

A thinkJar Thought Leadership Series

Creating Highly Engaged (and) Satisfied Clients

How to make self-service an effective part of a service resolution timeline, from preventive to automated, while ensuring high customer satisfaction

Published March 2017

Customer engagement is at the top of mind for customer service executives.

And rightfully so.

In thinkJar's yearly survey that asked what are the top three initiatives for the next five years, customer service managers placed customer engagement in second place for the next two years and at the top for the following three.

In addition, over 40 percent of organizations have customer engagement initiatives in place.¹ Those with initiatives report having an average 23 percent premium in key metrics² (revenue, cost, profitability, etc.) over companies that don't have a customer engagement initiative in place.

That suggests you could be making almost one quarter more money by implementing a customer engagement initiative. In addition, there is sufficient research demonstrating the need to deliver to customer expectations in the Age of the Customer³.

Either way you look at it, you must have a customer engagement initiative these days.

The equation is simple. Customer expectations for speed and accuracy of answers have increased during the past few years, propelled by customer exposure to better support technologies available online. But customers still want the same - a fast, easy to understand, complete, and accurate answer to their questions, accessible as they see fit.

The organizations that can meet those needs and adapt them to shifting expectations will win the support game, engender trust by their customers, and ultimately be rewarded with better engagement with their customers.

This report will tell you how to create a business case, how to plan, and where to start in creating better customer engagement and getting more satisfied customers in the process.

¹ <http://www.convero.com/#fancyboxID-2>

² <http://www.gallup.com/services/169331/customer-engagement.aspx>

³ <https://go.forrester.com/age-of-the-customer/>

A Better Business Case for Customer Engagement

Although it is expected that any service and support system deployed will have a return on investment (usually linked to reducing the number of more expensive interactions), the lessons companies learn from customer engagement pioneers over the past five to seven years form a better way to create a business case for an initiative at your organization. Here are things your company needs to do to improve customer engagement:

- 1. Deliver to Customer Expectations:** Forrester Research says that one of the key characteristics of the Age of the Customer⁴ is that clients' expectations constantly shift. While expectations in the past were driven by personal experience or related by close friends and family, the advent of online communities makes it so everyone can contribute to those expectations. Leading-edge organizations providing exceptional customer service by learning better what customers want and need are increasing customers' expectations – but also showcasing better delivery methods used by organizations (including cross-sell and up-sell)⁵.
- 2. Enhance Customer Journeys:** Millennials and Generation Z people are different from many of today's customers. Not only are they digital natives beginning to enter the marketplace and workplace, but their expectations of what they will encounter are also different.⁶ The most marked difference is their need for journeys versus simple interactions. Creating an infrastructure that can help them experience better journeys and enhances their chosen journeys represent the best ways to meet their needs – and deliver better experiences (and journeys) for all customers.
- 3. Create a Cheaper Organization:** A little over one-third of contacts to customer support are from "repeat customers"⁷, those who did not get an answer the first time and are now looking for more information. There is no magic bullet for first-call resolution, but there is a significant cost to not doing it. Often, it is worth spending to create improvements in how your company interacts with customers because those improvements likely also yield lower costs eventually. Isn't a 35 percent reduction in contact center costs worth the investment in implementing a better way to engage customers?
- 4. Empower Agents:** We have been having these discussions with service managers for over 20 years. Ten years ago, agents in the contact center wanted to leave because their jobs were too stressful and they did not have the right software tools to do their job well.⁸ The pay was not commensurate, they said, with the stress incurred. These days, call center agents leave because they don't feel empowered or don't feel they are making a difference.⁹ Today, taking care of customer needs quickly and even automatically through self-service frees agents to do more meaningful work (e.g. focus on helping customers with what they need) and empowers them to

⁴ <https://go.forrester.com/age-of-the-customer/>

⁵ <http://neilpatel.com/blog/15-persuasion-lessons-you-can-learn-from-amazons-upsell-strategy/>

⁶ <https://www.amazon.com/Gen-Effect-Forces-Shaping-Business/dp/1629560316>

⁷ <http://www.impactlearning.com/the-business-case-for-first-call-resolution/>

⁸ <http://it.toolbox.com/blogs/insidecrm/5-causes-of-callcenter-agent-churn-and-how-to-beat-them-53557>

⁹ <https://www.linkedin.com/pulse/4-tips-reducing-attrition-contact-center-kaylene-eckels>

do a better job. Empowered agents are cheaper to manage, churn less, and provide better quality work.¹⁰

A Model to Engage Customers Better

Much has been written about the problems that stem from poorly planned and implemented customer engagement initiatives, but one of the keys to these failures is lack of follow-through.¹¹ Virtually all companies that reported negative or “not as expected” results from customer engagement initiatives did so because they tried to create engagement as a “per interaction” event versus a time-driven, long-term outcome.

