

# Faster Service, Happier Customers:

Using Self-Service to Accelerate  
the Speed of Resolution

powered by CXone



- 01 Introduction
- 02 Create a Self-Service Strategy
- 03 Find the Perfect Blend of Self-Service and Agent Assisted Options
- 04 Nail the Transitions from Self-to-Agent-Assisted Service
- 05 Conclusion

# 01. Introduction

**If the best type of contact is the one that never happens, the second-best kind of contact is the one that resolves itself.** And, for those that aren't preventable or self-resolving, it's absolutely critical to have the issue resolved quickly. Put in other terms, the foundation to winning on the customer experience battleground includes proactively identifying and preventing issues and equipping customers with everything they'd need to quickly help themselves. Today's contact center leader should focus on driving one of these types of outcomes.

The reality for many, however, is that their primary fixation isn't on proactive prevention or equipping customers well. The main focus of most contact center leaders is reactive service recovery. They lose the time that they could spend on designing effective systems, planning for the future, and setting the team up for success to a vacuum of inefficient and broken processes, employee disengagement and cost containment.

**According to ICMI research conducted in the summer of 2017, self-service technologies are the #1 planned investment for contact centers in the coming year.** Additionally, 2017 research by NICE inContact<sup>1</sup> found that both consumers and businesses identified that their top priority for improving the customer experience is to respond quicker. One of the best ways to improve the speed of resolution is through the utilization of self-service technologies. It is through these advancements that organizations plan to evolve their service experience to a place that sets them apart from their competition. Through the right mix and context rich transition from self- to assisted-service, and by leveraging the latest technologies, customer insights, and best practice techniques, organizations will poise themselves for success.

If contact centers want to deliver great service to the growing number of digital natives who are now consumers, they must find a way to provide an experience that meets customers wherever they may be. And, they must find a solution that enables them to do so without increasing the cost of service. More importantly, they should motivate and engage their agents to solve complex problems while simple mundane requests are automated by self-service. With its cost-efficiency, inbuilt automation and ability to deploy across platforms and channels, self-service provides the remedy to this problem for an increasing number of organizations.

In this whitepaper, we'll explore the role self-service plays in enabling organizations to deliver a great customer experience. Even more importantly, we'll highlight the evolutions to the role of the frontline contact center agent and how to best leverage them for future success. It's mission-critical for contact centers to get things right when it comes to helping customers help themselves. It's imperative for contact center agents to have full context and insights on each customer's journey. As organizations increasingly use customer experience as their competitive differentiator, there is little margin to leave any interaction to chance.



## Create a Self-Service Strategy

## 02. Create a Self-Service Strategy

The best first step to set the stage for a successful self-service experience is an evaluation of your self-service strategy. A common mistake among self-service implementations is the belief that such systems can be forgotten about once they're in place. There is extensive planning upfront, but minimal efforts applied to evaluating the effectiveness of self-service long-term. Without proper reporting and customer satisfaction measures in place, contact center leaders may never know if their self-service options are user-friendly or functioning as intended.

In today's rapidly changing environment, it is not uncommon to see organizations revisiting their strategies as frequently as every eighteen, twelve, or even six months. In the words of one executive, "What we could once evaluate every three to five years is now necessary at least once per year! We had to throw our historical approach to strategic planning out the window." [Here are some questions that will aid you and your team in an evaluation of your self-service strategy:](#)

- Why do we offer self-service?
  - How did we select our current self-service channels?
  - Are we delivering an omnichannel experience when customers self-serve?
    - What is the transition from self-service to agent assistance?
  - Do we know if our current self-service strategy is meeting customer and contact center needs and demands? What evidence do we have? What information is eluding us?
    - What do we know about the organization's business and customer experience strategy? How could we use what we know to inform our forward approach to self-service?
  - What unanswered questions do we have about the role of self-service in achieving the organization's business and customer experience strategy?
    - How can we find the answers to what we don't know?
- Who owns the customer-facing self-service options in our organization? If it's not the contact center, who owns it?
  - How can the contact center take ownership of, or work with, that department to ensure that self-service meets the needs of both the customer and the contact center?

