KNOWMAX

The Self Service
Playbook

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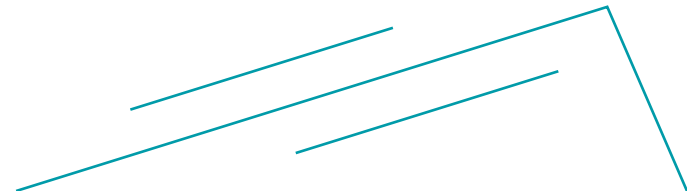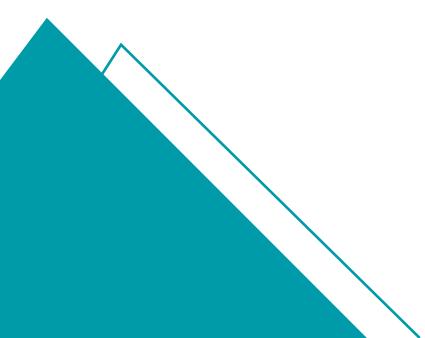
Introduction

Consumers today are more aware and smart than in previous decades. They not only become direct faces of an organization but also are one of the pivotal mediums of market occupancy and sale. No organization can run without up-scaling branding thus making customer satisfaction an essential and not just a fancy to uphold.

When customers encounter a problem, they usually exhibit a low rate of tolerance towards any delay in resolving same. Thus, it is mandatory for organizations to find concrete and crisp ways to deliver quick solutions. One of the most flexible ways to provide same is through an efficient mechanism of a self-service portal that can get easily integrated overall touch-points and guide users to a proper solution with interactive tools.
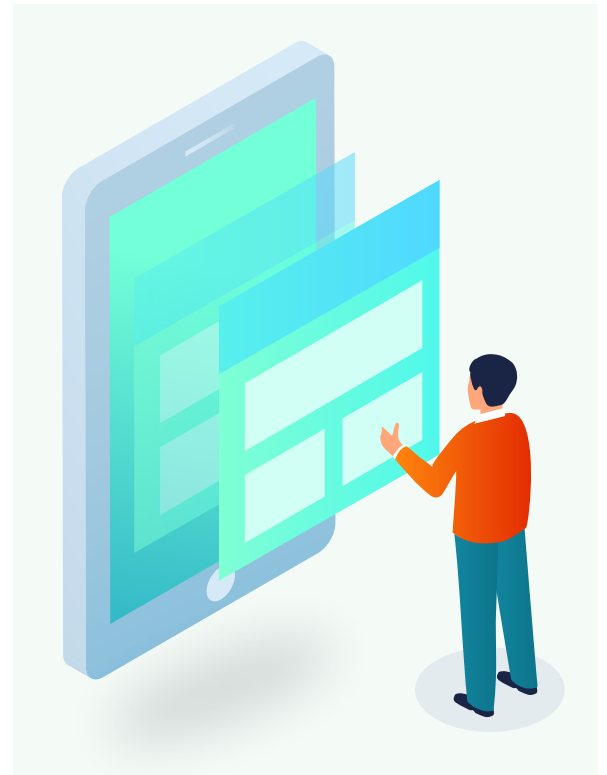
Self-Service

"Around 70% of organizations find customers call or email less once virtual chat assistants or VCA's are implemented. The study also reports increased customer satisfaction and a 33% cost-saving per voice engagement."

- Gartner (3)

Self-service mechanism is aiding your consumers to solve petty issues related to product or service on their own. It not only instils confidence and dependence in their minds but also strengthens the bond and trust they have with organization. It empowers customers to register any issue they have and resolve it. The organizations moreover can figure out nature and extent of problems being encountered by users with product and pay attention to improving their key research areas.

With advent of technology, it is no big surprise that ease of access to almost every sphere has opened up. In such a scenario, if a customer is made to wait at disposal of a call center agent for gathering all details, hold calls, search for solutions through their knowledge base and then give insights to a user; it is bound to irritate them off. The obvious dialogue one can hear after this shall be, "Had I known that for such petty a solution I'll have to wait for this long, I would have rather done on my own." /"The time I wasted rambling my brain with them, would have switched to a better product in less than half of it."
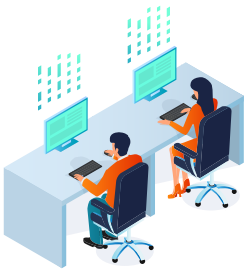
Need for self-service

To consumers

The long and tedious call procedures, a cranky music playing with a computer-generated "Please wait, you will be connected shortly" voice, wait time of up to 5 minutes on an average, only to call multiple times and still not be reciprocated with satisfaction!

