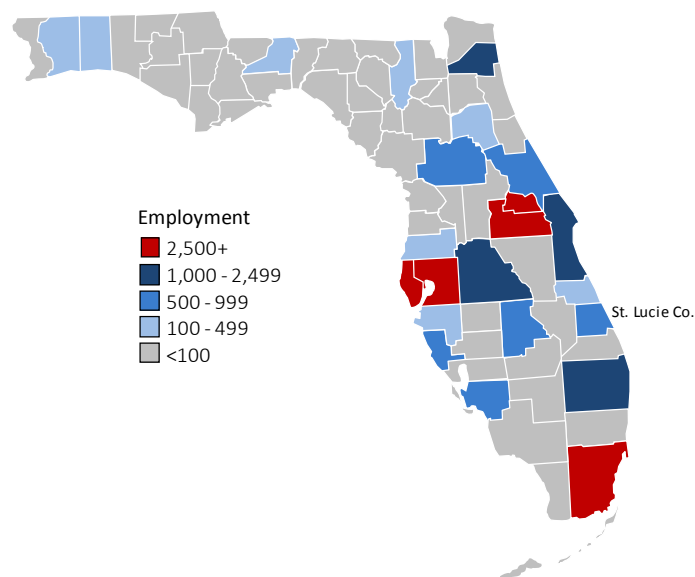# CALL/CUSTOMER SERVICE CENTERS

Types of Centers

Call/Customer Service Centers are frequently used to support consumer goods and services and operated by manufacturers, retailers and service providers (such as airlines and financial services) as well as by third parties. There are also business-to-business centers to support client accounts and offer tech support. Specific types and functions of call/customer service centers include:

- Sales and marketing (inbound and outbound)
- Technical support for product or software
- Promotion/membership drive for non-profit/political organizations
- Address general customer service issues (not handled through web . . . want real person)
- Account management interface with existing customer
- Other applications

Employment Within Florida

The locations with the highest concentrations of call/customer service center employment are in Miami-Dade, Tampa-St. Pete and Orlando. Second tier locations include Broward, Brevard, Polk and Duval counties.
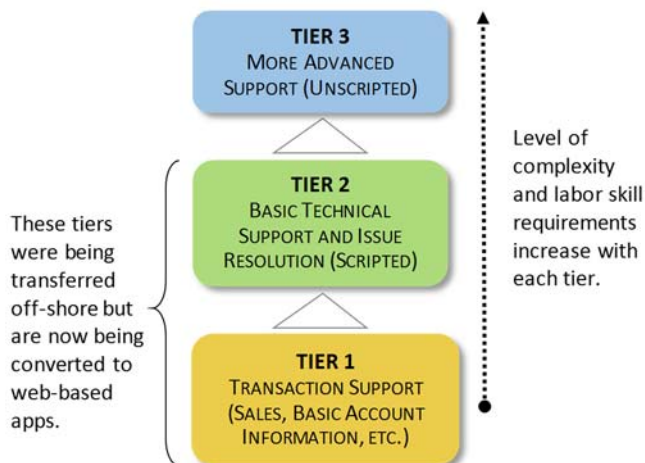
Trends

- Access to cloud computing to enhance flexibility in operations (rapid expansion or contraction).

- Use of web-based self service via an app without having to engage in a live conversation . . . less overall customer service jobs and more software/tech-related jobs to support the system. (see chart to the right)

- Live calls reserved for more complex issues . . . need higher level of talent.

- More employees working from home . . . higher productivity and lower operating cost . . . less bricks and mortar.

- Multi-channel access (e-mail, web, text, voice, video/web chat, social media, touchtone response, Smart Phone apps, etc.).

- More government regulations to protect customer financial and personal information.

CUSTOMER SERVICE CENTER EMPLOYMENT BY COUNTY

Employment
- 2,500+
- 1,000 - 2,499
- 500 - 999
- 100 - 499
- <100

St. Lucie Co.

