



# Tapping the Web's Self-Service Potential

By D. Blake Cahill

How many times a day does a call center hear customers bemoan failed attempts at problem-solving using Web-based self-service? Anecdotal information says, "Way too often." Clearly, making Web self-service work for customers is an important strategy in improving the customer experience across all channels. How is it done? By taking a multi-channel approach to support system design and carefully building a Web self-service environment around customer needs. Not just another empty promise, this method has resulted in substantially increased Web self-service use, lower call volumes and happier customers—and support agents.

## **Snapshot of the present**

Web self-service currently accounts for a small percentage of overall customer interactions. Deena Cherenza of the Yankee Group reports that only 7.7 percent of all customer interactions happen via the Web self-service channel, according to a 2005 survey. This percentage is expected to grow to a modest 14.3 percent over two years. In contrast, the SSPA (Service & Support Professionals Association) reports that 32 percent of customers favor the Web for self-service, yet the growth in actual usage between 2003 and 2005 accounts for less than two percent of new interactions. And given the SSPA's finding that customers currently experience faster resolution of their inquiry via the phone, there is significant untapped potential in Web self-service.

## **What's keeping customers away from self-service?**

Bad execution. According to John Ragsdale of Forrester Research, after five to seven attempts at using Web self-service a customer will never try again. Making Web-self-service efficient from the customer point-of-view is the key to lowering the time it takes for them to get the help they need and eliminating frustrations that build up while they're hunting around unsuccessfully.

## **Laying the groundwork: customer support channel integration**

Integrating the content that feeds into all customer support channels and the analytics that come out is the place to start. The knowledge articles available to customers and agents must address actual needs, be understandable from the customer point of view, reflect current information and practices and be consistent across all channels—including phone, Web-self-service, email, online chat, kiosks and everywhere else where support is provided. This centralized approach will both improve the self-help experience and improve phone interactions because both agent and customer are working with the same information.

Gathering data about which articles are accessed through which channels and with what frequency will short-cut the improvement process. Understanding content and cross-channel

customer usage patterns makes decisions about where and what to improve more informed. Continual feedback provides opportunities to improve service and the underlying systems that make support possible.

### **Web self-service environment must-haves**

Once the right content and measurement tools are in place, the Web self-service environment is the place to focus. The design goal is for a customer support approach that reflects your unique customer experience. Here are the top design considerations:

- Clear definitions of the customer problems that will drive the support environment and offered solutions
- Ease of use/ease of navigation
- Multiple navigation choices
- Use pictures versus words
- Creation of a personalized experience
- Education of users as they proceed through Web self-service
- Customer satisfaction measurements

### **Breaking it down**

Making Web self-service easy to use reaches into every aspect of environment design. Starting with the organization of content and the pathways created for customers as they navigate through various self-help layers, the system should get customers to their solution destination in as few steps as possible. And, the answer must be easy to understand.

Frequently asked questions (FAQs) are standard fare yet are a point of frustration if the questions aren't the ones that are top-of-mind for most users. A dynamic FAQ section monitors and ranks the frequency with which each knowledge article is accessed. This continuous measurement allows for adjustment of FAQ content and order—and suggests whether or not information provided elsewhere is sufficient. If too many people are asking the same question, it's a clue that more information on that topic is needed elsewhere. A good FAQ section will also connect users to other self-help tools, like search options to further investigate a topic or problem area.

It is also helpful to give customers search options that are easy to use. Natural language searches and knowledge base browsing functions let customers with different levels of technology experience find what they need using the means with which they are most comfortable. Presenting different navigation options and placing them at different junctures within the self-help environment accomplishes two things: it gives users multiple chances to access information as they discover what they need; and helps educate them about what's available and how to access it efficiently. Deflection tools—such as automatically presenting a customer with knowledge content related to the subject of an email inquiry before they hit the “submit” button—have been shown to resolve 20-40 percent of cases that were headed for the assisted email channel.

What about the information itself? By far, the best way to present content that describes or assists in product and service use is through illustrations and pictures supported by instructional text. The more complicated the instruction, the more pictures will help customers solve problems on their own. It is often useful to create content in different languages for both

customers and agents, all with the goal of developing content that makes consumption of information easier for customers.

Delivering a personalized experience can be as simple as offering different self-help sections for different product categories, for example. Taking this another step, companies can institute a log-in process that connects customers with information about only those products or services that are relevant to them. Personalized Web pages that give customers access to their individual support histories can track current inquiries or activities (such as a work order) and connect customers to information they've found helpful in the past.

Educating users about Web self-help begins with marketing and design of the self-help environment, and continues through agents that assist customers via email and phone calls. Agents can routinely refer callers to specific self-help pages for additional support, helping customers experience Web self-help as a viable option for problem-solving and general information.

Is it working? The only way to know if customers' needs are being met is to ask them. Simple satisfaction questions at various stages in the self-help process will provide data to supplement the usage metrics. Together, these measurements provide feedback for ongoing improvements to the Web self-help environment—and the systems that it connects to, including other support channels.

### **Web self-service success and the support matrix**

Making the effort to design, support and implement customer-centric Web self-service pays off in several ways. Companies using this approach have seen their customers gravitate to this cost-effective channel, accounting for 80 percent of all interactions within a two year period. And while there are clearly costs associated with developing and maintaining great Web self-service, the same companies experienced return on investment after eight months of implementation. What does this mean for the call center? Customers that email or call tend to have higher-level needs and use the assisted channels more appropriately. They have fewer complaints about time wasted trying unsuccessfully to get help—shortening calls and giving agents the chance to do what they do best: connecting customers to the information, products and services they need to build further customer loyalty.

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