



WHY SELF-SERVICE IS BECOMING A **TOP INVESTMENT PRIORITY FOR CONTACT CENTERS**

What Self-service is, Why it's
Important, and How to Get it Right

Back in the day, customer service was as simple as simple gets. You pick up the phone, dial an 800-number, and get placed with whichever customer support agent is available to help answer your question or provide the information you need. Some sort of generic knowledge would pop up on the agent's screen with a prompt or cue card for them to read from. The goal was to get callers in and out as quickly as possible while meeting their basic needs. Today, this looks entirely different thanks to automated self-service technologies.

Customers want answers fast and resolutions even faster, with the ability to do everything on their own – easily and seamlessly – if they so choose. Interactions that require additional assistance are now more complex than ever, challenging human agents to juggle multiple different apps and systems to get the information they require while meeting – and ideally anticipating – customers' needs. For managers, the rapid changes happening in customer service signal a need for greater agility to uncover new CX and revenue opportunities. Automated self-service addresses all of this and more.



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WHAT IS AUTOMATED SELF-SERVICE?

According to Zendesk, [nearly 70% of customers](#) will first try to resolve an issue themselves before talking to a human. This can be in the form of a web search, self-service portal, knowledge base, or interacting with a chatbot. Here is more information on these different applications of automated self-service:

Knowledge base

A knowledge base is a collection of published material that includes information and answers customers are looking for. It can encompass many forms of content, including commonly asked questions, how-to guides,

troubleshooting instructions, introductory articles, video demonstrations, and more. According to Zendesk, [91% of customers](#) would use an online knowledge base if it were available and tailored to their needs. Of note, video is rapidly becoming the medium of choice for instructional material.

Self-service portal

A self-service portal is a dedicated website that provides important information for customers. A good example of this is a healthcare portal, where patients can log in using registered credentials to view the results of their

medical tests, pay bills, and more. Microsoft reports that [77% of customers](#) have tried using a self-service portal at least once.

Chatbot

Unlike a digital or virtual assistant, a chatbot is reserved for more static interactions like a basic Q&A exchange. They are perfect for handling more basic inquiries like password resets and balance requests. Research shows that [70% of customers](#) prefer messaging over calling for customer support, and projects chatbots to reduce customer service costs [by up to \\$8 billion by 2022](#).

More recent applications of automated self-service – designed to streamline CX without compromising quality of care – include Conversational AI, digital deflection, and voice biometrics.

Conversational AI

Conversational AI enables customers to autonomously take care of things like paying bills, ticketing, and managing their account through a conversational interface (i.e., a smart IVR, voice assistant, intelligent chatbot) and go through entire processes without human intervention. At the same time, businesses can

discover what customers really want based on natural language processing and automated analysis of what customers say. With these techniques, they can improve CX both in real-time and over the long-term.

Digital deflection

Digital deflection allows companies to automatically recognize when a customer is calling from a mobile device and offer them the option to be redirected or deflected to a digital Web or mobile self-service experience. The customer can opt out at any time and go back to waiting for a live agent. Increasingly, digital deflection occurs across channels, as not only text but multiple messaging apps become contact center channels.

Voice biometrics

By recognizing a previously stored voiceprint, voice biometrics saves time that the customer would normally spend answering verification questions while improving business efficiency and costs. For a large enterprise where requests for support are high, this can lead to substantial savings while maintaining compliance, security, and customer satisfaction.

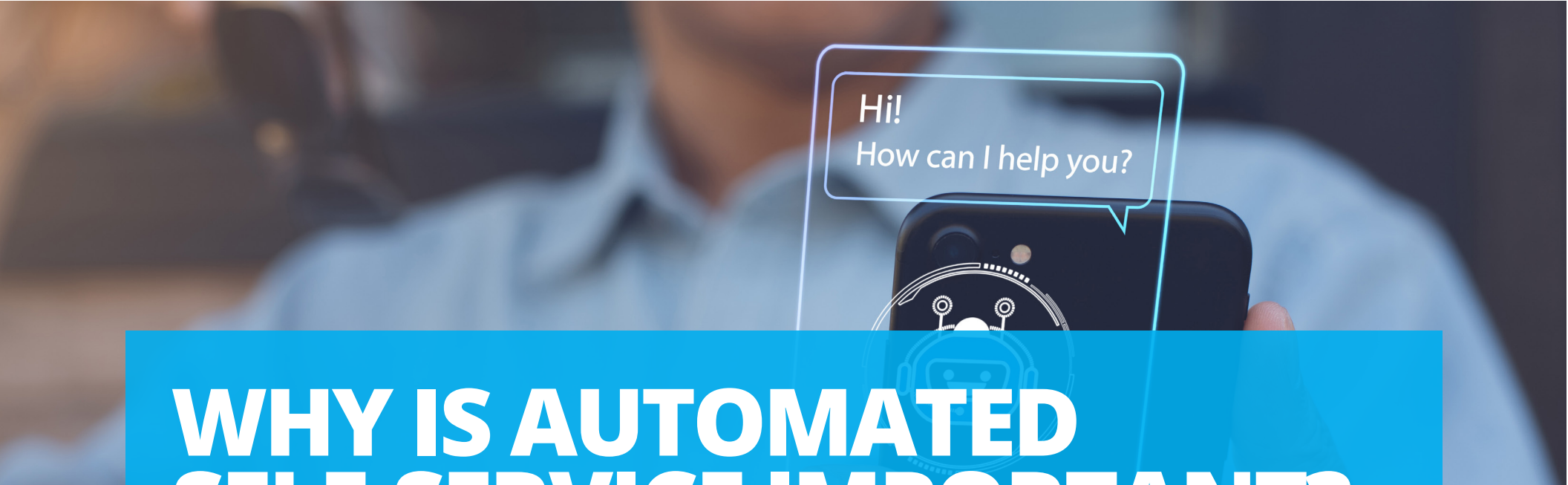
WHAT DOES AUTOMATED SELF-SERVICE LOOK LIKE IN ACTION?

