

# Driving Long-Term Growth and Business Success through Better Customer Experience

Applying a Data-Driven Digital CX Management Approach for the Telecom Industry in Latin America



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# CONNECTIVITY REVOLUTION: REIMAGINE CX WITHIN TELECOM INDUSTRY

## Foreword by Francisco Acuña Bachmann



**Francisco Acuña Bachmann**  
Latam Head of CX, Ipsos



***In this paper, we invite you to read from experts in Latin America in the industry, along with customer perspectives, to identify elements for rethinking the industry and your company's strategies, and how Experience Practice is embedded in the heart of Strategy in Telecom's companies.***

In today's fast-paced world, the telecommunications industry is at a crucial crossroads. Connectivity, spanning both personal and professional lives, has become a fundamental necessity. This document analyzes the challenges facing the telecommunications sector in Latin America, focusing on customer experience management as a driver of growth and business success.

Competition in the sector is now a central issue: the homogenization of products and services has made customer experience (CX) a key differentiator. Operators are forced to constantly innovate to stand out and retain customers in a saturated market. The emergence of new technologies such as 5G, fiber optics, and the Internet of Things (IoT), along with the appearance of new competitors, demands strategic adaptation and customer-centric management.

In this context, customer experience management, and its various metrics are presented as fundamental tools for measuring customer loyalty and satisfaction. This allows operators to understand their customers' needs and expectations, identify areas for improvement, and drive actions to optimize the experience, providing a holistic view of the customer experience and its impact on business success.

This document explores the functional and emotional factors that influence customer recommendations, including network quality, plans and packages, customer service, and sales channels. In addition, it analyzes the challenges and limitations that operators face in managing the customer experience and feedback models, such as low response rates in surveys and the difficulty of disseminating results throughout the organization.

Finally, recommendations are proposed for the future of experience management in Latin America, including the adoption of a customer-centric approach, leveraging new technologies, and the need to establish deeper emotional connections, leading to greater preference and business impact.

# EXECUTIVE SUMMARY

The telecommunications industry in Latin America is experiencing a period of intense competition and challenges. The industry is grappling with product and service homogenization, making **customer experience (CX) a critical differentiator in the market to stand out and achieve business success.**

At CXM Ecosystem, Net Promoter Score® is an important KPI that provides a coherent view of customer experience across various indicators, enabling operators to engage in meaningful dialogues with customers and pinpoint areas for improvement.

From a customer perspective, key aspects of both fixed broadband and mobile network services are:

- Functional factors: **quality and customer service;**
- Emotional attachments: **enjoyment and certainty**, which are highly correlated with customer support and business handling.

From a management perspective, effective NPS® management involves **internal alignment, robust feedback mechanism and cross-departmental collaboration for actions** while operators also confront challenges in measurement and application within the organization.

**The future of NPS® management in Latin America lies in data-driven, digitalized, and closed-loop management based on a deep understanding of customer voice.**

To elevate customer experience and achieve business success, recommendations for operators are:

- **Genuinely adopting the customer-centric approach within corporate culture to set up strategies and drive actions;**
- **Leveraging new technologies to establish deeper emotional connections with customers;**
- **Incorporating a comprehensive NPS®-driven customer experience management framework.**

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# Challenges of Telecom Industry in Latin America



## Always Connected As The New Normal

Being connected has become a necessity nowadays. The telecommunications industry has grown a lot after the pandemic as consumers expect to access stable internet at home for their business or study or to stay connected all day on their social networks.

On one hand, the development of new technologies, such as 5G and fiber, is pushing forward the industry to ensure higher speed, larger coverage of Wi-Fi, and reliable experience under very intense use of networks. On the other hand, like water and electricity, the broadband and mobile services offered by operators have become commodities that meet essential needs.

In each country, usually, there are several medium or large operators and several small ones in both mobile and fixed lines. This means that the rate is very competitive and thanks to the technological advancements and newcomers into the industry, consumers are easier than before to change their providers. In Chile, easy access to a wide range of services and low exit barriers make telecom among the industries with low customer loyalty.

**Competition makes getting customers becomes very expensive yet the huge investment in 5G and fiber are slow to be monetized.**



**Without a doubt, the main players have service as one of their biggest challenges because nowadays, it's like not having water or electricity- not having internet. So, every minute without service affects the recommendation and perception of the service significantly...It's about keeping up with demand. And I insist that it's where the players are that will win the market.**

Francisco Sánchez  
Head Of Digital Marketing, Telmex, Mexico

## Navigate In A Complex Ecosystem

### **Telecom operators are going through complex times in this growing and challenging market of Latin America.**

In some regions or countries, we see more growth where demand is increasing and therefore, the infrastructure as well. However, significant investment in the technologies and infrastructure also generates enormous challenges for telecom operators to be profitable. In Colombia, for instance, the high cost comes from not only the use of the spectrum but also the infrastructure setup in thousands of unconnected municipalities with no roads.

With the cost and expense scheme, spectrum costs and operating costs, in some countries, there is a certain tendency for consolidation of operators

and looking for ways to manage the existing challenges, which can be handled only by a company with a large volume.

### **Newcomers and partnerships bring more dynamic as well as more competition.**

The new entrants have been changing the competitive landscape in Latin American markets in recent years. The satellite provider Starlink, whose advantage is its ability to provide internet access to remote areas where traditional broadband services are not available, is putting into more efforts to win the market, for instance, on the advertising side for customer acquisition in Mexico. The market is also impacted heavily by OTT (Over-the-Top) providers as traditional telecoms are competing for the same customers with these emerging entrants who are more agile.



**Provide higher value to the customers. What you paid for communications 10 years ago compared to what you pay today is a fraction. All the operators are trying to stay ahead. The business is a very high-demand, bandwidth-demanding industry.**

Kent Western  
Chief Executive Officer, TSTT, Trinidad and Tobago



**It's an industry that must have a lot of investment, technology is advancing a lot, and you can't stay without investing, it makes the pressure on business results be stronger.**

Marita Fabiani  
Customer Experience Director, Entel, Peru

## AI As An Opportunity To Raise The Bar

**Telecom operators also need to gear up to embrace the advent of AI and the profound transformations it will usher in.**

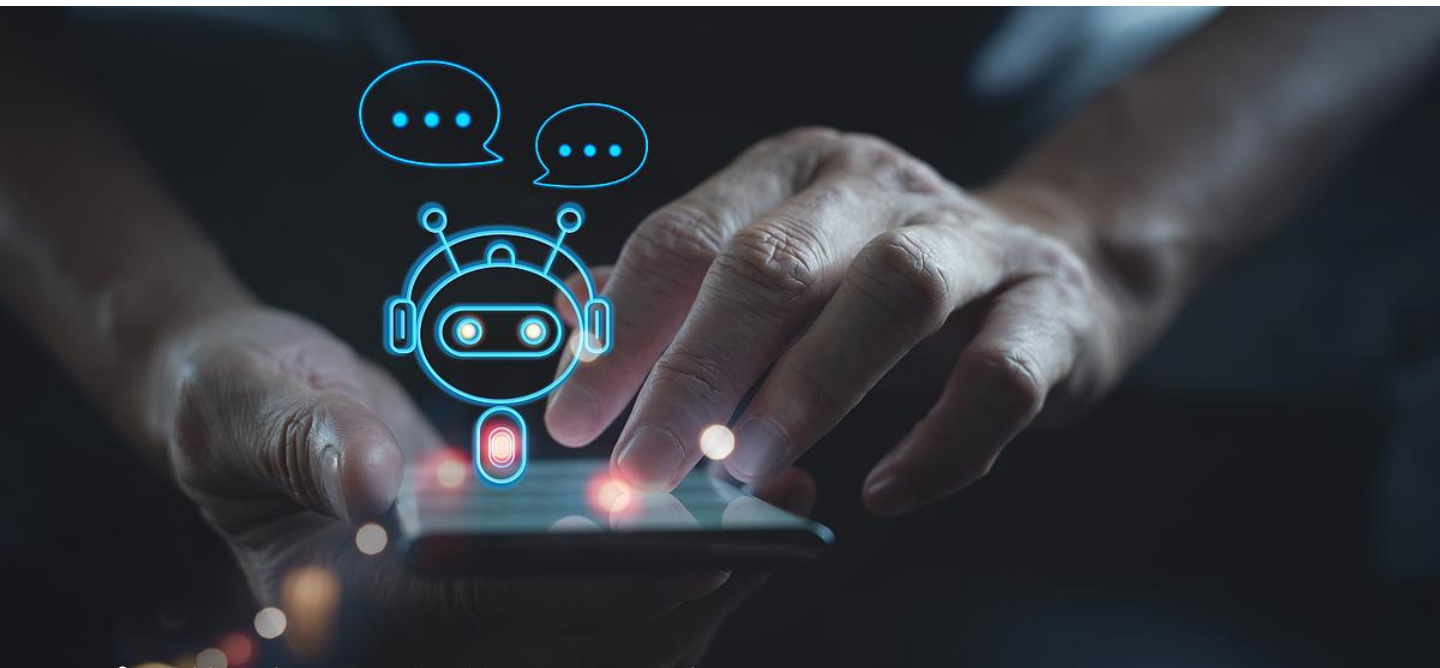
Now the competition is more than just selling more. From the organization itself to the employees within the company, the

ones who are not prepared for that boom will be left out. With AI, the competition is becoming more relevant to be at the forefront. It is about communicating with the customers based on what they consume and what they are concerned about, then providing quick solutions that fulfill their needs.



**Artificial intelligence (AI), whether you like it or not, whether you know about it or have heard of it, it will encompass you. Just as the computer encompassed you in its time, and then the internet itself, when the internet boom arrived, unintentionally embraced us, artificial intelligence is doing the same.**

Néstor Escudero  
Global Analytics Transformation Director, AT&T, Mexico





## CX As A Differentiator Point

**The telecommunications industry is facing the issue of homogenization. The experience delivered to customers enables a telecom operator to truly stand out from the rest in this competitive and aggressive market.**

Nowadays many new entrants can quickly respond to customer feedback and design what customers want. Traditional telecom companies, not born structured like startups, usually provide a product that is designed to meet everyone's needs and put it on sale in the market. When competition starts to increase, this mode starts to be questioned by customers. One of the challenges for big, traditional telecom companies today is to listen to customers, adapt to the things that the customers say about the products and services, and find the balance of all.

Today, consumers' reliance on their smartphones means they are always assessing the services provided by their

telecom operators, making the customer experience more critical than ever. The brilliant Customer Experience (CX) encompasses not only the quality of the service sold to customers – such as network performance, which is the core, but also the engagement with customers through various channels, responsiveness to customers' inquiries, implementation of customer-centric culture, the anticipation of potential issues, etc. These are added value that telecommunications companies offer today. Translating the voice of the customer regarding what is happening and identifying opportunities for improvement is crucial for operators to provide an exceptional customer experience.



**For me, telecommunications today is almost like banking. The services provided are essentially the same everywhere. Everyone offers internet, unlimited data, voice, and minutes—it's all quite similar... Everyone is including streaming applications in their plans as well. Thus, there is no real differentiation in that regard. Therefore, the only way to truly stand out from the rest is through the experience you deliver to your customers...**

Customer experience expert, Chile



# Management of Customer Experience

- Developing an NPS® -driven Customer Experience Management System

NPS® (Net Promoter Score) is a simple one number score that serves as a benchmark of how much customers like your brand / company and whether they like it enough to tell their friends and family about it. It is calculated from the question "**How likely are you to recommend x to a friend or colleague?**" with answers on a 0-10 scale.

Respondents are then grouped as follows:

- Respondents rating 9 - 10 are called **Promoters**
- Respondents rating 7 - 8 are called **Passives**
- Respondents rating 0 - 6 are called **Detractors**

NPS® is then represented as a one-number summary and is calculated as the percent of **Promoters** minus the percent of **Detractors**. This can range from -100 (all respondents are Detractors) to a score of +100 (all respondents are Promoters)

In this study, we talked to the senior executives from different international telecom operators in Latin America about how they measure customer experience management, how their companies use NPS® as an important indicator, like in other sectors, to measure customer loyalty and advocacy, and eventually, lead to business success.

