



E-book

Customer Engagement: **Driving a Better Customer Experience Through Self-Service**

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“If you want something done right, do it yourself.”

Or, as the literal translation from Charles-Guillaume Étienne’s *Bruis et Palaprat* states:

One is never served so well as by oneself.

Introduction

People often use this quote because they know what they want to do and would rather do it themselves – it takes longer to rely on others to complete the task.

Think of it this way: How many times have you called a company to accomplish what you feel is a five-minute task? Tasks, such as checking the status of an order or something as simple as changing your address and contact information.

You end up spending 30 minutes or more being transferred through multiple phone options or customer service representatives. Each representative must validate that you are the person you claim to be, and you’re put on hold two or three times during the process. All to do something you could have or would have preferred to do on your own – in under five minutes.

Customer service is changing. New bars have been set and customer expectations have evolved. While offering multiple channels of contact, such as telephone, email and internet, represented superior customer service in the past. Today that is simply a baseline model. The addition of social channels, broader engagement opportunities and demand for instant resolution of any question or issue has created the need for a “customer experience” model.

Customers simply want their needs met, their questions answered, and their problems solved; they want it done on their own terms, at any time. What’s more, they’re perfectly happy to do it themselves.

This eBook will explore how to drive better customer experience through self-service and why enabling 24/7 self-service opportunities for your customers are good for business.

Chapter 1:

Why Customer Self-Service is Good for Business

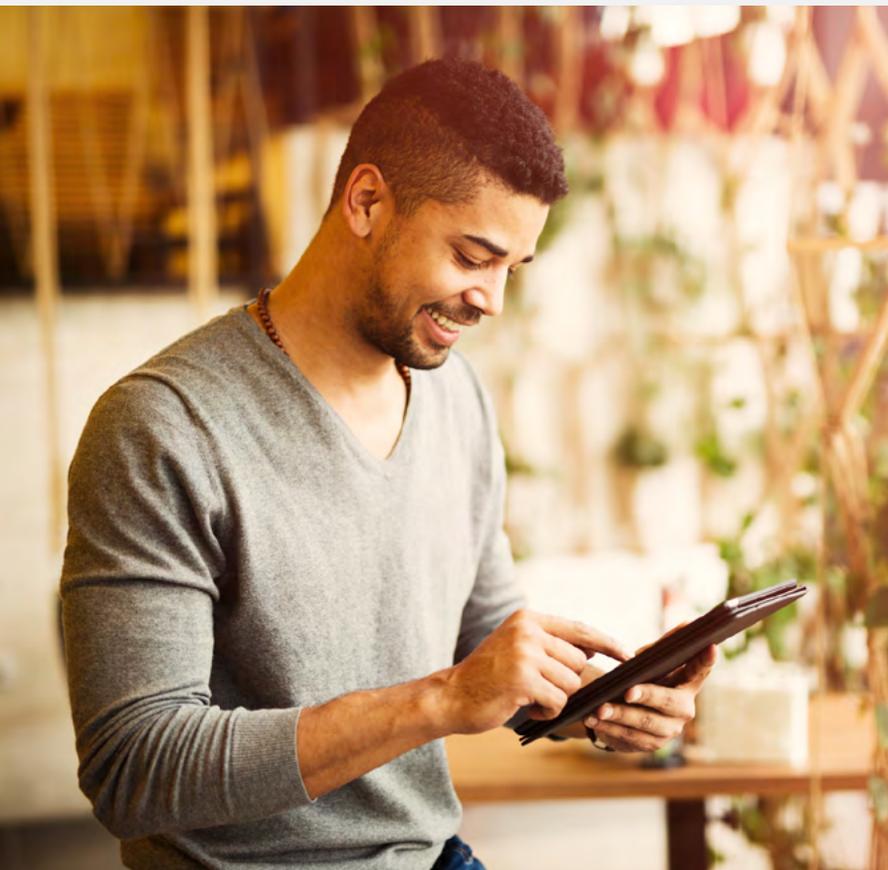
Take a flight anywhere these days and chances are you checked in, selected your seat, purchased your in-flight meal and added your boarding pass to your smartphone – all online. At the airport, you probably even printed your own luggage claim ticket before boarding your flight. Done your way, on your time, matching your preferences, and without the need for any further intervention.

This is the new customer experience model and increasingly, it is a model that has customers doing many things themselves. In fact, according to [research conducted by Aspect](#), using voice or phone was reported to be the most frustrating way to get customer service. That might explain [Twitter reporting](#) that customer service connections on their platform increased 250 percent in the last two years.

