

Omnisperience | Discussion Paper

Effective Digital Billing For Service Provider Success

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SPONSOR'S MESSAGE

Not for the first time, the digital communications industry is in the midst of a period of exciting and fundamental change.

The 2020 COVID-19 crisis accelerated digital maturation and due to customers' increased digital expectations forced a new inflection point.

Communication service providers (CSPs) are initially challenged with meeting these newly evolved needs, such as helping business customers understand their ICT spending and regain control of their budgets. Simultaneously, CSPs are readying themselves for the wide-reaching innovations heralded by the rollout of 5G and FTTP.

The sting in the tail of innovation is that if changes aren't effectively communicated to customers, then CSPs risk increasing frustration and the burden on contact centres as customers struggle to make sense of their bills.

Adding to the challenge, CSPs don't have the luxury of waiting years for digital transformation projects to enable more effective communication. The good news is that legacy billing systems are usually accurate and reliable – it's just the way billing information is presented that urgently needs to improve.

By focusing on the thin bill presentation layer, which sits between legacy business support systems and customers, CSPs can deliver a 'digital make-over' that instantly transforms their customers' perceptions of the billing experience. This alleviates the pressure on IT teams, allowing them to perform transformations at their own pace, with all the requisite controls and risk management in place.

We were pleased to sponsor this Omnisperience paper to explore how CSPs can evolve their current bill communications towards a more digital experience, enable them to benchmark themselves and explain the changes needed to move towards a more mature level of digital communications. These insights allow CSPs to focus on how they can quickly deliver increased customer engagement and boost their bottom lines.

And who doesn't like a win-win?

Grainne Magfhloinn
SVP Business Development, Soft-ex





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FOCUSING ON BILLS HAS NEVER BEEN MORE IMPORTANT

Communications service providers (CSPs) have a lot to gain from increasing their focus on bill communications and, in particular, working towards effective digital billing. Although they have been working on digital transformation for years, the COVID-19 crisis of 2020 has accelerated digitalisation and affected both the demand and supply side of the telecoms market.

On the **demand side**, customers – both businesses and consumers – have discovered just how critical connectivity is to their working and home lives. They have had to work from home, experiment with digital technologies, and have been put under financial strain. Even though the crisis phase has passed, the effects will be long-lasting, most likely indelible, and result in new patterns of demand.

Business customers are stabilising their operations and will need to get expenditure under control and audit their ICT in order to analyse what was bought during the crisis phase. One of the many changes that has taken place is a permanent shift to working from home for at least part of the working week – led by the likes of Twitter and Facebook^{1,2} – and a subsequent change in the ICT services required to support this.

Consumers and households have been insulated to some extent from the immediate effects of the crisis by furlough schemes, short working time initiatives, and by using

Consumers and households have been insulated to some extent from the immediate effects of the crisis by furlough schemes, short working time initiatives, and by using credit. However, eventually they will need to review their discretionary spending, as well as adjust to the New Normal modes of living and working, which will affect what and how they buy.

On the **supply side**, Omnisperience's research has shown that the crisis has not slowed down CSP investment in digitalisation. In fact, for 75% it has accelerated the timetable.

It is not sufficient simply to deliver the products customers now need. It is just as important to improve the effectiveness of how CSPs communicate with customers, as it is one of the most basic elements of successful digital business.

As simple as this might sound it is a big challenge for many CSPs. Our research has shown, for example, that three-quarters of them say that customers are calling contact centres not because their bills are wrong but because they don't understand them. While it is essential that bills are clearer, they can offer so much more:

- quantifying the value the CSP is delivering
- cementing new and existing customer relationships
- guiding customers towards relevant products that meet their needs
- reassuring customers
- effectively communicating essential information.

Considered carefully, and done well, bills can improve CSPs' marketing effectiveness and simultaneously repay investment through lower operational costs, fewer calls to contact centres and increased average revenue per user (ARPU).