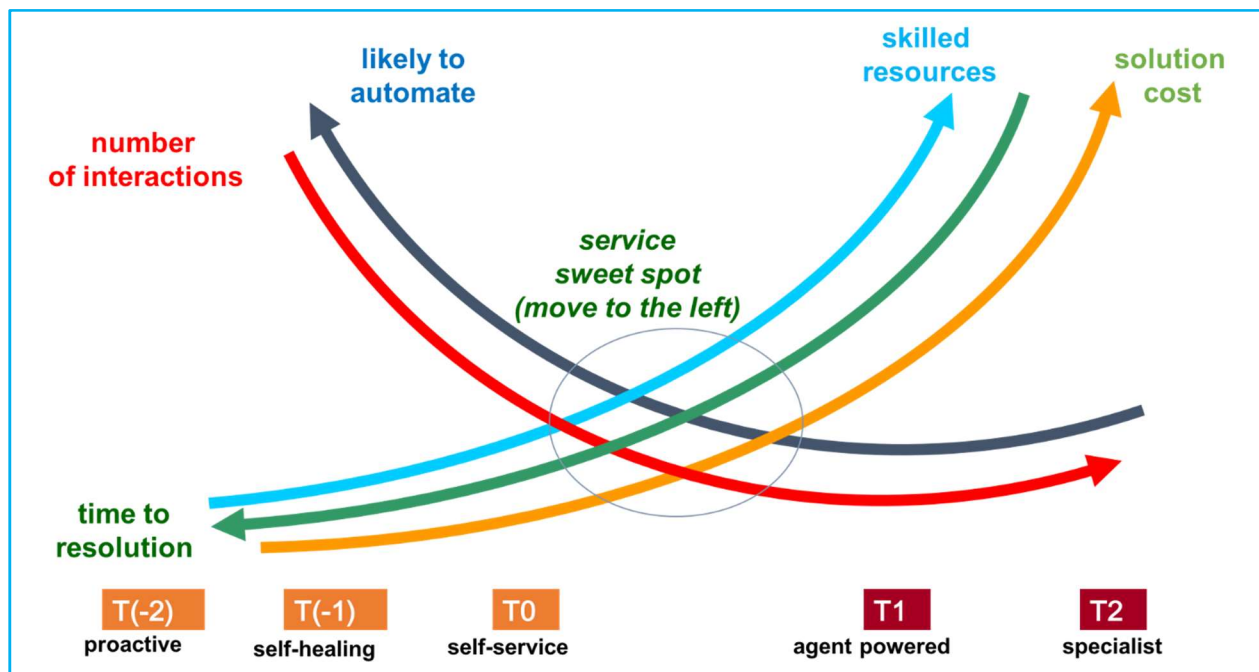


Figure 1 - Service Timeline (created by thinkJar, LLC)

For engagement to happen, the entire service resolution timeline (see picture above) must be addressed, not just the customers’ interactions with support agents or specialists. An organization must plan a distribution of knowledge and workflows to start prior to any contact - then follow through with a self-service initiative for customers, and end with a human-staffed model. This incorporates not only the same knowledge and information being available for proactive and self-healing actions through self-service, but also the know-how, wisdom, and determination of customer service agents and specialists to finish the end-to-end multi-channel interaction.

The range of actions must form a single interaction, not a series of them. For this to occur, the entire service timeline must be addressed. The support organization must have three critical elements:

- An understanding of customer engagement as a long-term, time-driven outcome that only happens when the entire spectrum of interactions has been properly tended to

¹⁰ <http://www.happyfox.com/blog/empower-support-agents/>

¹¹ <https://books.google.com/books?id=DLg0CwAAQBAJ>

- A system of record that can capture and manage all interactions and apply lessons learned from using the information to future interactions
- A self-service implementation for customers that spans channels and functions and is available to resolve all the interactions – from proactive to specialized.