According to Gartner, 89 percent of businesses are expected to compete mainly on customer experience.[i] Investment in driving a better customer experience through self-service will be key to a company's competitive advantage. One of the [drivers of this evolution](#) is the fact that 54 percent of Millennials, 50 percent of Gen Xers, and 52 percent of Baby Boomers reported to Aspect and Conversion Research that they have stopped doing business with a company because of inferior customer service.

Self-Service is Good for Business Because It's Good for Customers

Through self-service, businesses will improve the customer experience. A Forrester Research study shared that 73 percent of customers believe valuing their time was the most important thing companies can do to provide them with good customer service.[ii] Self-service is the ultimate time saver, and in fact, 90 percent of customers expect a self-service offering.[iii]



To understand this trend, think about how customers contact a company when they have a question. [Research shows:](#)



73%
of customers
search online



13%
of customers pick
up the telephone



9%
of customers
use email



5%
of customers
use live chat



The online search actually indicates that the customer is trying to find the answer to their question themselves. If they wanted someone from the company to assist in that effort, they'd be more likely to call, email or use live chat.

In order to be effective, though, online self-service needs to be easy to find. In the same research, it was shown that 52 percent of customers will only spend 10 minutes or less in their search, and 27 percent will spend five minutes or less. If the answer isn't quickly available, the frustration starts.

Customers receive three main benefits with self-service portals, and these benefits are important enough for all companies to consider.

- ▲ Self-service provides 24/7 support. As stated earlier, today's customer wants to be able to help themselves according to their own schedule. They don't want to wait because a call center closes after normal working hours. That's especially true because the majority of people only have the time and freedom to look for customer support after normal working hours.
- ▲ With new technology, customers can easily find their own answers and perform tasks themselves. Knowledge management software is now sophisticated enough to make finding answers easy. And, with system security improvements, companies can offer customers the ability to do things like check in to an airline flight or change their address in a company's files.
- ▲ Customers will have options across channels. Some types of customer service support will always require human interaction. For example, the privacy required for financial transactions may always require the human touch. When companies centralize their customer data and make it available organization-wide, a customer might call a support representative, get an answer back via SMS, then confirm using email.

Self-Service Also Provides Big Benefits for Business

Any system you use that can improve the customer experience and help your business puts you in a win-win situation. Self-service is one of those systems, and can prove to be vital to your business success.

[Self-service can:](#)

- Ⓜ **Boost organizational efficiency.** For example, a self-service portal will reduce the number of calls that come in to a call center. In addition, support agents will be able to focus on more complex issues and resolve those issues faster.
- Ⓜ **Handle some semi-complex issues.** With a self-service portal, it's possible to create walk-throughs using screenshots and videos. This will leave only the most complex issues to be handled by call center or support employees.
- Ⓜ **Raise the perception of your brand.** Being viewed as technologically advanced will have a positive impact on your brand. Consumers, and especially B2B customers, will view your company as a leading-edge provider.
- Ⓜ **Reduce costs and increase profits.** With call center and customer service costs declining, your company will have a real opportunity to increase profits.

How to Begin Making Your Customer Self-Service Smart

The best part of a customer self-service project is that most companies already have the data to justify the initiative. For example, if a large portion of the calls coming into your support center have to do with changing contact information, that's an easy and quick self-service win.

