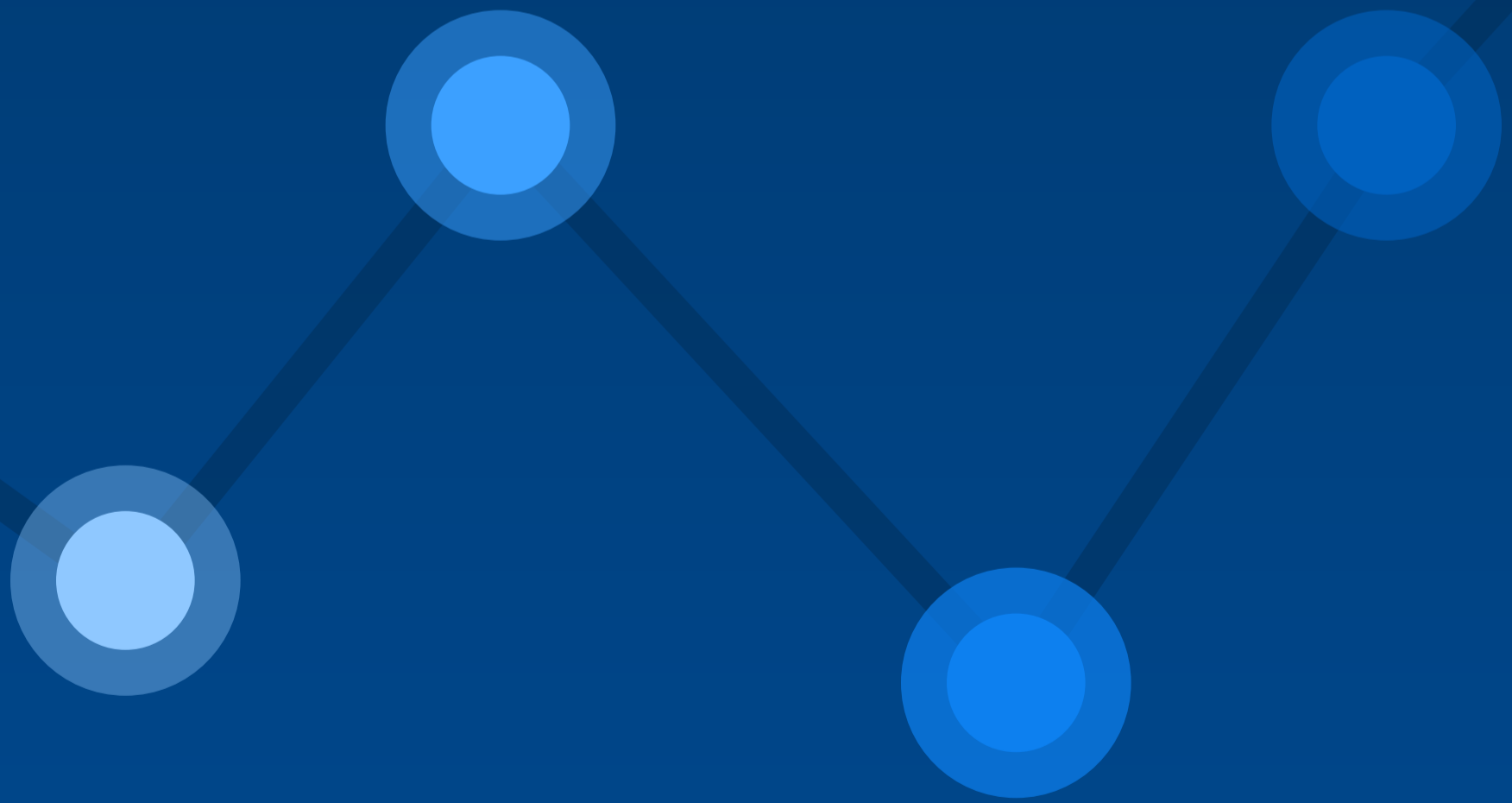




Building your business case for better self-service

2017 Roadmap to Intelligent Self-Service



Introduction

An overwhelming 97% of support leaders are investing in self-service in 2017. They're seeing that organizations' self-service channels are their customers' most preferred method for getting support, and that assisted service has become something they want to avoid. New technologies are dramatically improving that experience by making self-service easy, relevant and intuitive, while simultaneously making it more cost effective and efficient.