A customer (let's call her Mary) is looking to apply for a new credit card with her bank. Automated self-service capabilities kick in as soon as she navigates to the bank's "credit card" web page, including support in the form of a knowledge base. The bank's knowledge articles include helpful information on a range of services, from "how to" information (how do I make a mobile deposit?) to educational information (what is a savings account?) to an FAQ.

Using the knowledge base, Mary finds the credit card application and begins to fill it out. There are some questions, however, that the knowledge base articles can't help with, so she turns to the bank's chatbot (available at the bottom right of her screen) for further help. The chatbot, designed to help with more basic inquiries, can only assist Mary to a certain point, and

so it automatically escalates the interaction to a live agent who is best suited to help her with her request.

Mary is able to authenticate herself via voice biometrics, avoiding the go-around most companies require and giving the agent extra time before getting on the line. Once they are connected, the agent is able to see through an integrated desktop Mary's current chatbot conversation along with links to other information that may be helpful. Any previous conversations Mary has had with the bank – using any channel or modality – will appear above the current conversation. In this way, automated self-service provides a seamless, naturally flowing experience in which traditional annoyances are eradicated and answers/resolutions are delivered fast and effortlessly.



WHY IS AUTOMATED SELF-SERVICE IMPORTANT?

When done right, automated self-service naturally improves Customer Effort, Customer Satisfaction/NPS, and Customer Resolution. There's a high likelihood that customers will be able to get the answers or information they need with automated self-service technologies. If they can't, they'll be seamlessly transferred to a human agent who will be able to further assist, equipped with the entire context of the service experience up to that point. Effective self-service provides options for customers depending on their need and level of comfort with the technology.

For agents, automated self-service helps improve consistency, productivity, compliance, and resolution

times – all which translates into better CX. Consider Conversational AI: by being able to transcribe the call and understand the customer sentiment and intent in real-time (i.e., “I want to make a return,” “I have a problem with my account”), the technology can automatically push relevant information, guidance or knowledge articles to the agent to better assist them in the context of the conversation. Popular CCaaS platforms like Amazon Web Services Contact Center Intelligence (AWS CCI) and Google Contact Center Artificial Intelligence (Google CCAI) offer solutions for this kind of agent support.

For managers, certain applications of automated self-service offer key insight into what customers really want, enabling them to better predict needs and train agents to better solve problems, cross-sell and upsell. For example, they can program their system to trigger discounts or other special offers based on intent and sentiment detected by Conversational AI.

Across all industries, we're seeing the rise of self-service as organizations aim to reduce workloads, increase operational efficiencies, and improve the customer and employee experience. In hospitals and doctor's offices, self-service patient kiosks (where patients can use an ID card to autonomously check-in and check-out of appointments and register for new appointments) are [expected to grow at a CAGR of 16% from 2021 to 2026](#). [In the public sector, over one-third of organizations say they will have 75-99% of their services delivered using digital self-service by 2024](#). [In the private sector, over one-third of organizations say they will have 75-99% of their services delivered using digital self-service by 2024](#).

In short, the top benefits of automated self-service for organizations include:

- Reduced number of support calls
- Decrease in wait and response times
- Decrease in total support costs (maintaining self-service channels is much cheaper than managing live support channels)
- Improved customer satisfaction and loyalty
- Greater agent satisfaction with better support
- Greater ability to adapt, grow, and identify new opportunities



HOW TO SUCCEED WITH AUTOMATED SELF-SERVICE

Ready to get started? Here are some tips to help you along the way...

