

Self-Service

Best Practices Guide



VERINT®



Table of Contents

Introduction – The Risk v Reward of Self-Service	3
Self-Service Planning	4
Self-Service Execution	7
Conclusion.....	10

Introduction – The Risk v Reward of Self-Service

Driven by Internet technology, the ubiquity of mobile devices and improvements in wireless network speed, the demand for self-service continues to grow rapidly. In 2015 Forrester Research Inc. indicated that:

“ Web self-service interactions overtook all other channels. For the first time in the history of our survey, respondents reported using the FAQ pages on a company’s website more than speaking with an agent over the phone. ”

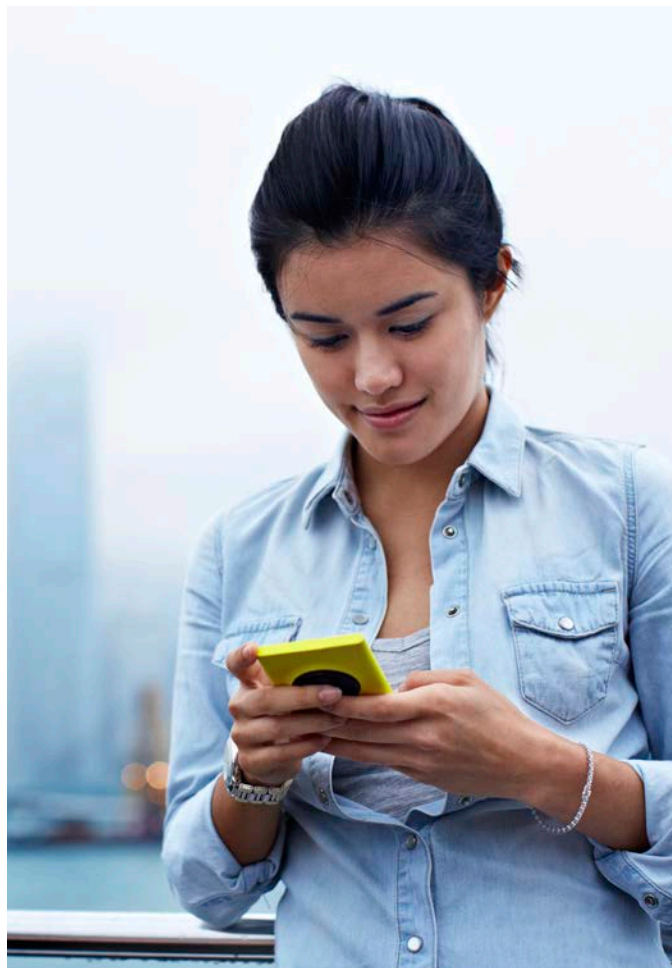
Forrester Research, Inc., Contact Centers Must Go Digital Or Die, by Kate Leggett and Art Schoeller, April 3, 2015

Today’s empowered customers, especially those in the younger demographics, are more than happy to resolve problems for themselves rather than going to the cost, inconvenience and expense of reaching out to a contact center for assistance. Customers value the convenience, speed and anonymity offered by frictionless self-service experiences.

The rewards for organizations that successfully deploy self-service are high, not only in terms of improved customer experience, but also in improvements to the bottom line through improved productivity, increased call and email avoidance, and reduced service costs.

While the rewards may be high, the risks of poor implementation of self-service are also high. Many organizations have limited touch points with their customers. So, when customers seek to engage, it is essential that organizations make every touch point count. A self-service activity may be one of the few interactions that customers have with a bank or an insurance organization over the course of their contract. It may also be the first experience a potential customer has with your organization. Therefore, the self-service experience really matters. Forcing customers onto a poorly designed self-service interface risks damaging the customer relationship irrevocably and gives the impression that your organization doesn’t value its existing customers.

Self-service has huge risks and rewards for organizations and is an essential component in the multichannel customer engagement mix. This best practices guide provides suggestions on how to maximize both the rewards and minimize the risks to your business. Self-service is an opportunity to win or lose a customer. It may be one of the few interactions a customer has with your business; it may also be the last.





