Get Customers to Love Self-Service in 4 Steps

Encouraging self-service is a major element in delivering a more connected customer experience. Leverage these four steps to start reducing organizational costs, increasing multi-channel efficiency and improving customer satisfaction.

1   Design automation with your customers' functional and emotional needs in mind

Encourage self-service by making your customers' IVR experience even better than their agent experience. Trends show that customers would rather self-serve than speak to an agent if it saves them time. The key to boosting self-service acceptance? Make automated functionality *exceptional*.

- *Deliver what your customers want.* Why do your customers call? Use data to determine common pain points and create solutions that address them. Automate easy, repetitious tasks such as password resets. Examine your technical support calls and provide simple instructions via IVR to reduce agent-handled calls. Integration with a back-end knowledge base is key.

- *Know your customer.* Customers struggle to self-serve when menu options are complicated. Furthermore, they speak their own language! Walk in their shoes to decipher it. In a speech-based IVR, capture as many utterances as possible and code the *right* grammars to address their most common needs.

- *Make all digital channels equally "understandable."* Once your IVR reflects your customers' needs, mirror its functionality across all channels. Your IVR development team should work closely with your Web team to drive consistent messaging and a familiar customer experience across every channel.

- *Automate.* Delivering seamless automation is an ongoing process. Regularly audit customers' requests for assisted support and provide self-service alternatives whenever possible. It's not always necessary to automate an entire call. Shaving even a little time off the front of a call to verify a customer can result in significant long term savings and speed-to-resolution.

2   Blend channels and allow seamless escalation

- *Make it seamless.* A well-oiled IVR can effectively address a breadth of customer concerns, but some issues require agent intervention. It's important to tie agent transfers to instances where customer responses are slow or invalid. Rather than discouraging agent support, brands should focus on delivering automation that feels more natural, while offering a transparent way to connect with an agent when it's necessary.

- *Blend.* Ensure that all communication channels, including IVR, Web, social media and mobile are one seamless customer experience. Your customers don't see the phone call they placed and text they sent as two separate conversations. Don't treat them as such.

3 Promote self-service offerings

A savvy customer will self-resolve again and again if you've made it a consistently successful venture for them. Customers new to self-service, like the elderly, may need a little more convincing! Actively promoting self-service is often overlooked. A cautious, yet consistent approach to encourage adoption is a smart step forward.

- Briefly introduce an opportunity for quick and effortless self-resolution at the front of the call.
- Reemphasize the opportunity on your automatic call distributor (ACD) hold message. (No more than once on a short queue; no more than twice on a long queue!) Drive the point home by including the opportunity in other channels like email notifications, voice notifications, click-to-call SMS and even in-store explanations.
- Encourage agents to highlight the merits of self-service during a call. They could remind a customer how quickly their concern could have been addressed via "Option 3" in the IVR, for example.

4 Measure self-service success

Design and build reporting metrics for every voice prompt, every timeout, every hang-up and every invalid response within your IVR. These reports will instantly provide actionable insight into how customers are successfully, and unsuccessfully interacting with your IVR.

Habitually monitor these reports to identify trends or changes in behavior. A new IVR can take 30 to 90 days to "soak" for customers, especially if the IVR is only used by a typical caller sporadically. Make *thoughtful* adjustments, and ensure enough time has passed for familiarity to set in before making radical changes.

Regularly measure automation effectiveness parallel to assisted support. Track things like:

- Customers calling IVR versus fully self-serving (SSR)
- Customers contained within IVR and not transferring to an agent? (Containment)
- Timeouts and invalids logged for each voice prompt
- Where hang-ups are occurring
  - How does this compare to requests and success of assisted support (or the likelihood that a customer will find and answer through self-service)?
- Repeat calls
- First-call resolution (FCR)
- Customer satisfaction (CSAT)
- Revenue/efficiency gains
  - Bill volume/amount paid, etc.
  - Appointments scheduled
  - Truck rolls reduced

Looking for other ways to improve your customers' self-service journeys?
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