Before you decide on which application of self-service to implement, decide what kind of information you want to provide customers.

Start simple. For example: password resets, bill pay, and balance requests. From there, it should be easy to decide which form of automated self-service will work best for your organization.

Maybe you'll want to offer access to knowledge articles including FAQs. Perhaps you'll want to offer peer-to-peer support through an online community, enabling customers/end-users to offer and receive help from one another. If you want customers to be able to log issues and service requests, a self-service portal might work best. If you're more interested in handling simpler requests, a chatbot will likely suffice. If you want to take this up a notch at any point, you can expand the bot's capabilities by having it authenticate users and provide them with a conversational interface to your enterprise systems.

Remember: self-service can save you money, but only if your customers actually use it.

Self-service is cost-effective, but only if it delivers the kind of value your customers are looking for. Focus on the user experience, making your self-service channels seamless and effortless across different devices and modalities. Here are [some stats](#) [🔗](#) to help guide you on what customers want most:

60% of companies don't store all of their support information in a single system, meaning customers have to look for answers in multiple different places. If you're going the route of a knowledge base, consider unifying information access to all useful content across your website (blogs, videos, knowledge articles, community forums) so customers don't have to hop back and forth. Also be proactive in providing self-service support; your customers shouldn't have to manually search for your knowledge base, chatbot, etc.

48% of companies don't involve customers in knowledge creation. Help your customers help you by allowing them to easily rate the content available on your site and share helpful content to your community. You can ensure the relevancy and accuracy of this content by having it undergo a formal company review.

92% of customers use search engines to find information. The last thing someone wants is a self-service channel that's difficult to navigate or takes them around in circles. Make search on your site intuitive so that customers can sort, filter, and explore results fast.

Focus on continuous improvement.

Constantly measure what your users do and their business outcomes so you can ensure continuous improvement. The goal is to make the self-service experience increasingly simpler, faster, and better. It is crucial to keep your business goals in mind, be they to deflect calls and save costs, provide a broader omnichannel experience, increase engagement, generate more sales, etc.

Don't discount the human element of customer experience.

Self-service will help reduce your number of support calls, but it's not the end-all for customer service. There's always the chance that your self-service methods won't meet your customers' expectations (or, as was the case with our example customer Mary, it will only be able to take them so far). Cater to most customers who prefer going through self-service to start their interaction, but always make it easy to be transferred to human back-up if needed.



SERVION IS HERE TO HELP

There's a lot to consider with automated self-service. You must carefully think about what types of activities you can (or more importantly, should) transition over to self-service. There's a great deal of data management and consolidation that goes into making it work (the more massive data sets get and the more that's needed to understand them, the more difficult it becomes to organize and manage everything). Perhaps most importantly, not all self-service automation tools are created equal.

A strategic technology partner is crucial for navigating the ins and outs of automated self-service. Servion offers an end-to-end, personalized approach that helps companies adopt, manage, and continuously improve automated self-service with solutions from leading technology partners like NICE, UiPath, Google CCAI, Amazon CCI, Automation Anywhere, Jacada, Koopid, Nuance, Selligent, and more. Here's how our customers are benefiting:

- ① Servion helped a US-based global information technology company implement a robotic process automation solution that reduced data errors and streamlined the workflow while producing quality, seamless integrations with ensured 100% protocol adherence and improved productivity. [Success Story](#) 
- ② A leading travel US-based travel agency used Servion to deploy a pre-emptive IVR solution that allowed them to reduce call abandonment rate and disconnection rates by over 70% within a few days of deployment, eliminated call waiting time and improved customer experience. [Success Story](#) 
- ③ A leading bank in Malaysia used Servion to start automating collections, card operations, and fulfillment - increasing throughput by 400%, reducing FTE by 69%, reducing processing time by 34%, and saving up to \$600k annually. [Success Story](#) 
- ④ A leading international bank in the UAE turned to Servion to design and develop an intelligent self-service application that includes promotional messages, multi-lingual support, caller identification, card activation and more. The automated self-service system has measurably reduced wait times, improved communications, and reduced time-consuming transfers and re-routes. [Success Story](#) 
- ⑤ Servion helped North America's leading telecom service provider reduce operational costs and improve service experiences with an AI-powered IVR. The solution can determine wait times in the call queue, predict customer intent based on information gathered through questions in the IVR, and intelligently authenticate customers. [Success Story](#) 

Now's the time to get on board, and a strategic technology partner is your best bet for doing so. Servion is here to help.

Talk to our automation and self-service specialists today.

For more than 25 years, Servion has been trusted by customer-centric brands for designing, building, running and optimizing Contact Centres and Customer Experience (CX) solutions. Our 1100 CX professionals apply their passion and deep domain expertise to the entire design-build-run-optimize solution lifecycle.

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