

## Tech Line



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# *The Brave New World OF SELF SERVICE*

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**A new generation of tech-savvy customers is shaking up the self-service status quo for contact centers.**

If you strike up a conversation about self service with contact center professionals, you'll likely get that "been there, done that" look. For some, it's a weary grimace that conjures up too many Interactive Voice Response (IVR) horror stories from personal experience and second-hand accounts. For others, there's a glow of satisfaction for a growing base of Web-based customers tinged with a hint of frustration for the channel's isolation from other modes of contact. The overarching feeling is resignation to business as usual — room for improvement, but nothing worth writing home about.

Those who've grown accustomed to this self-service status quo are forewarned: We're about to shake things up. In case you haven't noticed, a whole new generation of tech-savvy consumers has entered the fray with decidedly different notions about what constitutes effective communication. Mobile trumps land-line and full-screen. Text messaging trumps voice. Event-triggered notices trump customer-initiated inquiries. The good news: There's a golden opportunity to deliver superior customer service AND bolster the bottom line with new forms of self service. The bad news: You'll need to get your strategic, operational and organizational acts together to make hay of it.

For inspiration, we'll start with the good news...

### **New Tools Create New Possibilities**

As organizations continue to make progress deploying voice- and Web-based self-service applications, the technologists have been busy creating new tools to delight customers and lighten the center's load. A quick glance at the table below should pique your interest. Here is our take on state-of-the-art capabilities and their application in customer service environments.

**Alerting** services such as Varolii and Televox are a "pre-emptive strike" to reduce inbound contacts. Some centers generate alerts automatically as a function of good business practice — for example, order/shipping status from a favorite online retailer or fraud alerts from a credit card provider. Others place such notices under customer control based on their preferences. Financial services and airlines have been leaders in these loyalty-enhancing services. Most applications allow customers to choose the mode of contact — SMS/PDA, email, phone calls to a hierarchy of numbers, the hours for contact, and the events they are interested in hearing about. With solutions available through premise-based software or hosted services, you can get in the game with or without significant IT involvement.

On the IVR front, **automatic speech recognition**

(ASR) was supposed to be the “killer app” to take voice-based self service to the next level. According to a 2006 Ascent Group poll, 26% of centers use ASR (up from 10% in 1996) with 22% planning to implement the technology in the near future (see *IVR Improvement Strategies 2006*, published by the Ascent Group, for the complete survey results). It’s a respectable showing, but not the technological tsunami that some anticipated. ASR shines in environments that cannot be reduced to simple menu structures and circumstances where customer input cannot be characterized numerically, with airline flight departure/arrival times and stock quotes as leading examples. But for applications with limited menu options or easily mastered transaction types, such as those offered by a bank or credit card company, touch-tone commands get the job done faster. If ASR is on your planning horizon, think about how a touch-tone interface might figure into the mix, giving callers the choice for how they’ll interact with you. The greatest value of ASR may be in helping to identify callers and steer their calls to the right place when the caller needs assisted service.

Whether touch-tone or ASR, IVR technology is undergoing a transformative change — from voice user interface (VUI) to **voice user intelligence**. Companies such as EIG and Voxify offer services and software that optimize the customer experience while they are self-serving. Business rules assess customer profile information, preferences, transaction history and real-time responses to caller prompts to anticipate caller needs. This

assessment expedites routing to appropriate resources or speeds access to self service applications. Interactive Digital offers another example with its Adaptive Audio that monitors caller interactions — whether touch-tone or speech — and adjusts speed and menus, or guides lost (or frustrated) callers to an agent. Systems like this can consider what’s happening right now, for this caller, based on background noise, their experience or familiarity with the application, and their focus and ability to effectively respond. A similar movement adds *intelligence* to the “I” in a Web graphical user interface (GUI). Both have the potential to make self service more customer-friendly and efficient. Success of these tools improves with productive engagement between customer service subject-matter experts with the technologists who design and build the systems.

Even with the best of designs, there are times when customers get “stuck.” By applying a bit more business intelligence, IVR applications can identify distressed callers and offer assistance to provide callers with a successful outcome. Such interventions are common for Web-based applications where chat windows offer access to skilled resources. Web retailers leverage this capability to transform “window shoppers” to paying customers. And out on the assisted service frontier, **virtual assistants** answer questions and help visitors find their way around a site. If we look “under the hood,” we’d find a sophisticated knowledge base with a text-to-speech interface. But, as users, we simply interact with Alaska Airlines’ Jenn or Ikea’s Anna and make a point of visiting again if only to

Table 1. The application of state-of-the-art self-service capabilities in customer service environments

Next-Generation Technology Benefits Customers and Organizations								
Improved Customer Experience and Satisfaction					Cost Savings and Revenue Generation			
	More Convenient	Better Access to Info	Access to Broader Community	Rapid Response to Inquiries	Increase First-Call Resolution	Reduce Calls, Handle Times	Attract Customer Prospects	Increase Customer Loyalty
Alerts	Yes	Yes	-	Proactive	-	Yes	Possibly	Yes
ASR	Selectively	Selectively	-	Possibly	Yes	Possibly	-	-
Intelligent UI	Yes	Yes	-	Yes	Yes	Yes	-	Yes
Proactive Assisted Service	Yes	Yes	-	Yes	Yes	Yes	Yes	Yes
KM/Wiki	Yes	Yes	Yes	Yes	Yes	Yes	-	Yes
Web 2.0	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

