



WHERE CONTACT CENTERS ARE MISSING THE MARK WITH CUSTOMER CARE

ADAPTING LIVE CHAT AND REMOTE SUPPORT FOR THE CONNECTED, MULTI-CHANNEL CUSTOMER

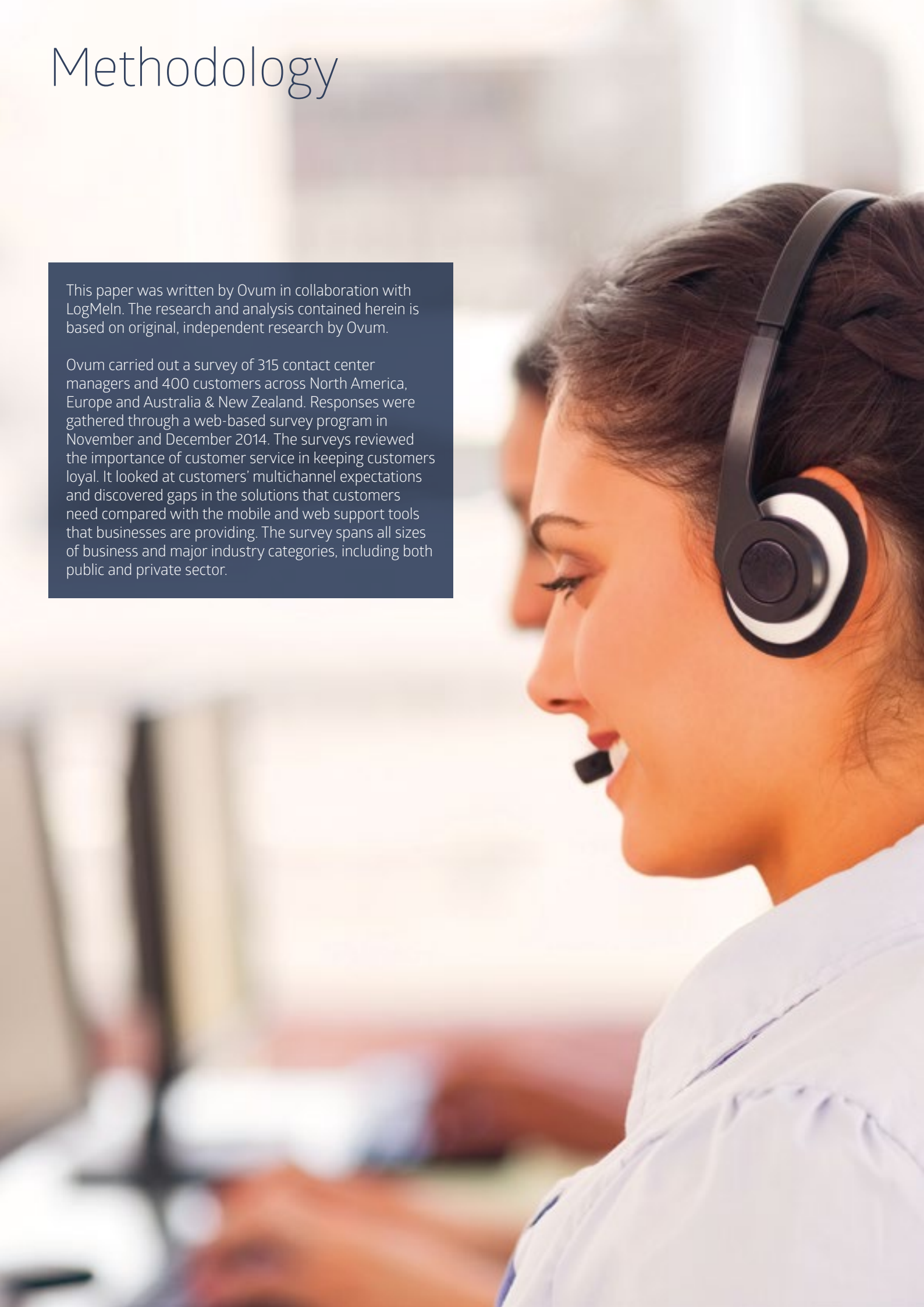
Contents

Methodology	04
Respondent demographics	05
Introduction	06
Key findings	07
Customer experiences directly impact loyalty	08
Customers look to web and mobile for answers first	10
Customers are rapidly adopting new channels and changing behavior	12
Customers use many different channels	14
A large number of interactions come from non-traditional channels	16
Resolution across digital channels needs to improve	17
Customers typically connect twice before getting a resolution norm	18
Time taken to reach an agent is still the biggest customer complaint	20
Customers believe that access to agents has worsened	22
Managers understand that wait times are an issue	23
Live chat is a promising new channel	24
Contact center managers are planning to invest in live chat	26
Customers want better access to live agents	27
Training agents and improving response times are top priorities	28
Customer mobility will impact contact centers' purchasing decisions	30
Tracking and improving the customer experience is a priority for contact centers	31
The Internet of Things shows potential for technical resolutions	32
Our conclusion	34

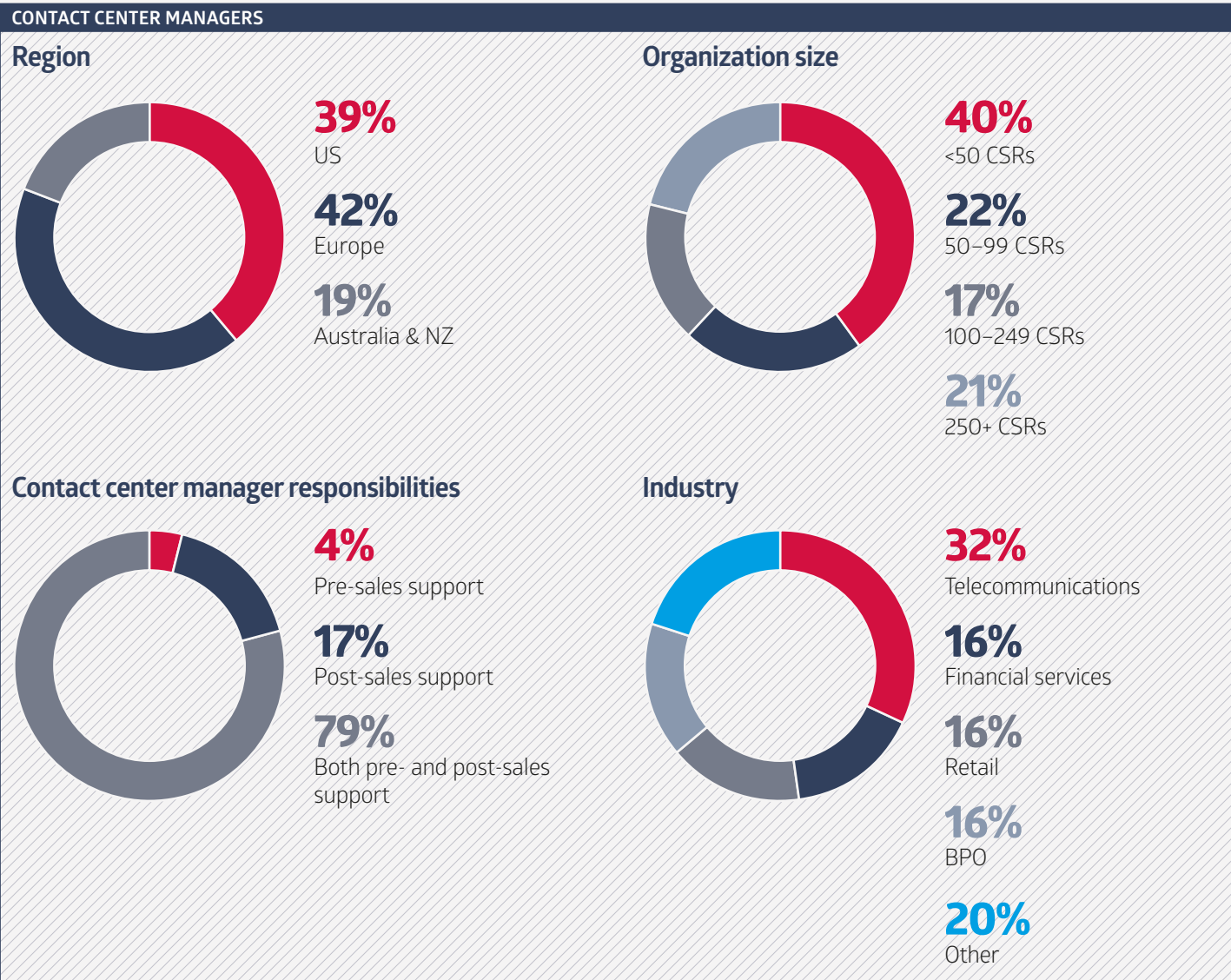
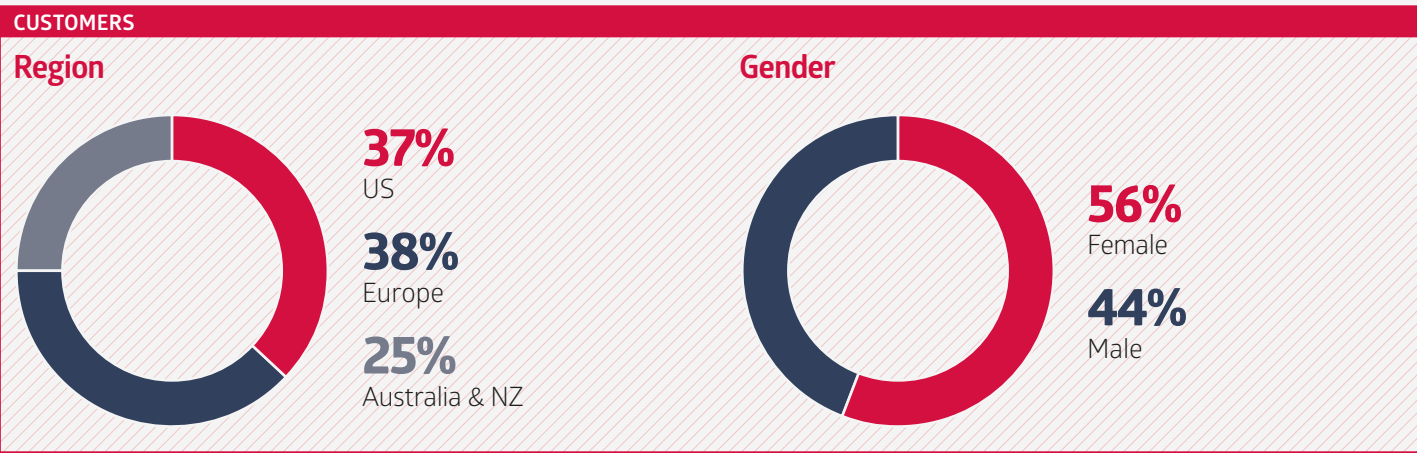
Methodology

This paper was written by Ovum in collaboration with LogMeIn. The research and analysis contained herein is based on original, independent research by Ovum.

Ovum carried out a survey of 315 contact center managers and 400 customers across North America, Europe and Australia & New Zealand. Responses were gathered through a web-based survey program in November and December 2014. The surveys reviewed the importance of customer service in keeping customers loyal. It looked at customers' multichannel expectations and discovered gaps in the solutions that customers need compared with the mobile and web support tools that businesses are providing. The survey spans all sizes of business and major industry categories, including both public and private sector.