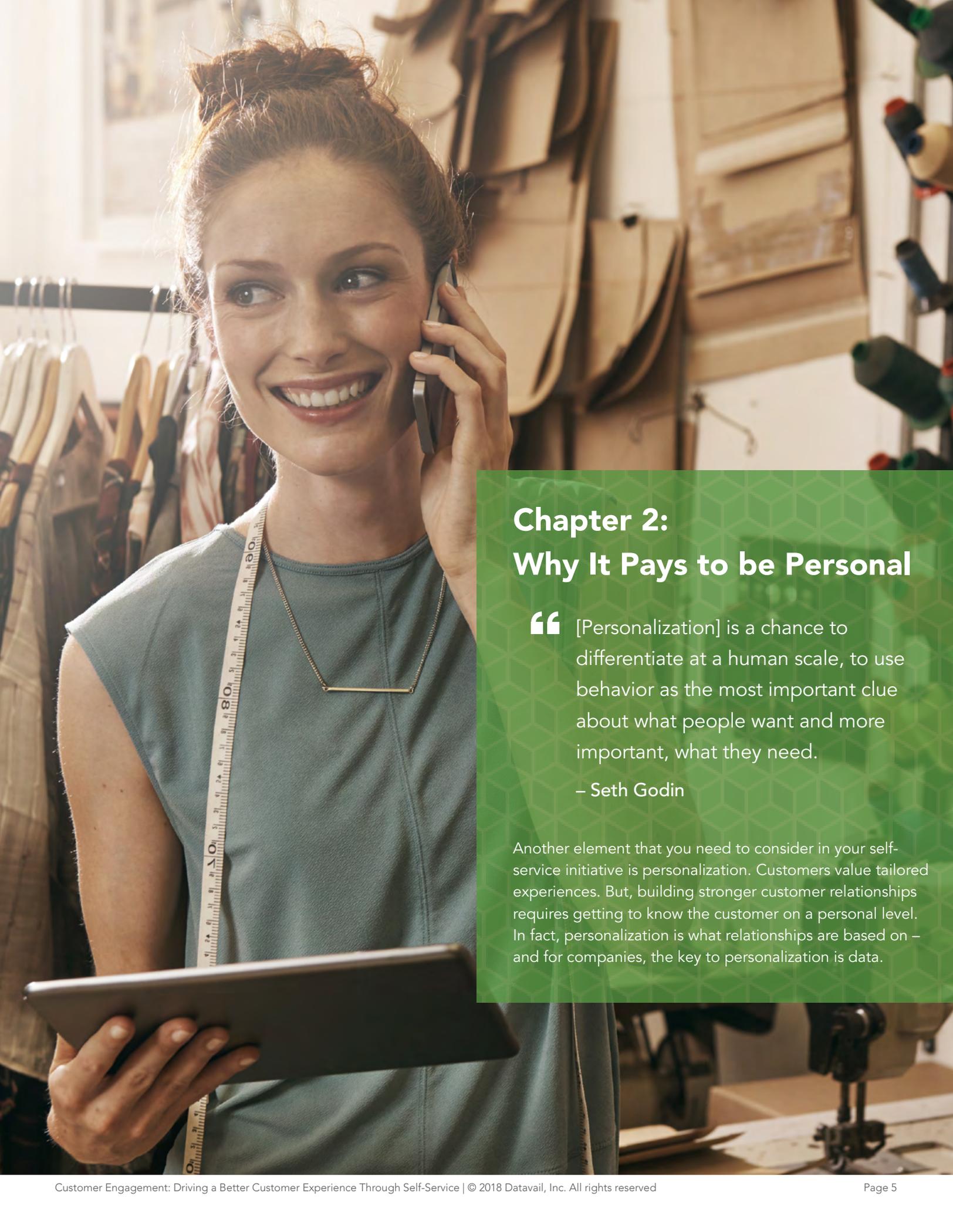
A system that allows customers to change their own contact information can usually be replicated at your own organization, simply by evaluating your current data on why customers call you. We always recommend examining your existing call center data – at least for the past 12-18 months.

This approach will not only identify your top-10 list of why customers call, but it will also let you categorize any seasonal or geographic trends that may influence how and where you begin your initiative.

Once you have your list, you can evaluate which ones might be simplest to move to a self-service model. Beginning with the easiest to move increases the likelihood of higher customer adoption once your self-service goes live.

It's a simple start to a smart self-service model designed to drive a better customer experience.



A woman with her hair in a bun, wearing a green sleeveless top and a necklace, is smiling while talking on a mobile phone. She is holding a tablet in her other hand. A measuring tape is draped around her neck. The background shows a workshop with various tools and materials.

Chapter 2: Why It Pays to be Personal

“ [Personalization] is a chance to differentiate at a human scale, to use behavior as the most important clue about what people want and more important, what they need.

– Seth Godin

Another element that you need to consider in your self-service initiative is personalization. Customers value tailored experiences. But, building stronger customer relationships requires getting to know the customer on a personal level. In fact, personalization is what relationships are based on – and for companies, the key to personalization is data.

How Personalization Can Pay Off

After two outages in less than a week, a frustrated customer contacted his cable provider to cancel service. However, the Atlantic Canada cable company had personalized profiling and tracking information available in real time. The astute customer service agent was able to understand the customer and quickly establish a personal connection on the phone.

