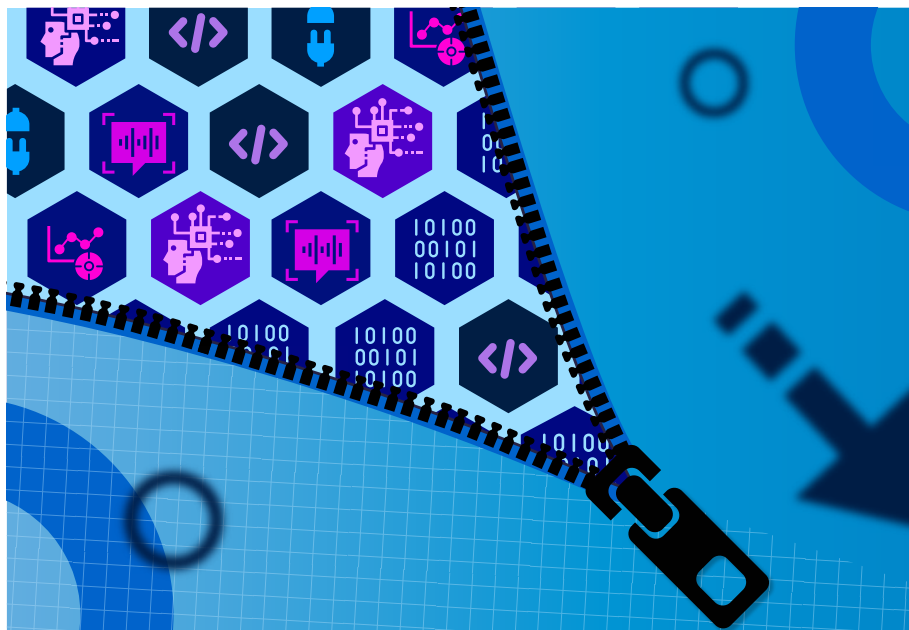# TIME TO GET REALLY EXCITED ABOUT SELF-SERVICE!

"Now we are on the cusp of great change with what technology can do for self-service, and it's not just the same old thing."

Contact Center
pipeline

TIME TO GET REALLY EXCITED ABOUT SELF-SERVICE!

It's a new era for customers and companies.

BY LORI BOCKLUND, STRATEGIC CONTACT

True confession: I struggle with whether to get excited or grow more cynical about self-service. This industry has a long history of hope for reducing agent-handled volumes—via IVR, websites, mobile apps, and now bots and AI. But tempering that hope is another long history of falling short of goals: the volumes just keep going up, and integration into agent-handled contacts is often lacking.

Now we are on the cusp of great change with what technology can do for self-service (SS), and it's not just the same old thing. So, I'm going with EXCITEMENT over cynicism! We need to approach it anew, with great enthusiasm, but perhaps most importantly, a laser focus on the customer experience.

