Customer Care Management

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▶ **Migrating Customers to Self Service**

Self Service

The ongoing and significant pressure to continually improve customer satisfaction, despite lower budgets has led contact-center managers to move customers to self-service interactions in order to decrease costs. Unfortunately, many self-service implementations based on customer relationship management (CRM) focus on CRM features, and fail to give sufficient consideration to the core business knowledge and processes required for a successful solution.

Migrating Customers to Self Service

The ongoing and significant pressure to continually improve customer satisfaction, despite lower budgets, has led call-center managers to move customers to self-service Internet interactions in order to decrease costs. Unfortunately, many self-service implementations based on customer relationship management (CRM) focus on CRM features, and fail to give sufficient consideration to the core business knowledge and processes required for a successful solution.

The result is the relearning of an old lesson: technology alone does not solve problems. In order to reap the benefits, new technology must be applied in accordance with business best practices. A self-service project should launch with both a technical implementation manager and a business process manager, the latter being responsible for identifying and codifying core business knowledge and processes to be represented and enacted in the self-service implementation.

Key Levers

Everything that happens in the call center pulls on one or more of the three call center management levers: call volume, average handle time (AHT) and agent productivity. Payroll is generally 70-80 percent of a customer interaction function's budget, so self-service technologies that can reduce live interaction volume offer potential benefits.

The relevant technologies include website interfaces, interactive voice response (IVR), automated email handling and fax-back services. In contrast to these self-service technologies, live Web chat offers an example of a feature that can *increase* AHT. To move customers to self-service, a company must truly understand its customer base and, in particular, the subset that interact with the corporation regularly.

For example, consider an electric utility. Self-service websites can be useful for service initiation and termination, but it is difficult to report an electric outage via a computer. Moreover, suppose a utility analyzed its incoming calls and found that the vast majority of callers came from lower-income customers, few of whom have access to the Internet, and who generally call for non-outage issues? This discovery would suggest that voice processing, IVR and speech recognition are more appropriate platforms for moving customers to self-service.

This example demonstrates the value of a key function of CRM called customer analytics which looks at customer behavior on a segment-by-segment basis. The customer segment that purchases may be different from the segment that needs support. Customer analytics tools define customer behavior, skill level and needs so that the customer is not merely identified, but their needs and the best way to satisfy those needs are presented to the enterprise.

Setting the Stage

A company embarking on a quest to increase self-service needs to take a cold hard look at the current state of its knowledge and process management assets. For example:

- Do workers still go to three-ring binders for information?
- Are user manuals pristine and 100 percent up to date?
- Is there a process for ensuring changes are made available immediately to agents and to end users?
- Is there an organized methodology for capturing the changing customer information demands?
- Is staffing in place that has responsibility for business knowledge and process?

The answers to these and similar questions will help senior management understand what it will take to move a significant number of customers to self-service.

When done correctly, these efforts can have the added impact of significantly improving the AHT and productivity performance of customer service reps (CSRs) in handling interactions that continue to reach the center.

Continuing the utility example above, an IVR can enable an electric utility to efficiently handle a large volume of calls in a short time during outages — it can use the calling parties' area code and exchange to quickly identify affected customers and immediately letting them know that the company is aware of the outage and is responding. This is much more efficient and less costly than relying on live agents, and is independent of how many agents are on duty at the time of the emergency. Customers receive quicker response, and live interaction is more readily available to those who may have an urgent need to speak to an agent.

The starting place for a move to self-service is to analyze whether corporate information, knowledge and processes are adequately documented for the CSRs. If that data is not well organized, it's also not likely to be ready to present to a customer in an automated fashion.

While mature centers are likely to have transaction inventories, process maps and knowledge bases, there's still a lot of work to be done, but it mainly involves organizing the assets into formats usable for self-service. In contrast, if a company still clings to paper-based knowledge and processes that are passed on verbally from new hire class to the next, like ancient mythology, the inaccuracies grow with each generation. Such companies must start a rigorous transaction, process and

knowledge inventory before planning the organization and presentation exercise.

There are two broad types of self-service: transaction-oriented and knowledge transfer-oriented. Transaction-oriented self-service focuses on accomplishing a specific goal, such as completing an order, entering a service ticket, registering a complaint, changing addresses. A transaction-based interaction requires a lot of process support with just-in-time contextual knowledge delivery.

Knowledge transfer self-service is commonly focused on product troubleshooting, warranty information, store locations and the like. A knowledge transfer self-service interaction will require extensive search, cross-keying and logic capability to ensure quick identification of appropriate knowledge. Many companies have some degree of both self-service types, and a company's mix of the two types may influence the selection of CRM self-service packages, as some products support one type better than the other.