Respondent demographics



Introduction

A warm-toned photograph of a person's hands interacting with a tablet computer on a wooden desk. The person is wearing a dark, patterned sleeve. The desk is cluttered with various items: a white computer mouse, a blue pen, several sheets of paper with text, and a blue folder. The background is softly blurred, showing more of the desk and a keyboard.

The new multi-device, always-connected consumer has greater expectations for customer service and the ability to switch providers if a business doesn't meet those expectations. Customers are reaching out to businesses on different channels from different locations via smart devices, and, as a result, they want faster resolution times and more competitive prices. At the same time they are ready and willing to make their voices heard through social media when they are unhappy with a product or service or business interaction experience.

Although businesses are fully aware of new behavioral trends among customers, not all of them are tailoring their customer service tools to match customers' needs. They face challenges measuring cross-channel behavior and determining which channels to prioritize in order to improve resolution rates in non-traditional channels. Contact centers need to place more importance on understanding the relationship between support interactions, channels, and improving loyalty by investing in the right technologies.

Key findings

- Customer service relationships continue to be an important influencer in customers' decisions to do business with an organization. 76% of customers claimed to have stopped doing business with a brand following a bad experience. Businesses need to pinpoint the cause of customer dissatisfaction and make changes to improve retention and protect their customer base.
- Customers are frequently using the web to search for information before making a call to a contact center. 60% of customers said they use the web to look for information always or most of the time before contacting customer service. However, only 9% of managers believe that their customers frequently use the web before calling, showing a big discrepancy. Managers need new tools to track web behavior and link it to live customer interactions.
- The number of customers using live chat and email has doubled over the last two years. As this number increases further, contact centers must be ready to handle interactions in non-voice channels, but also to provide quick resolution, as resolution rates are lower for support inquiries across non-voice channels.
- Live chat is a promising channel for support interactions; not only does it offer fast access to agents, but it is efficient because agents can handle two or three chats at the same time. It can also be used on mobile devices, using links from a mobile application or site, and agents can link customer web behavior within a chat interaction so agents are more readily aware of particular behaviors.
- Customers are most frustrated with time taken to reach a representative and resolution time. They believe these issues have worsened over the last two years. Long hold times and automated service menus continue to irritate customers who are keen to get fast resolutions to their problems. This explains why many are turning to the web for support inquiries, with contact centers seeing almost 50% of interactions coming from channels other than voice.
- Managers do realize that customers need quick resolutions to their problems, as their priorities for 2015 are agent training and improving resolution times. They track resolution times and customer satisfaction among other metrics in order to improve connectivity between agents and customers, whether through new or traditional channels.
- The Internet of Things is not completely understood by customers, but they would be willing to use it if it means solving technical issues quicker. Contact center managers however are familiar with the benefits of connected devices and are keen to resolve issues remotely.

Customer experiences directly impact loyalty

76% OF CUSTOMERS LEAVE AFTER ONE BAD EXPERIENCE

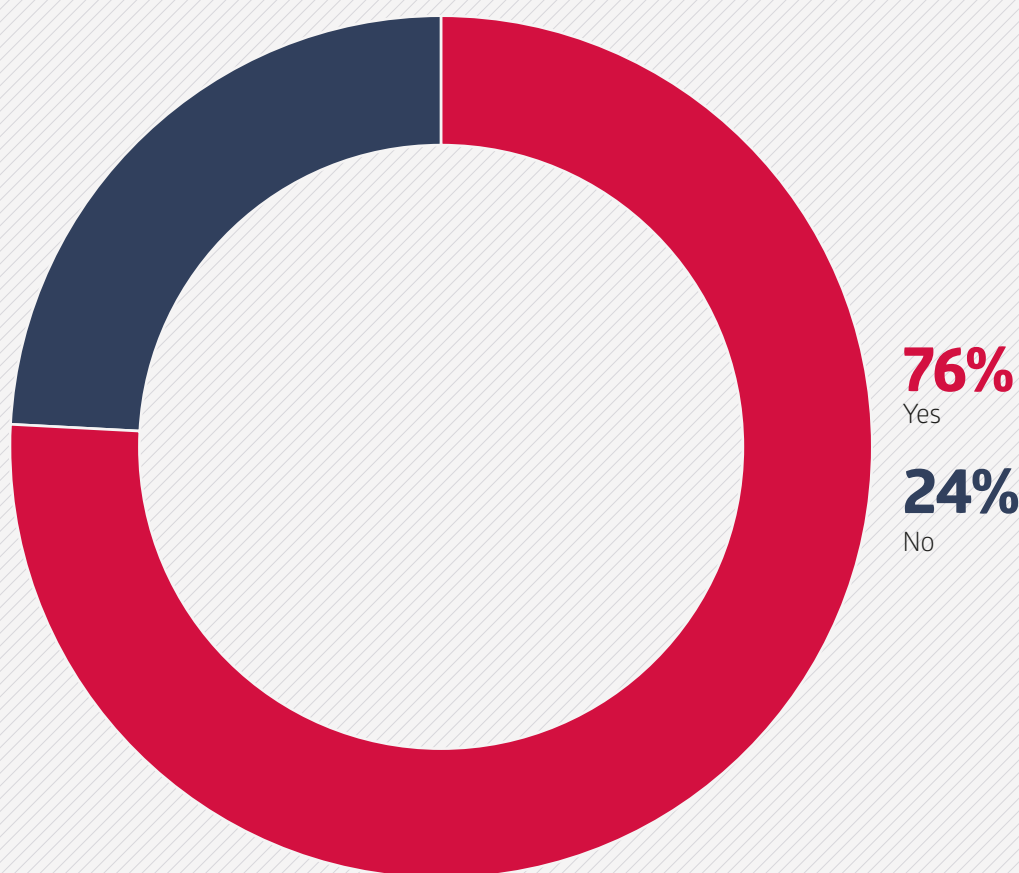
Access to information and product data on the web has dramatically increased, giving customers more power to make decisions about which companies they choose to do business with. They can write or read reviews of products and services, see competitor pricing, and determine the best way to fix a technical problem without even contacting a customer support representative. This means that businesses must be more on the ball than ever, monitoring how customers are using information online and understanding what drives loyalty.

Over two thirds of the surveyed customers have stopped doing business with an organization after a bad customer experience reminding us all how important customer service really is. Businesses need to ensure that customers are truly getting the support they need, whether through online tools or access to live agents when they need it.

FIGURE 1

76% of customers have stopped business following a bad experience.

Have you ever stopped doing business with a company following a bad customer experience?





Customers look to web and mobile for answers first

COMPANIES CAN AVOID A CALL BY PROVIDING BETTER ENGAGEMENT ON THEIR SITES

A high 61% of customers claim to use the web to research information most of the time before they call the contact center, and a further 23% occasionally use the web for research first. This indicates two trends; either that customers cannot find the information they need online or that they are collecting useful information to bring to discussions with agents.

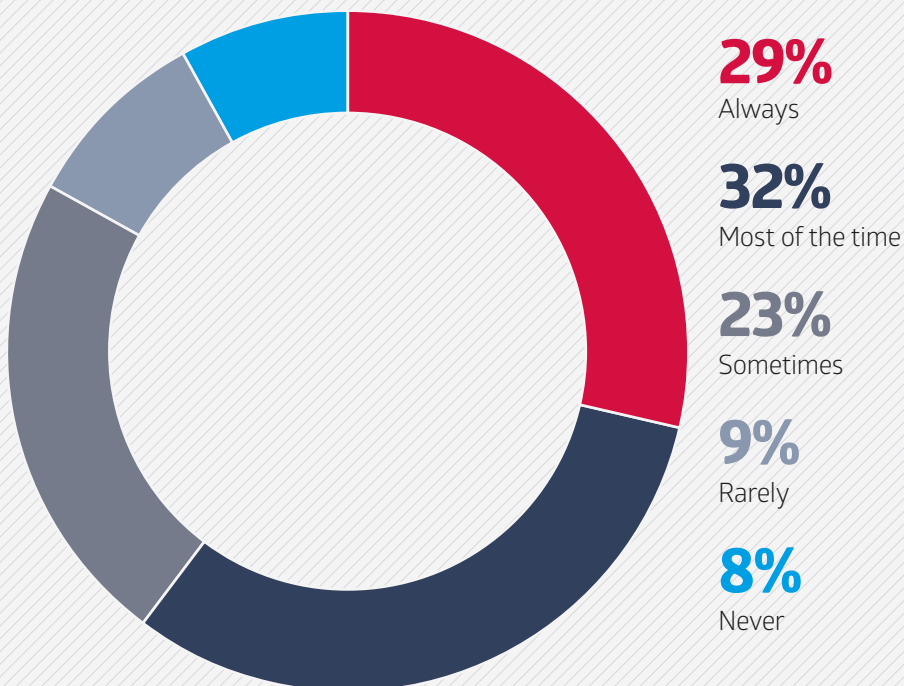
On the business side, only 28% of contact center managers believe that customers are using the web on a regular basis before making a call. They know that customers are using the

web and mobile devices to find information, but the extent of web use has not been tracked as closely as it should be. Marketing teams typically have website usage statistics, but this data isn't always shared with customer support. Managers in the contact center need this data so that they gain a more complete picture of how customers are looking for information on the web and at which point they need to contact an agent.

FIGURE 2

61% of customers are using the web to find information before calling a contact center.

How frequently do you look for information on the web or a mobile device before reaching out to a live service representative?



AGENTS NEED CONTEXT AROUND INTERACTIONS

In order to help customers more effectively, agents also need to understand how customers are using the web before they call into a contact center. They will benefit from links to website

tracking data and previous contact history so that the customer doesn't need to repeat information when they call.

FIGURE 3

There is a discrepancy between customers' web use and manager knowledge of cross-channel behaviors.

How often do you get calls from customers that have tried to find support answers on your website or mobile site/application but were unable to resolve their issue?