No matter what the maturity level of self-service is, in your organization, asking these simple questions will be helpful in the successful execution of a self-service strategy. This exercise is, in many ways, the foundation for building your channel access strategy and customer journey maps for self-service.

Organizations shouldn't implement self-service everywhere they can, just because they can. Companies with the best self-service systems intentionally place them in spots across the customer's journey that are most conducive to the customer already wanting to help themselves. Furthermore, they design them in such a way that the customer can easily connect with a live agent, should the need arise. Contact centers should build an effective self-service system with total consideration for the end user.

Gartner predicted companies that integrate customer communities into their support offerings could experience a cost reduction of **10% to 50%**, mainly from the deflection of calls to an agent.

**2017 research conducted by NICE inContact<sup>1</sup>** revealed greater insight on the current use cases for self-service, including website, mobile app, virtual assistant/AI chatbots, and IVR.

In that study<sup>1</sup>, businesses indicated that approximately **40% of their customer service experiences** occur in self-service channels.

**<sup>1</sup>Consumer respondents noted low satisfaction with these self-service channels** (there was an aggregate satisfaction rating of **39%** for self-service channels), but that

doesn't mean necessarily indicate that they prefer or desire agent-assisted service more.

<sup>1</sup>When asked to rank channels by the positive emotions in which they evoke, **mobile apps or virtual assistants/AI bots scored highest with consumers.**

According to this study by NICE inContact<sup>1</sup>, **consumers want to utilize self-service** – they're just not satisfied with how well businesses serve those channels.

NICE inContact customers found **significant gains in efficiency and a reduction in cost per contact by leveraging self-service IVR** to better route customers, or complete entire purchases without ever needing a live agent.

Forrester Research indicated **customers use FAQ pages on a company's website** more than speaking with agents over the phone.<sup>3</sup>

### Self-service should:

---

- Appear in the channels and locations where the end users are naturally and intuitively going to look for it
- Understand where the user is coming from, and offer recommendations for where they'll need to go next
- Provide context on why the suggested answer is the best fit
- Identify when self-service isn't the best channel and proactively suggest the ideal path to a resolution

**In other words, apply self-service to situations that can be easily predicted and designed with a precise awareness of its shortcomings and inabilities.**





**Find the Perfect Blend  
of Self-Service and Agent  
Assisted Options**

3

# 03. Find the Perfect Blend of Self-Service and Agent Assisted Options

In the 2017 research study by NICE inContact<sup>1</sup>, it was revealed that most businesses offer self-service options to communicate (especially IVR and their websites). In a previous study<sup>4</sup> by the International Customer Management Institute (ICMI) and NICE inContact, online self-service was ranked only second to 1-800 phone service to a live agent. For a channel with that level of importance, the question for contact center leaders isn't, "should I offer self-service," but is, "how do I choose the right set of self-service options and best blend self-service into my existing channel offerings?".

## Self-Service options are far and many.

It may be a simple DTMF based IVR to a sophisticated voice enabled intelligent IVR that can fully automate actions. It can be self-help page, FAQ, community or intelligent answering system. And, it can be anything from a virtual agent capable of responding to a specific question to fully AI enabled smart chatbots that can anticipate and automate. The specific answer to choosing self-service options or how to best blend with live channels will vary from industry to industry and contact center to contact center. There is no universal solution to placing and perfecting self-service options. Each organization must consider the unique needs of the business, the customers, and the employees when designing their self-service systems. Furthermore, they should evaluate each step of the customer journey and the nuances of those experiences to determine which ones are best suited for self-service.

From the perspective of your customers, their fundamental expectation is that they will receive service in their channel of choice, at the time they want it, and that it will be worry and error free once they receive it.

While this may sound like a simple concept, many contact centers lack the insights necessary to determine their blend of offerings and, as a result, make their choices by guesswork. This type of haphazard approach often contributes to unnecessary costs and complexities. Without conducting an exercise that uncovers the specifics of customer expectations across their many touch points, like customer journey mapping, contact center leaders will often struggle to find the right mix of channels for their unique client base.