Self-Service Planning

Reconsider Your Objectives

While cost reduction is the most common reason for deploying a self-service solution, it should not be the overriding objective. A continual focus on cost runs the risk of delivering short-term benefits but long-term pain for the organization as customer priorities take a back seat.

As we have seen, customers are eager to adopt self-service technologies, so the objective should be to make that experience as positive and frictionless as possible. Cost reduction and contact center deflection, while important business case considerations, should be viewed as positive side effects of the primary self-service objective, which is to optimize customer engagement. Thus, when it comes to evaluating the success of your self-service project, it is necessary to measure the impact on customer satisfaction metrics, such as Net Promoter Score® (NPS).

Identify Customer Contact Drivers

Before deploying a self-service portal, organizations must clearly understand the primary reasons customers contact them, often referred to as customer contact drivers. Once the organization has an in-depth understanding of the primary customer issues,

it can then decide which service requests to support using self-service and begin to design the self-service experience accordingly.

A variety of manual and IT-assisted techniques can be deployed to identify customer contact drivers. These include:

- Web page analytics – Identify web pages and content most accessed by customers.
- Employee surveys – Seek contact center agent feedback on customer request types.
- Customer satisfaction surveys – Use customer surveys to identify areas of dissatisfaction with customer service issues and trends.
- Speech analytics – Automatically analyze voice-based contact center customer engagement to determine customer issues and support gaps.
- Customer support ticket category analysis – Identify most frequent customer service ticket categories.
- Text analytics – Automatically analyze multichannel text-based contact center customer engagement to detect customer issues, trends and support gaps.

Self-Service Issue Selection

Not all contact drivers or customer issues will be suitable for self-service implementation. Organizations have to balance the needs of the customer for self-service and their own business and commercial needs. For example, many organizations are reluctant to support the ability to close a customer account via self-service. It will thus be necessary to evaluate each contact driver in turn to assess suitability for self-service.

In selecting the best customer service processes for self-service implementation, organizations should focus on:

- High volume, simple service request categories; e.g., account balance information, requests for an insurance certificate, warranty registrations, payment or renewal of subscriptions.
- Service requests that are important or of high value for the customer but low value for the organization; e.g., passenger seat selection, password resets.
- Mundane or repetitive processes where the agent cannot add value to the engagement; e.g., online check-in, customer on-boarding, appointment booking, order status updates.
- Processes that are common and don't differentiate you from your competitors; e.g. account statements, handbook or user guide downloads.

Look for Quick Wins

To obtain business justification for further investment in self-service, organizations should identify and prioritize the biggest quick wins and implement these self-service processes first as part of a progressive rollout of self-service functionality.

Think Mobile

Younger demographics, who often think mobile first when they want to engage with an organization, are most likely to use self-service. As a result, mobile self-service should be key consideration of your self-service strategy. In particular, if your organization has a customer mobile app for primarily retail purposes, mobile self-service can be used to support sales and can encourage adoption and repeat visits to the app.

Consider the Order of Technology Deployment

There are several technologies that are essential for successful deployment of self-service. In order of deployment priority, these are:

- Knowledge management – Knowledge management underpins a successful self-service solution by delivering easily consumable nuggets of information to customers and employees.
- Web chat – Web chat is a key digital escalation channel for customers unable to resolve issues using self-service.
- Co-browse – Co-browse is an additional digital escalation channel suited for certain customer service scenarios where web chat is inadequate. Examples include providing assistance with the completion of complex customer forms, explaining or training a customer to use a new software application or showing a customer how to navigate a new or unfamiliar web page.



Knowledge Management is Critical for Success

A knowledge management application will underpin your long-term self-service strategy. Knowledge management applications focus on finding and delivering the information that customers and employees are actually searching for. Knowledge can be delivered to customers using search via keywords, natural language, Boolean queries or parametric inputs. Knowledge management applications also use browse trees, bookmarks and guided process flows. Advanced knowledge management applications, such as Verint® Knowledge Management™, use context to help ensure that the right knowledge articles are automatically surfaced at the right time for customers, and can eliminate the need for search and make search more effective.