So Much to Get Excited About

Here's my list of game-changers that can transform a lackluster SS experience into a stellar one.
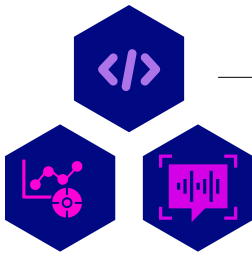
1. NATURAL LANGUAGE: Natural language improves the user interface, whether text-based or speech-based interactions. As this technology improves, it makes SS apps smarter about what is being said. In some cases, it even considers the emotions or mood of the speaker or writer. All that makes for a better overall "conversation."
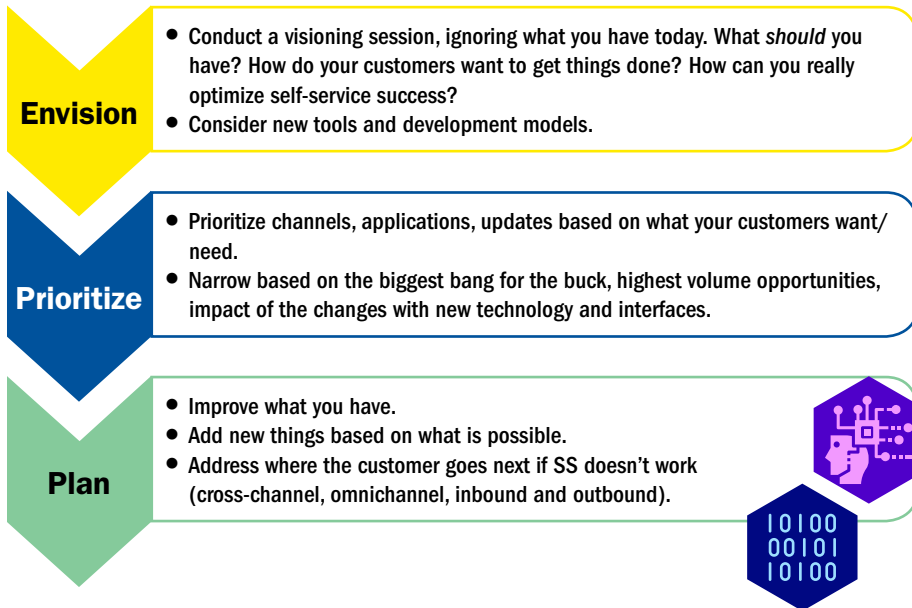
2. TOOLS FOR BUILDING AND OPTIMIZING INTERACTIONS: Whether a developer is diving in using Application Programming Interfaces (APIs) and Software Development Kits (SDKs), or a contact center user is configuring a work flow with a simple graphical user interface, things happen faster and easier than ever before. Buyers can tap a broad community of partners, developers and users for any given tool. They can build business

Tactical Changes for the IVR

I wanted to shine a special light on IVRs as they are typically owned by the center and are often ripe for tactical changes (especially if the IVR platform and/or applications are "old" and nobody has touched them in a long time). It is easy to identify if the IVR needs "fixing." Start with a self-assessment (SEE "YOUR MISSION"). Then get rid of low-use apps unless they are easily fixable in a way that would change usage for the better. Revise call flows, menus, prompts and recordings. And add proper tracking and the processes to follow up on what is working and isn't, and tune for success!

FIGURE 1: Plan with a Strategic Mindset

Envision
- Conduct a visioning session, ignoring what you have today. What *should* you have? How do your customers want to get things done? How can you really optimize self-service success?
- Consider new tools and development models.

Prioritize
- Prioritize channels, applications, updates based on what your customers want/need.
- Narrow based on the biggest bang for the buck, highest volume opportunities, impact of the changes with new technology and interfaces.

Plan
- Improve what you have.
- Add new things based on what is possible.
- Address where the customer goes next if SS doesn't work (cross-channel, omnichannel, inbound and outbound).

rules and decision points, capture and use data on outcomes to optimize, and then adjust the flow and interactions. Everyone likes fast and easy!

3. BOTS: No SS discussion these days is complete without talking about bots. Our "Future of the Contact Center" survey results (Tech Line, July 2019) showed great hope is being placed here. Bots could transform a variety of channels with well-built interfaces. Add in machine learning and it really gets exciting!

4. KNOWLEDGE MANAGEMENT: KM is changing with improvements that could enable better SS. Centers are no longer just talking about SharePoint and a bunch of documents and folders. KM structures information into bite-size pieces that can be accessed via a variety of channels—including self-service. AI can play a role here—optimizing information and finding it quickly. The power of good KM combined with better user interfaces makes me optimistic that self-service success rates may actually go up!

5. EVERYDAY TOOLS: The ongoing evolu-

tion of tools your customers use every day bodes well for SS success. Google (or other search engines) are often where customers start looking for answers; Google is incorporating more AI and "bot-izing" to help users find answers faster. So you need to imagine your customer starting there and think about how their journey evolves through that interface. Similarly, the increasing use of Siri and home devices like Alexa and Google Home present an interface that is all about convenience for the user. These tools leverage many of the things listed above, like better natural language, AI and access to KM.

6. BIOMETRICS: Improvements in authentication make it easier to get into SS, whether through your fingerprint or visual ID on your mobile device, or your captured or "registered" voiceprint. The more customers grow accustomed to these technologies, the more they will expect them as they embark on a self-service journey. Companies that leverage them will win in the self-service game.