- **NPS® is an accurate reflection of the customer experience provided by the operators.**
- **NPS® results also allow operators to understand the conversations going on with the customers and identify the opportunities for improvement.**
- **NPS® helps understand the brand's positioning in the market and identify strengths and weaknesses compared to other players.**



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**We believe that NPS® has the greatest influence on all other components of organizational success. When NPS® increases, revenue rises, efficiency improves, churn decreases, and profits grow. We have demonstrated that correlation.**

**We also have a strong connection between NPS® and retention, as we have analyzed NPS® data from several years ago. When NPS® improves, it reflects operational changes and overall success, and we've been able to align that data accordingly.**

Kent Western  
Chief Executive Officer, TSTT, Trinidad and Tobago

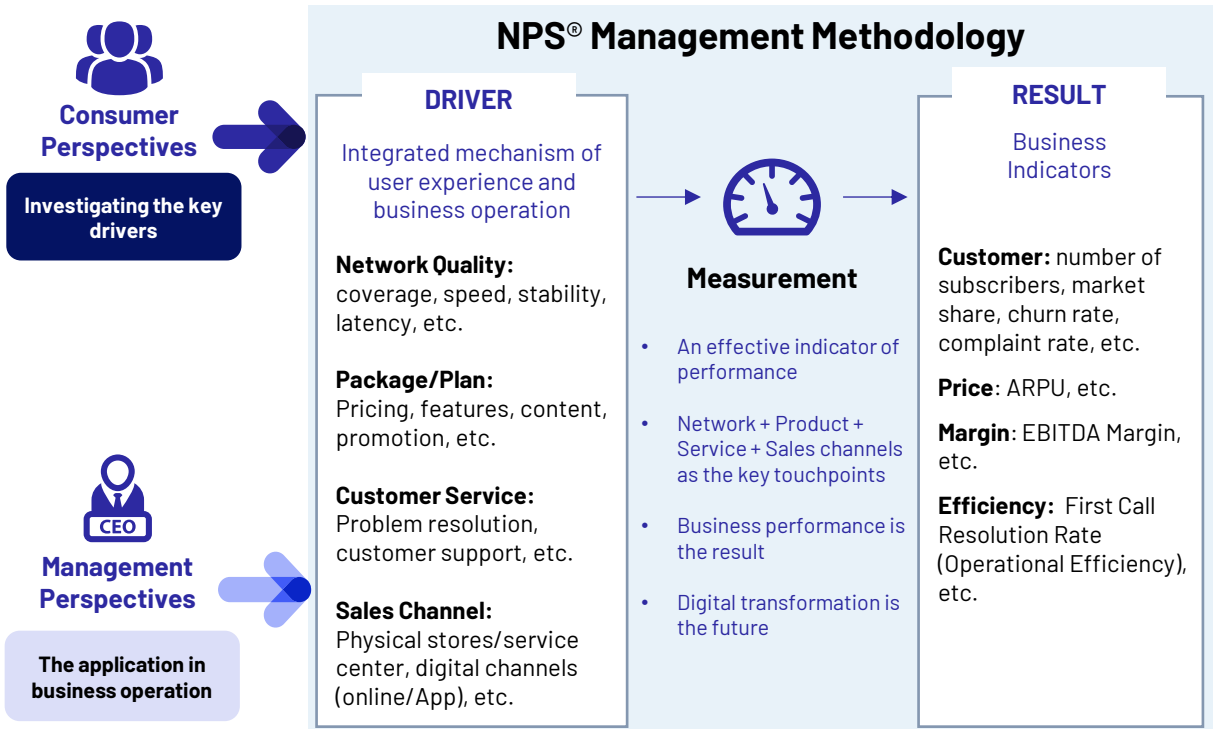


**The NPS® is the voice of the customer. It helps us a lot in trying to understand the customers and finding ways to solve their issues. One of the complicated issues of the business that we have not talked about is what we call the CHURN, which is the rate of customers who leave... the NPS®, to the extent that one has a good perception of service with the customer, is like an exit barrier in the face of the competitive effect, so that is the issue that we try to take care of and to help us in the reduction of CHURN.**

Alejandro Toro  
Chief Operation Officer, Tigo

Comprehensive NPS® management requires Latin American telecom operators to focus more intently on both understanding and improving the customer journey while ensuring internal alignment and responsiveness to customer feedback. From both consumer

perspectives and management perspectives, operators can bolster customer loyalty, stimulate positive word-of-mouth, and ultimately, secure a competitive advantage in the marketplace.



Source: Ipsos

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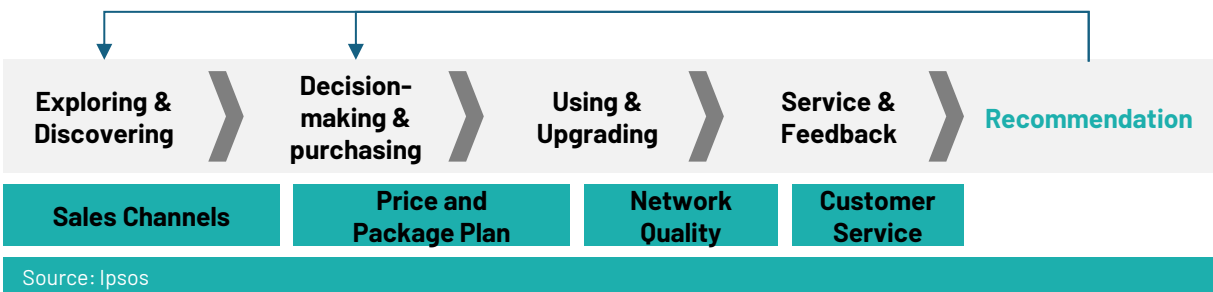
# CXM & NPS® Management: The View from the Consumer

- Understanding & Evaluation of Functional and Emotional Factors to drive Advocacy
- Driving Factors for Fixed Broadband
- Driving Factors for Mobile Network
- Featured Topics
  - Fiber Usage
  - 5G Usage
  - Emotional Attachments

# Understanding & Evaluation of Functional and Emotional Factors

**In this chapter, we will first explore from the consumer perspective and undertake a thorough examination of the customer journey to uncover the pivotal factors that shape recommendation.**

For instance, a general customer journey in the telecom industry involves:



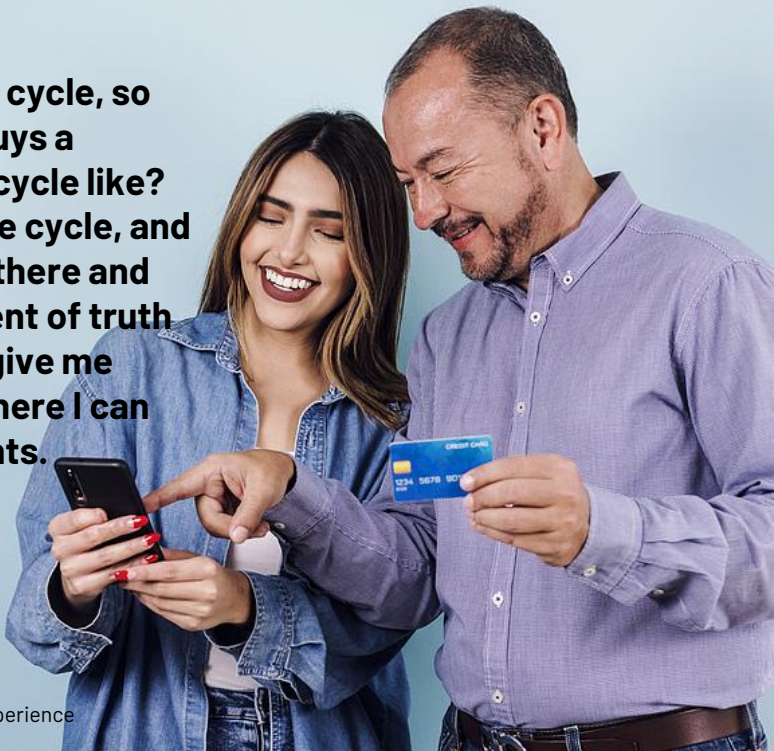
This process involves meticulously mapping each interaction a customer has with an operator, from the initial contact to post-purchase engagement. By scrutinizing customer feedback and

interactions, we could identify the aspects and specific touchpoints that most significantly influence customer recommendation and brand loyalty.



**We first study the customer’s life cycle, so thinking about a customer who buys a telecom service, what is this life cycle like? ... We do all this mapping of his life cycle, and then, within this mapping, we go there and start thinking... what is the moment of truth that I have to ask him, for him to give me some tip, some information on where I can improve. Those are the touchpoints.**

Customer experience expert, Brazil



## Price and Package plan

Fixed broadband plans usually include a monthly rent fee based on different broadband speeds, data usage limits and additional services. For mobile network services, the packages and plans differ between prepaid and postpaid users. The billing of prepaid (pay for usage in advance either by topping up or buying a bundle, and do not receive a ticket) is directly related to the recharge amount, usually without a monthly rent fee, and is paid based on actual usage. Postpaid or contract method refers to plans that pay at the end of the month and receive a receipt, either including a handset or not as part of the contract. Different from prepaid plans, postpaid plans may include more value-added services, such as international roaming and streaming service subscriptions.

## Network Quality

Network coverage is a primary metric for measuring the quality of network services. Whether for mobile or fixed networks, users care about whether the network covers their area. For fixed network users, the network experience mainly involves the reliability of broadband connections, internet speed, service stability, etc. For mobile network users, the network experience usually includes call quality, data transfer speeds, signal strength, network latency, etc. Mobility management is also an important aspect in mobile networks, where users expect seamless network switching during movement without affecting call and data

service quality. Perception of mobile networks is often a bit more volatile because consumers are constantly using their phones, which means sometimes they might have a good signal, but around the corner, it could drop, which changes the experience entirely. In general, it is easier to guarantee a good experience on network with a fixed service than with a mobile service.

## Sales channels

Consumers can visit physical stores of telecom operators or authorized retailers to purchase mobile and fixed broadband services. Nowadays, digital channels also become widely used and many operators offer online platforms and Apps where consumers can browse plans, make purchases, and manage their accounts.

## Customer service

Customer service refers to how the customers are assisted through the channels to make their journeys as painless as possible at different stages. One type of channel that has become widely adopted is the self-service channel where digitalization plays a significant role. However, the channels where there are service people to provide support are still important. For fixed broadband services, the experience along the customer journey is particularly relevant because installation and maintenance, which are key steps in the journey, are much more physical compared with mobile network services.

# Beyond meeting functional needs, we also need to create emotional attachments to customer experience and drive strong relationships.

Functional elements, such as reliable products, correct billing, and an easy-to-use website/app, reflect how well the basic needs of customers are being met. Relational elements reflect how well a business meets the needs of customers in a way that fosters a strong relationship with them<sup>1</sup>.

In 2020, Ipsos launched *The Forces of Customer Experience – The science of strong relationships, a human-centric framework that helps organizations better design and deliver customer experience, so that it drives true competitive advantage and a better Return on CX Investment (ROCXI)*<sup>2</sup>.

- **Fair Treatment:** Make customers feel that there is a fair exchange in their relationship with you
- **Certainty:** Make customers feel that things are clear, transparent and working as expected
- **Control:** Help customers feel in control of the situation and in the driving seat
- **Status:** Make customers feel valued, respected and worthy of special treatment
- **Belonging:** Help customers feel a sense of belonging and show you care about the greater good
- **Enjoyment:** Make customers' lives easier, so they feel a sense of freedom

In this study, we also add these dimensions to customer surveys to diagnose and prioritize the customer experience accordingly.



Source: Ipsos

The six Forces can be used as a frame to better map customer journeys by looking at the interplay between various functional aspects of the CX and the Forces, and therefore, connecting design, measurement and management of NPS<sup>®</sup> throughout an emotional framework, leading to strong and mutually profitable relationships.

In the following sections, we will dig into the results of the customer experience study in Latin America and analyze how those functional and relational factors impact customer NPS<sup>®</sup> for both fixed broadband and mobile network service.

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## For **fixed broadband services**, experience and perceptions regarding network quality and customer service are crucial aspects for operators to look into.

**Network quality** and **customer service** are the top reasons why consumers recommend or not the telecom operator they are currently using for fixed broadband services. Regarding barriers to not recommending current service providers, **promotions and feature content** also play important roles.

More specifically, about half of the respondents would recommend their current telecom provider because of the network quality-related factors of **fast and reliable network experience** and **consistent Wi-Fi signal strength**, which

are the top 2 reasons, followed by **easy-to-resolve inquiries/concerns, either via hotline, stores, online chat or via a self-service portal**, and **pleasant online shopping experience**.

Similarly, more than 40% of respondents state that **inconsistent Wi-Fi signal strength** is the top reason for them not to recommend their current telecom provider, followed by **difficult-to-resolve inquiries**. **Promotions and deals are not attractive, lack of packages that suit my needs** and **slow and unreliable network experience** are also main barriers for recommendation.