Mapping the touchpoints of the customer journey isn't just for the customers benefit - it also enables companies to ensure that they're delivering on employee and organizational expectations, as well. For most organizations, their primary expectation for service is that it be cost efficient. Contact center leaders can identify the relative value of interactions throughout the customer journey and leverage self or agent assisted-service to not just control the cost of service but also drive enhanced experience.

One such example is that an organization can decide to immediately route the highest value customers to a live agent - circumventing self-service systems entirely.

Alternatively, entire industries whose business is based on predominately low-value interactions may choose to heavily leverage self-service systems at their frontline. (For example, consider the increasing number of self-service kiosks at convenience stores and fast food restaurants.)

Additional advantages of self-service can be found in industry examples, like financial services, where highly secure information is communicated in self-service channels that limit the access of sensitive information to agents. In retail, where options are vast and the opportunity for up- and cross-selling is great, self-service is commonly leveraged to simplify the consumers buying experience, while increasing opportunities for incremental revenue growth. While there is no definitive guide to customer value and when to apply self-service, or not, businesses should strongly consider the balance of cost efficiency and opportunities to maximize revenue, while also recognizing the importance and need for the human touch throughout the customer journey.





**Nail the Transitions from  
Self-to-Agent-Assisted Service**

# 04. Nail the Transitions from Self-to-Agent-Assisted Service

One of the greatest stumbling blocks for organizations is the transition from a self-service interaction to live agent assistance. When done poorly, the effects ripple across both the customer and agent experience. But, when the right balance is achieved, and the two systems work in harmony, both the agent and customer experience are elevated. It's important to thoughtfully consider the customer's journey, in its entirety, and design the transitions with that full experience in mind.

## An example: such a balance is often seen in the mortgage purchase experience:

Lenders create a self-service portal that collects important customer data and preference information. This is often the first touch point.

- 1. Customers receive informational emails, a proactive outreach, and a personalized quote on their eligibility.
- 2. The agent is well-informed and appropriately positioned to deliver a level of service that is best left unautomated.
- 3. Through the remainder of the experience, documents are shared (and signed) digitally, updates frequently occur through an app, or other self-service channel, but the assigned agent provides care - and an offer of accessibility - throughout the experience.

## Ensuring that the human touch is delivered well requires an understanding of your agent's expectations.

At the most basic level, agents want clearly defined expectations that make sense and aren't designed to burn them out. They also want to have the tools, resources, and training to perform their job to expectations. This means two fundamental things in relationship to self-service:

- 1. Agents want self-service systems to handle the repetitive tasks that may otherwise burn them out. They also need to know that they can always trust the self-service systems to have the most accurate, up-to-date information.
- 2. Agents need context and visibility into the customer's journey. Additionally, they genuinely want to help their customers, but can't do it if their systems are disconnected and inefficient. If customers can't seamlessly move from self to assisted-service, it's the agents who face the adversity and angst of overcoming technological and process shortcomings. That just further drives their frustration, dissatisfaction, and lack of engagement.

Through powerful integrations with intelligent chatbots, NICE inContact enables contact centers to self service to agents. Using natural language processing to interact and understand human conversation, and seamlessly transferring conversations to a live agent - it provides full context to the agent. NICE inContact realizes that customer self-services must rise to a new level and, and they're able to power everything from purchases to customer support with AI-powered chatbot technology.

While there isn't a cookie cutter approach to self-service, the organizations who thoughtfully consider the needs of their customers, employees, and functional groups across the various touchpoints of the customer journey, and are willing to refine and finesse as they move along, will find themselves getting closer and closer to the best blend for their unique situation.