7. ARTIFICIAL INTELLIGENCE: You may have noticed that AI is a recurring theme.

As I've pointed out in other articles, AI is not a standalone "project." It is something that can be done as part of many other things, perhaps the ultimate "enabling technology." All the things that can be done in SS via business rules can be better with AI.

Plan with a Strategic Mindset

If you like the potential this list presents, your task is to start planning with a strategic mindset. This is where the focus on customer experience really happens, and it is the path to convert possibilities into projects.

Here's the trick: The contact center must collaborate with other channel owners like digital channels, marketing and IT. The contact center focuses on IVR because they typically own it, but this effort needs to be broad, looking at the web and mobile, and the new things like bots, and even the entry points outside of the corporate boundaries. Many companies have a "digital transformation" or "digital strategy" initiative. Self-service planning presents the opportunity to synchronize that effort with the contact center—for all self-service channels and for scenarios where customer needs cross into assisted service.

FIGURE 1 outlines some steps to get you started.

Execute with Intent

Planning is fun, but execution is where things really happen. Define projects around the "Customer Experience" (or Journey). Don't forget to tie in KM and AI as these broader capabilities can impact a variety of SS tools. Even as projects may be broken into sub-projects to address various user interfaces, don't lose sight of the bigger picture and how these all work together.

"Fix" what needs fixing without overinvesting in things customers won't use. For example, put the right apps in the right channels, get rid of apps that aren't used, and don't try to force use.

I've outlined some assignments (**SEE "YOUR MISSION"**) that can help you get practical about your pursuit. You should also consider focus groups, pilots and rigorous user acceptance testing to ensure success. You may think you know, but chances are your customers know better!

YOUR MISSION... SELF-SERVICE OPTIMIZATION

We're all about action here at Tech Corner. So if you want to improve your customer experience on self-service, here are your assignments to get started!

SELF-SERVICE "SELF-ASSESSMENT"

This assignment will start with the IVR, but you can do similar things with other SS channels like your mobile app or website. The goal is to experience what a customer might experience and use data (independent of reports—we'll get to that in a minute) to make the case for change.

- Call each number that points to the IVR.
- Go down each menu and sub-menu path (using calls, not some out of date documentation!).
- Do some counting and timing:
  - How many voices?
  - How many prompts?
  - How many layers to get to an outcome?
  - How many disconnected lists?
  - How many dead-ends?
  - How long does it take to get to an agent?
- Identify the red flags and show how you are going to fix them to align with best practices like single voice, shorter menus with fewer layers, no dead-ends, easy and fast for customers to get where they want, etc.

OVERALL SS CHANNEL STRATEGY

This assignment should help you understand more about what you have and what you need, with that laser focus on the customer.

- Create a matrix of use of channels versus applications:
  - Think of the demographics of your customer base.
  - Identify use cases for sales and/or service scenarios.
- Indicate what you have (X) and what you think you should have (O).
- Identify what to throw out.
- Identify what to add.
- Create a vision by timeframe:
  - For example, 1, 2, 3 years

USE OF REPORTS/ANALYTICS

This assignment may present a stark reality of the current state of self-service but can create a compelling case for changes. The answers will guide your strategic decision-making based on customer use and opportunities.

- Determine if you can answer these questions:
  - What is the numbers of *registered* users on each channel (fully set up, have passcode, etc.)?
  - What is the numbers of *active* users on each channel per month?
  - What is the volume on each channel per month? How has it been changing the last 2 years?
  - What is the usage on each application?
    - Which applications have low success rates but should have higher rates?
    - Which applications have usage so low you should remove them?
- If you can't answer any of these, you have serious gaps and need to address them!
- With answers in hand, you can build your plans for change—marketing to users, removing or fixing applications, adding reports, etc. ◉

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Contact Center Pipeline is a monthly instructional journal focused on driving business success through effective contact center direction and decisions. Each issue contains informative articles, case studies, best practices, research and coverage of trends that impact the customer experience. Our writers and contributors are well-known industry experts with a unique understanding of how to optimize resources and maximize the value the organization provides to its customers.

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