Data source: TelecomCX study in LATAM market, Ipsos, 2024 September



## Reasons for RECOMMENDING current Telecom provider

What are your reasons for recommending [current provider] for their fixed broadband internet service? (multiple-answer)



Price and Package Plan (92.0%)

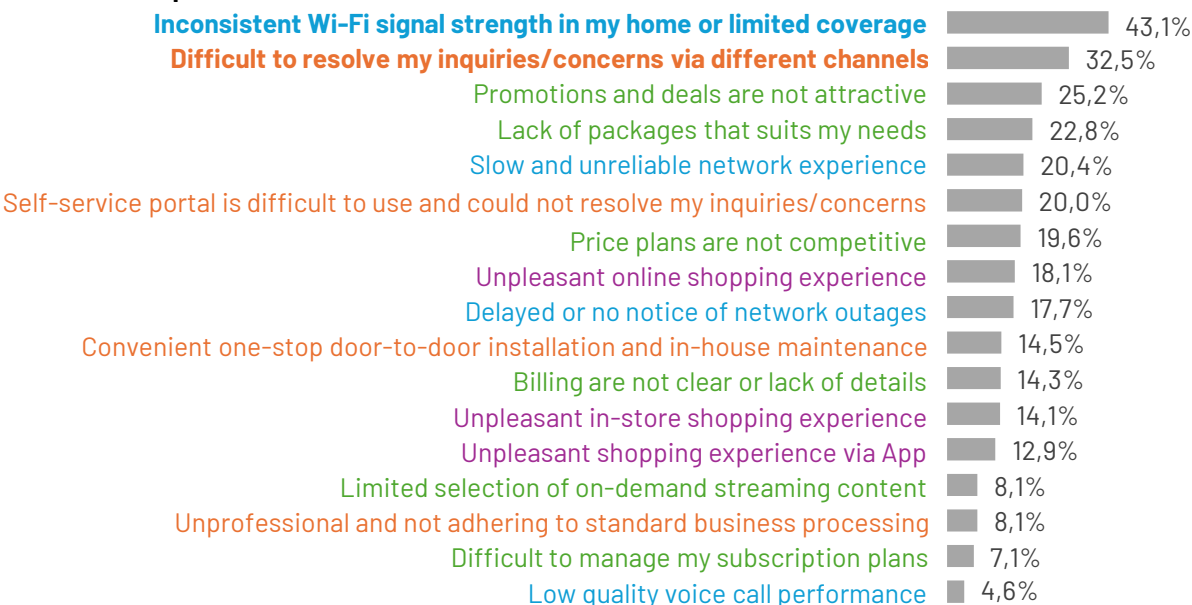
Network Quality (90.1%)

Customer Service (82.1%)

Sales Channels (69.4%)

## Reasons for NOT RECOMMENDING current Telecom provider

What are your reasons for not recommending [current provider] for their fixed broadband internet service? (multiple-answer)



Price and Package Plan (74.2%)

Network Quality (73.8%)

Customer Service (65.5%)

Sales Channels (43.3%)

Data source: Telecom CX study in LATAM market, Ipsos, 2024 September

Furthermore, we conduct Key Driver Analysis (KDA) in this study to do a bit more digging. The **impact** score represents how the NPS® score would change based on simulated increases in each driver. We can transform these into **contributions**, which sum to 100% and represent the relative impact of each driver onto the NPS®.

**Contributions** – For fixed broadband services, **Network Quality, including network coverage and network experience (speed/ latency/ stability, etc.) see dominant contributions (61.5%) to the NPS®.**

**Impact** – If average performance at Network Experience increases by 5%, NPS® would go up by 2.0 points if all other things are equal.

Key driver analysis of CX touch points for fixed broadband services

■ Drivers of Detraction ■ Drivers of Promotion		Contributions to NPS®		Total Impact on NPS®
Network Experience	<div><div></div><div></div></div>	36.0%	Contributions of Network Quality 61.5%	2.0
Network coverage	<div><div></div><div></div></div>	25.5%		1.5
Online store	<div><div></div><div></div></div>	4.4%	Contributions of Sales Channels 13.0%	0.3
Physical store/Service center	<div><div></div><div></div></div>	4.3%		0.2
App	<div><div></div><div></div></div>	4.3%		0.2
Business processing	<div><div></div><div></div></div>	4.3%	Contributions of Customer Service 12.8%	0.2
Customer Support	<div><div></div><div></div></div>	4.3%		0.2
Installation and Maintenance	<div><div></div><div></div></div>	4.1%		0.2
Plan Pricing	<div><div></div><div></div></div>	4.3%	Contributions of Pricing & Package Plan 12.7%	0.2
Plan Features	<div><div></div><div></div></div>	4.3%		0.2
Billing Process	<div><div></div><div></div></div>	4.1%		0.2

Data source: Telecom CX study in LATAM market, Ipsos, 2024 September

Typically, drivers that have not been experienced by everyone will drop towards the bottom of the model. For instance, **installation and maintenance** do not have a high impact at the overall level but would have a higher impact

among those who claim a maintenance service. In this case, further segmentation analysis could be conducted to explore this. We could also look at the emotional factors that are highly related to services.

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## For **mobile network services**, a similar pattern of top considerations is observed where consumers care about **network and customer service**.

Perceptions regarding **network quality** and **customer service** are crucial aspects to consumers recommending their current service provider, while regarding barriers to recommendation, **promotion** also plays an important role.

**More specifically, extensive mobile coverage, high speed and easy to resolve inquiries/concerns** are the top reasons

for users recommending their current telecom provider.

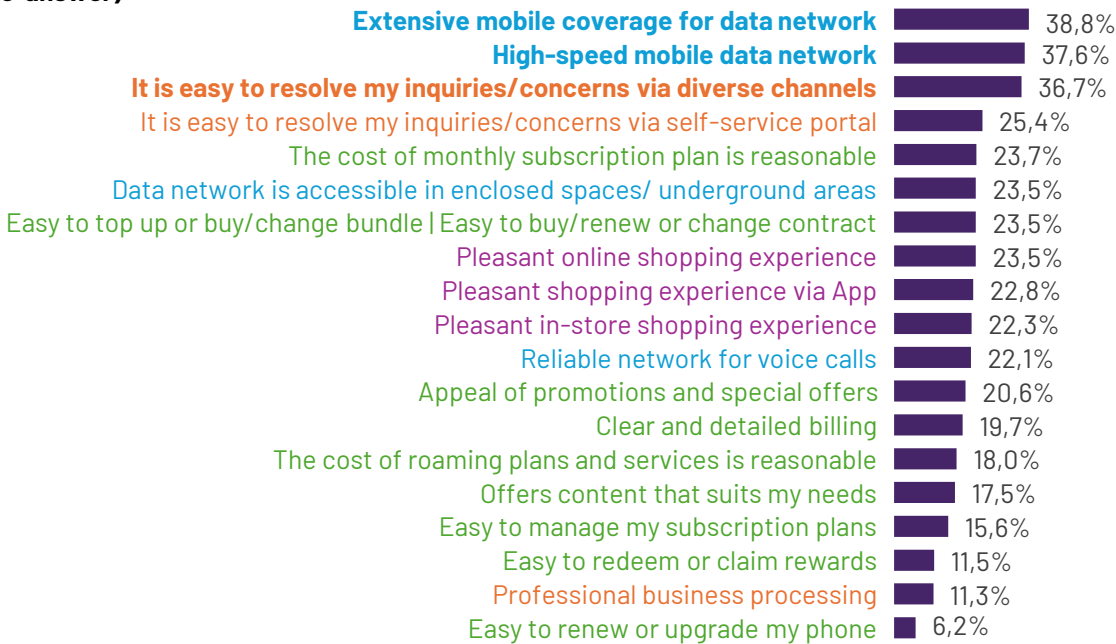
Inferior customer service regarding **difficult-to-resolve inquiries/concerns** is the top reason for users not recommending their current telecom provider, followed by **the data network is not accessible** and **promotions and deals being unappealing**.



*Data source: TelecomCX study in LATAM market, Ipsos, 2024 September*

## Reasons for RECOMMENDING current Telecom provider

What are your reasons for recommending [current provider] for their mobile network service?  
(multiple-answer)



Price and Package Plan (93.3%)

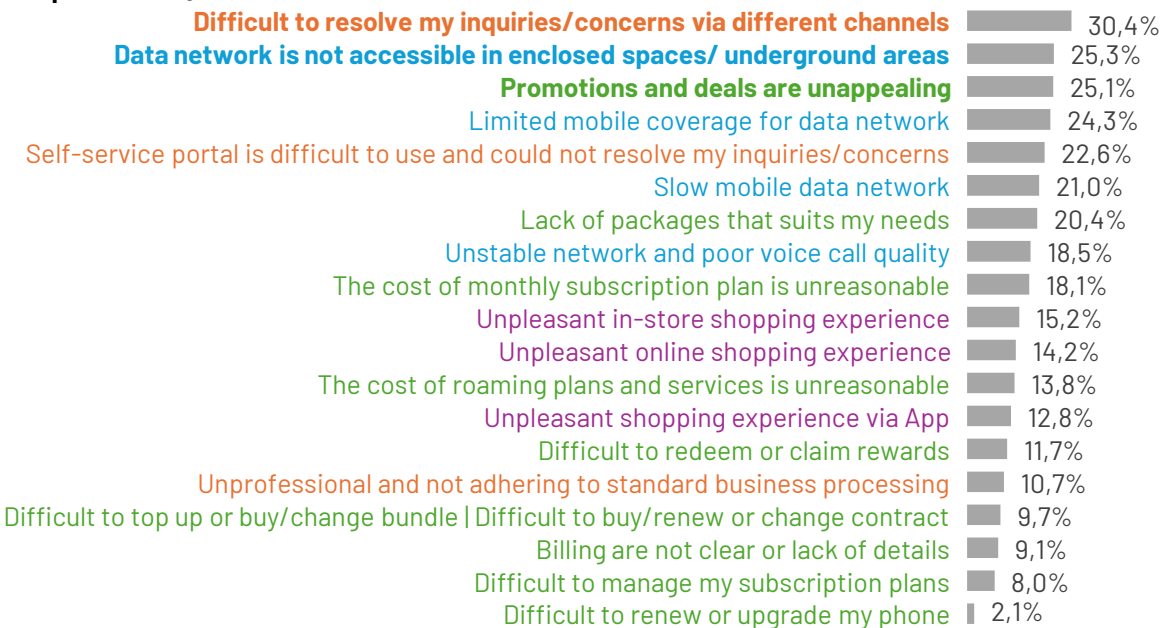
Network Quality (89.4%)

Customer Service (70.0%)

Sales Channels (64.0%)

## Reasons for NOT RECOMMENDING current Telecom provider

What are your reasons for not recommending [current provider] for their mobile network service?  
(multiple-answer)



Price and Package Plan (79.6%)

Network Quality (71.2%)

Customer Service (59.1%)

Sales Channels (40.9%)

Data source: Telecom CX study in LATAM market, Ipsos, 2024 September

**Contributions** – For mobile network services, **Network Quality and Pricing & Package Plan** see more contributions to the NPS®, especially network coverage, voice call quality and Top-up and bundle buying (pre-paid users)/Contract buying

(post-paid users).  
**Impact** – If average performance at Network Coverage increases by 5%, NPS® would go up by 1.0 points if all other things are equal.

Key driver analysis of CX touch points for mobile network services

■ Drivers of Detraction ■ Drivers of Promotion		Contributions to NPS®		Total Impact on NPS®
Network coverage	<div><div></div><div></div></div>	14.4%	Contributions of Network Quality 40.7%	1.0
Voice Call Quality	<div><div></div><div></div></div>	14.0%		1.0
Network Experience	<div><div></div><div></div></div>	12.3%		0.9
Topping up / Contract buying	<div><div></div><div></div></div>	14.2%	Contributions of Pricing & Package Plan 36.1%	1.0
Plan Pricing	<div><div></div><div></div></div>	9.3%		0.6
Billing Process	<div><div></div><div></div></div>	9.1%		0.6
Plan Features	<div><div></div><div></div></div>	3.5%		0.3
Physical store/Service center	<div><div></div><div></div></div>	9.2%	Contributions of Sales Channels 19.7%	0.6
Online store	<div><div></div><div></div></div>	3.5%		0.3
App	<div><div></div><div></div></div>	3.5%		0.3
Business processing	<div><div></div><div></div></div>	3.5%	Contributions of Customer Service 7.0%	0.3
Customer Support	<div><div></div><div></div></div>	3.5%		0.3

Data source: Telecom CX study in LATAM market, Ipsos, 2024 September

In the KDA, we carry out two sets of driver analysis based on those giving low/mid scores at the NPS® and those giving mid/high scores on the NPS® because in certain circumstances, what drives detraction is not the same as what drives promotion.

