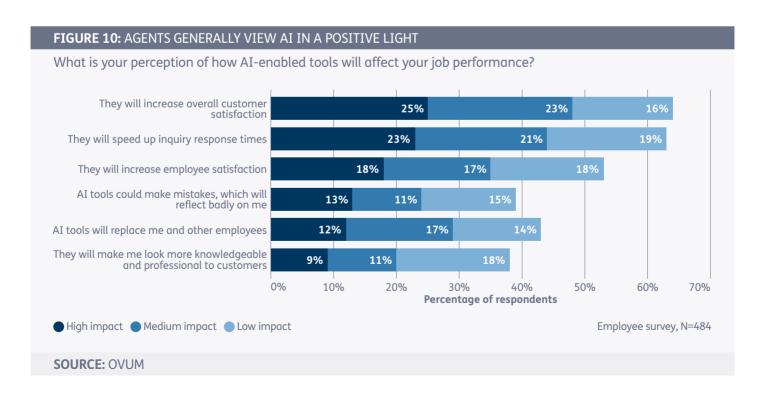
MANAGERS AND AGENTS ARE AWARE OF THE POTENTIAL BENEFITS OF AI

AI can bring multiple benefits to customer engagement, and the managers in the survey are aware of this. Managers place high value on the ability of AI solutions to improve overall customer satisfaction (54%) and to drive more-personalized customer engagement (47%). Managers also appreciate the way that AI solutions help improve agent morale and longevity (38%) and can be used to enhance knowledge management (33%) and actionable intelligence (31%).

Customer-facing employees have far less visibility into AI compared to customer experience managers, yet despite this, agents view the impact of AI on their roles as mostly positive, as shown in Figure 10. They agree with managers

that the highest impact will be increased customer satisfaction followed by faster response times and then increased employee satisfaction. Another benefit, albeit to a lesser degree, is the ability of AI to make them appear more knowledgeable. The negative aspects of AI, such as job losses, are not deemed to be high impact. These findings are encouraging as they suggest customer-facing staff will be receptive to AI solutions.

The agent view of the impact of AI on the workforce is echoed by managers in the survey. There is no getting away from the fact that AI will affect jobs, but only 5% of managers expect AI to cause a substantial reduction in the workforce, while 44% expect it to cause a slight reduction. Thirty percent expect the head count to remain the same while just over 20% expect AI to slightly or substantially increase the number of customer-facing employees.



THE REALITY ON THE GROUND IS THAT AI IS EARLY STAGE

Most enterprises are still early stage when it comes to AI strategy and implementation. The majority of managers in the survey are still formulating their AI strategy (38%) or have an early phase strategy in place (28%). This is understandable as developing an AI strategy is complex and there is a lot to get to grips with (AI investments/ ROI, use-case selection, organizational readiness, etc.). However, almost a quarter of managers (22%) admit to having no AI strategy at all. This group needs to start their AI journey or risk being left behind and put at a competitive disadvantage. Conversely, only a small minority have an advanced AI strategy.

When it comes to AI implementation, the dominant approach is to put ad hoc point solutions in place for a few selected use cases (44%). This is consistent with the fact that the majority of respondents are still early stage with their AI strategy and are moving cautiously. Just over a quarter have a centralized AI platform blueprint in place, but the short-term focus is still on quick wins. The focus on quick wins is pragmatic, but the goal should be a long-term implementation strategy. This makes for more joined-up AI where it is easier to identify opportunities and ultimately keep a better handle on AI investment costs.

MOST AGENTS STILL LACK AI TOOLS

The majority of customer-facing employees in the survey (57%) do not yet have any AI tools at their disposal, while 6% don't actually know. Overall, only 37% of customerfacing employees say they have AI tools. This is a startling finding but consistent with the fact that AI deployments are still early stage, and although AI is a focal point for contact centers, it will take several years before the vast majority see AI implementations rolled out.

Agents in physical locations are worse off than their counterparts in call centers: only 30% of the former have AI tools compared to 44% of call center staff. This could be a reflection of the diminishing role of physical stores in the overall sales mix as online and telephone sales assume a stronger role. There could also be a lack of awareness of the types of AI implementations available for customer-facing staff in physical locations. But there are a range of options: proactive guidance solutions for example, which can integrate into POS systems, ticketing systems, or order management systems to serve up relevant information about the customer or item the employee is looking at.

LACK OF AI TRAINING IS A FLASH POINT THAT NEEDS ATTENTION

Dedicated AI training is in short supply, with only a quarter of customer-facing employees having programs of this kind. This is once again consistent with early-stage AI deployment, but we recommend that AI education is baked into the core AI strategy and deployment roadmap. It makes little sense to give employees AI tools if they are not shown how to get the best from them, which in turn blunts their effectiveness and has a negative impact on ROI. Moreover, the provision of good-quality AI training can be a means to opening new career paths for employees, keeping talent and knowledge in-house while at the same time assuaging concerns that staff may have over job losses.