TIERS OF CUSTOMER SERVICE

TIER 3
MORE ADVANCED SUPPORT (UNSCRIPTED)

TIER 2
BASIC TECHNICAL SUPPORT AND ISSUE RESOLUTION (SCRIPTED)

TIER 1
TRANSACTION SUPPORT (SALES, BASIC ACCOUNT INFORMATION, ETC.)

These tiers were being transferred off-shore but are now being converted to web-based apps.

Level of complexity and labor skill requirements increase with each tier.

- Social media is both an asset (increased access to potential customers) but also a threat for rapidly deploying bad news about a company.
- Use of "Big Data" analytics to gather customer intelligence from multiple sources to better understand/serve/anticipate needs of customers.
- Establishing "bi-modal" teams that have a focus on maintaining existing operations while also focusing on innovations to improve operations and make future quantum shifts.
- The use of "voice biometrics" as an improved platform for customer recognition to enhance system and customer information security.

Site Selection Criteria

- **Labor** (access to talent and competition)
- **Real Estate** (leased office (Class A, B or C) or flex space depending on the market and type of operation)
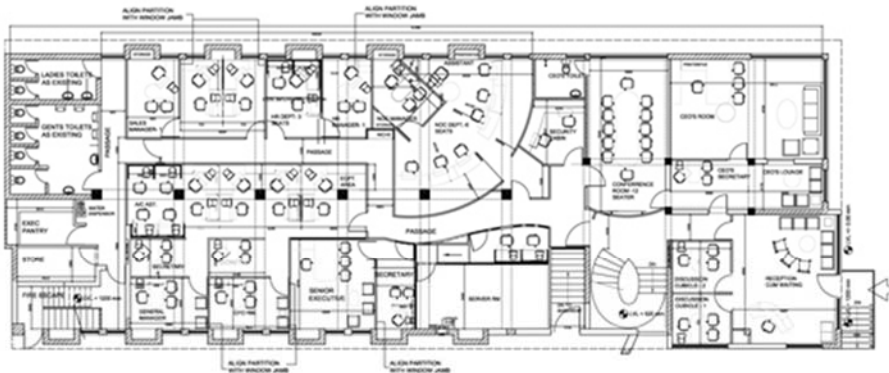
- **Utilities** (high reliability/capacity power and internet access). It is becoming more frequent for companies to engage in cloud computing services to avoid the high investment in hardware. This focuses the primary utility concern on the cost, reliability and capacity of internet access.
- **Transportation access** to airport and commutation via interstate/primary highways
- **Overall Cost** (labor, rent, taxes, utilities)

Opportunities for St. Lucie County Area

Leverage the availability of labor, training provided by Indian River State College and low operating costs (compared with Miami-Dade and Palm Beach Counties).

MEDICAL-RELATED INDUSTRIES

Types of Businesses/Operations

The medical industry/segment consists of a highly diverse business cluster:

- IT related: software development, cloud computing, big data analytics, etc.
- R&D for pharmaceuticals, software and hardware
- Testing and clinical trial services for pre-market products
- Medical devices (instrumentation, sensors, apparatus, etc.) for diagnostic, therapeutic and prosthetic applications
- Disposable items: wearables and supplies
- General and specialty furniture
- Pharmaceuticals and related substances
- Lab services
- Services delivered through major hospitals, clinics and medical practice offices

Employment Within Florida

Florida is in the top five states in the U.S. for medical Device/Supplies employment with over 20,000 jobs. Pinellas County has the largest concentration of medical device-related workers in Florida followed by Miami-Dade, Palm Beach, Duval, Broward, Collier and Alachua.

Industry Trends

The industry is currently under a lot of stress to enhance quality, maximize security of information, cut costs, remain profitable will meeting individual patient needs. This will cause some consolidation in the industry but also rapidly apply technology to achieve effective results and remain viable. The trends noted below reflect both the approaches and technologies being utilized.

MEDICAL DEVICE/SUPPLIES EMPLOYMENT BY COUNTY

Employment
- 2,500+
- 1,000 - 2,499
- 500 - 999
- 100 - 499
- <100

St. Lucie Co.