When drivers of detraction dominate, such as **plan features, online store and app channel experience**, and **customer services**, improvements are most likely to move people from the low to mid-level of NPS®. These are useful drivers to focus on if the score is low.

When drivers of promotion dominate, such as **plan pricing, billing process and physical store/service center**, improvements are most likely to move people from mid to high level of NPS®. These are useful drivers to focus on if the score is already high.

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More than one-fourth of respondents in the survey (excl. Mexico) use different service providers for fixed broadband and mobile network services. **Plan pricing,**

**Network coverage** and **service quality** are the main reasons that drive consumers' behaviors.

## Reasons for using different operators for mobile and broadband service

Could you please explain why you have chosen different telecom operator for your cell phone and broadband services instead of using the same operator?

### Network Coverage

**Signal coverage and stability are among the important reasons for consumers to choose different telecoms from FBB**

- "In my area where I live, Movistar's coverage is better and their prepaid plan is cheap, exactly for what I need." – use Claro and Movistar, Colombia
- "Mobile telephony is paid for by someone else and Claro broadband is not available in my area of residence." – use Movistar and Claro, Argentina
- "Why in the area where I live Movistar has better coverage, Entel does not have fiber optics in all sectors of Rancagua." – use Movistar and Entel, Chile
- "Movistar offers good latency in games, and the signal is usually good. On the other hand, it has not such good latency, but it has a better mobile signal, so it is ideal for devices where you don't play a lot, like mobile phones." – use Movistar and Claro, Peru
- "Because I often go to places where the signal only works with Claro." – use Movistar and Claro, Peru

### Plan Pricing and offerings

**One telecom among MBB and FBB can offer more favorable plans**

- "The package offered by the broadband operator was more advantageous than the one I use for mobile telephony." – use Claro and TIM, Brazil
- "Initially I used personal for mobile and home internet, but the price increased, forcing me to look for another option that I could pay for." – use Claro and Personal, Argentina
- "Claro has been one of the best internet services during the pandemic and since then it has generated confidence and satisfaction, whereas on my phone I use Entel out of habit and good promotions." – use Claro and Entel, Chile
- "I signed up for TV+ internet because there are channels on TV that are not available on any other operator." – use Movistar and Claro, Peru

### Service Quality

**Service quality also influences consumers' choices regarding telecoms**

- "I have not had the best experience with Claro and I could not finance a cell phone with Claro either, so that is why I had to deal with WOM." – use Claro and WOM, Colombia
- "Because I didn't have a good experience with Movistar in home services." – use Tigo and Movistar, Colombia
- "Because the staff telephone service is quite bad." – use Personal and Claro, Argentina

# Featured Topic: Fiber Usage

## Fiber adoption remarkably optimizes consumer experience and leads to business success.

In Latin America, the rapid expansion of fiber optic networks is transforming the digital landscape of the region. Many countries are actively moving forward with the adoption of FTTH (fiber-to-the-home) technology to enhance internet access speeds and reliability to meet the new demands of households' connectivity after the pandemic.

In the study, FTTH users show significantly higher NPS® and higher repurchase intention compared to non-users, meanwhile, they also claim better experience in network quality. **Faster speed** and **better stability** are top-perceived improvements by FTTH users, followed by **supporting high-definition video streaming/gaming**.

### When consumers use fiber-optic plans for the FBB service...

**+39.0%**

higher in NPS®

**+26.4%**

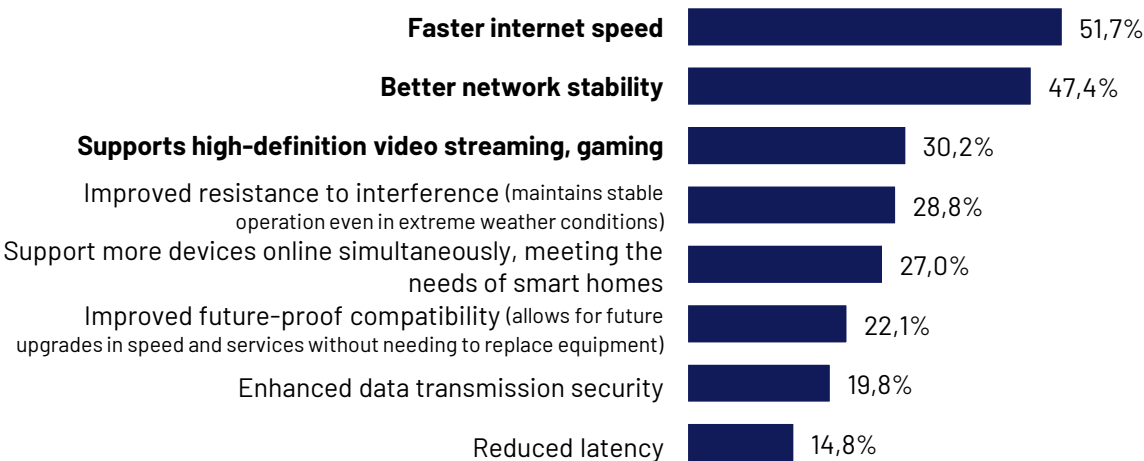
higher in Repurchase Intention (Top2)% saying they will DEFINITELY/PROBABLY continue to use their current Telecom provider for fixed broadband services

**+17.5%**

higher rating on overall performance of network quality (8-10)%

### Perceived improvements – FTTH vs. cable and copper-based network

What improvements do you see in your fiber optic plan using fiber-to-the-home (FTTH) technology compared to a cable/copper-based network? (multiple-answer)



Data source: Telecom CX study in LATAM market, Ipsos, 2024 September

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## Featured Topic: 5G Usage

### 5G users state they perceive a better experience and care more about the digital experience.

5G users also show higher NPS® and higher repurchase intention. Compared to non-5G users, 5G users' recommendations for their service provider are also impacted by their digital experience.

- 9.3% more will recommend their current provider for a **pleasant shopping experience via the App**
- 6.7% more will NOT recommend their current provider due to **difficulties in using the self-service portal to resolve inquiries/concerns**
- 11.0% more will NOT recommend their current provider due to **an unpleasant online shopping experience**

Customers show high expectations of 5G to have **expanded network coverage and stronger signal reception, rapid file download and upload, and faster loading times for web content on mobile devices.**

#### When consumers use 5G for the mobile network service...

**+14.7%**

higher in NPS®

**+10.1%**

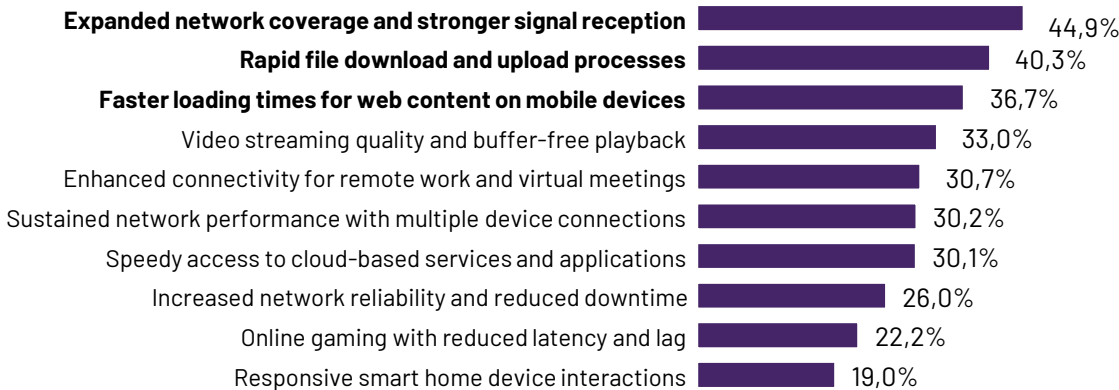
higher in Repurchase Intention (Top2)% saying they will DEFINITELY/PROBABLY continue to use their current Telecom provider for mobile network services

**+9.5%**

higher rating on overall performance of network quality (8-10)%

### Expectation of 5G in network experience improvements

When considering 5G network services, in which aspects do you most expect an improvement in your network experience? (multiple-answer)



Data source: Telecom CX study in LATAM market, Ipsos, 2024 September

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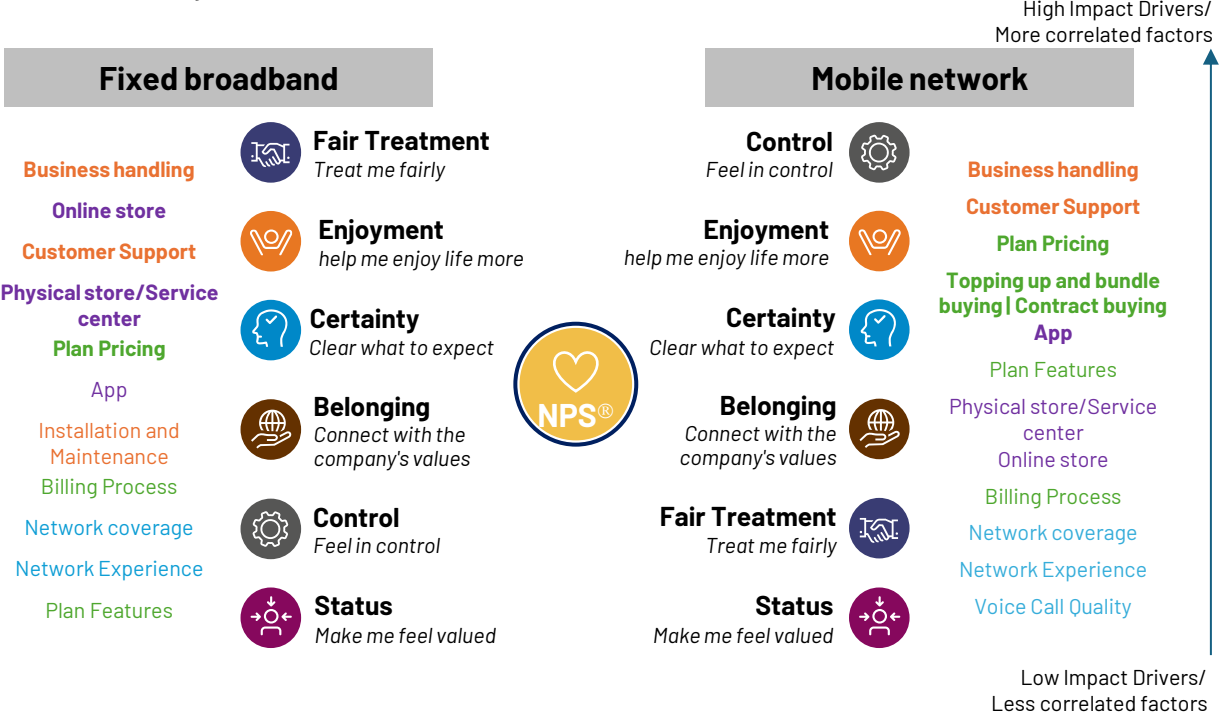
# Featured Topic: Emotional Attachments

For both fixed broadband and mobile network services, customer support and business handling are top functional touchpoints correlated with CX forces.

Besides network quality, we could see how other functional factors such as customer services, package pricing, and sales channels impact the emotional attachment.

For fixed broadband services, enjoyment and certainty are more related to the experience in **physical stores** and **installation and maintenance** because these two emotional attachments are more about reassurance, a sense of safety and security in using the service, as well as friendly frontline staff.

**Price and package plan-related** touchpoints play more important roles for mobile subscribers. The experience of **plan pricing, topping up and bundle buying/changing (pre-paid users) and contract buying/changing/renewal (post-paid users)** are highly correlated with emotional factors. This also indicates the high importance of **“Control”**, which is related to knowing how you are spending your Megas, how and where (app, website, physical store) you can pay your bills, and being able to deal with customer services.