An issue once arises and also gets solved quickly within a few clicks by self not only builds trust of consumers but also makes them feel independent. Amongst a plethora of work lined up for them to be indulged with, time saved and resolution achieved acts as cherry on the cake for them in a busy schedule.

To CX heads

CX heads are responsible for scanning all loopholes that might be real grounds for weak CX scores. The better you cater to a customer, better is your CX (Customer Experience) score. Whenever a sale is made, primary objective of consumer rests at deriving maximum comfort and auxiliary facilities. The moment any issue is encountered with and solved sans delay, your customer not only inclines about your service quality but also creates a fandom about your organization thus boosting CX scores.

To digital teams

No better boon for your digital wing than receiving direct insights and data in a workable form. Application of self-service enables tracking of what aspects of a product or service are most enquired about in terms of use and handling. What page does a consumer land on and stays for what time, which sections satiate them most and which need to be worked with?

To agents

Since the time a call is received a timer keeps running thus evaluating Average Handle Time (AHT) taken to close a ticket with 100% satisfaction delivered on consumer's end. If knowledge present with agents is not sufficient, time taken for them to scan through lengthy, stuffed and complicated articles and lists of questionnaires won't come to rescue. This shall further reduce FCR and C-SAT. With interactive self-service modules over all possible channels, even agents can improve quality of service, reduce AHT, and solve complex queries through simple tactics.

To organizations

It might seem like self-service is a module of disrupting personal touch of a consumer from host organization but benefits reaped put of its execution are unparalleled. Not only can this be applied over almost all consumer

touch-points giving a 360º cover, but it also reduces burdens of multiple calls over agents with almost nil impact on connectivity image of the organization.

While number of tickets per agent is reduced, it ensures efficiency of their work and reduces Average Handle Time (AHT). This leads to lesser response time. Fewer tickets per agent bring in lesser agent requirement thus saving your organization a fortune on your OPEX cost funds.

History

Do you know that self-service came up as a thought-baby to save the world from great economic crisis of 2001?

First used as 'self-sourcing' in 2005, (1) this term stood to mean replacement of skilled and paid human labour by that of mechanically trained and unpaid machinery. An article in HRO Today by Jay Whitehead states the struggle they faced post 9/11 attacks to rebuild all offices and get the trembling economy back on track. The losses were huge and lack of office infrastructure made it essential to find an alternative for keeping work on-going in accordance with other global franchises. This lead all heading teams to come up with advanced models that used machines and their connected device ecosystem to help end-users navigate their own way out to petty functions.

Current challenges in
self-service sector

A survey by Global Contact Benchmarking Report (2012) conducted with 637 respondents from 72 countries stated that 915 of organizations are now implementing some or other form of self-service. The number of organizations using self-service portals, techniques or modules has thus doubled.

Major challenges being faced by industry today in terms of planning, piloting, and execution of self-service are:

Against versus For

Traditional and modern ways of serving consumers differ a lot in their connectivity and approach. However, an organization should always strategically plan the extent to which each of them shall be deployed. While traditional approach of moving along with customers, help them journey to complex solutions with constant support irrespective of time involved; modern approach of self-service, to great extents, removes any such time and reciprocation involved barriers thus delivering speedy and apt solutions quicker than a flash of commands.

Final accounts give final results

Hiring of bulk contact center forces is usually viewed as a profitable investment as the manpower is trained for fluent vocal skills and is acquired at lower rates. To

another side of the coin, software required supporting development, creation, curation, and integration of self-service portals is considered as expensive. A major chunk of OPEX that goes into providing for manpower can be used to satiate the above and still roll on a positive turnover figure.

