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Taking Self-Service Seriously

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As the online channel grows in primacy, second rate self-service will no longer cut it

Web self-service has been an idea that management loves in theory but stumbles over in practice.

What's not to love? Customers come to your website and not only buy goods and services, but update their account information, check out their bills, participate in self-help forums, and arrange to receive email alerts when new products are announced: all without your having to take the time away from your customer representatives.

But as it has turned out, the devil is in the execution. Customers may visit once, but when it comes down to making themselves at home, too many are still reverting to old habits and reaching out to the contact center. What's going on is partly a matter of customer sophistication, or a lack thereof, but more crucially, a demonstration of just how much planning, insight, and stellar execution is needed to create a self-service web portal—one that not only looks pretty, but closes the deal.

If this performance gap is perceived as a slightly embarrassing problem today, it will be a major competitive headache tomorrow. That's because service providers must build to meet the demands of a new generation of consumers, who surfed the Internet around the same time they learned how to read. Consider that a child born the same year as eBay and Amazon went online is now almost a teenager. For him or her, "e-commerce" is better known as "shopping." And what businesses now call "self-service" will simply be an ordinary Web transaction, paired with the control and convenience that people already expect from their TIVO and iPod.

Business adoption

It may at first seem ironic, but self-service has actually seen higher rates of adoption in business-to-business transactions. The reason has less to do with great design of corporate portals than with the fact that corporate portal end users need the portal to do their jobs. A corporate purchaser of communication services, for example, is a member of a captive audience, and may have no choice but to master a supplier's website, however opaque, because doing so is now part of the job description. But pressure for self-service also flows the other way.

Network administrators, for example, increasingly want not just raw bandwidth for their service provider, but a view of their slice of that bandwidth, along with the online tools to actually manage it. The pain involved in exposing what have always been internal processes to customer scrutiny is that, presumably, the customer will call in less and therefore cost you less to support.

Also changing the picture is the number of ways - or channels- self-service will be delivered. Mobile devices, of course, are slowly becoming Web-savvy. The major distinguishing feature of the iPhone, for example, is not that it already resides in Steve Jobs' pocket, but that it has traded a keyboard for a comparatively large (3.5 inch) touch screen—large and clear enough to make mobile Web browsing and transactions more likely to occur. Less visible on the radar, but of even more potential impact is the melding of television and the Internet. IPTV--a service that is still in the early stage of acceptance-offers a new channel of self-service that will go beyond the electronic programming guides that we know from our cable and satellite TV providers. If service providers can unify the underlying self-service capability to support this new service, IPTV will put self-service within range of the television remote, providing the same self-service across the three screens of mobile device, home computer and television.



Yet for all this future promise, the adoption rate on self-service sites is strikingly low. In the communications services sector, most service providers would jump at the chance for even 15 percent consistent adoption among their residential customer base. And while the technology is moving forward, there is much room for improvement. Consider, for example, the consumer-oriented telecommunications websites, which have a wide range of self-service offerings. In theory, customers logging in can do everything from purchase downloadable ring tones to review their billing records. They can check out new phones, investigate different calling plans, and read through an extensive knowledge basis to untangle problems—all before having to call customer service.

But for all these opportunities, the "sense" of personal service remains low—which is one reason so many people revert to the contact center. A good self-service site should take into account who is logging in, how long they've been a customer, what kind of customer they are and what kinds of offers they might consider. If this

sounds far-fetched among carriers, that's because little of it has been done yet. But just log onto Amazon.com and use it a few times. You'll see an online shopping experience that is far more personal than can be found at many brick-and-mortar shops. Organizations need to realize this and build self-service commerce applications to make it more inviting, and secure, for customers to establish personas of sorts based on their interests. The work now is to take the idea of personalization and use it across all channels, based on one of the essential elements that are often missing – relevant, timely and accurate data.

More data and insight, put into practice

In looking for higher self-service adoption rates, companies need to do the careful analytics necessary to find out who is actually using the site, who is not, and why. The data can be surprising. For example, companies often want to move their "low-value" customers online. But the work Amdocs has done with telecommunication service providers has shown that it's often the high-value customers who are most likely to use self-service channels. They are more apt to have a broadband connection at home, a laptop on the road, and a higher-than-average comfort level with Web transactions. Ergo: know thy online customer and design accordingly.

Of course, it's not always that simple. One of our clients discovered that divergent groups all came to the site. The main users were goal-oriented planners who wanted a quick, fast, professional interface. But there was a less-confident second group, more open to recommendations, and—happily—more inclined to make impulse purchases—if the site appeared friendly and even fun. The design goal was to accommodate the second group without alienating the first: a tall but achievable goal.

Analytics can also tell you what people are doing on the site—where they go and what they respond to. Again, the data can be surprising. Eye tracking studies often show that people look between the lovely design elements in search of information. Analytics can reveal the collective visitor "footprints" on a site, showing which paths were taken, which were ignored, and where people jumped off. Knowing that will tell you a great deal about where to focus your design efforts. Customers should also be made aware through marketing campaigns not just of the existence of the site, but what self-service features are available. Otherwise, customers land on the home page, solve their immediate concerns, and depart for other websites.

Changes are also needed at the backend because people are already availing themselves of multiple channels and expect continuity between them. This means that if you place an order by phone, you should be able to wheel your desk chair over to your computer, log onto the company site, and see the transaction posted. Otherwise, you'll conclude that it hasn't gone through. For this to happen, legacy information "silos" will need to be fully connected, with one system "aware" of the other's activity. That said, the self-service challenge is primarily not a technical challenge, even though most projects are driven by IT. Customer operations are usually positioned better to know what is required.

Another trend affecting self-service is the Web 2.0 phenomenon of people creating their own content. That often plays out on self-service sites in the form of forums, where customers help each other. A common mistake is to treat these areas as no-go zones for employees, when just the reverse is true: product engineers, developers and troubleshooters can learn a lot from reading and interacting with

customers. But to make this happen, participation must be part of the job description, not just extra credit.

Finally, all self-service websites benefit by acknowledging transactions. While this is typically done with e-mail or on-screen messages, some companies have found that, especially in the early days of a site, calling customers to make sure the experience was a good one can improve adoption.

Doing all this is more a journey than a destination. Even armed with plenty of analytic data, you will not really know what succeeds until you try it. The best approach is to test-and-learn, then tweak the design and test again. And, as with any sales scenario, the best solution this year may become outdated in the next.

As for contact centers, they will still have a very important role to play—but one that evolves as a new, Web-savvy generation of consumers comes into its own. Contact centers will be less important as primary contact points, but will be seen as the place to go when the Website can't deliver. Even today, many companies are reporting that their callers are actually asking more complex questions because they've already solved the routine ones online. That's a pretty good indicator where the call center is headed. Every self-service site will be designed to minimize incoming calling. Yet no site will be complete without a number to call.

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