Data source: Telecom CX study in LATAM market, Ipsos, 2024 September  
Overall ranking of functional factors is calculated based on the specific factor ranking for each Forces

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# CXM & NPS®

## Management:

## The View from

## Experience Team

- Translating Customer Voice to Tangible Improvements within the Organization
- Limitations and Challenges

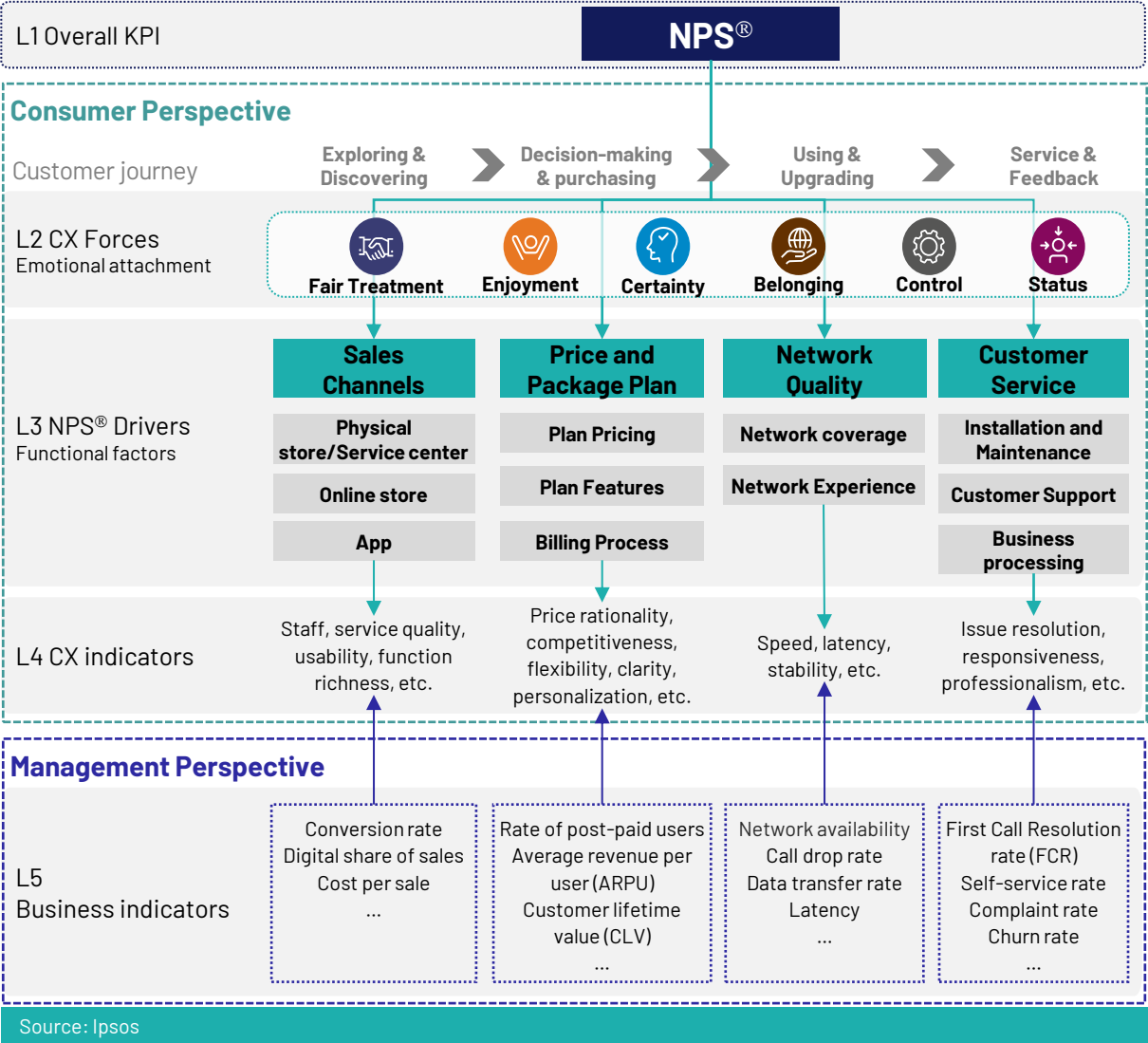


In this chapter, we further delve into the intricacies of NPS® management from a CX team perspective within Telecom operator organizations.

Linking NPS® enhancements to performance metrics can instill a customer-centric ethos throughout an

organization. The NPS® management system ensures that customer experience remains a paramount concern at all levels of the corporate hierarchy. We develop an NPS evaluation system that also integrates a management perspective, **mapping CX feedback to business indicators and driving improvement actions within the organization.**

NPS® of Fixed broadband services as an example



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Along the customer journey, the customer feedback of Emotional attachment (L2), functional factors (L3) and CX indicators (L4) needs to be analyzed and translated to Business indicators (L5) in corresponding internal departments for further improvement actions.

After a customer experience team obtains feedback data, three important steps are fundamental to transferring customer voice to tangible improvements.

### **Aligning Customer Feedback within Internal Departments**

It is imperative for operators to correlate

customer feedback with the appropriate internal departments. This alignment is crucial for identifying areas that drive improvement and ensuring that the entire organization is united in pursuit of a common goal: enhanced customer experience.

### **Instituting Feedback Mechanisms**

The establishment of robust feedback mechanisms is essential for continuous improvement. For instance, real-time monitoring of customer interactions, periodic surveys and feedback loops facilitate swift response and resolution of customer issues.

## **INDUSTRY PRACTICE**

**Collaboration starts within the organization when an issue is identified**



**We have experience committees and work cells.** For example, an experience committee meets with the president twice a month, or sometimes once, to review how the indicator is going. In addition, we share reports on the most relevant indicators of the experience with the parent company.

**The experience team works mainly in cells, which are interdisciplinary groups. This cell is responsible for responding to specific events. The process is activated when something happens, and the causes are identified, leading to concrete actions.** These cells are multidisciplinary, involving members of my team, networks, and even communications in some cases.

**...Everyone is involved: from the networking segment to internal communications and sometimes even legal. This allows us to address problems comprehensively and effectively.**

Business intelligence expert, Colombia

## Fostering Cross-Departmental Synergy

When reviewing the NPS® evaluation system from both the customer perspective and management perspective, it is crucial to translate the customer voice (L4) into business indicators (L5) and assign responsibilities to the correct team(s) for resolving customer pain points and making

improvements, including marketing teams, technical teams, operation teams, service teams, etc.

NPS® management is not the purview of a single department; it necessitates a collective effort across all departments of the business. Operators must cultivate a culture of collaboration where all relevant teams should proactively take action for improvements based on insights gleaned from customer interactions.

### INDUSTRY PRACTICE

Linking the CX indicators to operational KPIs to identify the performance drivers



We measure the relational NPS® by first asking the general NP® question and then asking various specific NPS® questions, and we assign weights to them... The initial response contributes to the total NPS® score. **We aim for the NPS® to be explained through these other indicators rather than the other way around.**

Each one (indicator) has a responsible person. For instance, if we talk about **surprising customers with our offerings**, that falls under the **market director**. When looking at **network NPS®**, it's handled by **the entire network area**, where we differentiate between **network quality** and **coverage**. **We link these to operational KPIs to see what drives performance.**

Sometimes you might be performing well at a certain level but want to make a leap; in that case, you need to identify which KPI can facilitate that jump. Conversely, if you're at a low level, you need to determine which KPI is causing the most pain for customers. So we continuously assess where we are and where we want to go.

CX and customer loyalty expert, Chile

From our talks with industry experts and management executives, telecom operators are also facing challenges and limitations under their current NPS® measurement and application.

### Measurement related challenges

For many telecom operators, currently the NPS® measurement mainly relies on surveys, especially traditional methods such as telephone surveys. Response rate

and timeliness issues will occur due to research method limitations.

### Application related challenges

After obtaining the data, the telecom companies will confront further challenges that need to be addressed within the organization to achieve improvement in customer experience and a more efficient management system.

## MEASUREMENT RELATED CHALLENGES

### ① Low response rate issue

If the customers do not participate, then the telecoms will not have feedback on their experience. Low participation may stem from the frustration a customer feels: Why should I say anything if nothing will change? It is important to engage more consumers especially new generations.

It's also important to balance the customer lake and ensure that the sampling is representative. What may happen is that an improvement change, or remedial action, could be relevant not to the entire customer base. Therefore, the survey must ensure that it's represented in the customer pool

to enable the greatest efficiency for changing within three months.

### ② Timeliness issue

The trajectory of NPS® reading may differ in each telecom. Usually, an NPS® survey is conducted monthly while the results are shared within the organization quarterly. If there is not an iterative, continuous feedback process, the organizations may not respond promptly to changes in customer feedback or emerging issues, leading to a lag in implementing necessary improvements as the opportunity would have already left with time.

## APPLICATION RELATED CHALLENGES

### ① **Dealing with the massive amount of data for more refined or digestible insights generated from both quantitative and qualitative results**

There are still a lot of people working on delivering the information to the channels and great opportunities lie in the ability to have the information much more accessible. A much easier platform is expected in terms of collecting all the information and managing it.

On one hand, the study usually provides a general idea of the touchpoints that influence the performance. However, a more quantitative analysis is needed of how much a touchpoint will ultimately affect the NPS® result. This helps determine where to focus the efforts. On the other hand, a large amount of qualitative feedback and comments from the customers are generated out of the study, which will result in huge time costs in analyzing the sentiment, and the specific content to identify issues and root causes.

### ② **How to permeate the NPS® results/findings throughout the organization**

The NPS® should not be considered as an exclusive tool for a more directive or strategic area, and results should not remain within a small group of people who only present it for decision-making. It should involve the entire organization so that everyone is aligned and can also provide feedback on the exercise being carried out.

### ③ **Fitting the relevance of TNPS (transactional NPS®) and ensuring that the RNPS (relationship NPS®) is forward in the organization**

When briefing the findings to departments within the organization on the transactional NPS, TNPS gives a feeling of premature success. TNPS could be improving while RNPS remains low, which causes confusion and disappointment. RNPS is about how the customer feels about the relationship, not just those moments. It's difficult for employees to digest this.



# Outlook of CXM & NPS® Management in Latin America

## **NPS® is an effective monitoring indicator, but not an objective itself.**

NPS® can be incorporated as a long-term tool to help telecom operators understand how to position themselves effectively in the market by grasping variables that they currently don't have much clarity on. For instance, satisfaction with the network is very functional: It either works or it doesn't. Relational emotional elements, such as caring for customers or the enjoyment level reflected in NPS®, are

aspects that sometimes the service providers are not as accustomed to. However, telecom operators should not get fixated on a single number as it is crucial to have the ability to understand NPS® in a competitive context and observe trends and their evolution. A better understanding of NPS® could provide valuable insights into the direction the company should take.

## **The future of CX management in Latin America lies in a data-driven, digitalized, and closed-loop management system based on a deep understanding of customer voice.**

- **Customer journey:** Deep understanding of users' real voice
- **Convergent Data:** Data-driven NPS® analysis and management
- **Closed-loop management:** NPS® Scenarios decision making and improvement of the commercial KPI
- **Capability transformation:** Improvement of NPS® digital management capability

This robust solution will enable telecom operators to address the challenges in their current CX management mechanism with NPS® analysis and more proactively embrace new technologies and dynamic market demand.

**Convergent Data** refers to the integration of various data sources to gain a comprehensive understanding of customer feelings and voices along their journey, including:

- Customer Care Data
- Survey Data
- Social Data

The convergence of these data types allows for a more holistic view of customer experience. The management system should ensure that data from various channels is consolidated into a unified platform, maintaining data consistency and completeness, which offers support for subsequent analysis and provides a reliable foundation for decision-making.



**The Vivo app is for any service** (both mobile and fixed services). We monitor app development and customer **feedback through the ratings and comments they provide. We are also very active on social media, present on all social networks, with recognized prompt customer response service.** We process all feedback received, addressing causes of issues or praises, replicating positive aspects in other areas.

**We handle all this within a large diagnostic platform that we have, which we call it the diagnostic center. So, it listens to the call center as well, all the call center calls.** We handle everything within our large diagnostic area, known as the Diagnostic Center. This center also listens to Call Center interactions using AI tools, monitoring what the customer and operator say to provide insights for operator training or process changes.