In the next few years, bill communications are set to evolve into a vital control point for business customers seeking a better understanding of their ICT spend as their workforces become increasingly dynamic and distributed, and into an essential engagement point for consumers and households in the New Normal.

Notes: (1) <https://www.theguardian.com/technology/2020/may/21/facebook-coronavirus-remote-working-policy-extended-years>
(2) <https://www.bbc.co.uk/news/technology-52628119>

CSPs tell us that making changes to bills isn't easy. Even something as simple as changing the colour or appearance of the bill can be difficult, expensive and time consuming.

This makes it hard for billers to match evolving customer expectations and support their own innovation and marketing goals.

THREE DRIVERS OF MORE EFFECTIVE BILLS

Producing a bill requires a CSP to collect and mediate data, calculate the bill by rating, discounting and applying rebates, and then match this with customer information. These parts of billing are handled by billing engines and are within the domain of billing operations. They are critical processes where the focus is on accuracy.

The next part of the billing process – and the topic of this report – is the formatting and presentment of the billing information, which we term 'bill communications'. This information is communicated via traditional paper bills, spreadsheets, electronic bills, and more advanced interactive portals. This discipline incorporates bill design and content creation, and has to meet the needs of both customers and the CSP itself.

Omnisperience research shows that three broad themes are driving improvements in bill communications today – as shown in *Figure 1* – market differentiation, operational efficiency and customer expectations.

FIGURE 1 THE THREE DRIVERS OF MORE EFFECTIVE BILL COMMUNICATIONS



THE CHALLENGES OF BILL INNOVATION

While the drivers are clear, making bills more effective is not always easy. There are a wide range of practical issues that need to be addressed.

Understanding the customer is an imperfect science, and traditional customer segmentation is being challenged³. The Gig Economy, for example, has seen millions of nanobusinesses⁴ created, changing the way people work. Products and solutions need to be carefully designed to appeal to new market segmentations. The bill structure, as well as the way the bill is presented and delivered, needs to match.

The psychology of billing is often not given sufficient consideration by the CSP. Understanding the customers' psychological and emotional response is an important component of bill design and presentation. Customer satisfaction surveys and analysis of contact centre data can give some insight into what customers think of their bill, and how they respond to it.

5G and product innovation are making new demands on bills, requiring new billing models and meaningful and chargeable service level agreements (SLAs). This introduces new elements that must be billed for and communicated effectively, such as billing on the basis of quality-of-service (QoS).

Product portfolios are expanding which is tough on sales teams, as they have far more to understand and explain to customers. Bills have a particularly important role to play when it comes to SMEs, as automated communications are more cost-effective to highlight recommendations and thereby upsell and cross-sell.

Internal politics and organisational responsibilities

often slow a CSP's ability to innovate the bill, because responsibility is fragmented between billing operations, marketing, customer care, finance, digital teams and so on. This can create a 'too many cooks spoil the broth' scenario as each team's needs compete for attention. When the bill is not owned by a single entity, it can also become far more difficult to make a business case for investment. While billing operations have done a great job at producing accurate bills, they are not best placed to improve other aspects of the bill – such as ensuring that they drive the desired emotional response and customer behaviour, as well as effectively communicate information.

Digital transformation and IT consolidation & renewal

are major, costly and risky aims that many CSPs conflate. True digital transformation is more than just an IT project. It is intended to deliver business transformation that refocuses the organisation around the needs of its customers. Often, customer benefits are only realised at the end of multi-year projects, while reliable and serviceable billing systems are removed at vast expense simply to deliver bill consolidation or new features.

Notes

(3) See Omnisperience Green Paper 'Market Segmentation' which you can download for free from: <https://omnisperience.com/research/> (4) A nanobusiness is a business that employs less than one full-time worker. It includes Gig Economy workers, micro-retailers, Influencer Economy and Creative Economy businesses, as well as those participating in the Sharing Economy. For more information see: 'Understanding the Nanobusiness Opportunity' which includes a free green paper, interviews and articles. <https://omnisperience.com/2020/05/11/understanding-the-nanobusiness-opportunity/>

DELIVERING EFFECTIVE DIGITAL BILLING

Improved bills can help CSPs deliver multiple benefits that increase market differentiation, drive operational efficiency and meet evolving customer expectations.