A knowledge management project typically includes five key phases:

- Determining objectives and metrics – From a self-service perspective, metrics, such as knowledge base page views and average time spent on the support page, will indicate customer adoption of self-service. Customer satisfaction metrics, such as NPS, should be tracked following deployment of your self-service and knowledge management solution to determine impact.
- Planning – Knowledge management is a continuous process, and planning includes identification of a knowledge base owner and identification of knowledge authors, reviewers

and editors, as well as a commitment from IT for maintaining the application.

- Designing a robust knowledge base – This includes development of content categories (taxonomy), content standards and a content template.
- Continuous knowledge improvement – Just-in-time authoring should be combined with reporting and analytics to better understand information usage trends and determine where gaps in knowledge exist. Activities may include:
 - Tracking the use of content over time to identify solutions that are rarely used and can be deleted to streamline searching and content maintenance.
 - Analyzing self-service search terms to better understand the language of users and more closely map content to their vernacular.
 - Analyzing search results lists to identify which solution answered a user's question best and where it appeared in the list, so that solution ranking can be optimized.
 - Regularly tracking the amount of content that is being added, modified or deleted to ensure that knowledge is continuously refreshed and improved.

For further information, Verint provides a separate assets and best practices guides, as well as consultancy services, for organizations considering a knowledge management deployment.



Understand Your Target Demographic

Self-Service and digital channel adoption is highest among younger demographics, with mature customers preferring traditional voice and email channels. Organizations introducing self-service options must thus verify that it is the right thing to do for their target demographic. When designing self-service experiences, businesses should also understand the level of technical expertise of each self-service user, as well as the potential devices being used.



Take the Customer Journey – Take an Outside-In Approach

The whole customer journey must be optimized and streamlined, not just the design and performance of the self-service interface. This means that self-service design must consider potential escalations from self-service to other customer channels, such that the transition between self-service and assisted service is as seamless or frictionless as possible.

Customer journey mapping involves carrying out multiple customer engagement scenarios to validate, as far as possible, that every customer journey or navigation through your web page and self-service channel has been considered. Scenarios could include product research, purchasing, self-service or a customer problem, such as a complaint, refund request, repair request or configuration issue. For each of these scenarios, you need to determine the customer starting point. This could be your web home page, your social media page or a third-party social media application, such as Twitter. Identify the steps in each scenario a customer may go through and determine the effectiveness of your self-service channel—and at what point you want to offer an assisted or alternative channel.

Customer Escalation

As previously discussed, self-service design must consider escalation from self-service to assisted or live agent channels. Displaying escalation links prominently—rather than burying them deep within the site—makes self-service users aware that escalation is easily available if it is needed.

Ideally, multiple channels should be available to the self-service customer, such as email, interactive chat and phone support.

While multiple escalation channels make sense, all channels do not have to be available to all customers. Availability can be tied to a variety of criteria, such as the value of the customer, the problem type or time sensitivity.

To help avoid customer frustration during escalations, individual contact information should be retained as customers transition from self-service to assisted channels.

Self-Service Execution

Develop Useful Content

A prime driver of self-service success is content that is always relevant to users. Relevance depends, to a great degree, on the freshness of the content and the strength of its relationship to the user and the user's current situation. The most effective authoring method is to fully integrate customer service agents into the knowledge creation and maintenance process. Agents should be able to contribute in multiple ways, such as flagging existing content for rework, creating new solutions and rating content for relevance. Agents must also be able to actively and efficiently contribute content without stepping outside their support roles.

Best-practice authoring models, such as the Consortium for Service Innovation's Knowledge-Centered Support (KCS), can be highly effective at promoting agent contribution. KCS focuses on creating knowledge as a natural by-product of the day-to-day interaction between agents and customers, which creates a "just-in-time" authoring environment.

Make Self-Service Easy to Find

It may seem obvious, but to drive usage of self-service by customers and prospects, it must be easy to find. Customers access company web pages primarily for two reasons: to buy or research a purchase and to look for service. However, finding customer service options on web pages can be difficult. Many web pages focus almost entirely on supporting the buyer rather than the existing customer looking for service.

Customer service is seldom on the front or landing page of a web page. Instead, many organizations put customer service several clicks inside their web pages. For organizations that want to support and encourage customer engagement, this is unsatisfactory.