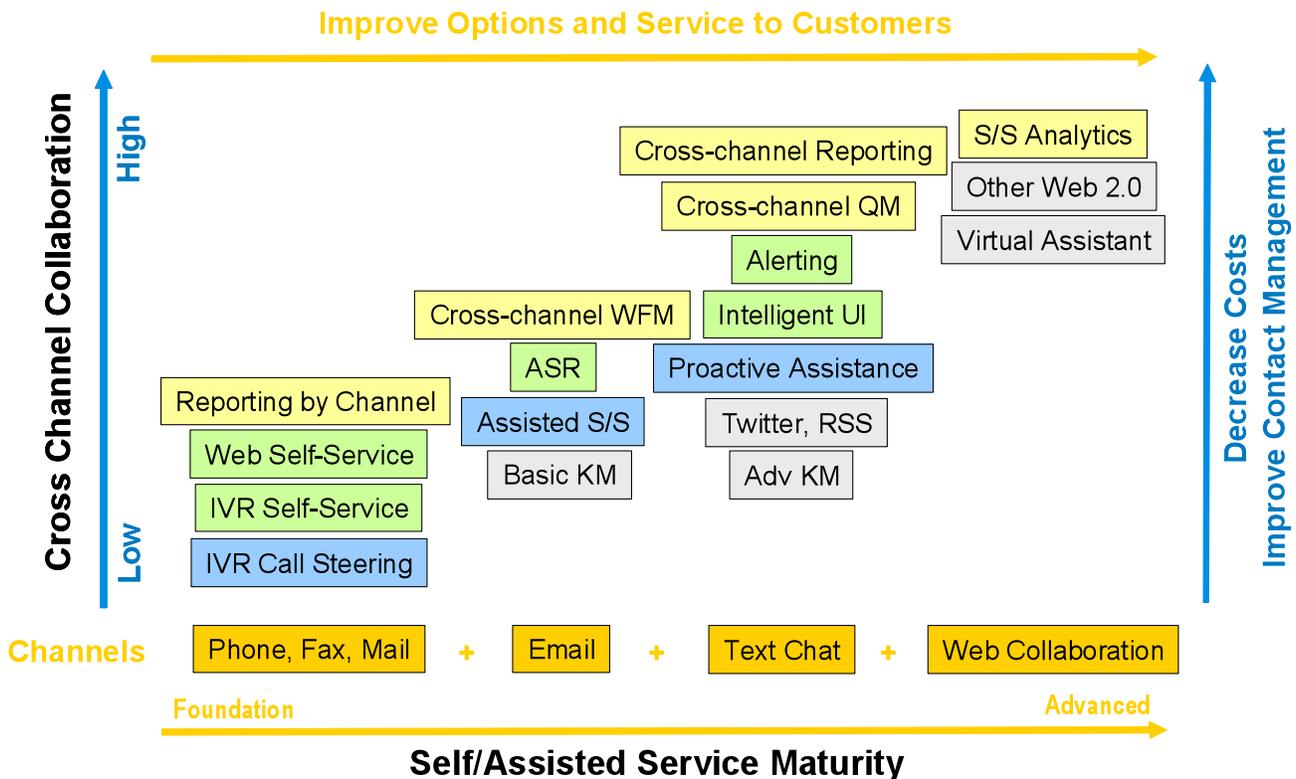
experience the novelty.

Of course, the Jenns and Annas of the world cannot exist without an organized repository of information from which to draw responses. A **knowledge management** system fits the bill with search capabilities that use a natural language interface. This search tool focuses on the intent of the question and returns the best possible answer drawn from the organization's collective information resources. Some companies use knowledge management to provide scripted responses to customer emails as they are submitted. "Hot links" give customers the option to escalate their inquiry to agents if their needs are not met. Both parties win through a combination of shortened email turnaround time and improved access to the "experts" (when necessary) by filtering out the routine inquiries. (This approach can also skirt the issue of mail clients placing email responses into the "spam" folder.) As an added bonus, permissions-based workflows exist for agents and customers to add to the knowledge base dynamically and/or rate the quality of responses, thereby increasing the value of the information and tool.

With **Web 2.0**, self service doesn't have to be managed or controlled by the corporation. Through forums, wikis, blogs, podcasts and social networks, your customers and prospects can share their knowledge about (and experience with) your products and services *with or without your participation*. While most centers haven't included Web 2.0 under their self-service umbrella, customers are increasingly considering it a valued self-service channel. In fact, the next generation may consider community-based resources superior to their corporate counterparts. At a minimum, you may find that these tools are diverting inbound contacts that would otherwise use your channels. How will you respond?