Carla Beltrão  
Customer Experience-Executive Director, Vivo, Brazil



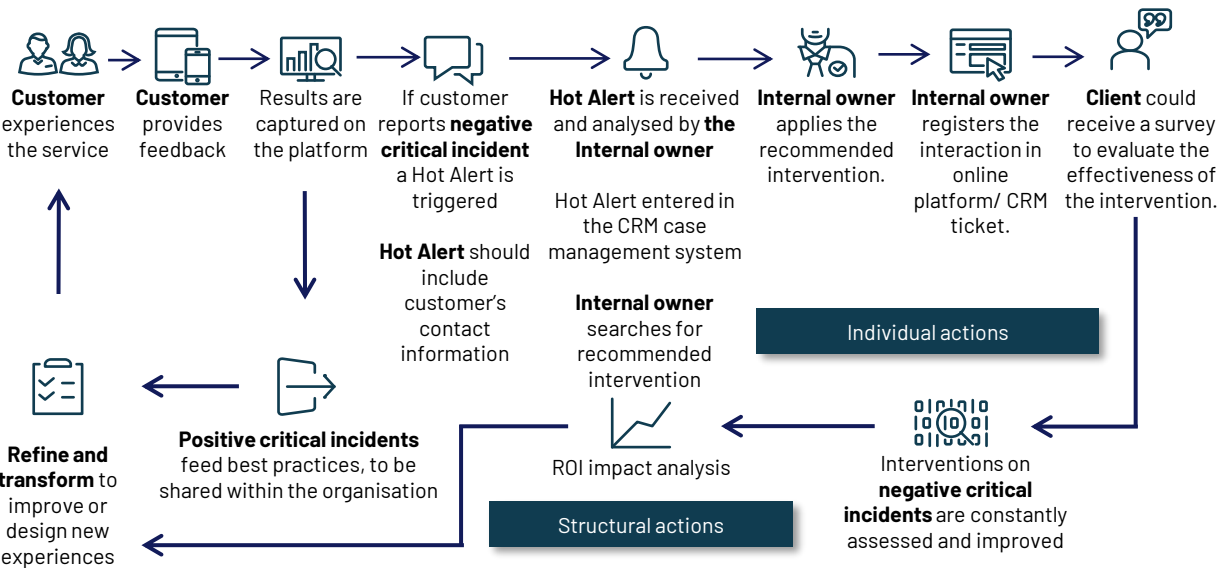
**A closed-loop management** starts with issue identification from customer experience measurement. The model drives transformational change by bringing the Voice of the Customer into the organization, and taking short-term and long-term improvement actions in order to differentiate itself in the markets.

Fully integrating the closed-loop system into business decisions, in line with an agreed vision and goal, one foundational step is to assess the current closed-loop

process. The assessment should help understand if there are gaps in terms of:

- Is closed-loop feedback linked to a business goal?
- Where case management take place?
- What triggers a follow-up?
- When follow-up occur?
- Who should follow up?

The majority of companies still lack a stage more of maturity to relate this indicator with business indicators and are still in the process of refining it.



End-to-end CLF (Closed-Loop Feedback) system, Source: Ipsos



**The example of T-Mobile, that was their great differential, they made decisions all together and everyone focused on something very important that came from the customer voice. This is a project that has to start from the board, from the top of the pyramid and go down, and not the opposite, the base of the pyramid trying to push because sometimes it happens, but it's a lot of effort and little result.**

Customer experience expert, Brazil

## INDUSTRY PRACTICE

### A closed-loop management to improve customer experience

Clear designation of the responsible for the experiences and giving them end-to-end responsibility as much as possible is the key to making progress in closed-loop management. For instance, clearly define the product owners and owners of the customer journeys and have the organization support them so that the owners have a complete team and don't rely on other areas. Then, set concrete

objectives for each of those journeys, with someone being accountable for them, say, on a quarterly basis.

As a result, the organization starts to follow what happened to the customer, provides resources to the people, gives them confidence, and initiates a virtuous cycle where, once things start working well, everything begins to improve.



If we manage to reduce the number of issues that interrupt your Internet service and detect problems faster, you will call less to customer service. If you call less, we have more capacity to attend to other customers. With more capacity to attend, I can provide better service. If fewer people are calling, I can respond faster when we have to deliver a technical visit to your home, and everything starts to flow more smoothly. What happened before was that when things broke, everything broke at once...

The more network data we integrate with the NPS®, the more actions we take. We have work plans in place for areas with worse experiences, and we focus on KPIs... Over the past year, we identified that fiber optic internet customers were reporting long repair time. We were taking an average of 60 hours to fix an issue affecting 8-6% of the base. Now, it takes 15 hours.

**The NPS® has drastically improved.** And when that happens, it's like saying, "This is the way." This is the path to success. **Today, everyone is eager to see the results from their efforts in customer experience and be motivated to keep improving.**

Customer voice expert, Argentina

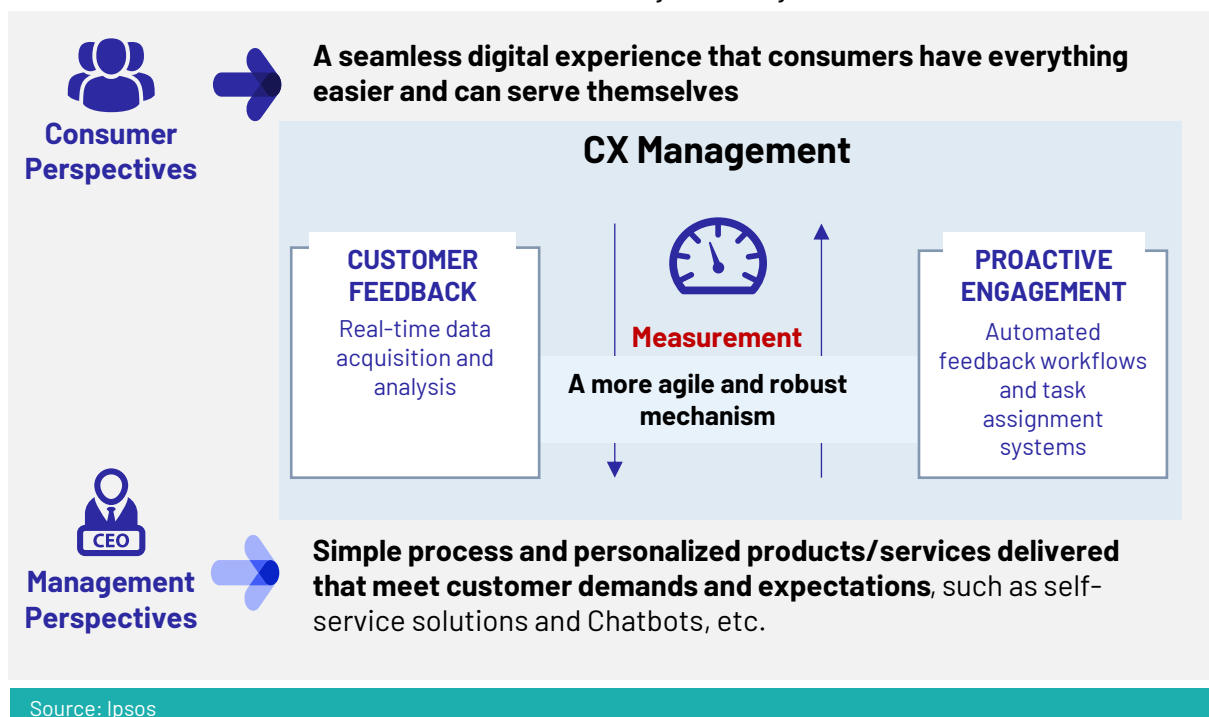


**The digital era is increasingly advancing, and it's a market that always has many opportunities as long as you know how to read the audience.**

Néstor Escudero  
Global Analytics Transformation Director, AT&T, Mexico

**Digital capability transformation applies to both customer front-end services and internal back-end business processes, showing great impact on CX management by influencing consumer behaviors, changing the ways of data acquisition, and how the telecom operators process their business.**

Consumers' demands and expectations for a seamless digital experience and an easier use of products and services in this digital era serve as a catalyst for telecom operators to undergo digital capability transformation. Simultaneously, the digital transformation of the operators is instrumental in effectively addressing the evolving consumer demands, thereby establishing a reciprocal and reinforcing dynamic cycle.





**In this digital era, understanding what the customer is thinking is the key to being able to design what the customer wants to use.**

For some customers, especially those in their 40s and 50s, it is sometimes difficult to adapt to new forms of communication, such as WhatsApp. Some conditions can affect the success of digital transformation, such as limited application options, limited memory of devices, etc. Not all customers are digital, yet they can all benefit from digital. Telecom operators should provide support and facilitate usage through social networks and other platforms.

**Today digitalization essentially underpins customer self-service.**

All the digitalization of solutions, whether for service channels or business processes, should be prioritized enhancing the customer experience beyond the traditional, non-digital way. For example, the digital channels the telecom operator develops internally – an app, a website, a WhatsApp – must be better than before, in the meantime, must be better than speaking to a person as well.



**Digital transformation, at least in mass consumption companies, is a model to optimize costs to try to serve the customer quickly and easily at a much lower cost and to seek efficiencies in the business...**

**The most significant contribution of digital transformation has been to allow the customer to buy, to serve themselves, and to do everything through digital channels.**

Alejandro Toro  
Chief Operation Officer, Tigo



**Regarding the NPS® as a tool, satisfaction indicators are generally higher in digital environments. This is because when users can solve their problems through an app rather than visiting a store or calling, their experience tends to be more positive. The NPS® should increase if you implement a successful digital transformation despite connectivity limitations.**

Business intelligence expert, Colombia

**The technology also enables more automated processes and precise root cause identification, increasing efficiency, reducing costs, and improving customer experience.**

Telecom providers could be more proactive and aggressive in offering solutions that generate greater value for businesses. This would allow them not only to support their customers more effectively but also to contribute to the optimization of our networks.

## INDUSTRY PRACTICE

**Data acquisition via digital platforms increases response rate**



**If we had used operators like we did 10 years ago, calling customers and conducting telephone surveys, it would have been impossible to collect 8 million surveys due to the prohibitive cost of gathering that feedback.** We had to digitize our process. Today, I would say 90% of our surveys are digital. You can respond through an app, a website, an email, a text, or WhatsApp. So, our capture process is 100% digital.

Customer voice expert, Argentina

## INDUSTRY PRACTICE

**Leverage the technologies to help better manage the operation**



If an antenna or node is reaching its maximum capacity, we should be alerted in advance, indicating that the node is full and that there could be service problems. Instead of waiting for a problem to occur, **it would be ideal if the network providers would let us know, even suggesting extensions that may avoid future inconveniences.**

**In addition, I believe that these providers should leverage the information they have to offer us useful insights.** They could use artificial intelligence or machine learning tools to help us better manage our operations. For example, if there is an outage in the network, **the model should be able to quickly identify that there is a break and notify it.** Likewise, they should point out areas of network obsolescence and suggest necessary changes to prevent problems.

Business intelligence expert, Colombia

# Recommendations

- Genuinely adopting the customer-centric approach within corporate culture
- Leveraging new technologies to establish deeper emotional connections
- Incorporating a comprehensive NPS®-driven CX management framework to drive business success



**It's people's minds, it's cultural, it's corporate behavior. We'll have to talk more, have more meetings about it, and then have technologies that help in this corporate communication.**

Customer experience expert, Brazil

Changing the mindset of people is crucial to be able to move forward with improvement actions.

**Genuinely adopt the customer-centric approach within corporate culture – a concept frequently emphasized but seldom earnestly implemented.**

The customer-oriented mindset is the lynchpin of business operations, however without resonating with every individual in the organization, the impetus to galvanize the team into action is lost. It is important to listen to and process customer feedback, which should not be viewed statically but should be deeply understood and analyzed.







## Customer Feedback As The Catalyst For Stakeholder Maturation



**What seems important to me is that regarding the key stakeholders of the company, there was a maturation process for everyone.**

**Many times, people don't want to hear what the customer is telling them because it implies a responsibility, so for a long time it was denied, or many people were detractors of what we did. But it seems to me that once you listen, and you see in a video what the customer says, and you read what the customers say, it keeps ringing in your head.**

**To the stakeholders, what the customer said kept ringing and it was like the engine that accelerated all the change. I think that's the key.**

Customer voice expert, Argentina

**Leverage new technologies to meet customer needs and establish deeper emotional connections with customers.**

Telecom operators need to continuously invest in new technologies alongside providing basic services, in order to offer personalized services and enhance long-term relationships with customers. In addition to functional factors, richer indicators are needed to assess the brand affinity, the degree of emotion, and whether customers would leave the brand or not, which may require more comprehensive research and management.