Realizing the importance of customer engagement, many organizations are now taking a different approach. For example, several leading financial service organizations are giving customer service a more prominent role, placing customer engagement options, including web self-service, email, phone and social contact details, right on their home pages.

As a minimum, self-service should be accessible one click from your home page via a clearly visible or prominent Support/Contact Us button.

Consider Self-Service Look and Feel

Many customer support landing pages are poorly designed and almost feel like an after thought. Organization branding and web page design rules should extend to the self-service interface. self-service should have a consistent look and feel with the rest of your company web page so that it feels like a continuation of your broader web experience and thus reflects the importance your organization attaches to customer engagement.

Deliver Self-Service Usability

To avoid abandonment and customer frustration, carefully consider the usability of self-service. The knowledge

management application can play a key role here, returning the most relevant information and preventing users from being swamped with too much data. For complex customer problems, dynamic scripting within the knowledge management solution can be used to help guide users through complex issues by asking a series of questions to narrow the issue. Where appropriate, familiar product images can be used to help guide customers toward the right answer to their problem.

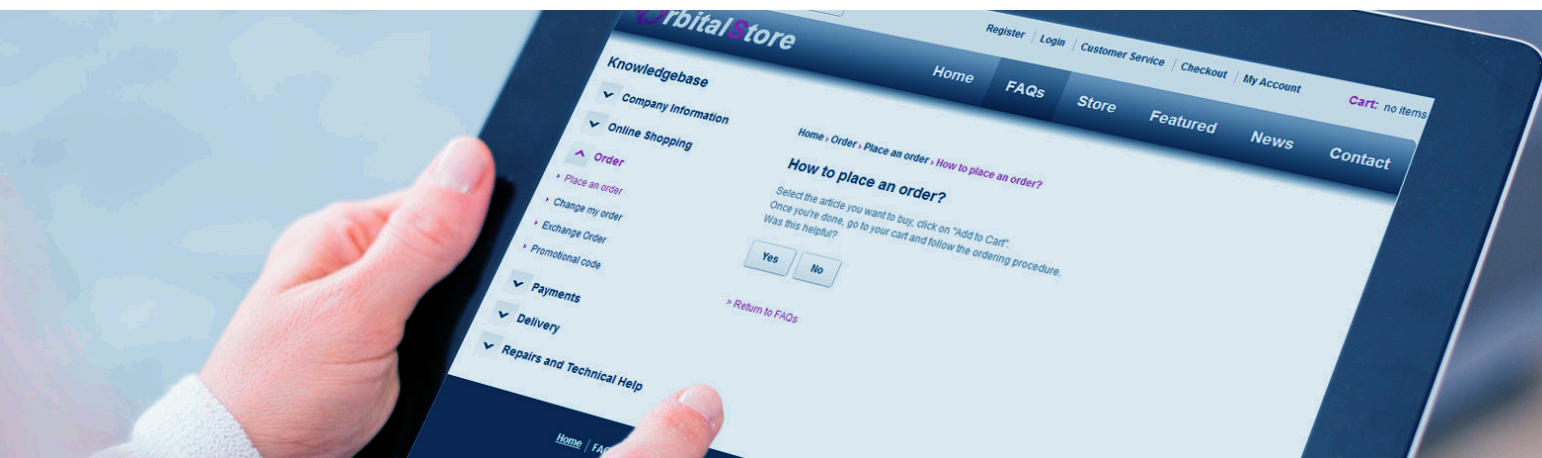
At all stages in the search for information, alternative customer engagement escalation channels should be clearly available to the customer.

Personalize the Experience with Contextual Relevance

By incorporating the context of the user's interaction, the self-service experience can become more personalized. For example, if a service is not available in all parts of the country, ask for the site visitor's postal code up front. Then, automatically filter content that is not relevant to their location out of the search results, offering only solutions and information for which the user is eligible. Doing so saves the user time and effort, and avoids frustration.