Medical Services

- **Patient-Centered Care**: patient and family made more aware of patient situation so more informed choices can be made that reflect family needs and values.
- **Population Health Management**: integration of health record data from multiple health-care sources to improve the outcome, cost and efficiency of healthcare services.
- **Value-Based Purchasing**: Program adjusts Medicare's payments to reward hospitals based on the quality of care that they provide to patients.
- Hospitals are being impacted by government mandates (by Medicare and others) for increased quality, more recordkeeping, and lower cost; patient satisfaction being reported on internet; quality scores being published; along with a shortage of critical staff. All this is impacting hospital costs and profitability.
- Healthcare networks and large providers are beginning to collaborate with multiple sources to help increase quality of care and more effective outcomes at a reduced cost of operations.
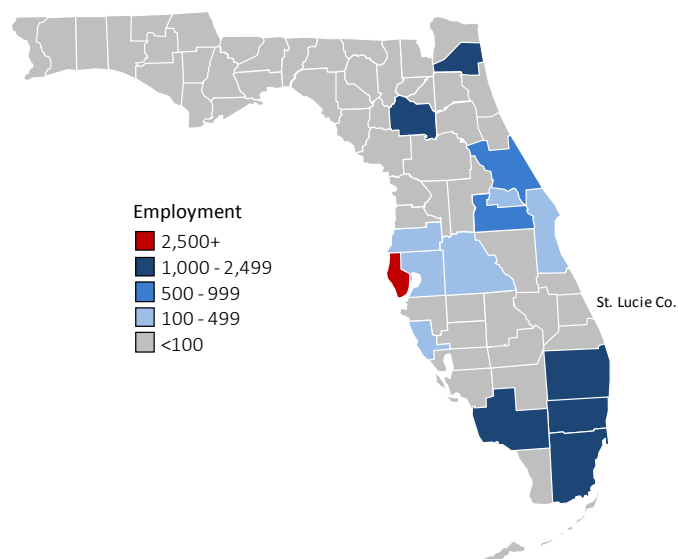
- Baby Boomer population (born between 1946 and 1964) is now 52 to 70 years old and there are 75 million of them (about 23% of the total population). This is incurring a major stress on the health-care system.

Medical Devices/Supplies

- According to the U.S. Department of Commerce, the United States remains the largest medical device market in the world with a market size that may exceed $130B in 2016. The U.S. market value represents over one third of the global medical device market and U.S. exports of medical devices exceeds $50B.

- There are more than 6,500 medical device companies in the U.S., mostly small and medium-sized enterprises with more than 80% of the firms having fewer than 50 employees. Medical device companies are located throughout the country with the highest concentrations in: California, Minnesota, Florida, New York, Pennsylvania, Michigan, Massachusetts, Illinois and Georgia. Other states with significant sector employment include Washington, Wisconsin, and Texas. Top industry players include GE, J&J, Medtronics and St. Jude Medical.

- Key segments within medical devices include:

  ☐ **Electro-medical equipment:** Includes a variety of powered devices, such as pacemakers, patient-monitoring systems, MRI machines, diagnostic imaging equipment (including informatics equipment), and ultrasonic scanning devices.

  ☐ **Irradiation apparatuses:** Includes X-ray devices and other diagnostic imaging, as well as computed tomography equipment.

  ☐ **Surgical and medical instruments:** Includes anesthesia apparatuses, orthopedic instruments, optical diagnostic apparatuses, blood transfusion devices, syringes, hypodermic needles, and catheters.

  ☐ **Surgical appliances and supplies:** Includes artificial joints and limbs, stents, orthopedic appliances, surgical dressings, disposable surgical drapes, hydrotherapy appliances, surgical kits, rubber medical and surgical gloves, and wheelchairs.

  ☐ **Dental equipment and supplies:** Includes equipment, instruments, and supplies used by dentists, dental hygienists, and laboratories. Specific products include dental hand instruments, plaster, drills, amalgams, cements, sterilizers, and dental chairs.