In either instance, follow the 80/20 rule: 20 percent of processes or knowledge will solve 80 percent of customer issues. So focus the process and knowledge development effort on that base and build processes and tools for identifying, developing, organizing and presenting the information. Since the knowledge management process never ends, the investment a company makes in these tools will pay off as they work through the last 80 percent.

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Call Coding

How is that 20 percent to document identified? If call coding hasn't already been instituted in the contact center, it is time to start. Call coding is one of the best ways to obtain information on customers' needs and the knowledge and processes required to support those needs.

Call coding is a process where CSRs characterize each call. Nearly all top-tier automatic call distributors (ACDs) support the ability to list end-of-call coding options dynamically. A list of call types is entered into the ACD. At the end of each call, agents use a series of telephone key strokes to "code" the call before they go on to the next call. For instance, a software company might use the following codes: code #10 might be a print problem, #11 error messages , #12 integration questions, etc. The call coding can be used by the documentation department to identify areas where the instruction manuals need enhancement, an insight which directly translates into knowledge management direction.

Optimally, the case management or CRM tool should provide call coding capability. It should be a required input field and the codes must be easily changed to facilitate the capture of new customer support needs. But what happens if the CRM system doesn't support the coding requirements or hasn't been deployed?   Fortunately, ACD reporting allows for easy access to this type of data; ACD call coding is dynamic and can be used to refine your efforts. Make sure your agents use this capability. Percent of calls coded and coding accuracy should be instituted as part of your agents' performance appraisal.

A couple of rules regarding call coding in order to improve accuracy: first, keep the option list to less than 10; second, don't change the list more than once a month. Those limitations stated, use call coding to identify what processes and knowledge assets customers need the most. Over time, coding can carefully refine these definitions to a high level of precision.

While waiting for the results of the first week of call coding, the next step is to build an exhaustive list of known processes and knowledge assets. Initially, don't make any

value judgment on the assets. This is just a survey.

Call coding will cull the information down to the 20 percent base to begin working on. Then, look to CSRs for help refining that 20 percent base. Look around an agent's desk. What is pinned on the wall of their cube? What kind of three-ring binders do they have on their desk? Agents reduce their material to just what they need. For example, of all the corporate manuals available, the most frequently used material will be found in an agent's cube. Cubes are small; what doesn't get used gets thrown away.

Finally, CSR focus groups are a tremendous value in identifying customer need. Make sure CSRs are not penalized for helping in this process. Many centers work on commission or reward based on average number of calls handled per hour. Taking two hours of an agent's time can reduce their pay or performance by 20 percent; you need to be sensitive to this issue and respect their time, so go into CSR meetings prepared, and get all you need in the first meeting. If you are fair, the agents will take some ownership of the process, which will help later when the center starts to shrink due to customer self-service. Keeping CSRs involved is also the way to capture changing customer needs that can be refined with further call coding.

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Self-Service "Field of Dreams"
But does this mean you have a "field of dreams"? — if you publish it, will they (the customers) come? In short: NO!

Once the self-service environment is up and running, how are customers motivated to use it rather than calling the contact center?   Of course, you can always decide to offer lousy service through the call center, a strategy that, while not recommended, is broadly applied.

It certainly helps if the transactions customers use most often and answers to high frequency questions are available in a self service format. The center should constantly work to identify new issues that need resolution and documentation. If new customer needs are not identified and resolutions made available on the self service portal, the operation will sink back into being a full service contact center.

At the other extreme are customer service environments that naturally lend themselves to self-service, with computer and software support being obvious examples. Most often, when calling for technical support, no matter how helpful the CSR is, customers still need to go to the website to get what they need, such as a device driver or a full set of instructions. After awhile customers are conditioned to start with the Internet in seeking support, and a phone call becomes the last option. If the online self-service component is done well, the enterprise can broadly publish its customer care phone number without too much risk of diluting the self-service effort.

By contrast, the travel industry, which has a service environment that does not naturally lead to self-service, has done an excellent job of moving customers there anyway. Several lessons can be learned from their approach. First and foremost, never, ever give a better deal or more desirable answer over the phone than through a self-service medium. At the very least, the answer or deal must be the same. No matter what airline or rental car company is called, there is always a forced announcement stating that better deals are available on the Internet.

If the customer ever gets more favorable treatment over the phone, it will be almost impossible to move them to self-service.

That's why processes are so important. Without strong, documented processes and process flows, CSRs will often have more latitude to give favorable treatment than is

offered in self-service environments. As long as CSRs can deviate from processes, a company will never move a significant number of customers to self-service.

Players in the travel industry are masters of the 80/20 rule and have perfected their self-service interfaces. There was nothing natural or easy about establishing travel self-service; it's an incredibly complex industry. The fact that most of us easily make reservations on line is testament to years of refining the processes and interfaces.