Increasing market differentiation

Differentiation is essential for CSPs as global markets are liberalised, competition increases and regulation ensures consumers can readily compare – and switch – providers.

It is a multifaceted issue and requires excellent marketing communications, as well as product innovation. More effective bill communications is an underutilised way of differentiating the experience. In particular, CSPs can use granular billing data to make offers stand out in the market (see *Figure 2*).

Of the CSPs we spoke to, 92% said they were planning to invest in improving their billing experience. They recognised the importance of:

- improving analytics and reporting
- enhancing the look and feel of the bill
- introducing self-service digital bills and more automation.

However, all of these changes cannot be made in one go, meaning that more advanced elements will rise up the agenda as the bill offering improves. Equally, not all CSPs are starting from the same point and some will have to play catch up and make changes that others have already delivered (see *Figure 3*).

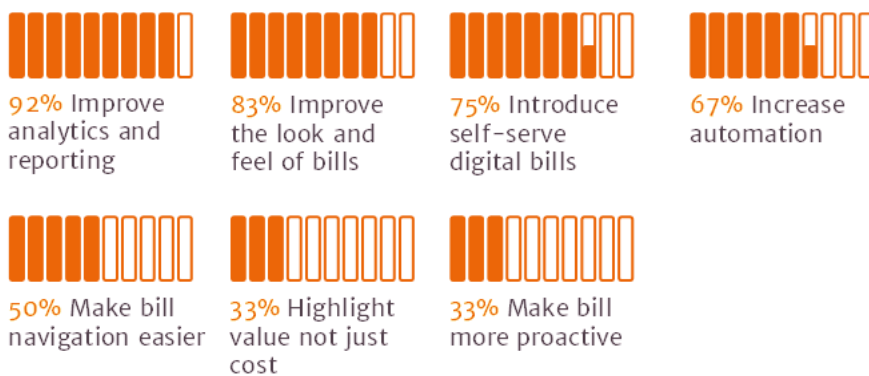
75%

of CSPs say
their customers are
calling their contact
centres because they
don't understand
their bills.

FIGURE 2 HOW EFFECTIVE DIGITAL BILLS ADDRESS MARKET DIFFERENTIATION CHALLENGES

ISSUE	DETAIL	HOW DOES EFFECTIVE DIGITAL BILLING HELP?	TIMESCALE	IMPACT
Increasing effectiveness of marketing communications	Ensuring the right messages get to the right people at the right time.	Analysing data on usage, behaviour and bill portal interaction improves understanding of individual customers and segmentation accuracy. Messaging is more targeted and relevant.	Short-term Necessary data and systems likely in place	●●●●
Increasing effectiveness of sales	Introducing efficient and trustworthy sales mechanisms. Increasing the number of products per customer.	Communication via the bill or portal can be automated and efficient, and offers can be better targeted and timed when based on billing system data. Uptake can be measured.	Short-term Necessary data and systems likely in place	●●●●●
Supporting innovation	Communicating benefits of new products based on 5G, fibre and new network features. Enabling new digital business models.	Billing system data can be used in consultancy-led sales or for automated guided selling. The value of digitalisation becomes clear to business customers. CSPs can provide data to customers to enable them to carry out their own analysis of behaviour and usage.	Short-term Necessary data and systems likely in place	●●●●
Navigating more complex portfolios	Helping customers to understand their options.	An online billing portal can support guided selling, simplifying choices for customers. Automated suggestion of products and solutions that better match real usage builds engagement.	Medium-term Careful process design and some investment needed	●●●●
Reducing margin pressure	Increasing sales revenue without additional delivery costs.	Using the bill as the primary communications channel. Intelligent, automated, personalised messages mean that customers are convinced of the value of new products.	Medium-term Careful process design and some investment needed	●●●●●