The frustrated customer laughed when he related the story a few days later. He said that the agent was both knowledgeable and sympathetic and that by the time he hung up the phone, he had both renewed his contract and increased his service. He opted in for a more expensive plan that added a family-movie subscription service. The result was increased revenues, increased loyalty and a happier customer.

Customers who take the time to complain are often the ones who will be the most loyal if you have the information (data) and the capabilities to turn the story around for them.

Personalization in Customer Self-Service

Have you ever called a company to complain, navigated a lengthy IVR phone menu that required you to punch in numbers or select multiple options, only to be connected to an agent who needs you to repeat it all again?

Customers no longer have tolerance for poor technology that masks itself as streamlined customer service. Instead, doing customer self-service right means providing answers or offering services that are aligned to customer profiles or behaviors.

Consider some examples:

- ▲ Online orders that include links to tracking information pre-populated with the order number – the customer can track an order with one click of a button
- ▲ Text messages that keep consumers/citizens updated across a wide variety of preferences:
 - extreme weather conditions
 - sports-team scores
 - traffic alerts
 - sales or pricing changes
- ▲ Online portals that track behaviors and enable repeat orders with a single mouse-click
- ▲ Recommendations based on navigation and/or previous purchases
- ▲ Sites that offer a plethora of personalized experiences – for example, a travel site that offers seat selection, destination recommendations, loyalty recommendations, and other tailored offerings
- ▲ Social media [responses that are personalized](#), not automated one-size fits all posts
- ▲ Asking for customer feedback



Personalization Also Drives Benefits for Companies

A [recent survey](#) indicates that while personalization improves the customer experience, it can also be very beneficial to your company. Findings from the survey show that personalization:

Encourages people to make impulse buys:

49%

of customers said they made an impulse buy based on recommendations from the company

Tends to increase revenue:

40%

of customers said they purchased an item that was more expensive than they'd planned due to personalized service

Reduces returns:

A mere

5%

of impulse buys were returned and 85 percent of buyers were pleased with their purchases

Promotes loyalty:

44%

of consumers say they will probably make additional purchases after a personalized shopping experience

A person wearing a blue button-down shirt is pointing their right index finger towards the right side of the frame. The background is blurred, suggesting an office or service environment. The text is overlaid on a dark semi-transparent rectangle on the left side of the image.

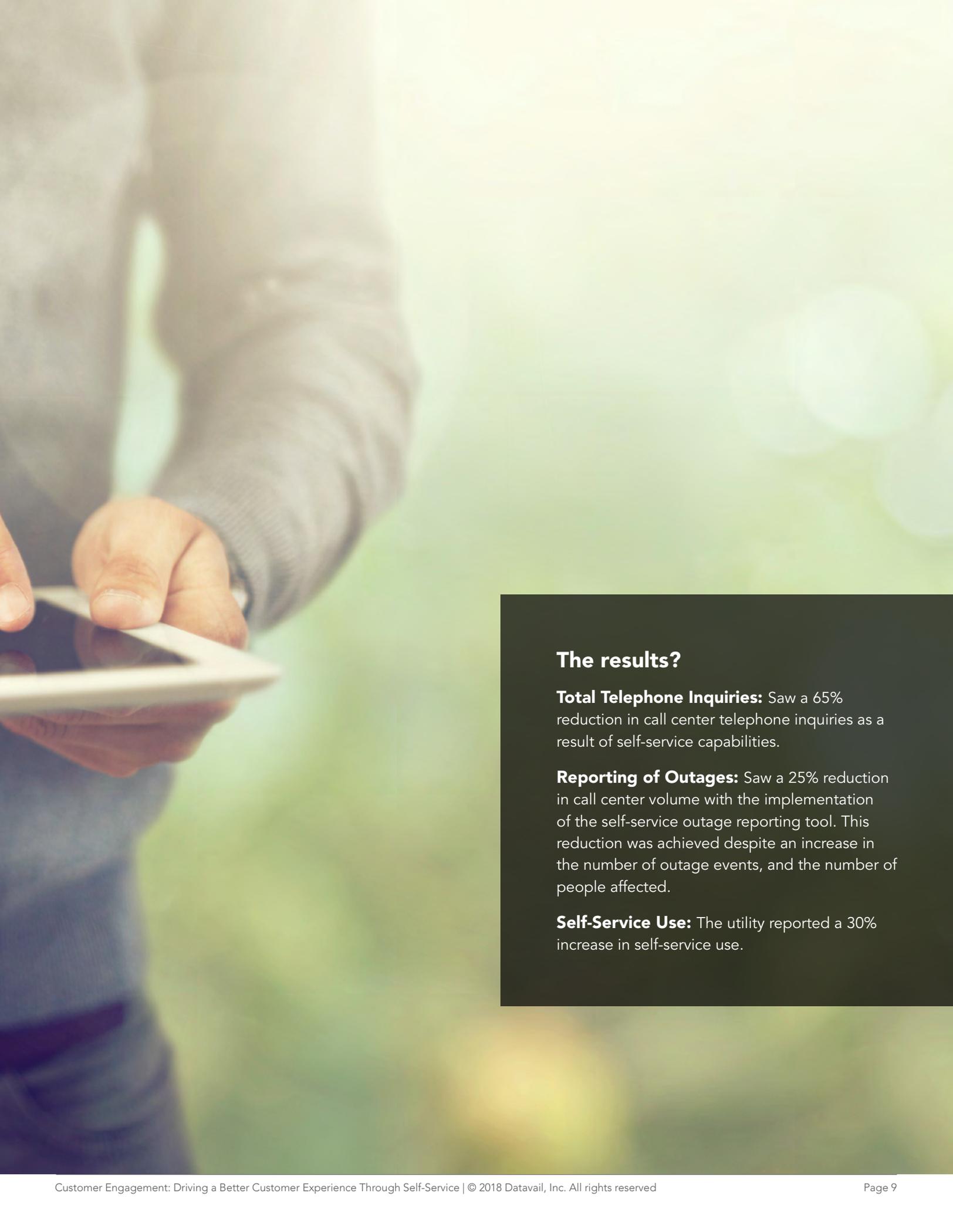
Chapter 3: How to Enable 24/7 Customer Self-Service for a Better Customer Experience