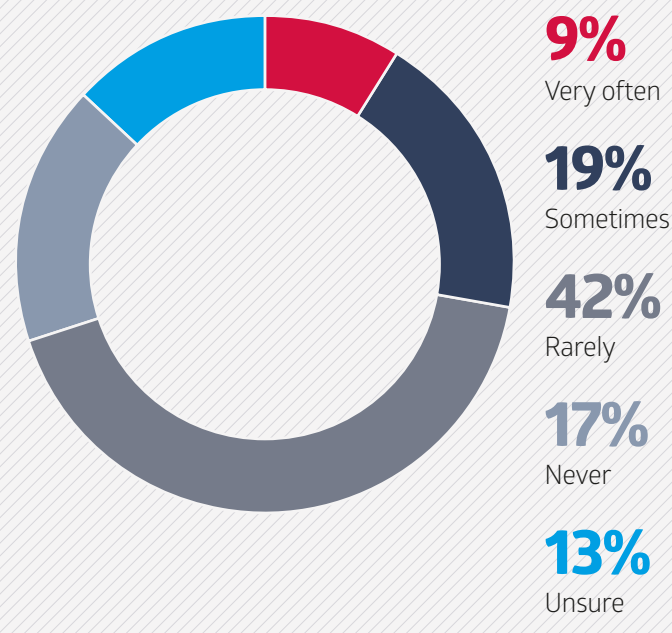
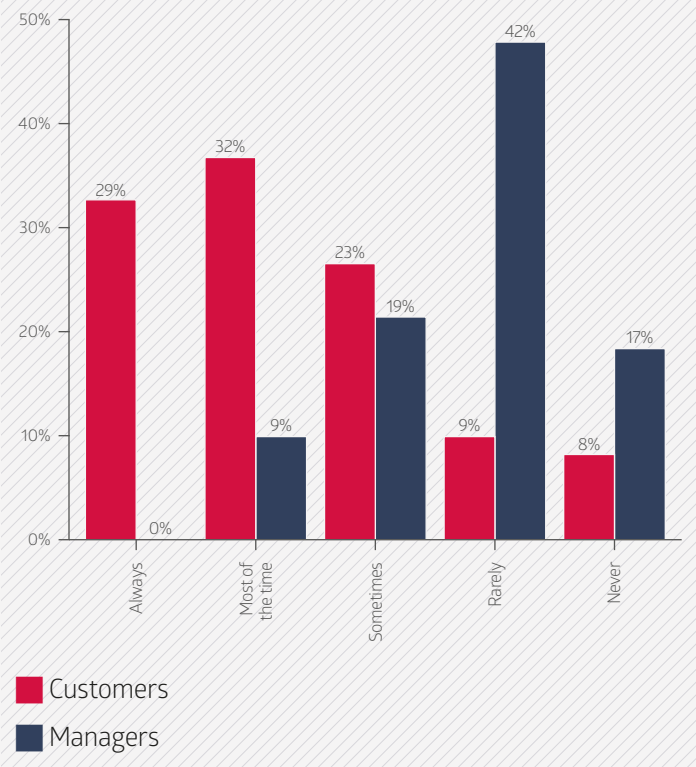


FIGURE 4

How often do customers call after they have tried to find support answers on your website or mobile site/application but were unable to resolve their issue?



Customers are rapidly adopting new channels and changing behavior

USE OF EMAIL AND WEB CHAT CONTINUES TO GROW

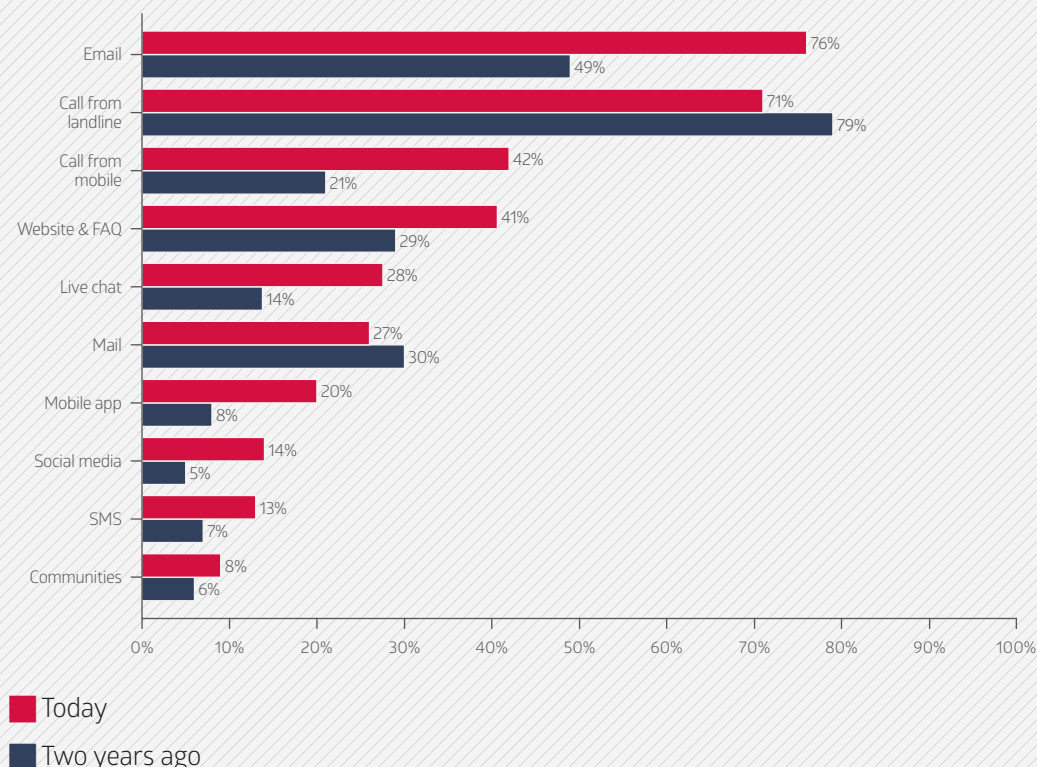
While voice and email continue to dominate as the channels most frequently used by customers, it's clear that in just two years a shift has occurred. The number of customers using a mobile phone for calls doubled to 42%, and the number of customers using live chat also doubled to 28% in 2014. This growth is expected to continue as customers become increasingly reliant on smartphones and web interactions.

Chat benefits all parts of the business, particularly when added to websites or mobile applications. Its advantages are that it is easy to use, customers don't need to leave a website or application to connect with an agent, and businesses can easily monitor customer questions. In addition, agents are able to handle two or three queries at the same time and can use co-browse and web history to understand and preempt customer issues in order to resolve them more efficiently.

FIGURE 5

Mobile, web self-service and chat are growing rapidly for customer support.

Which of the following support channels do you typically use to reach a business with customer support questions? What did you use two years ago?

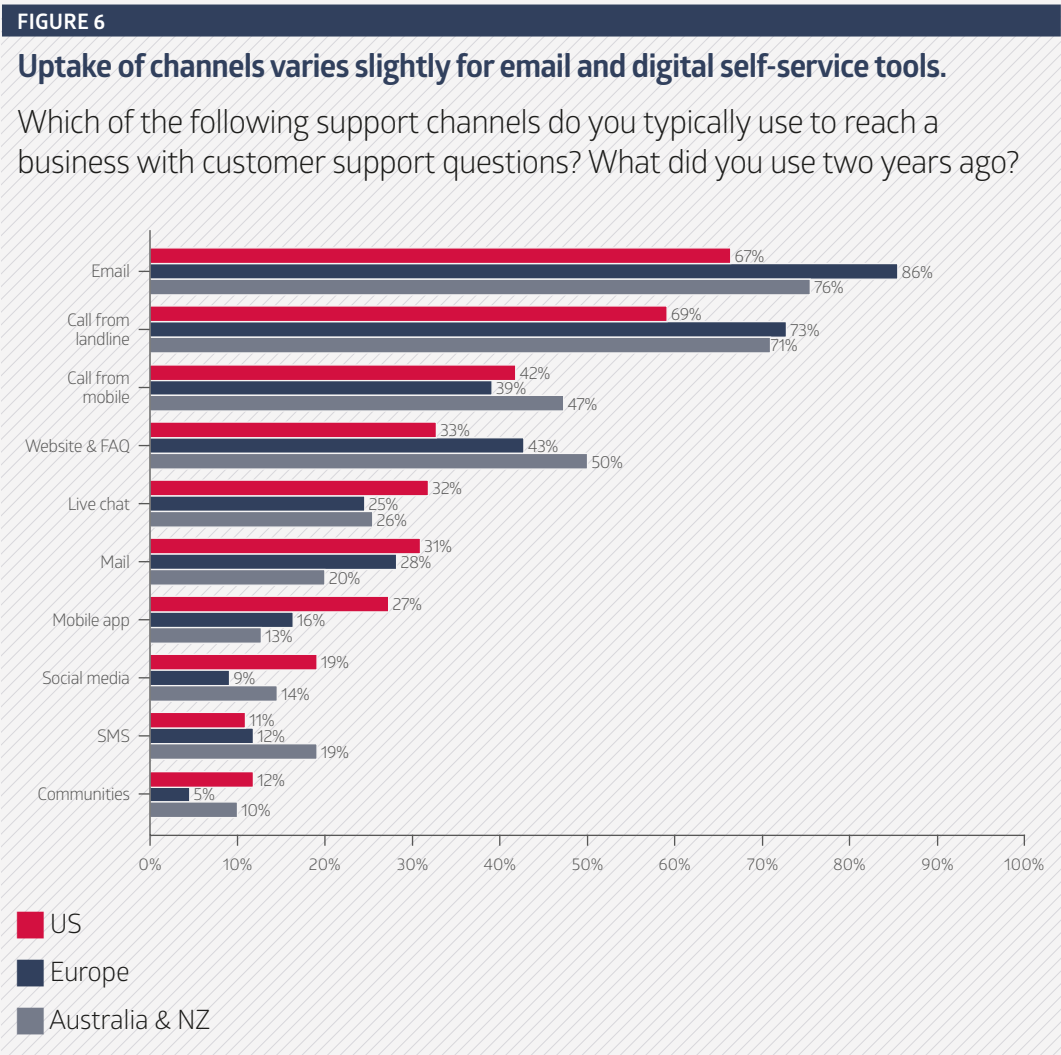


The number of customers using live chat has doubled in two years.

ACROSS REGIONS UPTAKE OF DIGITAL CHANNELS VARIES

Depending both on personal preferences and maturity of the regional market, customers show different preferences for choosing customer support channels. In Europe, email was pinpointed by customers as the most popular channel, with 13% more selecting email over a landline call as the way they typically ask customer support questions. Other variations came from digital tools, with US respondents showing a greater tendency to use mobile applications and social media

for support whereas 50% of respondents from Australia and New Zealand selected websites and FAQ pages as a common way to find support answers. Despite these slight differences, overall results were similar across regions and businesses should look at their own customers and common queries in order to determine how to adapt their multichannel customer support capabilities.

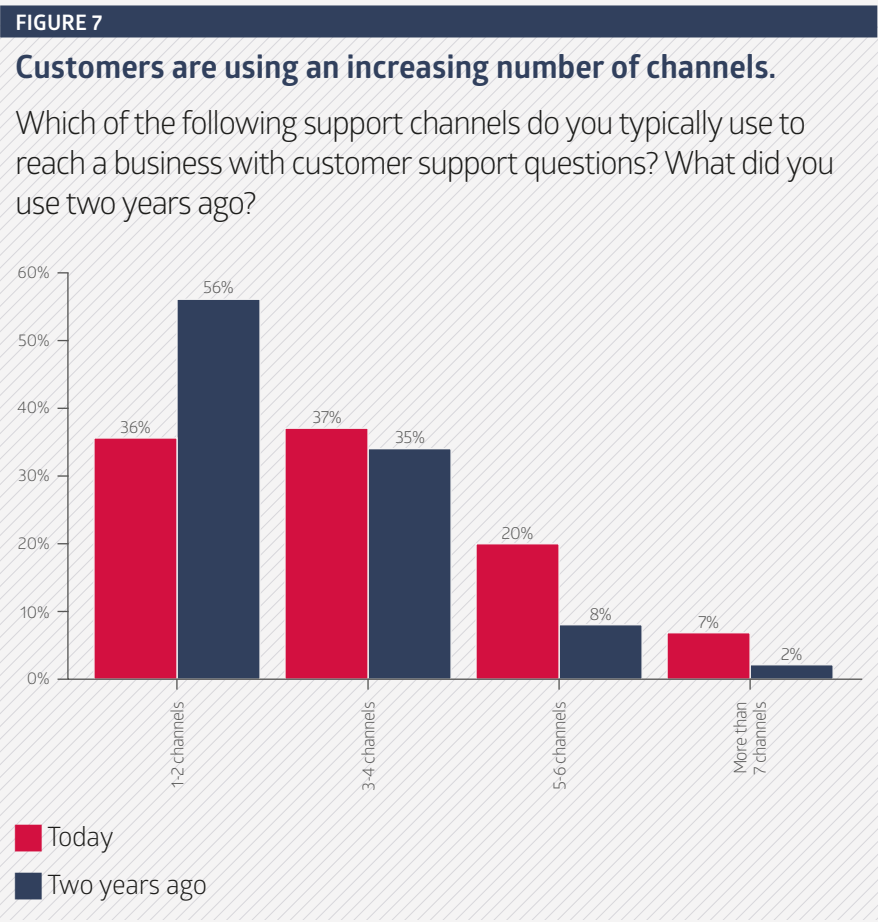


Customers use many different channels to connect

THE NUMBER OF TOUCH POINTS THAT CUSTOMERS USE HAS INCREASED OVER THE LAST TWO YEARS

One of the other interesting changes is that customers are using a broader range of channels, with some customers claiming to use at least six different channels to reach customer support. Personal preferences come into

consideration as well as the fact that mobile applications, chat and self-service are improving and making it even easier to connect in different ways.