FIGURE 3 HOW CSPs WOULD LIKE TO IMPROVE THEIR BILLS



Other ways in which CSPs wish to improve their bills include: Ensuring they provide more advice to customers (25%); Explaining any changes to the bill clearly and in advance (25%); Personalising notifications and exception alerting (17%); Tailoring bills to the needs of customers (8%); Making bills easier to understand (8%).

Driving operational efficiency

The way in which bills are generated and presented to customers varies significantly between CSPs, as well as products. Large CSPs usually have many billing systems that support only one or two products because new systems are implemented whenever a new product is rolled out. Customers simply want clear, consolidated information about product and service usage alongside their charges. If they do not understand the information provided, they will inevitably call contact centres.

Customisable summary information and detailed, interrogatable data can be aggregated, arranged and delivered at the presentation layer without the need for legacy billing systems to be replaced. Systems from specialist vendors can take data from any billing system, aggregating and displaying it in a consistent customer-friendly format (see *Figure 4*).

The impact of bill-related queries on the contact centre is particularly significant to CSPs, with 83% of respondents using contact centre call volumes and satisfaction KPIs⁵ (such as CSAT and NPS⁶) to measure billing effectiveness⁶.

While CSPs are generally very good at producing accurate bills – motivated by the fact that the accuracy of bills is mandated – they do not always put as much effort into the effectiveness of their bill communications. This means

that the most common reason for bill complaints and enquiries today is that customers do not understand their bills or believe them to be incorrect (see *Figure 5*). Each call to the contact centre therefore not only represents a frustrated customer but also results in additional operational costs.

Rather than focusing solely on billing system renewal and consolidation, which from a customer's perspective may deliver little additional benefit, CSPs can deliver many of the promised benefits by focusing on the layer closest to the customer – bill presentation. By transforming this layer CSPs can deliver consolidated bills, along with additional features such as analytics. This makes bills easier to understand and use without the cost profile and risk of replacing legacy billing systems. We call such an approach 'digital skinning', as it enables CSPs to deliver what customers need and expect faster, while allowing them to replace their billing systems incrementally in a more controlled manner.

Notes

⁵ Key Performance Indicator

⁶ CSAT – customer satisfaction rating; NPS – net promoter score. See the related Blue Paper on Billing Experience.

Digital skinning is the process of transforming the thin layer closest to the customer – giving legacy systems a 'digital skin' that preserves sunk investment while instantly delivering new features and a more digital experience.

FIGURE 4 HOW EFFECTIVE DIGITAL BILLING ADDRESSES OPERATIONAL EFFICIENCY CHALLENGES

ISSUE	DETAIL	HOW DOES EFFECTIVE DIGITAL BILLING HELP?	TIMESCALE	IMPACT
Call centre deflection	Reducing burden on call centres.	Making bills and detailed information available via an online portal, with customisable views, reduces bill-related queries and leads to reduced payment delay.	Short-term Immediate impact	●●●●●
Cashflow improvement	Lowering cost of retention and acquisition. Speeding payment and cutting bad debt.	Clear communication of service value reduces queries. Delivers data that sales teams and customers can analyse.	Short-term Immediate impact	●●●●●
Reducing cost of producing bills	Improving the way billing data is presented to make it more efficient and reduce costs.	Online billing cuts cost of paper bills. Consolidates data from multiple billing systems.	Medium-term Some investment needed	●●●
System rationalisation and consolidation	Mitigating costs of legacy, and multiple billing and charging systems.	Portal-based bill presentment, or 'digital skinning', mitigates inefficiencies without major IT project costs.	Medium-term Some investment needed	●●●●