North American Utility Evolves into a Customer-Centric Business with Self-Service

Navantis, a Datavail company, worked with a North American Utility to implement the Customer Care Self-Service Reference Architecture for Utilities to deliver a highly functional customer self-service web presence.

The website provides 24/7 access to information and services customers need, such as payment history, bills, account details and also the ability to view and report outages in their area.

Navantis used call center data to understand what the utility's customers were calling in about. One of the top five requests was to update account information because a customer was moving or had a new phone number. The new self-service capabilities addressed these needs to make it easier for customers to engage with the utility on their own terms.



The results?

Total Telephone Inquiries: Saw a 65% reduction in call center telephone inquiries as a result of self-service capabilities.

Reporting of Outages: Saw a 25% reduction in call center volume with the implementation of the self-service outage reporting tool. This reduction was achieved despite an increase in the number of outage events, and the number of people affected.

Self-Service Use: The utility reported a 30% increase in self-service use.

Summary

In today's business environment, it's not enough to provide customers with several ways to reach your business. People want to simplify their lives by doing some things themselves. Self-service isn't an option, it's something your customers expect.

As a result, the future of customer service is self-service. Using a company's data that is already available, a self-service environment can be built that enables customers to do exactly what they want, when they want.

By moving back-end activities to the front-end, customer service costs (like call centers) are reduced and customers are happier, doing specific tasks themselves. This model delivers a better customer experience, reduces cost, and opens the door to drive improved personalization.

Knowing your customers – what they want and what they need - is the type of personalization that could turn a customer into an evangelist for your company. Alternatively, if you don't know your customers, you could be pushing them into your competitors' open arms.

Could your customer service benefit from starting or expanding self-service capabilities? We've done many engagements for additional utilities, Registered Electricity Providers (REP) and across other industries. Get a complimentary half-day review and report from a Datavail expert! [Contact us today](#) to schedule your evaluation.



References

[i] <http://www.gartner.com/smarterwithgartner/test/>

[ii] <https://go.forrester.com/blogs/16-01-28-online-self-service-dominates-yet-again-why-its-an-effortless-way-to-get-to-your-answers/>

[iii] <https://info.microsoft.com/dynamics365-global-state-cust-service-en-gb.html>



Biography



Vikas Mukhi

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Vikas Mukhi is an Enterprise Architect at Navantis, a Datavail company with 15+ years of successful leadership and experience in business processes, complex applications and secure enterprise-class solutions necessary for 24/7 business operations.

His responsibilities include Solution strategy and implementation for business operations and has been recognized as a customer-trusted advisor throughout the project life cycle.

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