Taking Self-Service to the Next Level: 8 Ways to Decrease Costs and Increase Customer Satisfaction

"Give a man a fish and you feed him for a day. Show him how to fish and you feed him for a lifetime." This well-worn proverb can be amended to summarize the current state of contact center self-service:

Direct a customer to self-service and you deflect a phone call. Provide your customers with self-service options that meet their information needs and decrease your long-term call volume.

OK, maybe that phrase doesn't roll off the tongue quite as smoothly. But it is indicative of the lingering problems companies face in improving self-service. While organizations are putting more emphasis on solutions and increasing their investment in technology, many are still fishing for answers on how to reap the benefits they anticipated by offering their customers a self-service option.

In a 2011 ICMI research report on "Self-Service and the Multi-Channel Contact Center," nearly 80% of the respondents affirmed that they offered self-service opportunities to their customers. Businesses of all sizes increased their spending, investing between $100 thousand and $50 million over a three-year period. But are these growing expenditures fueling any real progress in providing self-service that meets the needs of customers and contact center?

Respondents stated that the two key objectives of implementing self-service strategies were reducing operating costs (83.4%) and meeting the increasing customer demand for self-service (74.3%). When you dig beneath the surface, it becomes evident that there is lack of clarity about not only how, but whether, these goals are being accomplished. It's also difficult for companies to determine how to justify the ROI of their investments. One of the main obstacles is an inability to properly measure self-service success.

- Nearly half (43.6%) of contact center professionals who responded said their organizations do not measure customer satisfaction for self-service. Companies that have no mechanism in place for gauging the customer experience are flying blind.

- Almost three quarters of respondents (70.7%) surveyed indicated that their companies don't have an integrated method of reporting on multi-channel contacts. Without any empirical means of gaining insight into customer activities on individual channels, organizations cannot determine roadblocks in the process, can't track success or have any true means of understanding customer segmentation within individual channels.

There's an additional Catch-22 to the lack of measurement capabilities that makes it more difficult to realize gains in either cost savings or customer satisfaction. If customers aren't satisfied with self-service channels, they're going to turn to live agents for even the least complex transactions, with the cost of individual contacts ranging between $3 and $10 each. This dissatisfaction sends costs spiraling upward. The added customer effort expended in unsuccessful self-service processes means callers are already frustrated, causing AHT (average handle time) to go up and overall satisfaction to go down.

What are the factors keeping contact centers from better collecting feedback, measuring customer satisfaction and capturing the all-important recording data for self-service channels?

The most mature and recognizable channel deployed by the majority of organizations is IVR. Long perceived as a panacea to reduce costs, many out-of-the-box IVR systems were not designed to provide information or data on the experience delivered. For the most part, centers did not build processes during implementation that would enable them to effectively measure or exert effective control over this vital first stage of the customer experience.

In fact, many companies have given little thought to what happens during customer encounters with their IVR. They've run the same system for years and never updated it. Companies take a surface look at usage or completion rates, never taking into account such factors as customer effort or escalation rates.

Web self-service applications often suffer similar neglect. Too many organizations post FAQs that are seldom revised on a regular basis. Shopping carts are abandoned at unacceptably high rates without proper attention given to why customers aren't completing transactions.

While some systems require in-depth planning, re-tuning or new technology implementations, there are effective short term process improvements that can drive quick wins. Many of these initiatives can be fast-tracked to help turn around self-service programs. Here are a few common-sense guidelines to help immediately raise customer satisfaction levels:

1. Take a Fresh Look at Your Self-Service Strategy

If you want to fix something, you need to know what isn't working. You can try to figure out what's going awry yourself, but assembling a team to look at the big picture should provide better answers to such key questions as:

- Why do we offer self-service?
- What are the real reasons that we should offer it?
- Do we know if our current self-service strategy is meeting the needs of both customers and our contact center?
- What do and don't we know?
- How can we use the knowledge we have and determine how to get the knowledge we need?
- What department is in charge of self-service?
- If it's not the contact center, how can we either take ownership or work with the governing group to ensure that both the customers' needs and our requirements are being met.

2. Conduct Ongoing Internal Testing

It's stating the obvious that both IVR and Web self-service applications need to be tested before and during implementation. But it's equally critical that they're tested at regular intervals throughout their entire life cycle. Product and service updates, changes in strategy and customer demands all necessitate frequent testing and updating of self-service channels. Much of this testing can be accomplished without additional technology or the assistance of external suppliers.

Pre-implementation IVR testing involves duplicating actual call volume experienced by the centers and identifying any system hiccups that could create bottlenecks that negatively affect the customer experience. Once the IVR is live, the best way to test is to emulate customer behavior. Dial into the system frequently. Evaluate such elements as menu logic and speech recognition performance, taking note of extended silences. To get a better idea of what callers who opt out of the IVR experience, look at hold times and call routing efficiency. Testing is also a good exercise to assign to selected agents who should report back to you and share some of their findings with their peers.