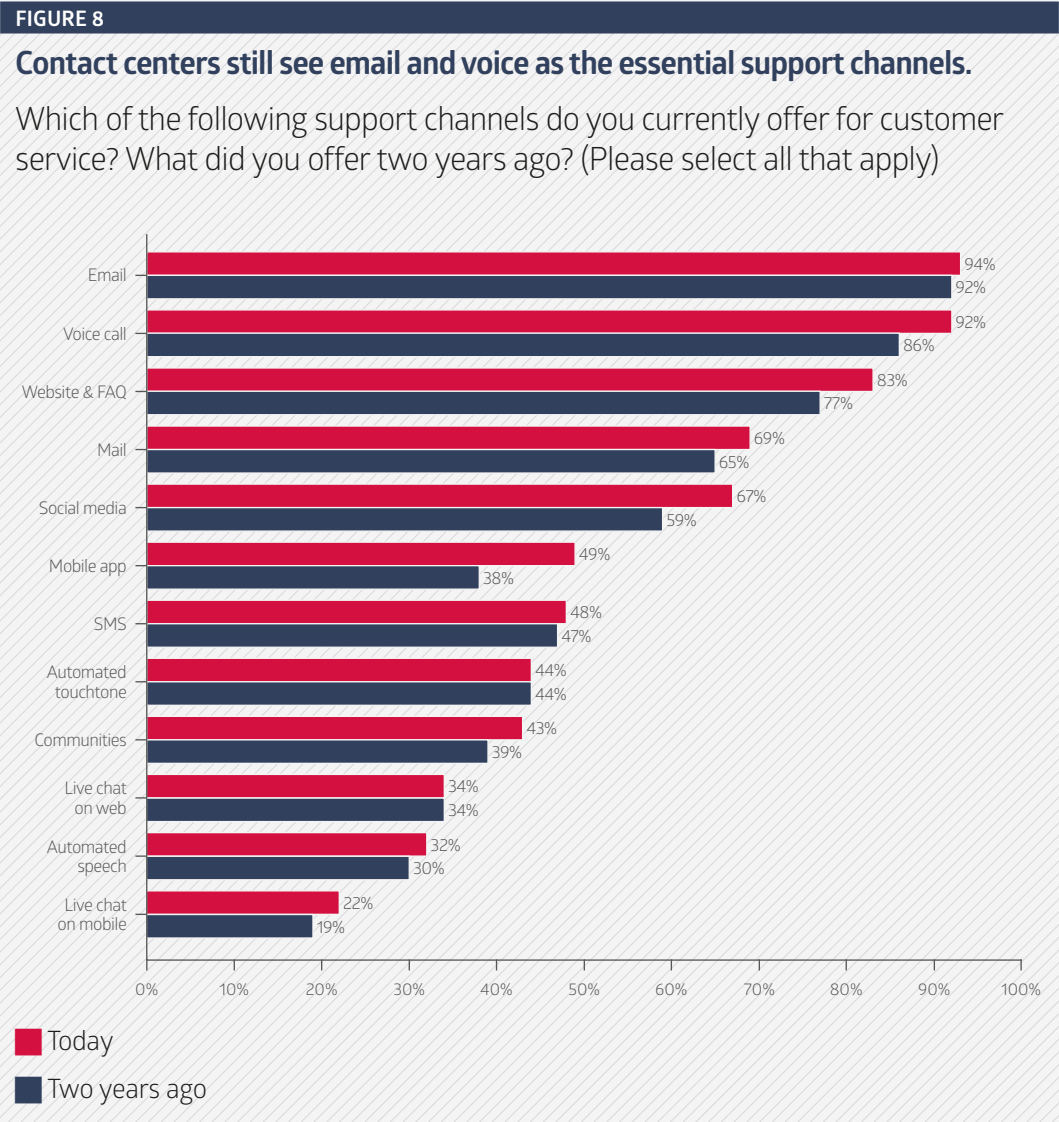


“
64% of customers use at least three different channels for support.

CONTACT CENTERS ARE MISSING THE MARK BY NOT PRIORITIZING WEB & MOBILE CHAT

Contact centers have been keen to adopt new channels, and more than 60% have invested in social media. However, adoption of live chat is still much lower among respondents, despite its significant uptake by customers. While having email, voice and web FAQ pages should be

viewed as essential support options, contact centers need to address their provision of other channels and ensure they are ahead of customers in order to drive up adoption and resolution rates.



A large number of interactions come from non-traditional channels

WEBSITES, SMS, SOCIAL MEDIA AND LIVE CHAT ALL PLAY AN IMPORTANT ROLE IN TODAY'S CUSTOMER SERVICE

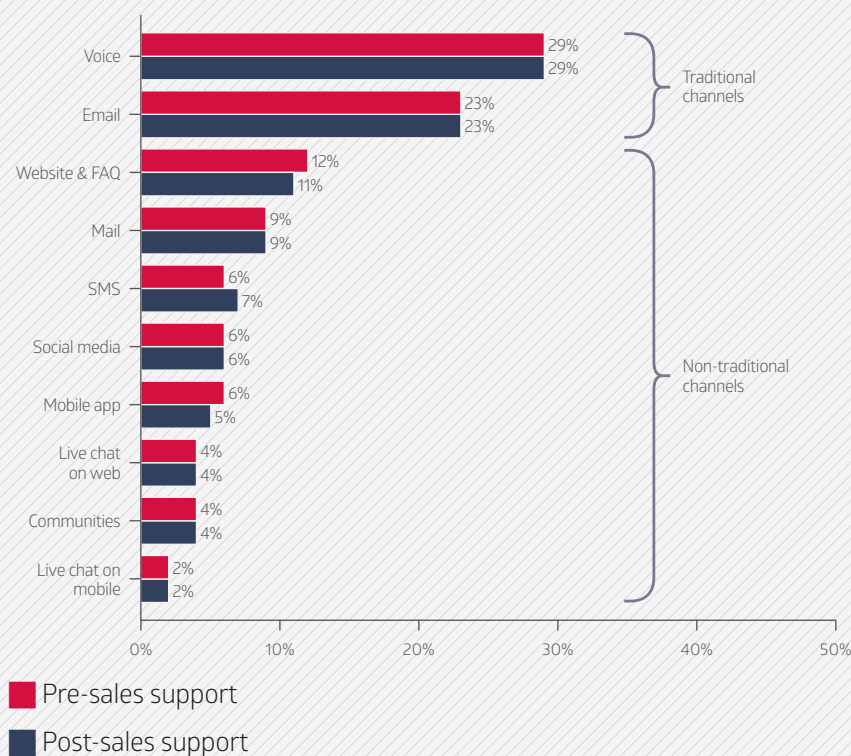
While email and voice are still the most used channels for customer service, it's clear that the shift in interactions is impacting support. Managers stated that almost 50% of interactions come from channels other than voice and

email, and this number is only likely to increase. Customers typically choose the same channels for both pre-sales support and post-sales support with the channel mix being aligned according to contact center managers.

FIGURE 9

Nearly 50% of interactions come from web and mobile channels.

Please provide an estimate for the percentage of customer interactions that come from the following support channels today



50% of interactions come from channels other than voice and email.

Resolution across digital channels needs to improve

A man with glasses is shown in profile, looking down at a tablet he is holding. The background is a blurred office environment with other people and desks. The lighting is warm and focused on the man and his device.

IF CUSTOMERS KNEW THEY COULD GET A RESOLUTION TO THEIR ISSUES ON THE FIRST ATTEMPT, OVER 70% WOULD CHOOSE A CHANNEL OTHER THAN PHONE.

While phone and email are still the most frequently used channels, customers are increasingly adopting live chat for agent interactions and using the website for self-service. Customers want to use channels other than voice and email, but only if they know they can get a quick resolution to their issues.

Channel preference is also related to the urgency of an issue, or ease of access to self-service. For example, when asked about changing a reservation, only 12% of customers would choose to use voice if they knew other channels would help them find a resolution. Likewise live chat is a growing tool and the third choice after email and phone for billing queries. One thing that also becomes clear, when asking customers about their ideal channel choices, is that each customer has very different preferences and priorities and all of them need to be supported by businesses.

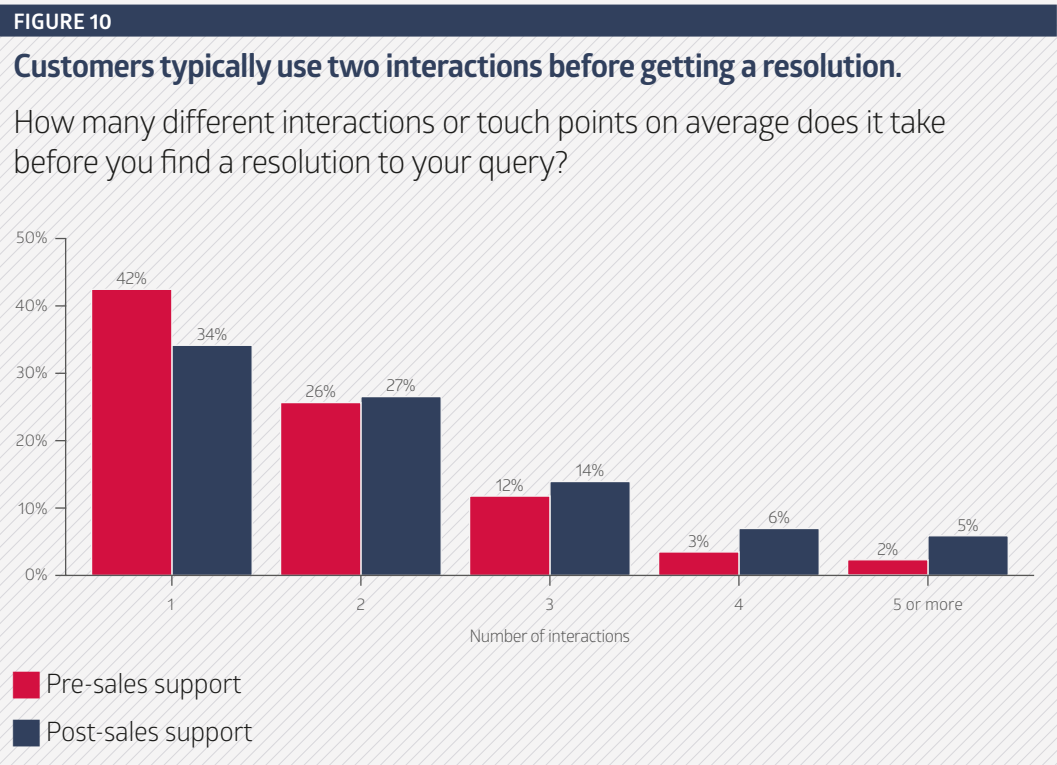
Customers typically connect twice before getting a resolution

ON AVERAGE, IT TAKES TWO INTERACTIONS BEFORE CUSTOMERS GET A RESOLUTION

On average, it takes two interactions before a customer resolves their issue. While this may not seem like a high number, over 50% of customers typically use more than two channels to find resolutions. Ideally this number would be lower and customers would find the answers to their question on the first contact.