FIGURE 5 WHY CUSTOMERS COMPLAIN OR ENQUIRE ABOUT THEIR BILLS

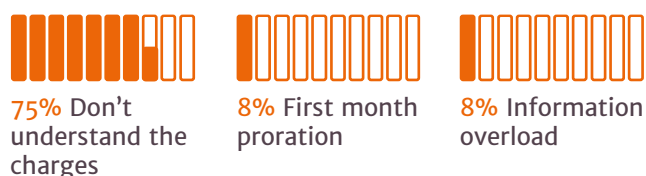


FIGURE 6 HOW EFFECTIVE DIGITAL BILLING HELPS MEET EVOLVING CUSTOMER EXPECTATIONS

ISSUE	DETAIL	HOW DOES EFFECTIVE DIGITAL BILLING HELP?	TIMESCALE	IMPACT
Responding to customer needs	Reducing staff time to manage bills. Helping customers to cope with after effects of COVID-19.	Providing customisable views of usage and charging data. Communicating via relevant messages.	Short-term Immediate impact of reduced customer care costs and faster sales cycles and payments	●●●●
Communicating more helpfully	Helping customers save money, improve efficiency and support digitalisation and other changes.	Proactively suggesting rationalisation of device assets. Automated suggestion of better packages or more appropriate products. Providing easily navigable data and delivering alerts where attention is needed.	Medium-term Impact felt over annual contract period	●●●
Encouraging loyalty, reducing churn	Creating, keeping and building more valuable relationships with existing customers. Increasing the number of products bought per customer. Minimising the cost of customer acquisition.	Explaining how bills are calculated more clearly – in particular the initial bill (which may contain one-off items or proration). Communicating the value of products not just their price. Delivering an effective digital experience and providing a mechanism for customer satisfaction measurement.	Medium-term Relationships will flourish through repeated good practice	●●●●●

The bill is the most important mid-lifecycle customer communication.

But many legacy bills aren't flexible enough to support the continual changes stimulated by digital innovation.

Making change easy is set to become one of the most important features of tomorrow's bills.

Meeting evolving customer expectations

Business customers' operations are changing. They are:

- increasing digitalisation of operations
- finding new ways of communicating with customers
- evolving product and service portfolios
- recovering from global disruption caused by the COVID-19 pandemic
- focusing on more effective business continuity planning
- embracing new ways of working.

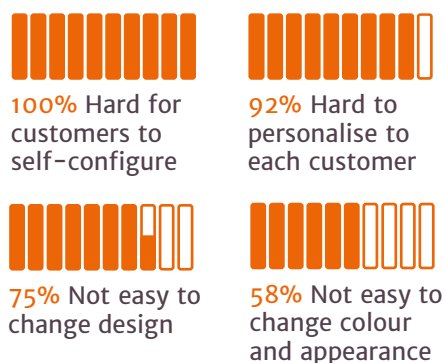
Through all of this, CSPs are well placed to offer support using detailed bill data and the interactions of an effective digital billing process to build better relationships with their customers (see Figure 6).

One important facet of meeting customer needs, which is often overlooked by CSPs, is the language and design of the bill and the way it is presented. In particular, the tone of voice used in all billing-related communications needs to be consistent and appropriate from the first bill received by a new customer to the last provided to a departing customer. This is not easy to get right.

At a time of considerable innovation, with more products being brought to market, and changes to bundles and tariffs being driven by both CSPs and their customers, the risk of confusion is higher than ever before. This is why it is essential that CSPs focus on improving the clarity of their bill communication.

It should also be remembered that customer expectations evolve continually. CSPs therefore need the ability to offer an interactive bill, additional features and the flexibility to change bills in line with innovation and customer expectations (see Figure 7).

FIGURE 7 LEGACY BILLS ARE HARD TO CHANGE



WHAT AN EFFECTIVE DIGITAL BILL LOOKS LIKE

There is no single model or template for the ideal bill, since the circumstances of each CSP and the nature of products and solutions bought by each customer will vary. In fact, taken to its logical outcome, personalisation means that each bill will be idiosyncratic, as it will be individually designed to the needs of the customer. That said, an optimised bill will have a number of specific characteristics.