A broad survey of travel websites shows the major transaction supported is reservations. The travel industry has exploded over the last five years. Had human customer care and customer interaction grown proportionally, many travel businesses would have been unsustainable.

The travel industry also gets good marks for continuing to publish and make call center phone numbers readily available. If the only way to force customers to utilize the self-service platform is to hide the call center phone number, your self-service development effort has failed.

Now That You Have Self-Service
Customer self-service does not happen in a vacuum. Complementary activities must occur in the contact center to ensure the success of the self-service effort.

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To leverage the investment in the self-service platform, it must be made available to contact center CSRs to use as their tool for helping customers. This helps ensure consistency of information across interfaces.

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Nowadays, there are different reasons for skills-based routing in the contact center. In the past, skills were associated with areas of product expertise; skills are now based on an agent's natural capability. Some people write better than others, some are more verbal, some sell better, some are more sensitive to service needs.

This can work to your favor in a time when economies of scale are king in the call center. With support from knowledge and process management tools developed in support of the self service exercise, it is possible to collapse skills-segmented agent groups, and instead segment groups "virtually," based on customer value. Customer analytics tied to CRM tools can guide the CSR through call flows specifically designed for a caller, based on past purchase behavior, response to cross- and up-selling, or any other criteria.

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If any agent group segmentation occurs, it is in support of the 80/20 rule. This approach is called "tier triage," a scenario in which there is a front-line agent group with generalized training across all product lines and processes. Armed with knowledge and process tools, this "tier" can handle 80 percent of calls with 20 percent of the training. And, the training they receive is focused on customer interaction and human relations; i.e. the training concentrates more on information access and retrieval rather than on product or contract details.

When customer needs exceed the capability of this tier, the call is escalated to a specialist tier. Process management ensures the handoff is complete and accurate. Tier triage allows for

a reduction in new hire skill levels and training costs; the first tier acts as a talent farm for the specialist tier.

This arrangement works great in support of customer self-service. All contact mediums operate from the same service engine and there is consistency of information and processes across these mediums. The system is self-feeding in that there are processes to identify new customer needs, processes for specialist development, and processes to ensure customers are favorably disposed to assist themselves.

Staffing For Self-Service

The self-service environment requires care and nurturing. There must be funded staff to constantly maintain and improve the knowledge and processes that make up the customer self-service environment. In a sophisticated customer service organization, knowledge and process management should have the same level of support given quality management or workforce management.

There is justification for locating the Knowledge and Process group physically close to the contact center to provide access to customer intelligence. This cooperation goes in both directions. The knowledge and process group will collect customer needs, but the contact center can act as a beta test for the deployment of new self-service assets. When budgeting for knowledge and process staff, demonstrate to senior management the return obtained on investments in the management of corporate knowledge assets.

Conclusion

Customer service managers are under pressure to increase customer utilization of non-mediated customer service channels. To do so, the manager must use customer analytics to understand who the customer is,

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what they need, and the best way to fulfill that need. The good news is that customers are smart; they will migrate to the medium that best serves their needs.

Some businesses lend themselves naturally to self-service, while others can succeed only with careful focus on the needs that drive a significant portion of their customers, and by developing knowledge, processes and customer interfaces to support those needs. Responding to customer needs must be consistent across interaction mediums.

Customer self-service environments require care and feeding. Knowledge and process management should be funded and staffed in the same manner as support services for a call center. The bottom line is that customer self-service is not the result of implementing a software package. It is the result of the knowledge and processes deposited into the package.

Five Steps to Self-Service:
- Ensure absolute consistency of information across service channels.
- Implement end-of-call coding in the call center to capture new customer needs.
- Follow the 80/20 rule to focus your resources on the minority of processes and knowledge that will support a majority of customer needs.
- Leverage self-service investments by deploying knowledge and process tools in the call center to improve agent productivity and control consistency of information.
- Empower customers to support themselves through ongoing knowledge and process development. Staff to support this work.

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⊙ **Searching for the "Perfect "CRM**

Searching for the "Perfect" CRM

For many years, contact center managers have been searching for the perfect tool to support customer service delivery. Unfortunately, the customer contact center is often not always the primary focus of a corporate CRM effort. Field force management, e-mail, customer analytics and back office integration are many times the focus of CRM projects and the contact center is almost an afterthought. Although the contact center is frequently the primary point of interface a corporation has with their customers, the contact center is very often not represented in the selection of a CRM package.

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About the Author

Ike Mitchell is a Principal Consultant at CSC and a Contact Center specialist with in-depth knowledge of process re-engineering, customer service and technology. He has focused on both the technical and human sides of contact center management. His experience includes assessing and avoiding business risks, planning technology assets, and managing large projects. Mr. Mitchell has extensive industry experience and has provided consulting services in over 100 contact centers covering multiple applications, sizes, technologies and industries.

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