Safe but social information

Whenever a customer is required to fill in any information related to their personal data, it sounds as a potential fraud or invasion of privacy. While it is extremely important to provide safety of data that a user entrusts you with, it is also required to store the same centrally so that any information once entered and organized, can be searched and dealt with quickly. Omni-channel support provides an all-round assistance to consumer and seeks to be available at all points where a customer can contact the organization seeking help with regards to any aspect of product/service.

At first, the information needed is entered by user. If information has to be entered in at each touch-point that customer uses; be it their own details or progress achieved in problem being discussed, user is bound to lose their temperament with a high chance of negative review being carried around. Also, many times such an act is repeated, the many calls it takes for consumers to reach a solution satisfied state which becomes equivalent to a low FCR rate.

No actionable analytics

Real-time data access is needed today to track all that goes in and around your app and website. The results might appear progressive but might just turn out to be diminishing upscale. It becomes mandatory for digital campaigns to succeed. The data must be acquired, collected, organized and analysed in real-time and feedback mechanisms designed and executed as close as possible so as to provide for instant damage control as and when it appears to be.

Self-service can be provided through verbal means that help filter out useful information from a huge repository of information through sorted out Google-like search tools. Primary function of all such modules is required to be focused on the fact that it should essentially expedite time-saving on users' end. Solution provided should be in close reference to the problem put up and a high consistency of knowledge must be maintained.

Though it may not seem that big an issue, but if knowledge merely sounds similar instead of being consistent overall platforms it easily breaks the attention of users thus reducing your trustworthiness to them.

5Ws and 1H of successful self-service

What:

What delivers a successful self-service?

Self-service is a derivative of cooperation and understanding between corporates and clients. Modules deployed should thus be representative of the same. A simple decision tree flowchart or a visual guide touring seeker to the solution shall not go out of fashion meanwhile delivering crisp and simple solutions to a so-seeming uphill battle.
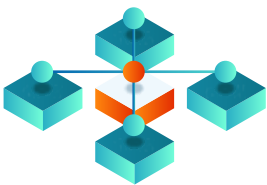
Where:

Where can such implementations be made?

With an efficient tool at your disposal, easy and seamless integration should be as obvious as given. A good self-service module must get integrated over all available touch-points open for a consumer to reach out through. A flawless tool should be capable of integration over website, app, text and call support, and social media support handle.

When:

When can self-support portals be opened to public use?

A self-service portal can be launched and immediately opened for use by public. The world of technology is quite dynamic and prone to changes and updates far frequent than stagnancy. Staying aware and upbeat is thus an essential parameter to be met. While in making, it should be launched as a pilot portal for testing purposes and be aired live only afterward.

Who:

Who can benefit from self-service portals?

Primarily aimed at reducing tickets per agents and speeding up complaint closure time for consumers, self-service portals come largely to the rescue of digital stakeholders, public relations department and service quality monitors. Thus, a pervasive approach of acquiring and implementing self-service enablement is mandatory in the nature of 'now' over 'maybe later'.

Why:

Why do organizations need self-service portals?

In a nutshell, the organizations, at each level need to minimize their workload shifting burdens at more reliable points. Such a precision of workload shifting and minimization can be easily capsulated by implementation of successful self-service portals.

How:

How reliable can self-service be?

Knowledge over self-service, unlike a contact center, can be accessed by both agents and end-users as well. This facilitates a two-dimensional approach towards constantly maintaining an up to date repository of information on the cloud. This not only centralizes data but also helps in speeding up search and application of information as and when needed. Thus self-service helps create time, place, and person utility for the organization. Over 50% of consumers feel that it's important to have provisions that facilitate them to solve their problems on their own rather than being directed to mind-numbing calls resulting in a blank outcome.

Channels

Application

Integrate your self-service modules with your application. Just as soon as the user encounters a trouble, first thought that instantly crosses their mind is contacting company through an official channel. If your organization uses an app based operation, there is nothing like it to provide self-service at same place thereby helping the customer avoid pains of multiple channel switches.

Website

Whenever a customer reaches out to you for solution; it is majorly through a Google search asking the way out of it. Once your own website's solution page appears on SERP, it becomes easy and trustworthy for the consumer to be there and get the solution state achieved.
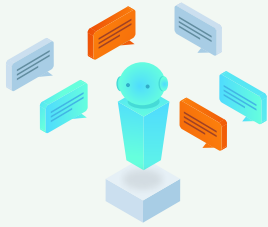
Chatbot

Chatting might be a waste of time according to the universal association of parents and bosses. What if it was this chat itself that gave you great C-SAT insights and ornamented NPS scores? Use your chatbot as an interactive tool to integrate over any platform and be capable for disseminating consistent information at each touch-point.