The good news is that both customers and contact center managers agree that it typically takes an average of two interactions to resolve a customer’s issue. Over 70% of

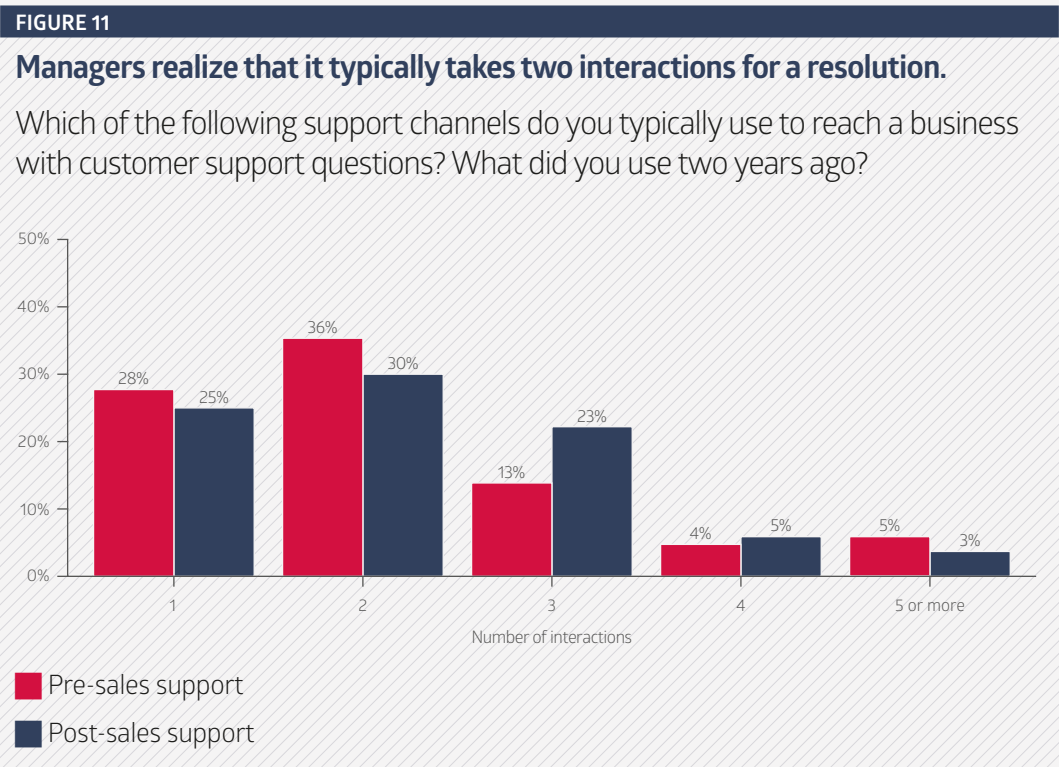
managers believe that customers typically use more than two channels before getting a resolution. Customers and managers are aligned and the number of interactions to get a resolution is not high. However, most contact center managers would strive to resolve issues after one interaction and according to the surveyed contact center managers, this is only happening about a quarter of the time. Contact centers need to focus on customer issues where it takes three or more interactions to resolve an issue because this can lead to high support costs.



CONTACT CENTERS NEED TO IMPROVE FIRST CONTACT RESOLUTION

The other data insight is that pre-sales resolution rates are higher than post-sales resolution. It shows that sometimes companies neglect to invest heavily in post-sales support to keep customers happy and loyal after that initial purchase.

Organizations should track and improve first contact resolution across channels for both pre- and post-sales support with the aim of reducing customer effort and improving customer satisfaction.

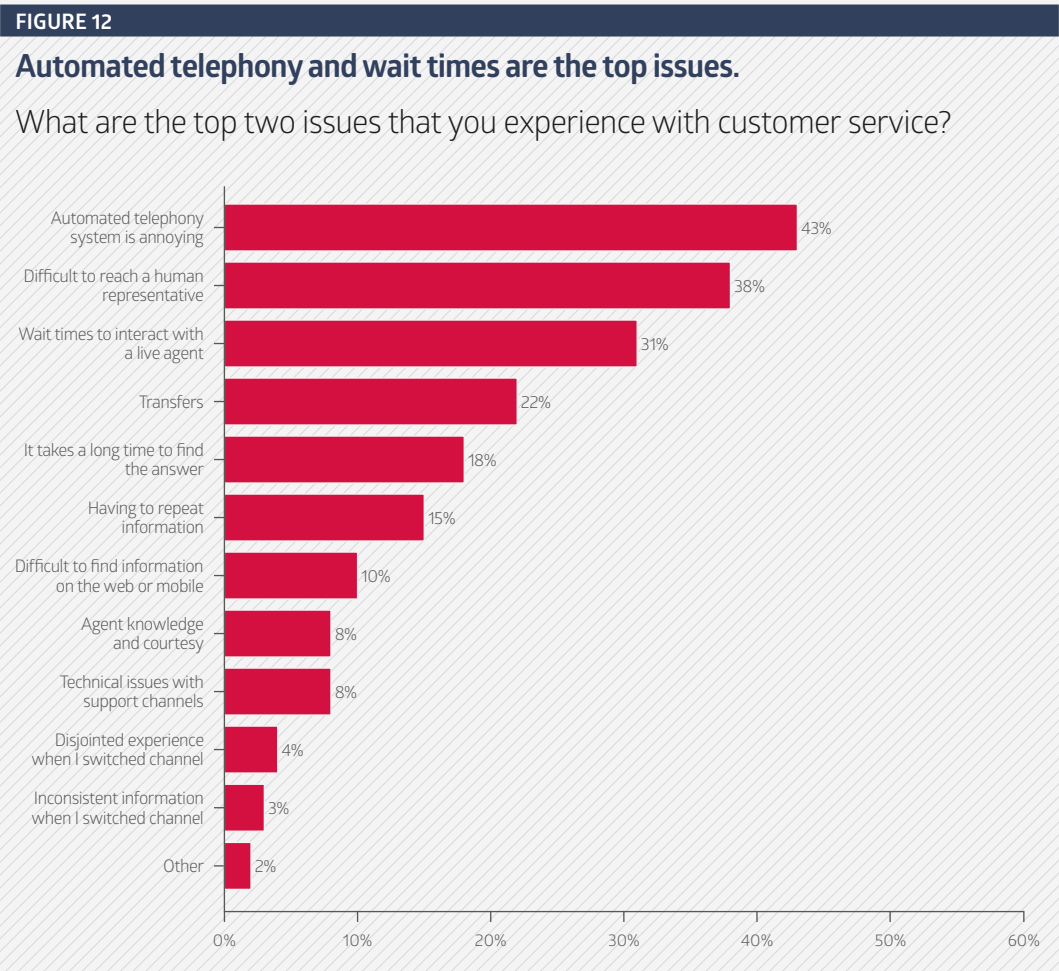


Time taken to reach an agent is still the biggest customer complaint

CUSTOMERS ARE FRUSTRATED BY AUTOMATED SYSTEMS AND WAIT TIMES

When asked their top issues with customer service, respondents selected automated telephony and time to reach a representative. They clearly want better access to agents and faster response times. However, frustrations with automated telephony could indicate an opportunity for contact centers to invest in different channels, such as chat or social media, where

agents can handle more queries at once and there is no need to go through the IVR system to reach an agent. Furthermore, links with context for agents, call backs and new options will help customers manage time better and reduce the need for automated systems that are causing frustrations.



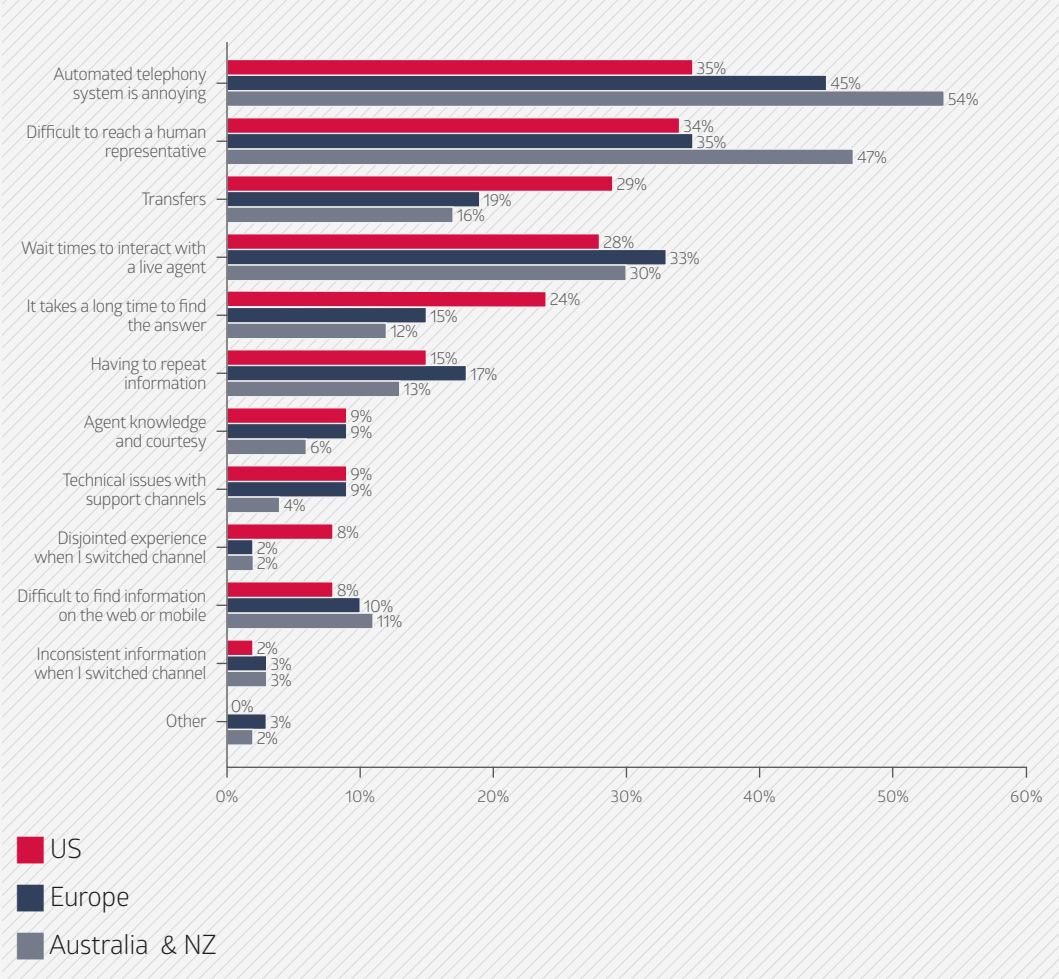
CUSTOMERS ACROSS THE GLOBE FACE ISSUES WITH AUTOMATED TELEPHONY AND REACHING REPRESENTATIVES

When these same results are reviewed by region, some notable differences appear-with Australian respondents showing a greater frustration with automated telephony and reaching a human representative. In the US, transfers appear to be a more common issue. Across the board, the sentiment is that time taken to reach a representative is too long and businesses still have work to do in improving IVR, routing and response times.