As it was stated a long time ago, the best service is no service – the need for clients to contact customer service directly never happens.¹²

On the service timeline above, proactive service before customer contact and self-healing service (an automated model of self-service) can handle around 30 percent of new service needs, per many service leaders thinkJar has interviewed over the years. With well-deployed self-service and a well-trained system, 60 percent of all interactions with agents can be avoided.

The numbers certainly support the deployment of a service timeline approach to solving customer service issues. And the core of the solution is a self-service platform.

Self-Service as the Beginning of the Solution

Throughout the history of customer service, self-service solutions were much maligned. Self-service has had a bad reputation, whether it's interactive voice response (IVR) systems that got customers lost in phone menus that never ended in the right place or automatic email responders that sent the wrong information or, more recently, web-based self-service solutions without the right answer or with too many potential answers. This has all been changing lately, with a rise in adoption of self-service by customers.

There is a lot of value to using self-service as part of a service resolution timeline where there is a planned escalation model in case the solution is not found. If the right information and the right solutions are proactively placed in the right place (in a customer's computer, device or software), problems can be automatically prevented. Interactions with agents – often the most expensive form of customer service - can be avoided and customer satisfaction can be reached via automated resolutions.

If that step fails and a problem occurs, placing the right tools and knowledge within the product or solution can make the next step in the timeline possible - the product can act based on the knowledge and solutions available and heal itself. Once again, an interaction with an agent is avoided.

If all this fails, there is one more stop - a web-based (also available in other channels, most notably chatbots of recent success as an example) self-service system can create more solutions for the user to find what they need. After all, customers just want an answer – not necessarily a person to give it to them.¹³ Almost 70 percent of customers have confirmed that in study after study.

¹² <http://www.destinationcrm.com/Articles/Web-Exclusives/Viewpoints/The-Best-Service-is-No-Service-49244.aspx>

¹³ <http://www.forbes.com/sites/shephyken/2015/09/03/how-quickly-do-your-customers-get-the-answers-they-want-and-their-complaints-resolved/#50896c6758b9>

Yet, there is still one more element – an agent. Ultimately, human agents represent the best way to handle the service timeline. A self-service system is only as good as it can recognize and improve (via self-learning tools) and has a good workflow to escalate when necessary.¹⁴

Still, a good self-service system generally can handle and resolve about 40 percent of customer interactions. With self-learning enabled in knowledge management, about 60 percent of first-contact questions can be resolved. Beyond that, it becomes a question of investment in the system, training via machine learning and automation, and complexity of the questions being asked; since roughly half of interactions can be handled with a well-implemented self-service solution, you should implement it.

Since 85 percent of customers today expect to find a self-service solution on the web site and 70 percent of customers prefer to use it rather than interact with an agent. Delivering to customer expectations of faster, better, cheaper, and more accurate answers is what self-service is all about – and why it should be at the core of your engagement initiative.

Moving Forward

The case for engaging customers effectively is quite convincing:

- You need to fulfill your customers' expectations
- You need to control your costs while doing so
- They expect to find easy and effective self-service solutions
- Self-service is core in resolving around 60 percent of customer interactions
- Self-service delivers value to both the company and the customer

Implementing self-service obviously requires some study and work, – but today's self-service systems have evolved so much from the early ones it's certainly worth investigating. If you decide to move forward, make sure you find a solution that handles these four requirements:

1. Can operate across (virtually) any channel, including email, chat, and social. Single channel solutions are more expensive over the long run
2. Has a self-learning tool working with the knowledge base to improve the quality of the responses, based on the results of previous interactions
3. Has a simple workflow that can be tuned to your needs (and those of your service level agreements) and can escalate based on different criteria such as type of customer, type of problem, length of problem, number of touches and your own criteria)
4. Can accommodate other parts of the service timeline to both prevent the first occurrence of self-service as well as feed information to specialists and engineers to prevent customers being inconvenienced with the same questions as they evolve along the service timeline. Self-service is good, but to avoid the incident is better.

Finally, ensure that your customer engagement initiative can generate an outcome of true engagement when all else was properly executed before.

¹⁴ http://blogs.forrester.com/kate_leggett/16-01-28-online-self-service-dominates-yet-again-why-its-an-effortless-way-to-get-to-your-answers