**We are talking about industries that manage millions of clients. We have 13 million clients, to personalize for them is not a simple thing, so it does need a lot of technological allies to achieve that level of personalization...**

**I think (NPS®) it is a good indicator as a starting point, but it is not the only indicator. The recommendation of a brand is nourished not only by the experiences that the client has had at the level of attention channels, but also by the experience with the product, loyalty and identification with the brand. This is part of the connection or emotional relationship that customers can have with the telecom.**

Gonzalo Estella  
Customer Experience Director, Claro, Peru



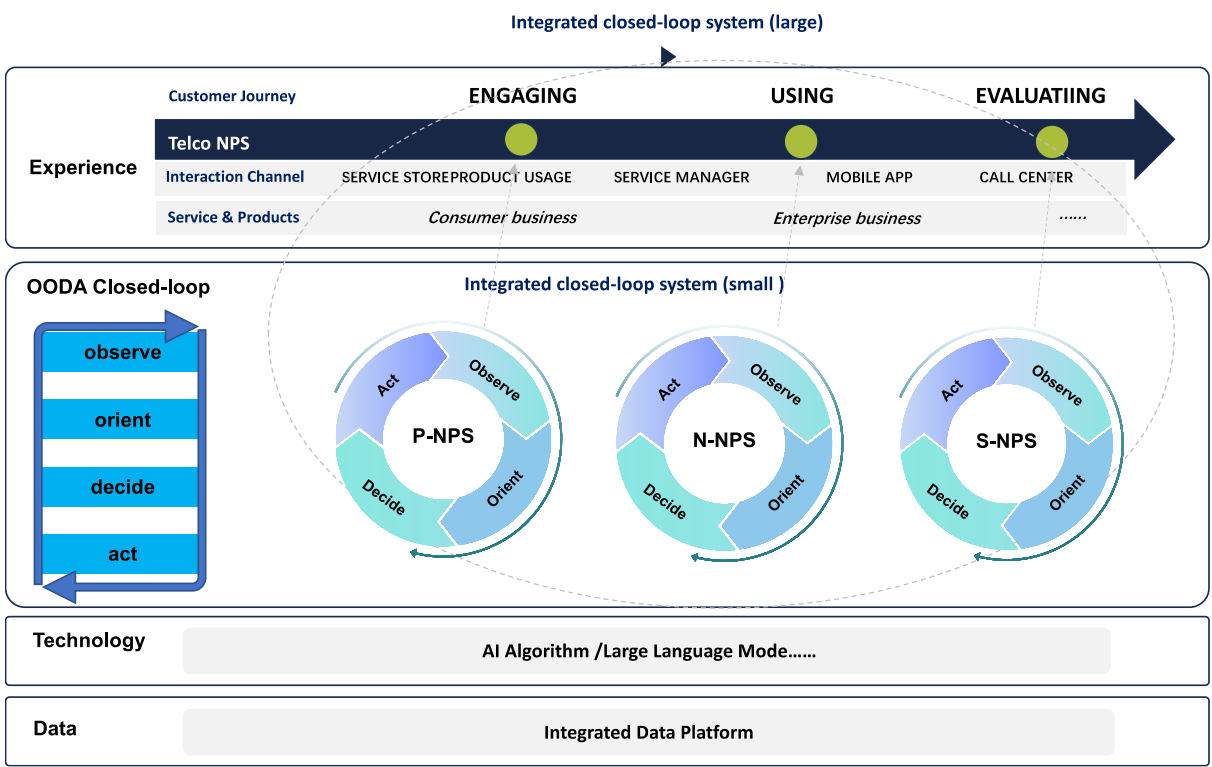
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**Incorporate a comprehensive NPS® -driven CX management framework to drive improvements for business success.**

This framework will provide telecom operators with guidance in the application of advanced NPS® -driven customer experience management system.

Recently TM Forum released a standard management framework<sup>3</sup> to support next-generation telco NPS®, which clearly articulates the concept of closed-loop management of CX and leverages NPS® to guide business strategies and drive final improvements.



Source: TM Forum

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In the proposed NPS® Management Framework, the overall NPS® indicator is meticulously decomposed into three sub-domains, including Product NPS®, Network NPS®, and Service NPS® that align with the operator business.

- **Product NPS®** analysis of product experience, such as service plans, provided during the contact phase
- **Network NPS®** analysis of network experience (e.g., network coverage, stability, speed, etc.) during the usage phase
- **Service NPS®** analysis of customer service experience such as business handling, and usage of self-service

portal, provided during the evaluation phase

Upon the identification of these sub-domains, an in-depth root cause analysis can be conducted to elucidate the specific factors causing customer pain points, thereby establishing a solid foundation for subsequent improvement initiatives.

**These sub-domains are evaluated separately, helping operators make more precise business adjustments accordingly via mapping external customer feedback data and internal business indicator data.**



**One of the most important variables, of course, is the network. We assess customer satisfaction with the network and compare it against quality indicators such as operational speed, coverage level, uptime, and all those metrics will be correlated with customer feedback.**

CX and customer loyalty expert, Chile



**What we dignify may or may not add to you, is finally product, I refer to terminal offer, if it's your customer to renew a terminal or if it's a new customer to bring in, that's like the second relevant point that moves the needle of loyalty... then other elements come into play, transparency criteria... the weight of channels later, there yes customer service has a relevance.**

Marita Fabiani  
Customer Experience Director, Entel, Peru

## INDUSTRY PRACTICE

### TSTT: Mapping NPS® to the causes and take actions correspondingly



When we see someone leave or take action, we can map it to a reading at the end. We collaborate with a partner who conducts mapping research for us. I can look at **a map of our country that shows NPS® by customer segment, product category, and region, along with actual network performance, experience scores, and every other relevant metric.** This allows me to clearly identify patterns, whether it's success, improvement, or shortfalls. If a store improves in a specific area, **I can now map that to an increase in NPS®, and ultimately, to an improvement in revenue.**

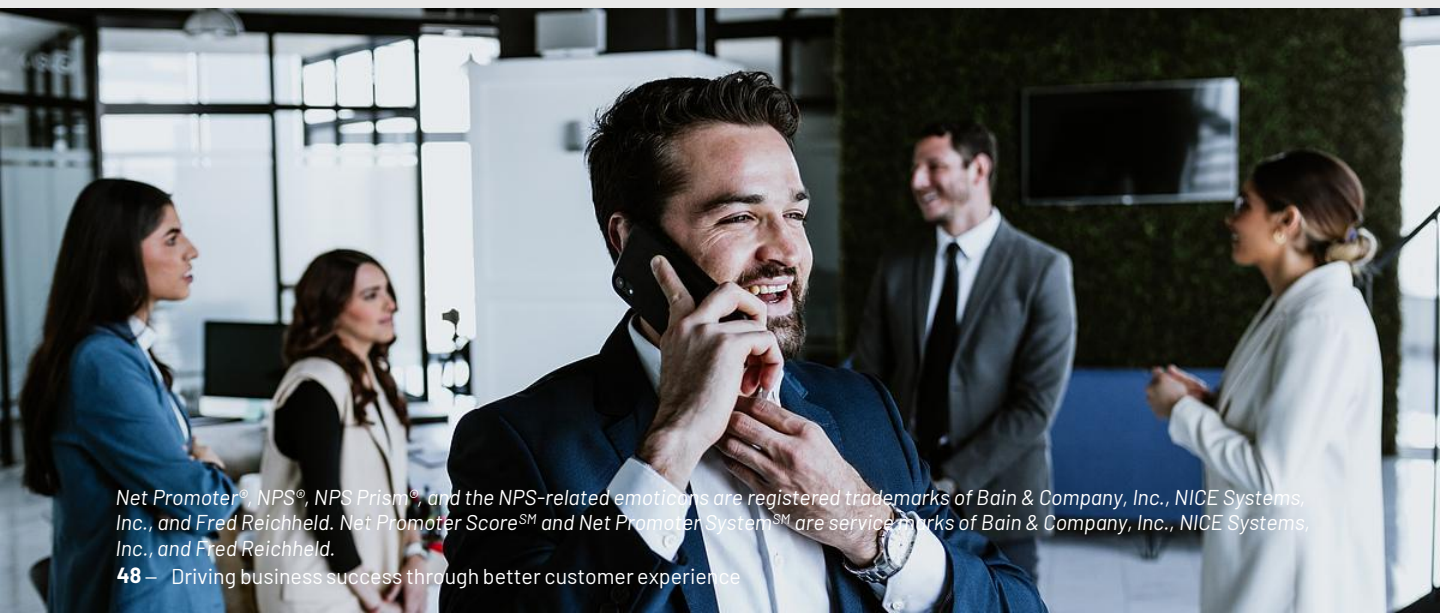
Kent Western  
Chief Executive Officer, TSTT, Trinidad and Tobago

For example, matching the network details to the customer experience. TSTT is applying algorithms that enable the team to ensure mapping the exact moment to the issue. If there was an outage in a certain area, it links the actual issue to the customer sentiment. So, if a customer says, 'I'm always losing service in this area with my mobile phone', it goes

to the area, assesses the network question about how it is performed and provides insights. That allows the team to then prioritize investment in that. This mapping mechanism enables a swift closed-loop management of capturing information and responding to the customer.

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**48** — Driving business success through better customer experience



In the framework, detractor identification is a crucial component at the “Observe” phase in the closed-loop management system.

NPS® management does not mean working with the score number but **understanding what creates detractors**

**or empowers promoters and leveraging this information to continuously monitor and improve the customer experience.**

Therefore, telecom companies also consider neutral customers, who must be taken care of so that they become promoters instead of detractors.

## INDUSTRY PRACTICE

**Constantly listen to detractors, promoters and passives under the NPS® mechanism and drive changes for improvement**



I have a strong belief in Net Promoter Score (NPS®) and the importance of understanding those on the fringe. **We specifically focus on customers who score a 7, we see them as next to promote. Those in the lower range are seen as next to detract.** So, any small positive shift from a 7 turns that customer into an opportunity. Conversely, any negative shift moves them into a disadvantageous position. We have a Corporate Customer Experience Leader, a senior manager, who focuses specifically on that area of the business. He looks at the issues raised by those customers and works to move them out of the detractor range and into the neutral stage.

**For customers in the neutral range, we analyze their issues, these become our priorities. We pay close attention to detractors who are just below neutral, and those at the top of the neutral range.** From there, we study the behaviors within that group to identify ways to encourage promotion.

Kent Western  
Chief Executive Officer, TSTT, Trinidad and Tobago



All the time I'm listening to detractors, I also listen to promoters, but I **analyze more the data of the promoter. Open responses, and see, here is a very good practice, maybe I can improve and do for more customers.** But normally, we **listen and talk to the super detractor, which is from 0 to 3.**

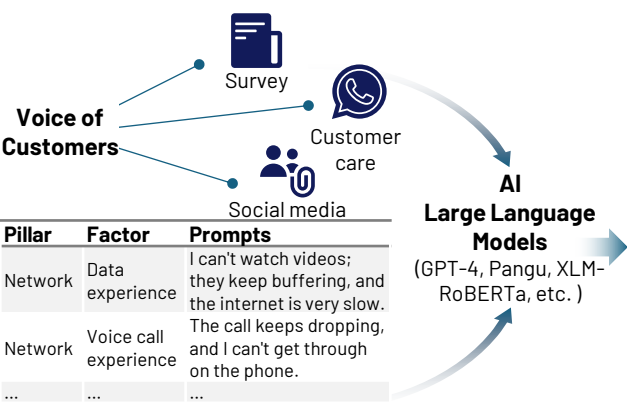
Customer experience expert, Brazil

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Based on the framework, the technical layer enhances data processing efficiency and reduces human intervention through automation systems, enabling real-time monitoring and analysis to allow businesses to respond swiftly<sup>3</sup>. AI technologies, algorithms and systems in the technology layer will support intelligent decisions and improve the digital management capability. According to our talks with industry experts, leading telecom companies are increasingly deploying AI technologies.

**Qualitative insights are essential to understand the data out of a quantitative result, and in turn, will feed back into the development of attributes for the measurements.** With the quantitative data firmly in place, the CX team uses qualitative feedback to give it texture.

**Semantic Recognition and Natural Language Processing (NLP) will enable the company to process and analyze huge amounts of qualitative data from different data sources,** such as open-ended responses in quantitative surveys, focus group discussions, comments on social media, queries from hotlines, etc.



Source: Ipsos

The technologies enable telecom companies to find ways to become more efficient by extracting data directly from the conversations customers are having. For instance, a transcription and a summary will be generated out of focus group discussion and this will allow the operator to scale the amount of focus groups at a very low cost.

**INDUSTRY PRACTICE**

**Apply Semantic Recognition and Natural Language Processing to process qualitative feedback of customers**

We obviously **test with artificial intelligence, we test with emotions, we test with new metrics to start connecting...** The number of surveys we do is brutal. We have to find a way to be more efficient and take the data from where customers are talking to us today... Listening to customers is listening a little more to get out of this more product-oriented view... **It's to stop thinking about individual products, start listening to needs.**

Customer experience expert, Argentina

VOC	Pillar	Factor	Sentiment
I changed the television and internet service to provider A because it failed a lot with provider B.	Network	Data experience	Negative
Because it is the operator with the greatest ease of installation in home services in my location.	Service	Installation and Maintenance	Positive
...	...	...	...

Things happen in real time, which leads to complex and rich dynamics. For instance, telecom companies may roll out co-launched promotional packages with famous sports events, yet they also need to be prepared for the scenario where the event is no longer news.