FIGURE 13

Over 50% of Australian respondents are frustrated with automated telephony.

What are the top two issues that you experience with customer service?



Customers believe that access to agents has worsened

ALMOST 50% OF CUSTOMERS BELIEVE THAT THE ABILITY TO REACH THE RIGHT REPRESENTATIVE HAS WORSENERED OVER THE LAST TWO YEARS

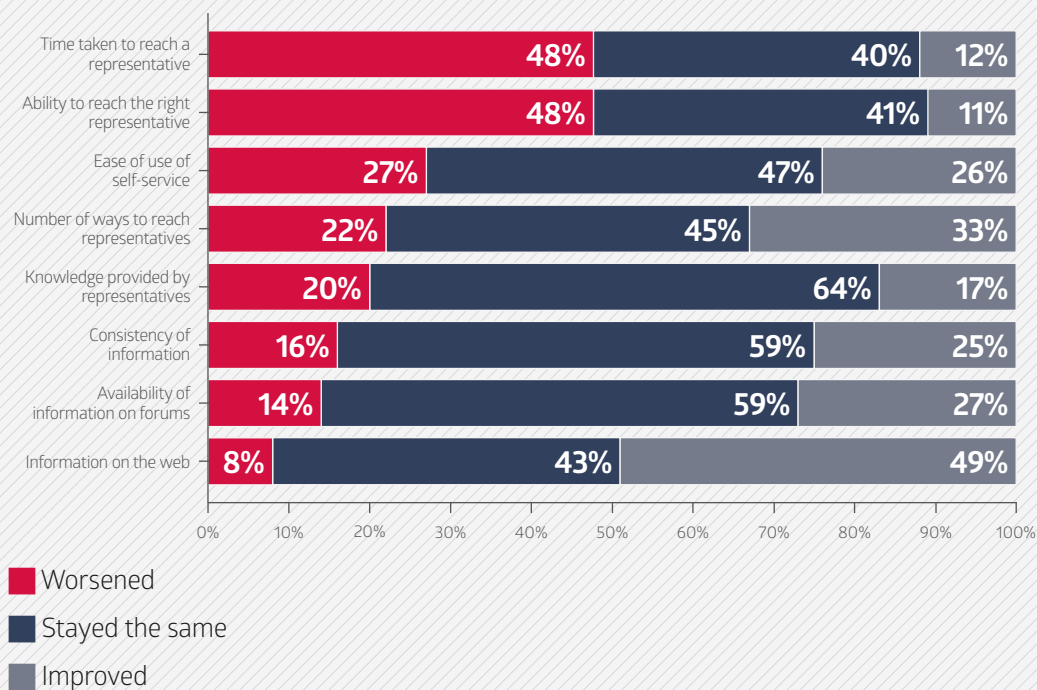
While customers understand that information on the web has improved, they also feel that time to reach the right agent to answer their query has worsened. Contact centers have

focused on expanding their channel options for customers but may sometimes overlook that the agent interaction often has the biggest impact on customer satisfaction.

FIGURE 14

Customers believe that ability and time to reach a representative has significantly worsened over the last two years.

How have the following aspects of customer service changed in the last two years?



Managers understand that wait times are an issue

32% OF CONTACT CENTER MANAGERS PINPOINTED WAIT TIMES AS A COMMON CUSTOMER SERVICE COMPLAINT

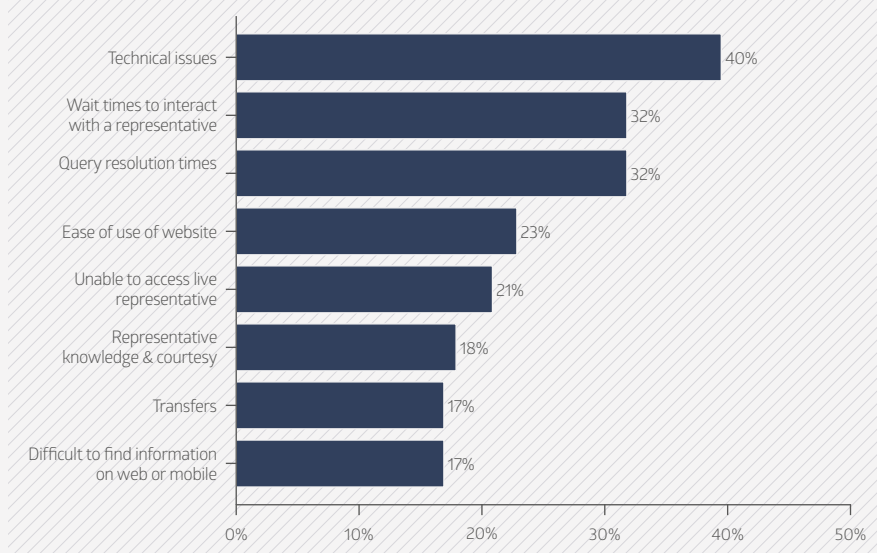
In addition to technical issues, managers have also pinpointed wait times and resolution times as top issues for customers. They know they need to improve these things in order to deliver better customer service. While staffing up a contact center can help deliver shorter wait times, contact centers realize that this is an expensive proposition. In order to help deliver faster resolution times for customers they should focus their energy on delivering better resolutions via web and mobile channels. Chat is one example of a channel that offers rapid access to agents while eliminating IVR wait times.

Contact center managers have also pinpointed that technical issues are often to blame for customer service issues. This underscores that although they may put energy into training representatives, without the right underlying technology, customers may still receive bad experiences. It is important to invest in technology to support agents, provide them with up to date information and ensure that customers can easily find information they need on web and mobile channels.

FIGURE 15

Managers realize wait times and resolution times are an issue.

What are the most common complaints about customer service?



41% of contact center managers admit that technology is frequently or occasionally to blame for customer service issues.

Live chat is a promising new channel

CUSTOMERS EXPECT THE FASTEST RESPONSE FROM CHAT

One of the reasons for the rapid growth of live chat is that customers believe they can get a quick response. 46% of customers said that they expect a response within less than one minute for live chat compared to 38% for phone within the same time frame. Customers do expect longer wait times

for social media, communities and email and are, therefore, likely to use these channels for questions that are not as urgent. Ideally customers want average response times of four minutes for live chats or phone calls, three hours for social media or communities and four hours for an email.

FIGURE 16

Live chat is viewed as just as important as phone call in speed of response.

How quickly do you expect a response in the following channels?

CHANNEL	<1MIN	1-10 MINS	11-30 MINS	31-60 MINS	1-2 HOURS	2-24 HOURS
Live chat	46%	52%	2%	1%	0%	0%
Email	3%	17%	15%	18%	14%	33%
Social media	14%	23%	19%	11%	10%	24%
Phone	38%	58%	3%	1%	0%	0%
Customer communities	7%	26%	17%	14%	11%	25%



On average, customers expect a response in four minutes for chat and phone.

CUSTOMERS HAVE SUCCESSFULLY RESOLVED ISSUES USING CHAT

The main reason many customers still use the phone is that they know it is the channel in which they will be most likely to resolve their issues. The percentages of customers that have had success resolving issues on web pages, mobile applications and social media are less than 20%. Contact centers need to improve information across web channels as well as providing customer guidance over which types of information can most easily be found in a particular channel.

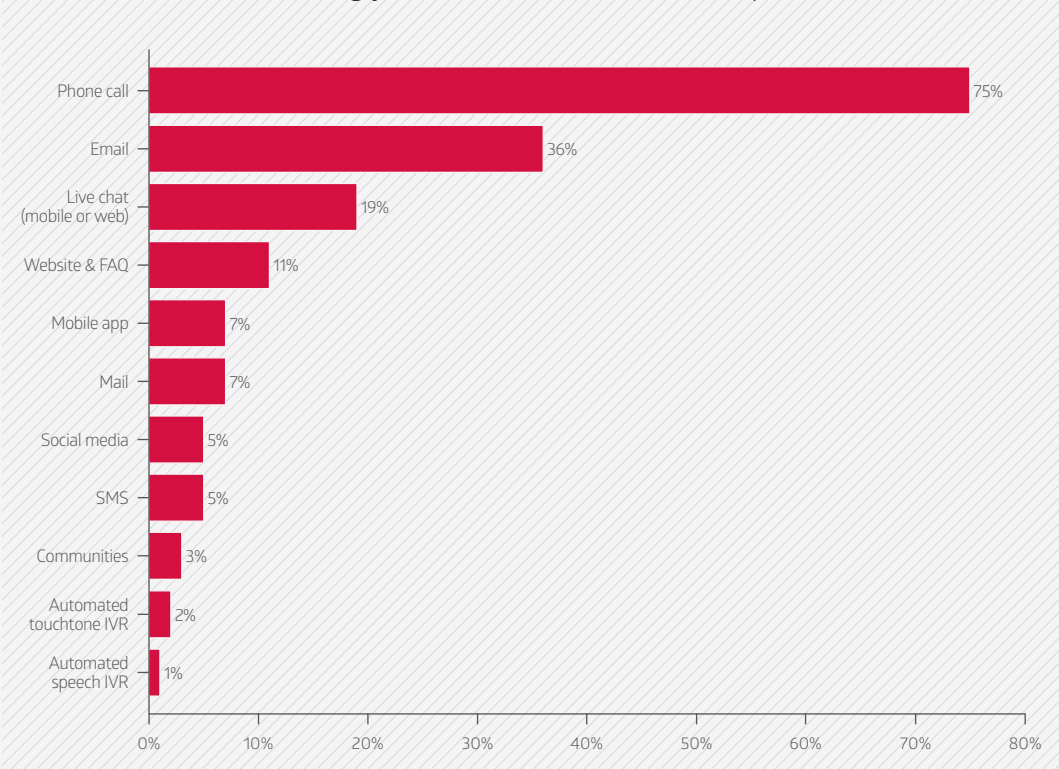
Live chat was pinpointed as the third best way to get a resolution after phone and email. Customers favor the channels where they have access to a knowledgeable agent

and chat helps them to quickly start up a two way interaction without leaving a web page. Looking back at the channels that customers are using, only 28% of customers said that they typically use chat when reaching out to customer service; meaning that this resolution rate is relatively high compared to uptake of live chat. If businesses can utilize chat more frequently to resolve customer issues and change customer behavior they will potentially be able to deflect calls and save on costs. They should also focus on improving resolution rates across social media and digital self-service tools as customers will continue to use these channels to search for information.

FIGURE 17

After phone and email, chat is the most reliable choice for resolving issues.

When reaching out to customer service, through which channels have you had the most success resolving your issues on the first attempt?



