

# Integrating Self Service into Your Contact Centre

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## Self Service in The Contact Centre

Most call centres have some form of interactive voice system in place to allow customers to self serve using the phone. Many organizations also have websites where customers can seek information or perform simple transactions. Self service applications have many benefits. For the company they can reduce staffing costs and alleviate peaks. For the customer, they can speed access to information and offer transaction privacy.

But self service can't operate in a vacuum. In order to be successful, it must be a critical part of your contact centre. So don't treat phone and web self service like poor relations. By designing your applications with users in mind, and by linking the applications to your contact centre, you'll be helping your customers help themselves.

## Five Steps to Good Design

According to Giga Group ([www.gigaweb.com](http://www.gigaweb.com)), after 5-7 unsuccessful attempts at self service, customers will give up and go to the most expensive channel – speaking with reps. So make sure you design applications that customers actually want to use. Here are a few tips to guide your efforts.

### *Align Applications with Your Overall Self Service (and Customer Service) Strategy*

- Offer core information and transactions both on the IVR and the web, and more complex applications on the most appropriate media.
- Be consistent across media. Ensure that information, wording and passwords are used consistently to reduce customer confusion. Use the same data source for all media.
- Ensure that marketing materials promote your self service applications, setting realistic expectations and giving users guidance on what they need to use them successfully (passcodes, account numbers, PC specifications etc).

### *Consult Customers*

- Conduct focus groups with customers where you ask users what applications they want to see, and what they would prefer to use on the web or voice self service.
- Test applications for usability. Always conduct usability tests with real customers, and don't cut corners! Testing should focus on whether the application is simple and efficient to use, and if customers can easily find what they need. Also test to make sure that you're using clear, everyday language. Finally, usability testing should check that the information users receive is unambiguous, accurate and complete.

### *Help Customers Correct Errors yet Stay in the Application*

- Provide IVR navigation keys that let callers repeat information, move forward or backward, and obtain instructions where appropriate.
- Present up to date FAQs and interactive search capability with natural language on the web.
- Don't log off or hang up on users prematurely – give them a sufficient number of tries (generally 3 attempts).

### ***Make it Simple to Reach a Human!***

- Applications that make it difficult to reach live assistance put people off attempting to self serve in the future.
  - ◆ Always offer prompt access to a person in the centre (live chat, VOIP call, or web call back for web self service; transfer out to a rep for IVR/ASR).
  - ◆ Place email forms, click to call buttons, and toll free telephone numbers within the web application.

### ***Continue to Improve!***

- Gather customer feedback and use this to improve your design on an ongoing basis.
- Talk to customers as much as you can – through focus groups and surveys. Have CSRs capture customer comments about applications.
- Monitor system reports regularly to understand usage: what's popular, what's not, where do callers exit to a rep frequently or cancel a web transaction, etc.
- Use this data both to improve your applications and to profile customers and identify new opportunities to offer alternative services.

### **What if They Need Help?**

Even if your application is designed along best practices, customers who use self service will still need assistance from the contact centre at times. The steps below will help you address the unique needs of these customers and help assure they remain proponents of self service in the future.

- Adapt your hiring and training plans to ensure that your reps are able to help customers with self service applications.
  - ◆ Ensure your CSRs use your self serve applications regularly. There's a big difference between reading a callflow or looking at screenshots and actually using an application. Make sure they've been in the driver's seat recently.
  - ◆ Promote reading comprehension skills, grammar and typing skills among CSRs supporting web-based applications.
  - ◆ CSRs taking support calls need to be able to troubleshoot when user technology problems may be causing the application to fail and should be able to help customers to resolve common problems.
  - ◆ Customers can feel angry and frustrated (sometimes even stupid) when they have invested time and energy attempting to self serve but have not succeeded. CSRs must deal efficiently yet empathetically with customers to complete requests, yet also educate and reassure them so that their confidence is improved for a future attempt.
- Make sure your processes and systems are updated to reflect these specific customer contact types.
  - ◆ Define which CSRs will be trained on these contacts.
  - ◆ Ensure your quality monitoring process has guidelines that are appropriate for "support" contacts.
- Put customers who have started to self serve at the front of the queue, and have correctly skilled CSRs available to help them 24 hours a day seven days a week.

- For web based contacts: make sure your CSRs have access to the same data that the customer can see, and that it is in the same format.
- Auto-acknowledge emails with a short but realistic estimated resolution time. Then reply to the customer accurately, completely and promptly.
- Ensure that the CSR knows where the customer exited the application.
  - ◆ Give the CSR the capability to “handhold” the customer through the application by “pushing” screens or conferencing into the IVR.

## Summary

As many contact centres have found, self service is much more than having a web site, or putting together some phone menus. Being successful in self service starts with design, includes having a good understanding of your customers, and ends with the quality of your CSRs.

Get the design as good as you can to minimize the support calls in the first place. Recognise that customers bailing out of self service will need special help. Make some investment so you have the people, the skill and the tools to deliver this with quality. Continuously assess how you are doing, and listen to customer feedback.

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## Sidebar

### Investing in Operations Can Have a Huge Pay Off in Customer Satisfaction

To successfully support both web and IVR contacts effectively, every contact centre needs to make investments in people, processes, and technology.

- A flexible workforce management system to have the right skilled resources available when you need them.
- Multimedia routing and email management tools.
- Adequate bandwidth to support all applications.
- Enough on-line storage capacity and a good filing system and process for emails and text chat.
- Focused training that supports self service.
- A quality monitoring program that evaluates assisted self service contacts (preferably with voice and screen capture).

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