## 05. Conclusion

After conducting in-depth research, NICE inContact realized that while many organizations are supporting self-serve channels today, it unfortunately does not mean that consumers are satisfied with their customer experience. To improve on this, businesses need to implement systems that deliver full context across the customer journey and thoughtfully consider the handoff from self- to assisted service. Recognizing this, organizations intend to invest heavily in self-service technologies in the coming year. A wise decision in our view, as customers are showing increased interest in leveraging tools that enable them to help themselves; agents indicate excitement and enthusiasm towards the benefits and advantages provided by self-service; and companies see a great value in reduced cost to serve. The momentum is building for self-service in the contact center and the stakes are too high to implement the wrong systems. We expect the best results to come from self-service systems that are seamlessly integrated into your contact center, to ensure that customers and agents alike can interact naturally throughout the customer journey as situations dictate - regardless of whether they use self-help or assisted-service, or both.

NICE inContact is dedicated to providing the most comprehensive platform for businesses to support today's complex mix of self-service and agent-assisted, voice and digital, inbound and outbound omnichannel interactions. NICE inContact CXone also prepares businesses for tomorrow, by providing you with a future-proof, flexible and extensible platform. Leveraging a comprehensive suite of self-service capabilities, including our seamlessly integrated intelligent chatbot, Interactive Voice Response supporting Text-To-Speech (TTS) and Automated Speech Recognition (ASR), NICE CXone enables you to build, maintain and update omnichannel routing flows that combine features and functionality, regardless of channel, into one consolidated, visual and user-friendly interface.

Integrating customer data from a single source of truth, such as your CRM environment, plays an important role for both agent-assisted as well as self-service interactions - supporting both in the same system ensures data is available to agents when they need it, and available for self-service interactions as well. Also, since we use the same system for both self-service

and agent assisted interactions, it is easy to ensure that data is available at any touchpoint throughout the customer journey.

By adding Artificial Intelligence (AI) bots, NICE inContact CXone further enables organizations to automate lower-complexity, lower value interactions by equipping customers with the means to resolve basic issues by themselves. This frees up valuable agent time to handle more complex interactions. The system is built to seamlessly transition customers between those self-service and assisted channels. And again, since customer data lives in one common system of record, they are readily available regardless of channel.

**A successful contact center needs the correct mix of intelligence, design, and practical functionality in their tools to come out as a winner in today's competitive environment. NICE inContact CXone has the right mix of self service and integrated agent assisted options to transform one-on-one customer experiences. NICE inContact CXone empowers your contact center to compete and win in this experience economy.**

## 06. References

1. NICE inContact Customer Experience Transformation Benchmark Study, 2017
2. Predicts 2012: CRM Customer Service and Support Stagers into the Post human Age
3. Channel Management: Core to Your Customer Service Strategy
4. Smarter Service for the Connected Consumer

# About Atos

Atos is a global leader in digital transformation with over 110,000 employees in 73 countries and annual revenue of over € 11 billion.

European number one in Cloud, Cybersecurity and High-Performance Computing, the Group provides end-to-end Orchestrated Hybrid Cloud, Big Data, Business Applications and Digital Workplace solutions. The group is the Worldwide Information Technology Partner for the Olympic & Paralympic Games and operates under the brands Atos, Atos Syntel, and Unify. Atos is a SE (Societas Europaea), listed on the CAC40 Paris stock index.

The purpose of Atos is to help design the future of the information technology space. Its expertise and services support the development of knowledge, education as well as multicultural and pluralistic approaches to research that contribute to scientific and technological excellence. Across the world, the group enables its customers, employees and collaborators, and members of societies at large to live, work and develop sustainably and confidently in the information technology space.

Find out more about us

[atos.net](https://atos.net)

[atos.net/career](https://atos.net/career)

Let's start a discussion together



# About NICE inContact

NICE inContact makes it easy and affordable for organizations around the globe to create stand-out customer experiences while meeting key business metrics. NICE inContact provides the world's #1 cloud customer experience platform, NICE inContact CXone™, built on an open cloud foundation that is flexible, scalable and reliable for enterprise, small business, government and business process outsourcers. NICE inContact is a part of NICE (Nasdaq: NICE), the worldwide leading provider of both cloud and on-premises enterprise software solutions.