Contact center managers are planning to invest in live chat

OVER 20% OF CONTACT CENTER MANAGERS WILL INVEST IN LIVE CHAT IN 2015

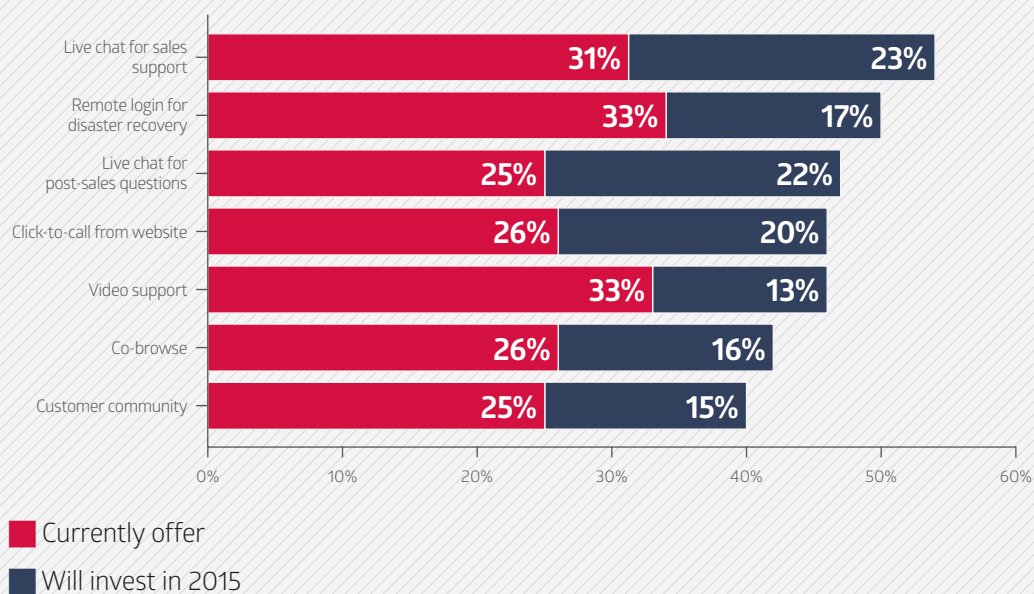
Businesses are realizing the value of chat in allowing customers to connect quickly. It is high on the list of priorities for investment for 2015, with 20% of contact center managers

stating that they will invest in live chat for either sales or post-sales support. Click-to-call and remote login for disaster recovery are also popular investments in the near term.

FIGURE 18

Chat for sales will be the most invested technology.

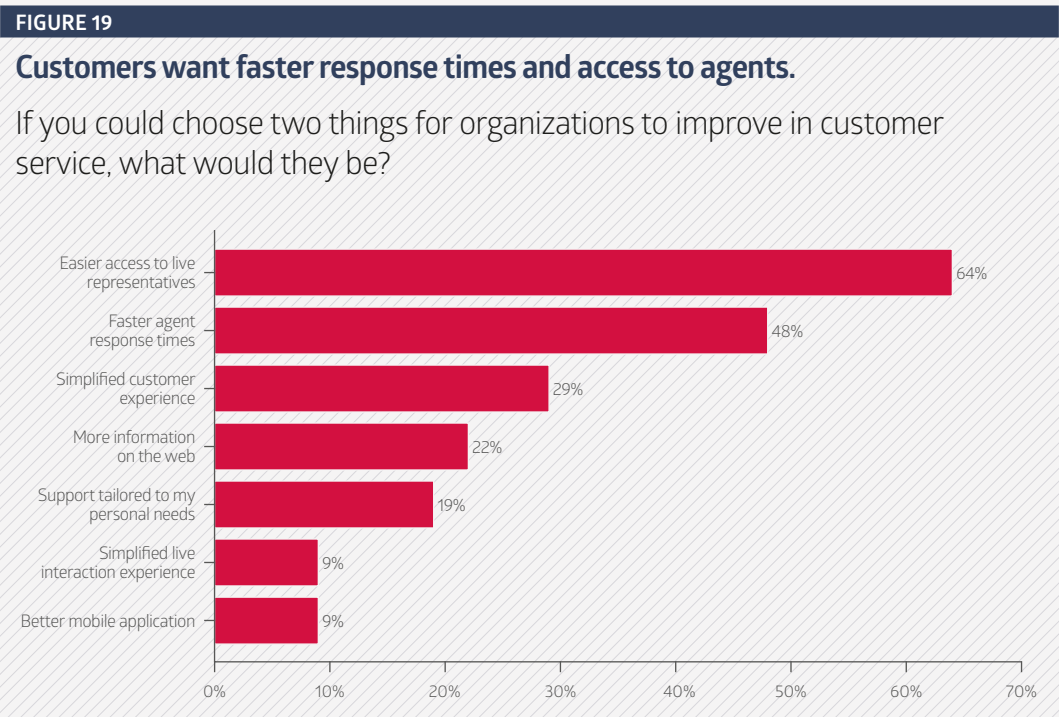
Which web support tools do you offer and/or plan to invest in for customers?



Customers want better access to live agents

64% OF CUSTOMERS WANT EASIER ACCESS TO REPRESENTATIVES

When asked what they would improve in customer service, customers stated access to live representatives above all other choices. They clearly value live agent assistance, particularly for important queries such as technical issues or suspected fraud. However, live agent access could include interactions in any channel, from chat to social media to phone; as long as customers get personalized assistance to pressing issues and resolutions, they will be satisfied.



Training agents and improving response times are top priorities

28% OF CONTACT CENTER MANAGERS SAID THEY WILL FOCUS ON IMPROVING RESPONSE TIMES IN 2015

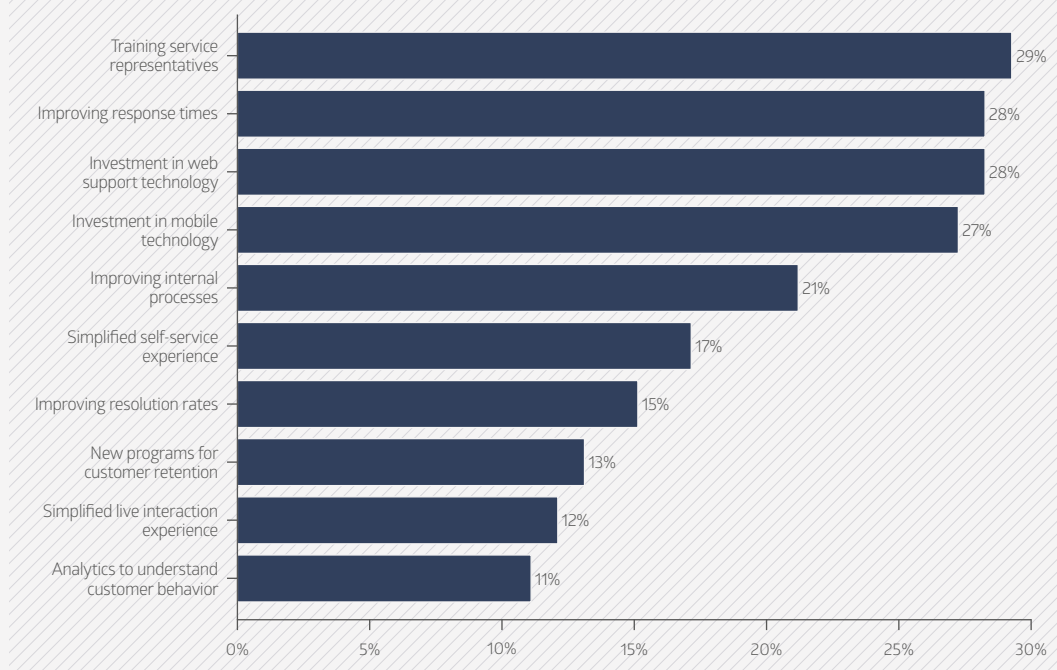
Agent response times and speed to resolution are the biggest issues for both customers and contact centers. It is, therefore, unsurprising that contact center managers plan to focus on training agents and improving response times as their top priorities in 2015. Training could include updating agents on new channel best practices, as well as giving agents specialist knowledge to ensure they meet customer demands as they become more knowledgeable through self-service and the web. In order to deliver faster responses, they should ensure that customers are routed to the most suitable agent in the

best channel for their particular query. However, the issues pinpointed by customers in customer service are mostly related to technology; training of agents won't resolve problems with wait times or gaining access to representatives. Businesses should focus on improving speed of routing, IVR and self-service menus and internal processes in order to improve response times.

FIGURE 20

Managers realize the importance of improving response times.

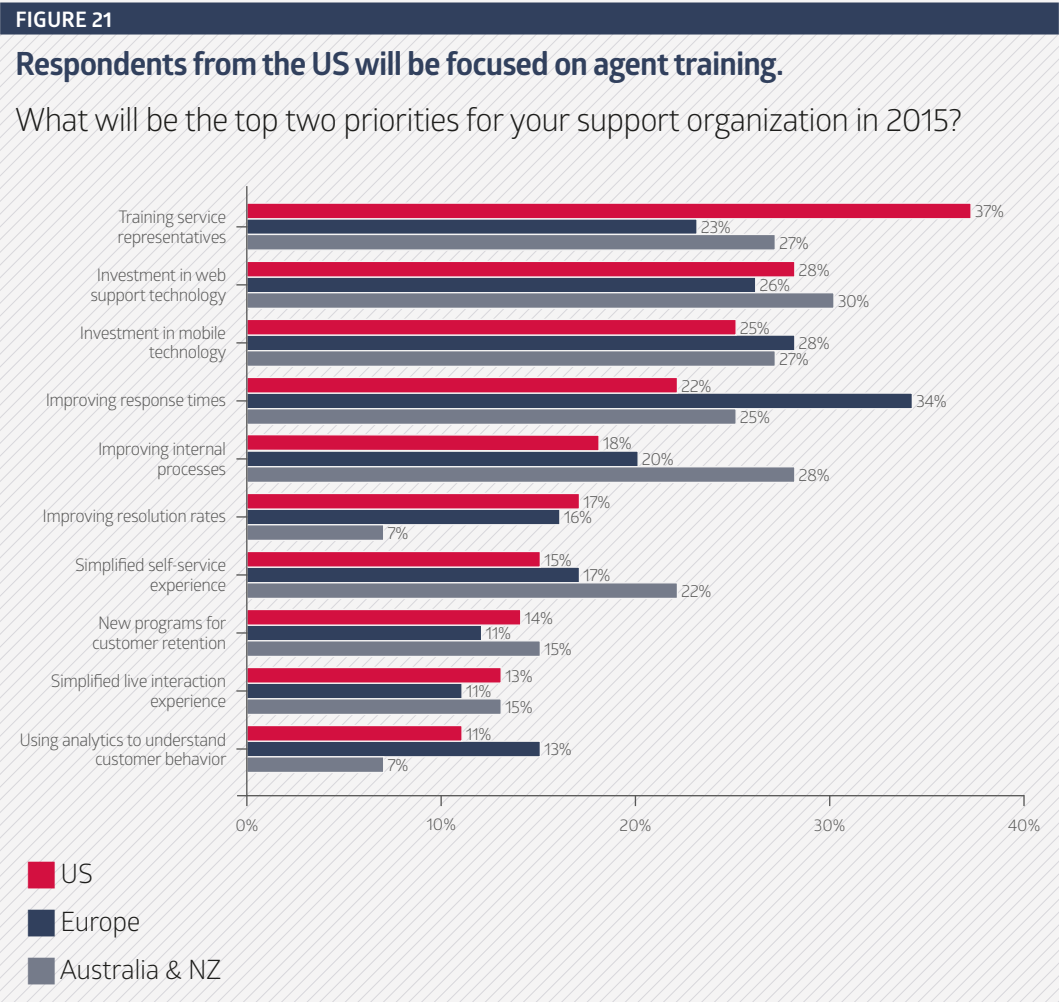
What will be the top two priorities for your support organization in 2015?