- The medical device industry is using cutting-edge technologies such as 3D printing, advanced materials and micro-scale options in developing in-situ devices.
- New diagnostic and monitoring techniques for certain situations are being utilized including remote diagnostics through video conferencing, use of Smart Phone apps with sensors to diagnose and monitor patients. There are wearable devices that can track health condition.
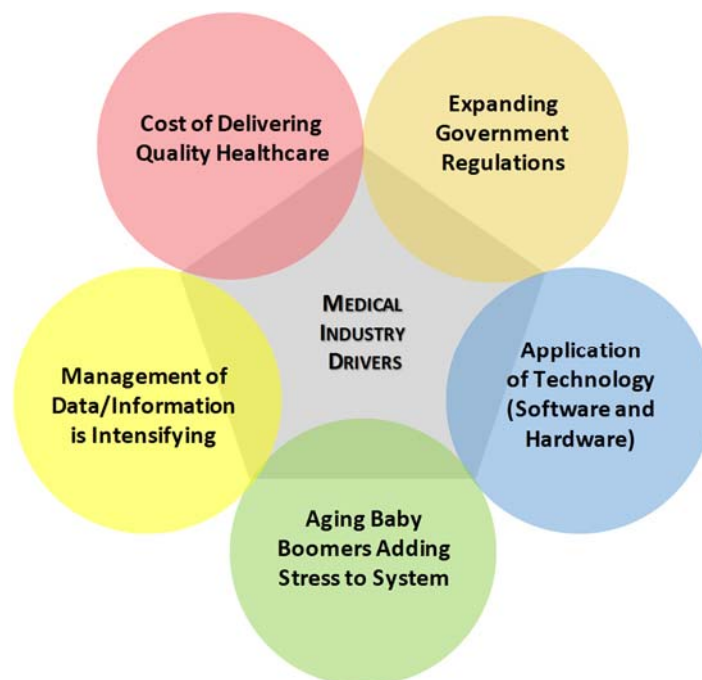
- Continued expansion of advanced surgical procedures with minimal invasive effects on the patient (remote micro surgery).
- Major market players (Medtronics, J&J, Stryker, Becton-Dickenson, etc.) continue to acquire and consolidate to gain market coverage and penetration in targeted segments as well as address the cost issues related to hospital consolidation and government intervention.

Site Selection Criteria

The location criteria for businesses/organizations within the medical industry vary greatly depending on which segment they represent. General location criteria are highlighted below.

Major Healthcare Operations
Driven primarily by demographics and market needs. The facility has to undergo a "certification of need" before it can be constructed.

Support Services to Major Healthcare Operations
Having access to leased space and the right technical talent are primary drivers.

R&D Operations
Typically located near/at company headquarters and has access to R&D partners such as a major research university of commercial partners.

Clinical Trial Services
Company utilizes a third-party service (frequently) with access to a major healthcare facility that engages in clinical trial activity.

Medical Device Manufacturing
Local priorities shift slightly as the product goes from a unique, high margin product to more of a commodity that has significant competition and seeks low price.   The smaller and mid-size operations will tend to have all or most of their functional groups (leadership, back office, R&D and manufacturing) all in one location. Therefore, the location needs to have attributes that meet the different functions. General criteria include:

- Real Estate (available leased building for small/mid-size operations)
- Labor supply (ability to hire production technical talent locally and recruit higher level talent into the area . . . acceptable quality of life: housing, quality of schools, recreation, retail options, etc.)
- Access to airport for executives and major customers
- Access to R&D partners (major university of commercial partner)
- Ability to engage in clinical trials for product offerings seeking FDA approvals (primarily for in-vivo applications)
- Overall cost (labor, rent, taxes, utilities)

Opportunities for St. Lucie County Area

Leverage local real estate options; access to qualified labor (materials-related skills in aerospace and boat building industries); training support through Indian River State College; potential access to local/regional clinical trials and large elder population; access to UCF and other R&D universities; and attractive quality of life for broad income ranges to recruit small and mid-size medical device companies.