WhatsApp Bot

Why just stop at a chatbot when even that can be integrated with WhatsApp and be used to self-solve queries while already on at another task simultaneously instead of alternatively.

Social Media

A platform named to show off your chiselled marketing skills now carries the onus to show off your business tactics by simply satisfying your consumers at the platform they might currently be using. Hitting the iron when hottest is the best after all.

Modules

Decision Trees

interactive decision tree software resolves complex queries and simplifies customer interactions through a series of questions accompanied by multi-choice type answers. This streamlined technical process for support teams and customers has a step-by-step intuitive workflow. It allows users and departments to create guided workflows as per business needs. From resolving customer support tickets to streamlining communication within departments, a decision tree makes every operation a cakewalk.

How-To-Guides

it is the visual assistance that agents need while handling complex customer interactions. Picture guides ensures best for agents and users by allowing faster and efficient resolutions using images as a better tool as compared to words. Visual guides support resolutions for multiple devices like smartphones, smart televisions, tablets, etc.

Articles and FAQs

Over 90% of users would use an online knowledge base if it were made available. You can easily monitor words and phrases that users and support agents use to alter and improve navigation experience. Highest number of hits procured per keyword helps the organization to bid more and closely screen it.
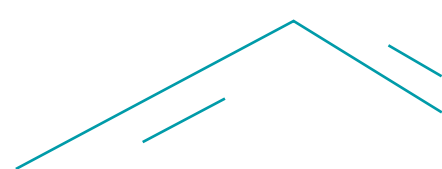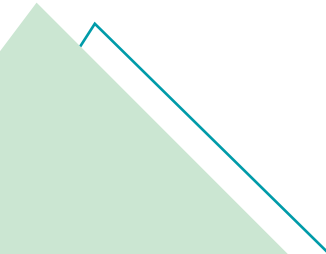
Augmented Reality