While there is nothing wrong with delivering conventional, passive solutions or information, usefulness can be greatly enhanced by going beyond the users' expectations when helping them reach the desired outcome. For example, when customers ask about return policies, provide them with an accurate answer—and then go one step further by offering them the opportunity to fill out the Return Merchandise Authorization (RMA) request form online and print a return mailing label.

This type of active relevance can be particularly valuable as a way to support sales during self-service interactions. An answer that describes how an accessory or upgrade to a product could solve the user's problem can be accompanied with an "Order Now" button so that customers can immediately add the accessory to their shopping cart.



Avoid Customer Frustration

Decision trees are an important feature of any self-service solution, and when deployed correctly, they can help guide users through complex issues and deliver more accurate knowledge to the customer. However, heavy reliance on endless decision trees can frustrate customers. Again, it is important that organizations take the customer journey through their self-service portal and see that assisted channels are made available when appropriate.

Integrate Web Chat

Web chat is growing in importance as a customer service channel and is a key escalation channel for self-service. The benefit of web chat as an assisted channel is that the customer still retains power to request, accept or reject assisted service, and chat can be easily integrated within a web or mobile application. Similar to self-service, integration with knowledge management is essential for web chat, so that any knowledge management investment for self-service can also be used for web chat. Verint has also published best practice guidelines for web chat that can be used in conjunction with this guide.

Deploy Self-Service as Part of an Omnichannel Engagement Solution

Deploying self-service as a point solution in the long term can lead to higher costs as organizations attempt to integrate their self-service application with other customer channels. Customer engagement point solutions reinforce business siloes, discourage customer service collaboration and make it much more difficult to support blended contact centers.

During the course of a customer engagement, it may be necessary to transition customers to other more appropriate channels. Self-service should thus be part of an omnichannel customer engagement solution that supports the ability for customers to seamlessly transition from self-service to assisted channels (e.g., chat, co-browse, voice) without loss of context.

Promote Self-Service During Escalation

While escalation channels, such as email and web chat, need to be readily available to self-service users, this does not mean agent assistance is the only way to help. By incorporating passive de-escalation into the escalation process, you can give customers one more chance to find the right answer, while still responding to their requests for help.

Passive de-escalation uses the data the user has entered in the escalation form to automatically search the knowledge base for relevant articles, and then presents those articles before the request is sent. This can work because customers who are

writing for live assistance often restate their issue in different terms than they used for the initial self-service search. Smarter search engines can make good use of these more specific descriptions and the context provided in the escalation form. The user can review the suggested articles and, if they still do not answer the question, continue to submit the escalation.

Measure Performance

Ongoing measurement of the impact of self-service is critical to evaluate the effectiveness of the project and build a business case for further investment. Metrics selected should include customer experience as well as self-service operational performance or effectiveness measures. Examples include:

Customer Experience Metrics

- NPS
- Percentage of positive knowledge base responses from customers
- Self-service customer satisfaction

Self-Service Operational Performance and Effectiveness

- Self-service number of hits
- Most popular pages
- Self-service growth rate
- Self-service rate
- Percentage of online visitors without an assisted interaction

Promote Social Communities

Social communities are another source of self-service knowledge. Social communities enable customers to support each other in peer-to-peer forums and access relevant knowledge from other community members when searching for information. If they exist for your organization, you should promote social communities through the self-service application. If appropriate, you can also choose to include community results as a section in self-service search results.

Don't Forget Upsell

Customer service also presents an upsell opportunity. Upsell opportunities should be considered during self-service customer engagements. Upgrades and product offers can be made automatically based on the context of the self-service engagement. Context can be used to determine when upsell is or isn't appropriate. For example, it is inappropriate to attempt an upsell when the customer has a serious or complex issue. Upsell, if performed, should be done subtly and should not detract from the overall customer service experience.

Use Multimedia

Organizations should consider the use of video clips and demonstrations to support self-service if it is appropriate for their products and customer base. Video answers can be embedded within self-service answers. Complex technical inquiries that could potentially take multiple customer engagements and significant time to resolve can now be more efficiently addressed through the customer viewing a short video online. The service experience for customers is also improved when, in contrast to making a lengthy phone call, customer can access and replay video answers any time of day or night at their convenience.