Web self-service testing involves checking site and account security as well as accuracy and relevance of FAQ responses, which can be a major trouble spot if not frequently examined. It's also important to evaluate how easy it is for customers to access personal accounts and complete transactions.

There are products available to automate the testing process. End-to-end monitoring and diagnostic tools have the capability to dial in and navigate through an IVR transaction, reporting on key issues. You can also work with third party vendors specializing in testing voice and Web self-service systems. Whether you do it yourself, use an automated program or outsource it, the key to effective testing is to do it early and often.

3. Measure Completion Rates

Self-service success lives and dies by the completion rate. Without measuring this vital KPI, your agents don't have the information they need to support customers who couldn't or wouldn't use self-service. Lack of knowledge on completions also subjects agents to increased customer frustration. If callers who've been unsuccessful in navigating an IVR have to escalate to an agent, it's almost a sure bet that they'll be unhappy. If customers can't find the right information or complete a purchase on a Web self-service channel, the agent to whom they transfer is likely to get an earful.

There's also the very real danger that customers who've been turned off by poor self-service options will simply give up and take their business elsewhere. Many will take the added step of slamming the company's service on Twitter or other social media sites.

When completion and transfer rates aren't measured, it's impossible to measure the ROI of self-service technologies. To increase completion rates, the key areas to focus on are tuning and improving self-service channels to make them easier to use and more responsive. It's also important to take steps to prepare your agents for service recovery.

4. Conduct Detailed Monitoring of Customer Self-Service Sessions

Everyone knows how important it is to monitor live agent contacts. It's equally critical to monitor customer interactions on self-service channels. Advanced quality monitoring vendors now provide interaction recoding applications that capture everything each customer experiences from the moment they reach the contact center through the end of the transaction.

This process provides an accurate picture of how easy is to navigate an IVR and complete transactions without agent assistance. It also shows how effectively calls are routed when escalation is requested. Programming options are available to alert specialists about callers who become entangled in the IVR or are hesitating to move forward in a transaction, enabling proactive customer contact immediately after the troubled interaction.

5. Obtain and Act on Direct Customer Feedback

While it's important to test and monitor, what really determines the success of self-service programs is how customers feel about the experience. The best way to find out is to ask customers directly. Both IVR and Web self-service give you the power to effectively gather customer feedback. You can employ fully automated post-call surveys where customer are asked to rate their experience before they begin a transaction, then automatically directed to a six to eight question survey when done. Web users can be surveyed with pop-up windows or outbound emails. Survey responses can be programmed to respond to abnormally low ratings, capturing the caller's ID with a link to the recorded interaction to enable follow-up damage control.

6. Manage the Data for Transfers to Live Agents

One of the most puzzling findings in the 2011 self-service research report was that 64% of companies didn't know when customers have opted out of self-service to reach an agent. This increases handle times and plays havoc with workload forecasts.

Companies often lack this information because they don't have CTI systems in place to ensure that transactional data is being transferred back from the self-service channel to the agent. Forcing callers to repeat data they've already provided triggers an extremely negative experience for customer and agent alike.

7. Apply Intelligent Design

To encourage customers to use self-service instead of engaging directly with your agents, you need to design channels that take their needs and preferences into account. This involves using both customer feedback and customer data to create customer-centric self-service experiences across multiple channels. Understanding your customers, what segments they come from and what expectations they have needs to be incorporated into your design. The key to self-service retention is making it as easy as possible for the customer.

8. Investigate Your Technology Options

Adopting new technologies is not an overnight decision. Corporate needs must be analyzed, budgets approved and implementations carefully planned. That said, now is the time to begin looking into the many available tools that are changing the self-service landscape.

These include:

Cloud technologies – Beyond avoiding the cost of maintaining on-premise equipment, cloud systems enable rapid and inexpensive revisions of existing applications, including easy reprogramming of IVRs and the capability to update knowledge bases with customer feedback.

Knowledge management – These increasingly popular programs provide the needed continuity that ensures that customers get the same answers online that they get from the IVR or from a live agent.

Natural language search engine – Natural language processing (NLP) is a vital part of successful speech-driven IVR. It also drives many superior web-based applications, enabling customers to type in complete sentences as the search engine instantly analyzes the request, then pulls up appropriate content from the knowledge base.

Agent avatars – Sophisticated intelligent digital characters now reside on many company websites, adding a more interactive human touch to Web self-service. In many cases, their advanced capabilities can replace live chat with agents. They are also being used as virtual assistants in mobile transactions.

To read more on this topic, download the white paper "ICMI What's Wrong with Customer Self-Service?"

http://www.crmxchange.com/Pages/inContact.aspx