Standing on verge of expiration, gone are the days when physical presence was referred to as close supervision and guidance. With smartphones, co-browsing, and AI sensing cameras, it becomes a lot easier to share screen by asking for access permission and thereby guide user towards self-help solutions live on-product.
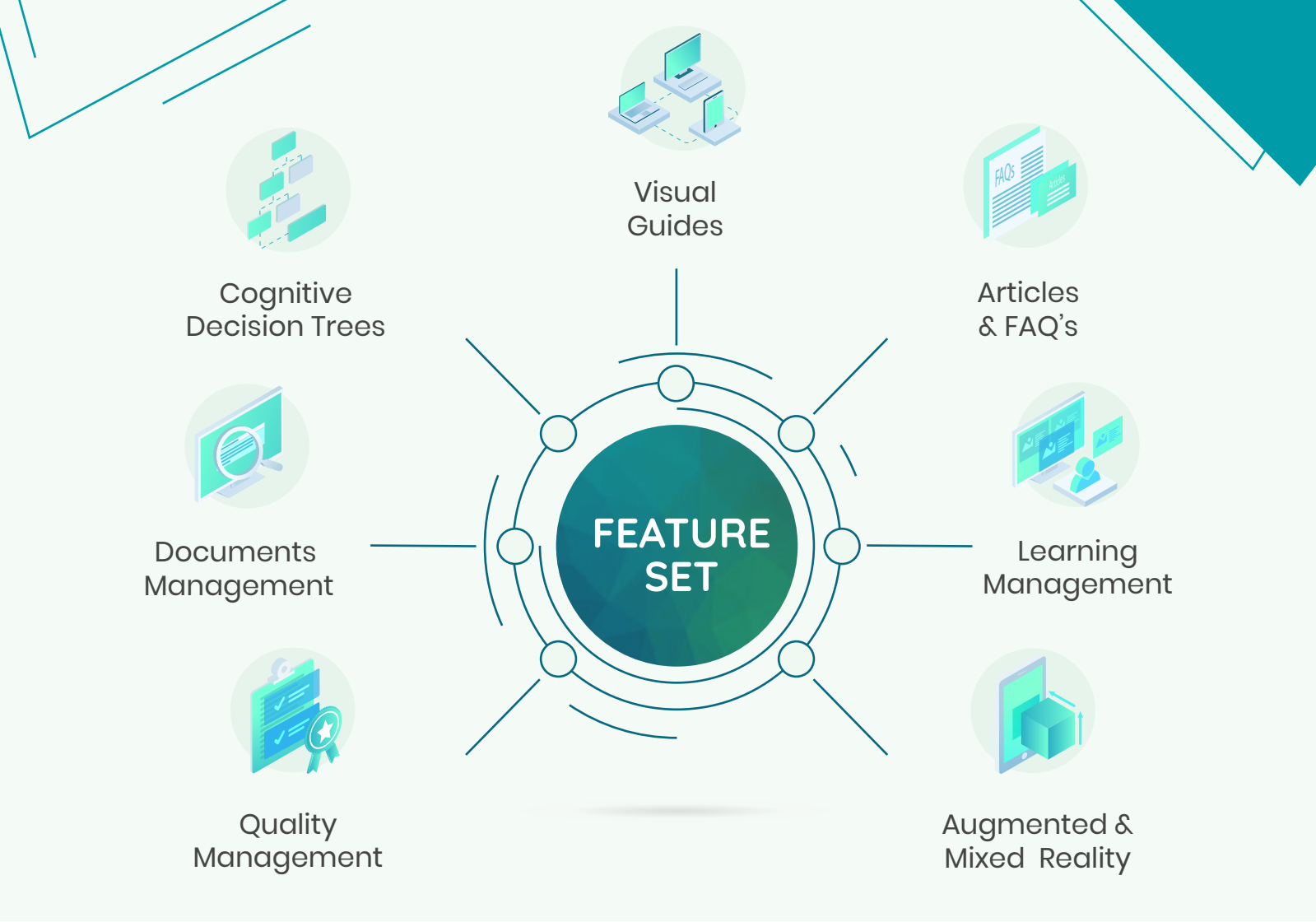
Conclusion

Nowadays, organizations have a workload of multiple processes and are unable to focus on what their customers expect from them. It leads to a haul in the customer churn rate. However, adaption of user convenience digital platforms empowers end-users to encounter and resolve their queries themselves thus delivering a great customer experience.

With self-help tools, customers will no longer beholden to on-hold queues, and follow-up calls. They can source solutions and proceed further. All-time accessibility to updated information makes your customers feel being heard and connected to the organization. In a nutshell, self-help tools are a boon that will minimize the time and effort taken to access, find, and implement information for both your customer and you.

Cognitive Decision Trees

Visual Guides

Articles & FAQ's

Documents Management

FEATURE SET

Learning Management

Quality Management

Augmented & Mixed Reality

Channels

Contact Center

Web

App

BOT & RPA

Retail

Field

Integrations

salesforce

zendesk

freshdesk
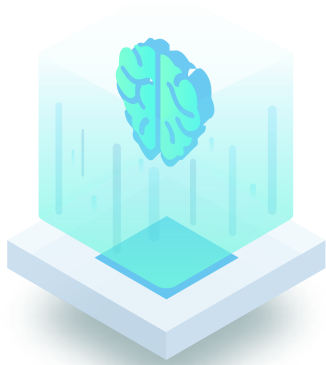
freshchat

talkdesk

SIEBEL

TIBC

yellowmessenger

AMEYO

INTERCOM

Some Of Our Global Customers

About Knowmax

Knowmax transforms the idea of knowledge management and highlights how it keeps everything curated without much effort.

A knowledge management software, Knowmax intends to organize information through the magnificent support implemented by artificial intelligence. It enables a centralized data repository for information management where businesses can expand the quality of CX from spectrum of content creation, curation and its diversified distribution across multiple channels. Knowmax simplifies the bulky organizational data and knowledge for individuals to understand and handle operations. AI backed tools make it easy for support professionals to find the relevant information while dealing with clients. When support agents get predictive search powered assistance through self-service platform, the businesses encounter plenty of revenue generating opportunities while driving the vision of digital platform.

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