Consider Future Self-Service Evolution

Self-service no longer has to be delivered via a traditional browser or app on a PC, laptop or mobile device. Emerging self-service use cases include device-based self-service on, for example, printers and wearable devices. Embedding knowledge into devices gives the user immediate access to context-based support information directly related to the product issue without having to find and locate information on a traditional web site.

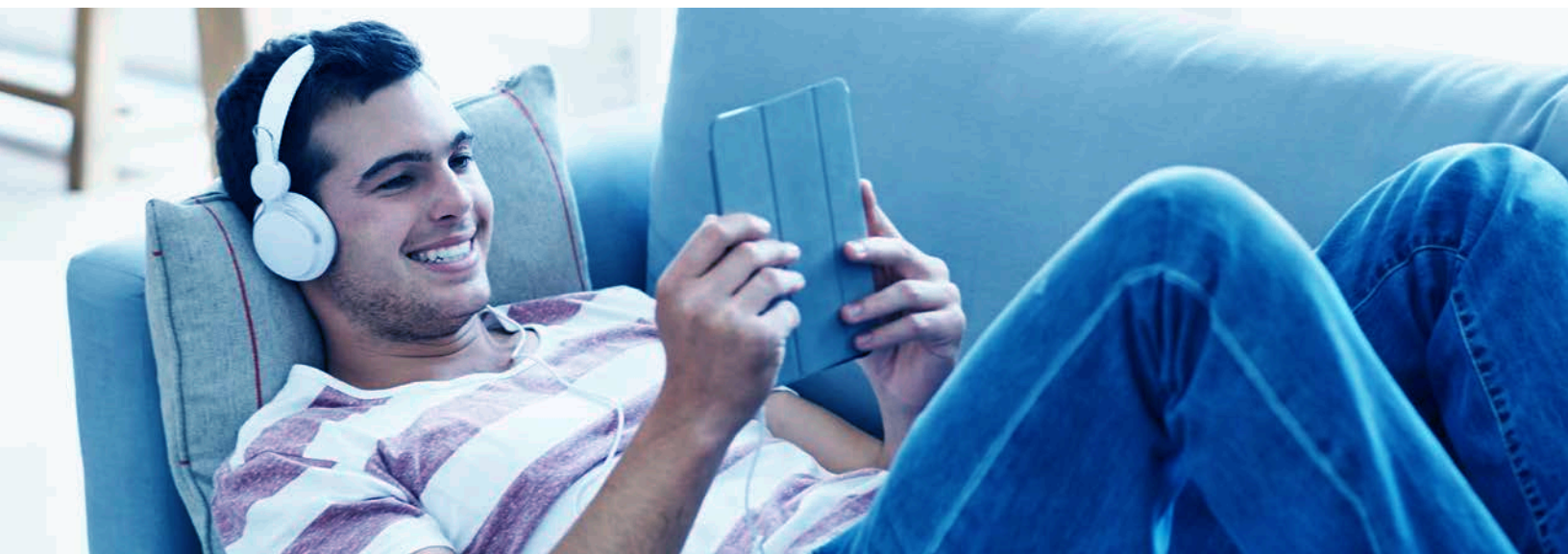
Look for Customer Feedback

The self-service portal should give customers the opportunity to quickly rate self-service articles, as well as provide feedback on their self-service experience. This information can then be used to continuously improve the self-service experience for future customers.

Integrate with Case Management

The ability to raise and obtain the status of a customer case is a major contact driver for many organizations and thus a self-service opportunity. Customer cases can cover a spectrum of reasons, from raising and obtaining the status of a mortgage or loan application to requesting a refund or raising a formal complaint. Cases are likely to cover issues and requests that are of high personal importance to the customer. Thus, great care should be taken with the design of the self-service experience.

Case management customer processes will often require the exchange of personal information, requiring customers to login to a secure personal account where activities can continue to be supported by self-service.



Conclusion

Self-service can provide organizations with big rewards if done correctly, but can also pose a huge risk for companies if implemented incorrectly. Self-service is an opportunity to win new customers or lose existing customers. When a customer comes to your website, it might be the only interactions he or she has with your company. If you don't make it a positive experience, it may also be their last.



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