**Algorithms and Data Processing Technologies enable the company to be ahead of the curve** to incorporate the changes even if it's under the radar to provide personalized services that meet customer needs, giving them a sense of "Status". Large-scale data are analyzed with the identification of sentiments, behavior patterns, key factors, etc.

## INDUSTRY PRACTICE

### Leverage the artificial intelligence to understand the customer

Usually when a customer enters a chat, a bot greets "Hello, how can I help you", and asks the customer to "select the preferred option" from a list of questions frequently asked by others. If the bot cannot help, it transfers the customer to someone.

The company is going beyond that, aiming for the bot to act like a human being from the start and provide quick solutions. And if the issues are very complex, then it will transfer the customer to someone who

can provide more specific assistance.

Sentiment analysis is also conducted. The response from customers is contrasted and there is an algorithm with a set of predetermined words based on previous experience that classifies them and tells whether that customer was upset or not, or to what degree their frustration was. The algorithm has been learning over time because it gets trained as it receives information.



**Initially it's about the perception of your psyche.** Suddenly, the network is terrible. But **if you feel attended to, if you feel cared for, if you feel comfortable, you won't leave.**

That has reduced our complaints to PROFECO (Procuraduría Federal del Consumidor).

They went down 20% because **we are trying to focus more on what concerns the customer and not start bombarding them with packages, calls, messages, etc.**

Instead, **we ask: "What concerns you?"** And I resolve that. These have been the focuses from an analytical standpoint that we've been heard on with the proposals we've made.

Néstor Escudero  
Global Analytics Transformation Director, AT&T, Mexico



**Intelligent Systems and Platforms can automate the data collection and real-time processing**, enabling the relevant teams and departments to quickly respond to customer feedback for transactional evaluations, reducing errors

and delays from manual operations. For instance, if a customer calls the call center, an automatically generated survey will be sent the following day, across digital channels, etc.

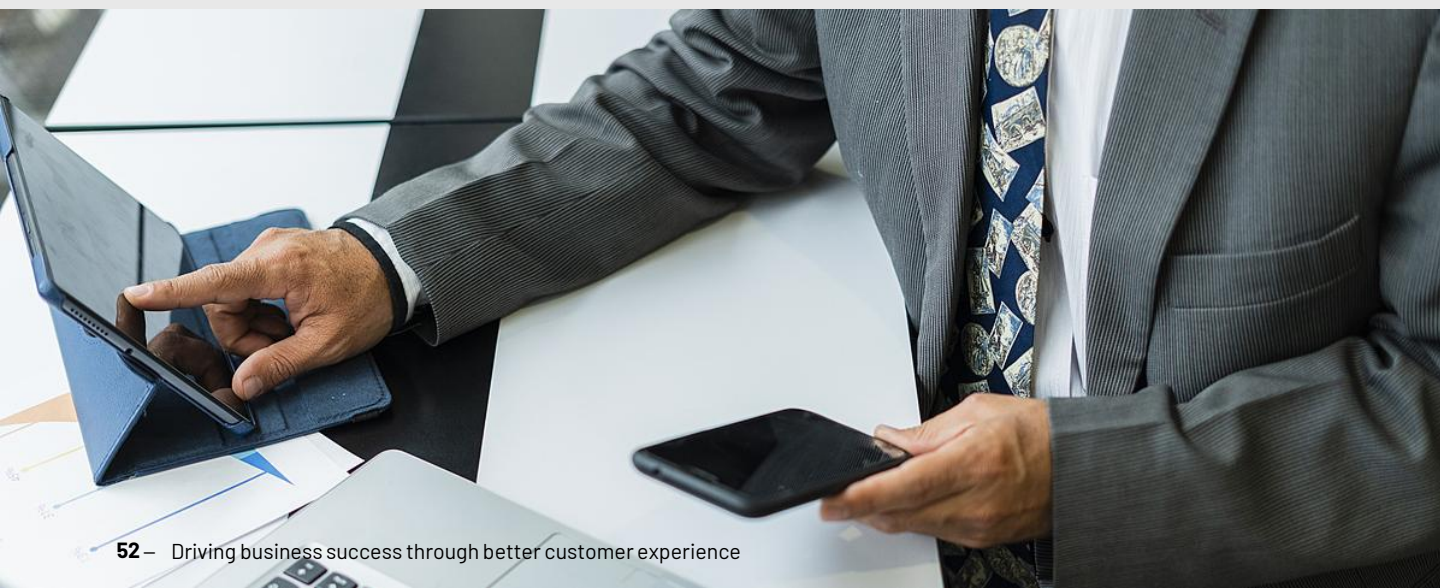
## INDUSTRY PRACTICE

Deploy automated intelligent tools to obtain customer feedback



Internally we have a market research-based tool that listens to customers at various points in their journey. We have around **200 touchpoints for customer contact measurement**. Whether it's paying a bill, making a purchase, receiving something from logistics, entering a store, using the App, or calling the Call Center—there are over 200 touchpoints, including technical visits at home. All these are triggers for this thermometer research, which is constantly running, **generating about 30 million pieces of customer feedback per year**. We leverage Artificial Intelligence to **mine all this information, providing diagnostics to help us take action**.

Carla Beltrão  
Customer Experience-Executive Director, Vivo, Brazil



## ACKNOWLEDGEMENTS

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Latam Head of CX, Ipsos

### **Helen Wilson**

Chief Experience Officer, Customer  
Experience and Channel Performance,  
Ipsos

**13 senior executives professionalized in customer experience from leading telecom operators were interviewed as part of this report. Some executives requested that their participation remain anonymous, therefore 7 contributors are named here.**

## REFERENCE

1. **THE KEY TO YOUR CX SUCCESS – Finding the right customer experience KPI for your business**
2. **THE FORCES OF CUSTOMER EXPERIENCE – The science of strong relationships**  
<https://www.ipsos.com/en/forces-customer-experience>
3. **IG1394 Telco NPS® Management Framework v1.0.0, TM Forum**  
<https://www.tmforum.org/resources/guidebook/ig1394-telco-nps-management-framework-v1-0-0/>

## FOR FURTHER INFORMATION

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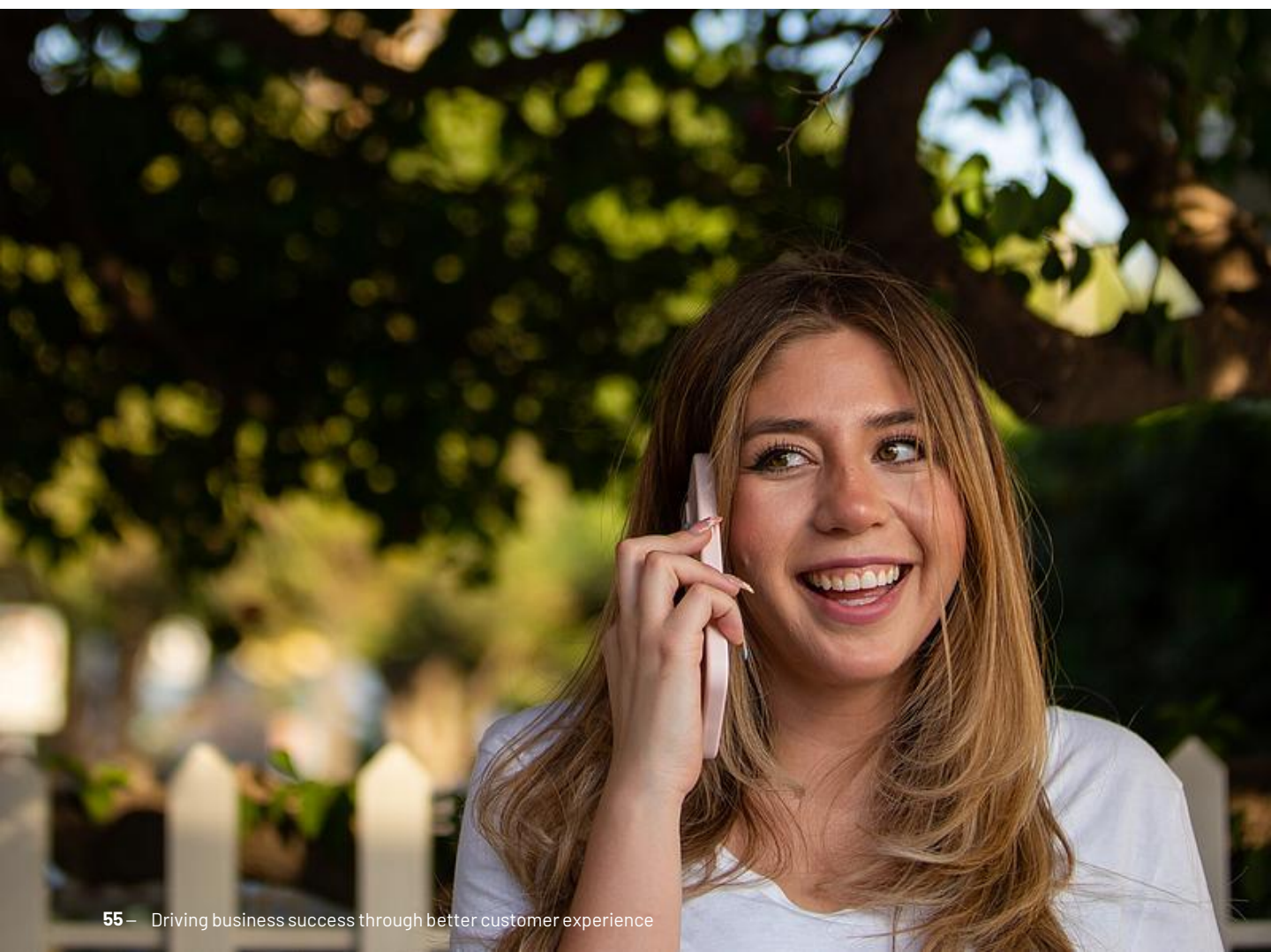
### **Francisco Acuña Bachmann**

Latam Head of CX, Ipsos

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## FURTHER READING

1. **Putting in the Effort: Why treating customers fairly is key to business success**  
<https://www.ipsos.com/en-uk/get-fair-or-fail-why-fairness-is-key-to-business-success>
2. **When Difference doesn't mean Different: Understanding cultural bias in global CX programs**  
<https://www.ipsos.com/en/when-difference-doesnt-mean-different-understanding-cultural-bias>
3. **Rewiring your CX DNA**  
<https://www.ipsos.com/en/rewiring-your-cx-dna>
4. **CX service design: creating emotional attachment and driving brand growth**  
<https://www.ipsos.com/en/ipsos-views-cx-service-design>
5. **THE FORCES OF CUSTOMER EXPERIENCE IN LATIN AMERICA – The science of strong relationships**  
<https://www.ipsos.com/en/forces-customer-experience-latin-america>



## Study design

### Quantitative research

Ipsos conducted quantitative research of 931 adults aged 18+ (mainly 18-60) between September 11<sup>th</sup> and September 23<sup>rd</sup>, 2024. The survey across 6 countries, including Mexico, Peru, Brazil, Argentina, Chile, and Colombia, was conducted online using the Ipsos Online Panel System.

Respondents in the survey are subscribers of both fixed broadband and mobile network services from leading international telecommunication operators in each country, and decision makers when choosing the operator(s). The results should therefore be viewed as representative of a more urban, affluent, and 'connected' population. Survey results are analyzed using aggregated data from the regional level.

Strict quality control methods are adopted throughout the entire data collection process from recruitment via Ipsos online panel to data cleaning for analysis. For example:

- Questionnaires with excessively short or long response times are discarded;
- The logic of scoring is checked for consistency, and samples with too many identical answers or logical contradictions are discarded;
- Open-ended questions with low quality are also discarded.

### Qualitative research

In total 13 customer experience experts are recruited. All experts are in senior positions in leading telecom operators from the same markets covered by the quantitative study (except Trinidad and Tobago) with professionalism in customer experience optimization and CX management depending on their professional background and position.

The expert interviews, each lasting about 45 minutes, were conducted in person or via online conference call between September 11<sup>th</sup> and January 3<sup>rd</sup>, 2025. Market research codex ensures the anonymity of experts based on their will for reasons of privacy.

## About Ipsos

Ipsos is one of the leading market research and advisory companies globally, operating in 90 markets and employing over 20,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 solutions are based on primary data from our surveys, social media monitoring, and qualitative or observational techniques.

Our tagline "Game Changers" sums up our ambition to help our 5,000 customers move confidently through a rapidly changing world.

Founded in France in 1975, Ipsos has been listed on the Euronext Paris since July 1, 1999. The company is part of the SBF 120 and Mid-60 indices and is eligible for the Deferred Settlement Service (SRD). ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP [www.ipsos.com](http://www.ipsos.com)

