

## Customer-Focused Self-Service Not an Oxymoron

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***A look at tools and strategies to enhance the customer's self-service experience — and open their minds to the power of automation.***

Articles and white papers abound about how best to wean customers away from comparatively expensive live-agent assistance and, instead, get them to embrace the power of self-service applications.

Unfortunately, we also often hear about how contact centers — after efforts to achieve the above objective — end up angering and alienating a healthy chunk of their customer base.

While the latter stories are true, they are not inevitable. That is, there is nothing inherently flawed with, nor evil about, self-service; in fact, there are many instances when customers not only will tolerate an automated interaction with your company, but actually welcome it.

For every three or four tales of self-service chaos, there is probably at least one of a contact center that has achieved ample success — from both a cost-saving and a customer satisfaction standpoint — via its IVR and/or online self-service applications.

The key difference between centers that fail and those that succeed is that the former tend to focus more on contact economics, while the latter tend to focus on customer experiences, says Ken Landoline, program manager with Yankee Group's Enterprise Research group.

“Self-service investments focused solely on cost-reduction benefits are no longer a competitive differentiator. Improving the customer experience is now the goal of leading centers. When implemented properly, self-service can be a win-win solution for the customer and for the enterprise.”

Centers that focus on the customer experience don't try to ram self-service down customers' throats. Instead, they carefully analyze the best self-service technologies and options for their particular customer base, and then strive to achieve an artful balance between automation and live agent assistance. Top centers recognize that sometimes the ideal solution for a customer will be to complete a transaction via a speech-based IVR system; sometimes it will be to obtain information or assistance from an online knowledgebase; other times, the customer will need or want to speak to a live agent to solve a critical issue; and still other times, a combination of service methods might be required or preferred.

“The way to treat customers is how they want to be treated,” says Landoline. “Self-service should not translate to less service.”

## **Tools and Tactics for Customer-Focused Self-Service**

While leading contact centers do not force self-service on customers and understand that live-agent assistance is often critical, these centers do invest in the most dynamic and user-friendly self-service applications available to open customers' eyes to the power of automation. Having such systems in place not only enhances the customer's self-service experience and increases the likelihood that they will embrace autonomous channels during future contacts, it also frees agents to focus on the most complex and value-laden customer contacts — those that would not be best handled via self-service.

Following are a few of the key self-service practices and innovative applications — for both IVR and Web self-service — that top contact centers use to win over even the staunchest automation adversaries:

### **Interactive Voice Response (IVR)**

**Embrace advanced speech recognition (ASR):** Traditional touchtone IVR systems are going the way of the dodo. In their place are ASR-driven IVR apps that enable centers to vastly reduce the number of steps callers must take to get what they need. Powered by natural language processing, ASR enables customers to cut through unnecessary menu options by stating exactly what they want (e.g., "I would like to change my mailing address.") In addition, advanced speech recognition applications provide an unmatched level of security: once customers "register" their voice in the IVR, their voice patterns are recognized during future transactions (each person has a unique voice pattern that cannot be duplicated or changed).

"The world in which the traditional IVR platform developed and matured is long gone — and the difference is as evident as the difference between day and night," says Doug B. Brown, vice president of eLoyalty's Architecture and Call Center Practice areas. "...This is not your father's IVR — it's better, easier and cheaper, and the bottom line is that organizations need to understand what it is and how it is different so they can best take advantage of this exciting technology."

Exciting yes, but not perfect, especially if the contact center rushes through the critical process of dialogue design — how the system/caller interaction is scripted. Dialogue design can spell the difference between a speech-driven IVR application that customers want to use and one that they want to blow up. As Bruce Pollock, a speech recognition consultant with West Corporation, says: "You can have the highest quality speech software in the world, but if your call center speech application interface is not intuitive to callers, you'll have recognition problems — not because of the speech engine, but because of poor dialogue design."

Pollock adds that, while the vendor may be the scripting master, it's up to the contact center client to play an active role in the process. This will not only ensure that the center's managers

and IT people understand the call flows and prompts, but also that the dialogue design is in line with the center's corporate culture and caters to the center's specific customers.

**Incorporate CTI.** As effective as speech IVR can be as a pure self-service tool, often the caller will want to, or have to, speak to a live agent. And there are few things more frustrating for customers than, after telling the IVR system what they want to do and providing their account number (or other information), having to repeat the exact same information to the agent who later handles their call.

Centers with CTI-enabled speech recognition eliminate such customer frustration, and shorten call lengths, by investing in applications that integrate the voice and the data portions of a call, and then deliver that information to agents' desktops.

Customers aren't the only ones who will appreciate the intelligent transfer. CTI will likely keep your agents from gritting their teeth or hiding in the break room. "Most call center speech applications require [agent] backup for numerous reasons," says Pollock. "Look for an opportunity to use CTI to 'close the integration gap' so that [agents] can have access to what your callers speak into the speech system — and don't have to repeat the same questions when initiating their portion of the call."

**Enhance interactions with personalization.** Automation and personalization are not mutually exclusive; the more customized a self-service application is, the more eagerly customers will embrace it. That's why more contact centers are banking on personalized speech recognition — one of the hottest trends in speech recognition today.

These applications gather and store specific data about individual customers and use that information to customize responses and speed transactions with callers during future interactions. The most common example is the use of "skip lists," where the application — after recognizing an established customer based on their phone number or other information — skips over options that do not apply to that particular customer. With such an application in place, a customer who calls weekly to check his account balance could be greeted with, "Hello Mr. Johnson, would you like to check your balance again?" Or a customer who requested to speak Spanish on their last two transactions could be greeted instantly in Spanish the next time they call.