- **A digital format** with a design that is customisable by the recipient, easy to understand and easy for the CSP to change.
- **On-demand availability** rather than at intervals determined by the CSP.
- **Convergent information**, with charges from across the portfolio displayed in one place. Recurring, one-off charges and discounts will be clearly explained.
- **Business customers** will be able to have different views into their bills depending on their role or department. For example, summary information for senior management or more detailed breakdowns for finance teams.
- **Sales and marketing information** will be delivered that is customer-specific, value-driven and relevant. It will alert customers to ways in which they can change their products and solutions to improve the benefits to them. Such messages will be based on analysis of usage and other customer data.
- **Clear pricing** will be provided, with the benefit to the customer clearly explained.
- **Intrinsic value** will be highlighted to build customer trust and lay the foundation for increased customer loyalty and new customer referrals.

CSPs are planning to invest in more effective bill communications

Some 92% of CSPs Omnisperience spoke to said they were planning on improving their customers' bill experience (see *Figure 8*). Most had short timescales for this investment with more than three-quarters (84%) saying they would invest within two years. Their investment plans, it should be noted, have not been affected by the COVID-19 pandemic. In fact, this has emphasised the vital role the bill plays as a customer communications tool.

Market differentiation is currently the most pressing issue for bill communication improvement according to the CSPs Omnisperience spoke to (see *Figure 9*). However, what is important will vary between markets and according to individual CSP's strategies. As CSPs become more sophisticated in their strategic and tactical use of their bills, different factors will rise in importance.

FIGURE 8 WHEN CSPs INTEND TO INVEST IN BILLS

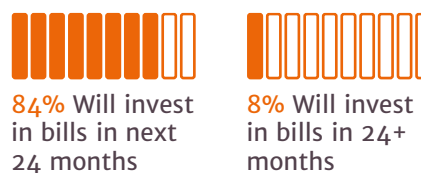


FIGURE 9 MOST IMPORTANT FACTORS AFFECTING BILL COMMUNICATION IMPROVEMENT

IMPORTANCE	FACTOR	DRIVER
1	Responding to competition	Market differentiation
2	Brand alignment	Market differentiation
3	Supporting innovation	Market differentiation
4	Customer retention	Customer expectations
5	Cost reduction	Operational efficiency
6	Attracting new customers	Customer expectations
7	Creating new revenues	Market differentiation

OMNISPERIENCE BILL COMMUNICATION MATURITY MODEL

This model is based on 12 key elements, covering the aspects of bill communication described in this paper. Some of these aspects can be benchmarked readily through internal review and data collection. Others may require additional data from customer surveys. CSPs can use this model to assess their current maturity level and identify where they can improve.

	Traditional		Digital	
	Stage 1 Basic	Stage 2 Developing	Stage 3 Advanced	Stage 4 Optimised
Format	Paper	Static online	Interactive	Proactive
Design	Generic Every customer gets the same type of bill. Bills are tightly coupled with billing systems and designed by IT.	Partly tailored Some information specific to customer need. Attention is given to usability, formatting and branding.	Personalised Information and design is tailored to needs of the customer. Customer can navigate through bills.	Self-personalised Customers can change the format or appearance of their bills.
Speed of change	Months to years	Weeks to months	Days	Instant
Bill format change	Difficult/impossible to make changes. IT department (or an external resource) is required to make changes.	More flexible and easier to change. May still require help from IT.	Interactive and easy to change. Non-technical staff (eg marketing) can make changes to bills.	Dynamic, with enriched, granular and personalised data. Customers can choose how to display information.
Frequency	Quarterly or monthly	Quarterly or monthly	Daily	On-demand
Sales & marketing capability	Generic insert	Generic alert	Tailored and targeted	Proactive, personalised and value-driven
Pricing model	Cost-based pricing	Competition-based pricing	Value-based pricing	Benefit-based pricing
Billing governance	Aspects of billing are the responsibility of inappropriate departments.	Multiple departments have input to bill design and the billing process.	Appropriate input to all aspects of billing, but no strategic direction or budget.	Multidisciplinary team with clear governance treating billing strategically with a budget to match.
Cost of customer acquisition and retention	●●●●●	●●●●	●●	●
Traffic to call centre stimulated by bill enquiry	●●●●●	●●●●	●●	●
Type of response	Indifference	Engagement	Loyalty	Partnership and recommendation
Emotional response	Negative to neutral Fearful, dreading, shocked, as expected, bored.		Neutral to positive Intrigued, interested, delighted, surprised.	