While you may not be prepared for the full Web 2.0 smorgasbord, you might experiment with **microblogs** such as Twitter and other notification resources (RSS feeds, widgets/gadgets) to assess their impact in preventing routine inbound contacts — or encouraging desirable ones. Microblogs can provide input that the customer care center can proactively address, or gather consumer interest in new products or

Figure 1: The Self-Service/Assisted-Service Maturity Spectrum shows the value of increasing channel deployment and cross-channel collaboration.



promotional offers. These applications can get off the ground with minimal technical knowledge and/or support, and they're a relatively low-risk way to experiment with new modes of contact.

### Old Issues Need to Be Addressed

Our enthusiasm for the self-service doors that technology opens must be tempered by awareness of the long-standing organizational challenges. First and foremost, the operational and organizational silos in many organizations make it difficult for companies to bring self service together. With telecom/IT owning the IVR; marketing, eCommerce or IT owning the Web; and the contact center owning agent interactions, no one lays claim to the overarching strategy or has authority to set standards for presenting a unified face to the customer. As Web 2.0 and other technologies get thrown into the mix, the situation can only get more difficult. It's time to address the issue by creating a multidisciplinary team that defines service excellence from a customer perspective and institutes plans and reporting

structures to attain it.

Second, self service cannot be divorced from assisted service. Customers are much more likely to take the plunge, and succeed, on self-help when a convenient, informed "safety net" is available to help them. Assisted service excellence isn't simply a matter of back-room planning to ensure consistent content and design across applications. It also requires training and change management to build competency and enthusiasm among the rank-and-file service reps. As self service grows, the role of the CSR evolves in the direction of "technical support" to help customers succeed at self service. Tying self service and assisted service together can facilitate support from CSRs rather than the perception of a threat.

Perhaps the most important issue to address is the lingering attitude that self service represents degradation in customer care. Self service can mean better service, especially when informed by customer preferences and made available across a range of media. A growing population likes — or even loves — to self-serve. It's time to

### Keep an Eye on Best Practices as You Craft Self-Service Strategy

If you've set your sights on stellar self service, make sure you factor these hallmarks of excellence into your planning process:

- Make sure all strategic initiatives align with and support the business strategy. If you aren't clear on where and how self service fits with the business strategy, go no further until you've figured it out.
- Develop a comprehensive, cohesive vision of self service and assisted service that spans all media — including alerts, IVR, Web, email, Web 2.0 — with a clear focus on the customer experience.
- Look for opportunities to develop a common applications infrastructure with a consistent user interface that is media-appropriate. Use today's standards, such as VXML, to ease integration across channels. The Web and IVR are different interfaces but they can share common applications, integration to backend systems, and reporting outcomes.
- Prepare scripted responses to common inquiries that you can leverage across all channels. Develop a process to expand and update this library.
- Customize the self-service interface to the customer desires or patterns as much as possible. The more the customer can mold their experience, the more likely they are to return and succeed.
- Create an in-house forum for synchronizing your multichannel strategy across the various channel owners to ensure that your self-service tools work together to meet business goals. Identify appropriate channels by contact type to offer the right options with high likelihood of success.

treat technology as a member of the customer service “A Team.”

### Getting Your House in Order

If you’re serious about delighting customers with your self-service offerings, your top priority is an obvious one: Build better self-service applications. Often self-service development and application design takes place in a vacuum by people who make assumptions about your customers. You can’t understand your customers’ needs, habits, preferences and likes/dislikes without talking to them. Use focus groups and surveys to find out what your customers really think about your current offerings and what they would like to use. Design applications that are easy to find and easy to use so once your customers self-serve, they won’t want to call in unless they absolutely have to. Build a user-friendly GUI/VUI and test it with real customers through structured usability testing prior to production.

There are also tools that can help optimize self-service applications by monitoring, measuring and analyzing customer use and behavior while self-serving. Vendors, such as BBN (IVR) and ClickFox (IVR, Web and other channels). record user behavior and speech while self-serving and provide analysis and reporting to understand your customers’ acceptance of, and success with, your self-service applications. Real-time monitoring flags issues before the customer relationship is damaged or customers form negative opinions about self service.

There is no self-service “application of dreams.” If you build it, they may not come. Part of your self-service strategy must be a plan to encourage use. See if you can provide incentives for customers to use the applications and for your agents to educate callers when a self-service application is available.

Don’t ever stop learning. Create ongoing dialogs about current and possible self-service applications with your agents, your custom-

ers and vendors so you have the information required to optimize your applications.

There are also internal cultural changes that will take place as your self-service applications become successful. Watch the self-service usage volume and the agent-assisted volume by contact type to note the impact on your staffing requirements, both in terms of hours and skills. The volume impact might not be a one-for-one trade-off from agents to self service. Self-service applications could stimulate new contacts from customers who only self-serve. Also, agent-assisted contacts could become more about assisting those who choose to self-serve — getting set up, using it effectively, addressing issues — than processing transactions. Are your agents suitably versed in the applications to offer assistance? Can they transition from being a “player” to a “coach”? You have to manage this change so self service is perceived as a vital tool in the overall customer experience and corporate success. 

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