CURRENT AI DEPLOYMENTS ARE FOCUSED ON LOW-HANGING FRUIT OPPORTUNITIES

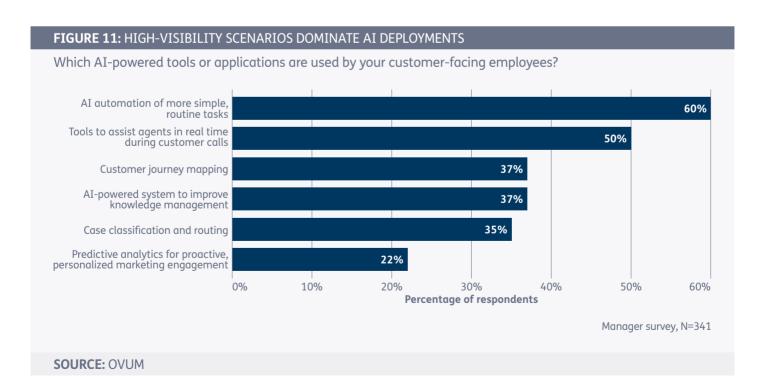
CERTAIN HIGH-VALUE USE CASES ARE BEING NEGLECTED

When it comes to current AI deployments, most companies in the survey have prioritized AI solutions that address broad, high-visibility use cases, as shown

in Figure 11. The top AI deployments are for automating routine tasks (60%) and assisting agents in real time (50%), followed by AI for customer journey mapping. The focus on these AI use cases is understandable as they present benefits that are easy to understand, which in turn makes it easier to justify the investment. For example, AI tools that help agents automate simple/routine tasks give them added time to focus on more-important revenue-generating activities. However, other high-value AI tools – such as solutions to improve knowledge management or enhance personalization – are less widely deployed. This is an oversight, given the issues with knowledge/information management revealed by both managers and employees in the surveys.

A MIXED BAG FOR AI NEXT STEPS

Given the current focus on AI automation, it is perhaps not surprising that robotic process automation tops the list of solutions that managers are considering for future technology implantation (58%). Managers are placing a high priority on self-service with conversational AI (42%), which is also an evolutionary next step for many organizations that have already used text-based chatbots/virtual agents. AI-powered knowledge is another priority investment area (39%), which is encouraging given the problems with existing systems in this domain. Managers are also drawn to AI-powered sentiment analysis (50%), which is more unexpected as this is a less mature branch of AI that draws on a mix of advanced technology (e.g., machine learning, cognitive intelligence, natural language processing). Managers may be thinking of the way that sentiment analysis can be used to enhance conversational self-service solutions. But one area that is in danger of neglect is the use of AI to drive NBA (32%), which is currently driven by a low-tech approach and less able to maximize the opportunity.



Conclusion

One of the most urgent findings surfaced by the survey is that frontline customer support employees need to be better equipped to meet rapidly growing customer expectations. Employees want to step up but are hampered by mediocre training and by what are often outdated, inefficient tools. Clearly this needs to change or both customer and agent satisfaction will suffer. Technology will form part of the solution, but of course other aspects of a business will need to be reviewed (e.g., product/service strategy, organizational culture, training). New and emerging technologies must be thoroughly assessed with an eye to tangible business benefits. For example, how can solutions help create the types of experiences that result in brand loyalty? And how can they help employees do their jobs in a way where they are constantly adding value? AI solutions in the customer engagement and support domain can stand up to this level of scrutiny, and some of the key benefits are listed right:

- AI-powered knowledge management solutions enable greater consistency in message and customer experiences across channels because silos of information can be broken down. They also facilitate greater agent adoption and usage of documentation because AI solutions are easier to access and use compared to traditional knowledge tools. Royal Bank of Scotland (RBS) has used an AI knowledge management solution to streamline information access across multiple channels for the bank's 30,000 customer service agents that handle 650–700 customer enquiries per month.
- AI self-service solutions can handle routine or repetitive tasks, freeing call center agents to focus on more productive activity. For example, Intuit Mint Bills (part of financial services software firm Intuit) has used an AI-powered self-service solution that has helped cut call center volumes by almost half.
- AI-driven bots can enhance sales results. Signet, a distributor of industrial and business supplies, realized very positive results from a chatbot solution, with sales conversions increasing 48% and the number of online orders growing 43%, while customer service ratings rose from 4.3 to 4.9 (out of 5).
- Ovum forecasts project the initial focus of AI in customer engagement applications to be on agent augmentation as opposed to direct customer-interfacing activities. This assumes that AI will enable agent NBA support via automated pop-up suggestions and improve FCR results by bringing relevant knowledgebase information to the agent's attention as appropriate. Both activities will result in higher levels of employee and customer satisfaction.

Appendix

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METHODOLOGY

In 1Q 2019, Ovum conducted a survey (mix of online and telephone based), on behalf of LogMeIn, with 341 customer experience managers and 484 customer facing employees working in both physical locations and call centers. The survey covered seven markets: Australia, New Zealand, US, Canada, UK, Germany, and France. It also spanned an even mix of industry

verticals, principally in financial services, travel, telecommunications, hospitality, and retail. The survey findings and analysis form the basis of the white paper, which has been further augmented by drawing on input from Ovum's top subject matter experts and our ongoing coverage of the customer engagement ecosystem.

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We create business advantage for our customers by providing actionable insight to support business planning, product development, and go-to-market initiatives.

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