5 THINGS YOU SHOULD DO NOW

CSPs have a huge opportunity to use the bill strategically to address some of their most pressing challenges. Based on Omnisperience's assessment of the current position, market and technology trends, we believe CSPs would benefit from doing the following:

1.

Convene a multi-disciplinary team to critically review the effectiveness of billing. Use the Omnisperience Maturity Model to help. The team must include sales, marketing, customer care and experience, finance, billing and IT.

2.

Define responsibilities for different aspects of billing to ensure bill effectiveness is optimised. Build a business case for investing in bill communications that incorporates all costs related to current bill presentment - including contact centre resources.

3.

Commission research to capture customers' perception of bills and then act on this. This is another opportunity to connect with customers to nurture understanding, trust and engagement.

4.

Consider whether bill transformation can be achieved through targeted investment in bill presentment. This is a great way to deliver benefits faster without the need to replace legacy systems.

5.

Commission or work with experts in communication design to improve the effectiveness of your bill and ensure it meets the evolving needs of your customers.

About the authors



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Danny covers billing, charging, pricing and bundling at Omnisperience. He is a well-known telecoms analyst, having worked with Analysys Mason, the boutique analyst house Innovation Observatory, and as a contributing analyst for Heavy Reading. Danny has written reports on subjects ranging from smart cities to connected drones, and cloud computing to enterprise mobile networks. He has undertaken research-based B2B consulting and developed wholesale strategies for telecom service providers.



Teresa Cottam

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Morgan is responsible for managing Omnisperience's primary research amongst digital service providers, enterprises and SMEs. He has five years' experience in the collection and analysis of quantitative and qualitative data from the telecoms and business sectors. His current research domains are IoT and cybersecurity, and he also provides commentary on industry M&A.



About this paper

Omnisperience Orange Papers are reports that provide advice on key topics of interest to telecoms service providers. They are based on evidence collected and presented in our Blue Papers and are provided free-to-market thanks to the sponsor. We would like to thank Soft-ex for sponsoring this project, which has enabled us to provide this research to readers free of charge. In line with our research methodologies the sponsor's role was limited to providing input on the scope of the topic. The sponsor did not seek to influence or alter the findings of the research or how we collected the data.

About Omnisperience

Omnisperience is a UK-based analyst firm providing insightful, accurate and fresh data, research and advice to telecoms service providers, vendors, network equipment providers, regulators, other consultancies and digital businesses. Our distinguished analysts are passionate about helping ICT firms increase their revenues, better understand their customers, identify new opportunities and optimise experiences. Find out more at www.omnisperience.com

About the sponsor

Soft-ex, part of the WidePoint Group, is a leading global supplier of Digital Billing Communications solutions. They assist Digital Service Providers to deliver interactive digital bill presentment and analytics, which leads to enhanced customer experience and reduced billing and customer care costs. They not only deliver intelligence to the end user regarding costs and usage analysis, but also deliver Subscriber Data Intelligence to the DSP. Soft-ex is headquartered in Ireland with offices in the UK and the Netherlands, and customers and partners in over 90 countries globally. For more information see soft-ex.net



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