"Through some simple programming and a good text-to-speech engine, callers will perceive that the application has been personalized for them," explains Paul Kowal, president of Kowal Associates, a customer relationship management consulting firm in Boston. "For a call center interested in deploying a personalized speech recognition application, the benefits are many and the costs are small compared to those benefits."

**Explore “guided speech” IVR.** Regardless of how much effort the center puts into making self-service engaging and user-friendly, there will be the occasional glitch here and there, or customers who don’t feel quite ready to let go of agents’ hands entirely. In such cases, most centers make it easy for callers to opt out of the IVR and reach a live agent who can help them with the rest of the call.

The latest trend takes a much more proactive and dynamic approach to assisting customers who embark on a self-service transaction. “Guided speech” IVR —a.k.a., guided IVR, agent-assisted IVR, hybrid IVR, et al. — combines the technological potency of advanced speech applications with, when necessary, the human intelligence and understanding of live agents. In centers that use guided speech IVR, designated agents serve as invisible IVR guides — assisting the center’s speech application with recognition on an as-needed basis, thus ensuring that the caller receives the correct information or solution. Agents not only quickly transcribe what the caller said whenever a recognition problem occurs to facilitate the call flow, they can also type in open-ended questions for the speech engine to ask the caller to help the IVR gather exactly what it needs to complete the transaction.

An IVR guide can assist several callers at once — creating a positive self-service experience for each and, consequently, increasing the likelihood that those callers will choose the less expensive self-service route when interacting with the company in the future.

## **Web Self-Service**

**Use a natural language search engine.** Just as natural language processing is key to successful speech-enabled IVR, it also drives some of the best Web-based self-service applications. Rather than requiring online customers to enter a few key words into a search box and hope for the best results, natural language engines enable customers to type in complete phrases or sentences describing what they are looking for. The search engine instantly analyzes the query, searches the knowledge base and quickly delivers appropriate content.

**Implement a dynamic FAQ application.** Considering the sheer volume of contacts that call centers and Web sites receive, keeping FAQs fresh and relevant can be a challenge without a little help from automation. Dynamic FAQ applications evaluate past knowledge base queries and responses, as well as content from past email and chat transactions with customers, then provide lists of potential FAQs to include on the Web site.

**Create personalized customer portals.** Though many online customers are intrigued by not having to rely on a person to serve them, they still want the experience to be personal. For many top contact centers, this is easily achieved via customer portals, which are, in essence, personalized Web pages where customers can access and view their detailed account

information (e.g., balances, past transactions/purchases; pending orders, etc.) by simply entering their username and/or password.

Such applications — used extensively and expertly by financial institutions and retailers— use intelligent and customer-centric technology to track all customer activity and apply that information to each customer's private portal.

“Employ” agent avatars. Numerous organizations have started using intelligent, automated avatars — digital characters that reside on corporate Web sites and serve as customer service, technical support and sales assistants — to add a more interactive, human touch to the Web self-service environment. Agent avatars interact directly with customers, just as a live agent would, listening to customers' spoken or written requests and comments, and communicating — via voice (or chat) — often complex information through text-to-speech technology.

Avatars can guide customers to appropriate Web pages, provide quick answers to FAQs, even make small talk and tell jokes — all at a fraction of the cost of live agent support. Granted, avatars will never completely replace live agents, but they can dramatically reduce the number of routine and repetitive contacts that living, breathing beings must handle, thus helping to reduce employee burnout and turnover while creating a positive, memorable online experience for customers.

### **Monitor the Machines**

Whether IVR- or Web-based, a big part of making self-service customer-centric is taking time to monitor your machines. Ensuring the quality of automated contacts is just as important as ensuring the quality of contacts that involve live agents; however, few contact centers have carried their quality monitoring programs over to the self-service realm.

Many leading contact centers have invested in multimedia customer interaction recording tools that can capture a random sample of customers' IVR and online service experiences. On the IVR side, such tools enable the center to see such things as how easy it is for customers to navigate the IVR and complete transactions, as well as how effectively such front-end systems route each call when a live agent is requested or required. Some systems can even be programmed to alert specialists about callers who get entangled in the IVR, or who seem to get confused during the transaction — thus enabling the contact center to not only fix any glitches but also to contact the customer immediately after the interaction, before their frustration leads to defection.

On the Web-based side, multimedia interaction recording tools let contact centers uncover such things as how well customers navigate the Web site; what information they are looking for, and

how easy it is to find; and what actions or issues lead most online customers to abort their self-service transaction and call, email or request a chat session with an agent.

As important as monitoring self-service interactions is, it alone does not fully capture how the customer felt about their experience. The only way to do that is to ask them — something too few centers actually do.

Progressive centers, on the other hand, not only go out of their way to gauge how satisfied customers are with their self-service experience, these organizations gather such feedback immediately after the interaction — usually via an IVR-based phone survey or a survey sent via email. Such timely surveying not only ensures that the feedback gathered is accurate (since the experience is fresh in customers' minds), it enables the contact center to take quick action and perform triage whenever it is determined that a customer is highly dissatisfied.

Why so many centers fail to consistently monitor self-service contacts and gather direct customer feedback regarding those contacts is baffling. After all, if customers who try to serve themselves have negative experiences, not only are they likely to return to the more expensive (for the company) live-agent contact options, when they do, they likely aren't going to be in the best of moods. And if their self-service experience is very negative, they might not return at all.