PRIORITIES DIFFER BY REGION

Other technology investments that are high on the agenda for contact center improvements include improving mobile and web support technology. By reviewing self-service and adding specialist tools like chat, managers can help deliver a faster experience across channels. Tailoring customer service to specific needs will help drive productivity gains and make response times faster for customers.

Priorities differ by region: training is the top priority in the US, improving response times is most important for European businesses, and updating web support tools for respondents from Australia and New Zealand.



Customer mobility will impact contact centers' purchasing decisions

2015 WILL ALSO SEE INCREASED INVESTMENTS IN MOBILE

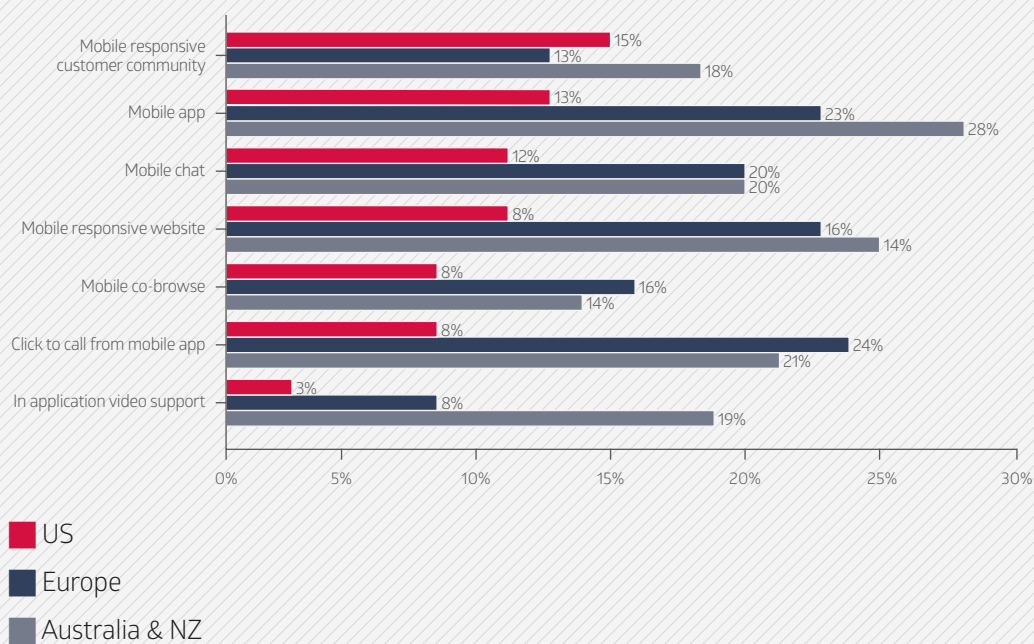
Investments in mobile and digital tools across the board see organizations investing in mobile applications, mobile responsive sites and click-to-call within mobile applications. Despite heavy customer adoption of smartphones for calls and self-service, businesses lag behind in adapting their

mobile applications to support integrated live interactions and responsive mobile sites. A quarter of respondents from Australia and New Zealand and Europe will invest in their mobile applications and responsive websites in 2015.

FIGURE 22

Managers from different regions will invest in mobile support in 2015.

Which mobile support tools do you plan to invest in for your customers in 2015?



Tracking and improving the customer experience is a priority for contact centers

CUSTOMER SATISFACTION AND FIRST CALL RESOLUTION ARE THE MOST POPULAR METRICS

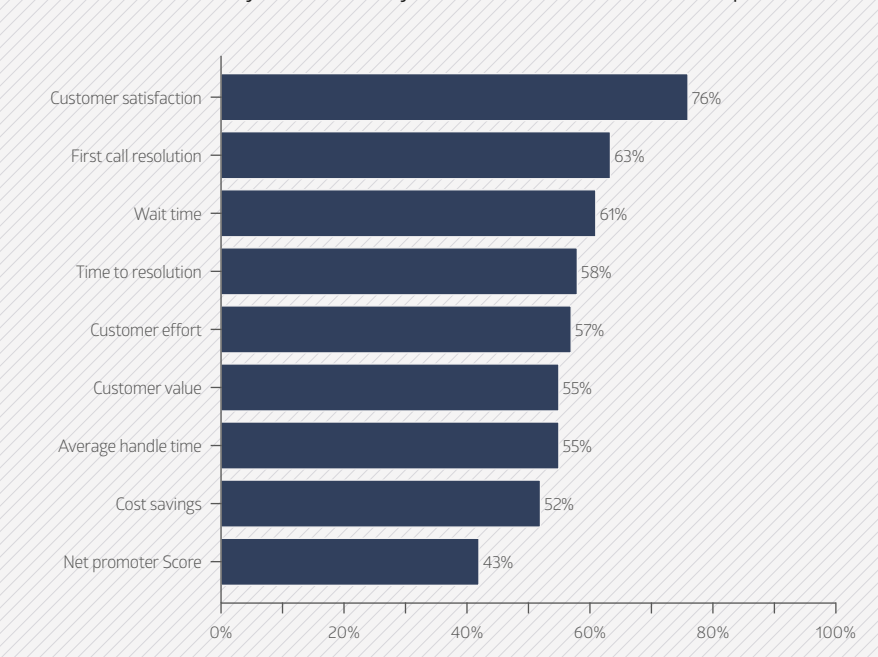
Contact center managers are tracking a range of metrics in their contact center, with customer service highlighted as an important focus for 76% of those surveyed. A majority of managers are tracking at least four of the metrics, with first call

resolution, wait time and time to resolution appearing high on the list. Businesses know that metrics are core in tracking and improving customer satisfaction, as well as agent performance.

FIGURE 23

CSAT is clearly a priority, but it is directly impacted by wait time, and customers have experienced this – gap in support needs to be improved.

Which metrics do you currently use to track customer experience?



82% of contact center managers are tracking four or more customer experience metrics.

The Internet of Things shows potential for technical resolutions

CUSTOMERS WANT TO BE ABLE TO RESOLVE TECHNICAL ISSUES FASTER

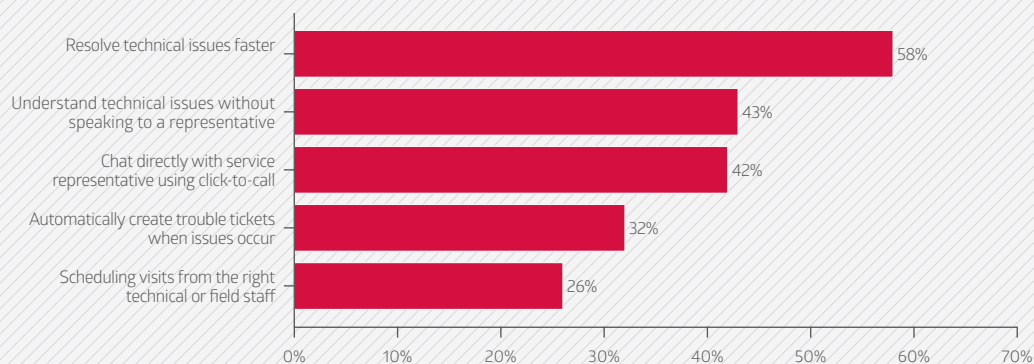
When asked whether they would be willing to connect their devices to the Internet, over 50% of customers said that they didn't believe it to be necessary or would be uncomfortable with connecting their devices. However, 25% were keen to do this if they can resolve their customer service issues faster. And when asked about useful benefits for connected devices, 58% of customers said that they would like to improve

resolution rates for technical problems. Although not all of the surveyed customers are aware of what the Internet of Things could mean for them, they are united in wanting to be able to resolve problems faster. Any solution that gets them quicker resolution times and the ability to diagnose problems without the need to call customer service is likely to be appealing.

FIGURE 24

Customers see Internet of Things as hazy but want to resolve technical issues faster.

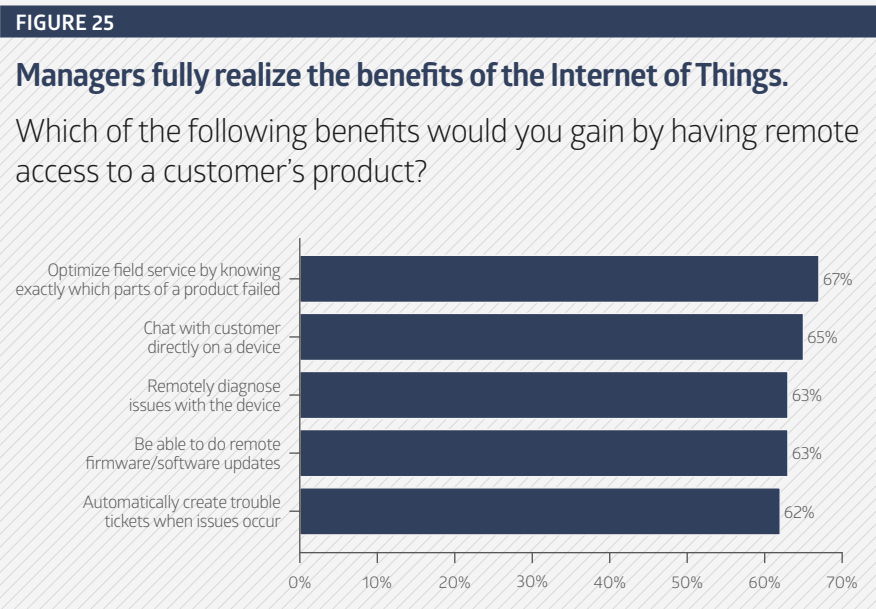
Which two of the following benefits would be most useful to you by connecting your products to the Internet?



MANAGERS REALIZE THE INTERNET OF THINGS HAS NUMEROUS BENEFITS

35% of the surveyed contact center managers said that they have devices that can be connected to the Internet and out of those respondents 88% currently offer connected versions of those products. However, all of the surveyed managers are aware of how the Internet of Things can be beneficial to their

organizations, understanding that remote technical diagnosis is just one advantage. When asked about benefits of connected products, they stated that being able to optimize field service, chat directly to customers on a device, and carry out remote updates are all advantages that they would hope to gain.



“Over 50% of contact center managers said that they receive support calls occasionally or frequently without having an accurate view of the problem.

Conclusion

CONTACT CENTERS NEED TO ADAPT AND OPTIMIZE CHANNELS TO IMPROVE RESOLUTION RATES

In order to adapt to the modern customer, contact centers need to provide fast resolutions while allowing customers to connect to live representatives when their queries need urgent or personalized assistance. They should review their existing support tools and consider how channels like chat can be deployed to provide faster access to agents.

Managers need to better understand customers' cross-channel behavior in order to improve not just first call resolution but first contact resolution across all channels. Wait times and automated systems continue to frustrate customers and in order to assist with this, contact centers should drive customers to the most suitable channel for their issue, improving resolution times in self-service and allowing customers to access click-to-call or -chat for more important queries. Optimizing channels will ensure that customers get the answers to urgent queries in the right channel, but businesses must first carry out a more detailed analysis of customers and their preferences.



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We hope this analysis will help you make informed and imaginative business decisions. If you have further requirements, Ovum's consulting team may be able to help you. For more information about Ovum's consulting capabilities, please contact us directly at consulting@ovum.com

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