Better self-service needs to be a priority for your organization this year, as there are real, measurable results from which you can benefit. Our roadmap to intelligent self-service will encourage you to think about what your organization is doing to invest in bettering your customer service experience and evaluate if you're investing in the right areas.

An optimized self-service experience reduces effort to meet customer expectations, offers more personalized and relevant experiences, increases support organization efficiency, boosts case deflection and grows revenue - and we want you to experience this goodness.

Now is the time to make self-service a priority and this is your roadmap to building your business case for investment and achieving self-service success.

How Legacy Self-Service is Failing Organizations

Customer service is changing, because customers have changed. Regardless of the type of business you're in, we guarantee that your customers expect your organization (and every other business they interact with) to achieve 'digital parity'. Your organization's self-service is no longer only compared to direct competition, your organization needs to be able to deliver the same advantages as other online vendors, it needs to be easy to interact with and among the best self-service experiences your customer has encountered. This is a tall order for the limited capabilities traditional self-service offers.

Legacy self-service models don't offer ways to connect and surface knowledge, they are nearly impossible to continually improve due to the lack of visibility of what customers are doing and the highly manual updating processes, and they encounter several measurement challenges. It's no wonder such models are failing today's ever-evolving organizations.

Furthermore, there is a disconnect between people and technology in traditional models. 'Traditional' is not reserved exclusively for technological capabilities. In some cases, the proper technology is there but the people are not supported or properly aligned with the internal processes. In this scenario, a self-service strategy is destined to fail. This disconnect results in a poor and inconsistent customer experience. And even though 81% of service teams believe that service has the largest impact on how customers perceive their brand, 65% of consumers say they receive inconsistent experiences wherever they engage with them (e.g., in store, online, email, mobile, social). It is crucial to align your people, processes and technology to truly move the needle.

Identifying the Need for More Intelligence

Before we dive into building your business case, it is critical to first get a better understanding of how your current strategy is falling short. Check the boxes that apply to your organization's self-service as it is today:

The common roadblocks to self-service success

We have multiple content repositories for self-service, and no way for customers to easily search through them all

We have little visibility on what content helps our customers, and where they struggle to find answers

We do not have a methodology in place to efficiently capture and reuse knowledge

We have not collectively identified a way to define and measure self-service success

We have highly manual and time-consuming processes to update and tune relevance on our self-service site

We experience measurement challenges and lack proper analytics and reporting

We do not deliver relevant and personalized experiences for each customer

Our content is not kept up to date on a regular basis

Our self-service does not proactively recommend content and insights to customers

Our self-service does not help us to grow our revenue

The boxes you've checked are all critical roadblocks to delivering effortless, cost efficient and measurable self-service. Now that the gaps in your current strategy have been identified, you can build your roadmap accordingly and embark on your journey to self-service success.

Laying the Foundation of Your Roadmap

Strong self-service begins with establishing a process to capture and reuse knowledge. To empower your customers with the most current and relevant answers, you need to make sure the content that they need is accessible to them, when they need it. Knowledge-Centered Service (KCS) is one set of practices and methodologies to capture and re-use that knowledge. KCS concepts propose a four-step approach to make capturing and reusing knowledge part of your organization's everyday workflow.

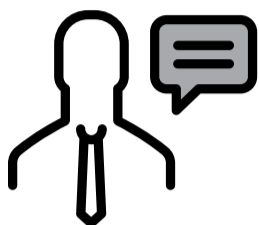
1. Create content as a byproduct of solving issues
2. Evolve content based on demand and usage
3. Develop a knowledge base of your collective experience
4. Reward learning, collaboration and sharing

[Learn more about KCS from the Consortium for Service Innovation.](#)

Once you've optimized your organization's ability to leverage its collective knowledge, the next step is to identify all relevant content and make it searchable. Making all relevant content searchable, regardless of where it resides, is made possible through unified search. Unified search spans across all your content repositories to streamline the search experience for your customers.

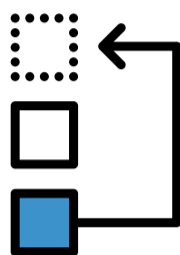
Demystifying Intelligent Self-Service

Fortunately, there's a new sheriff in town. Intelligent self-service provides customers with the best information, every time, so they can do more on their own with less effort.



Answer

Consumer-like search across all knowledge



Suggest

Personalized and contextually-relevant content & offers

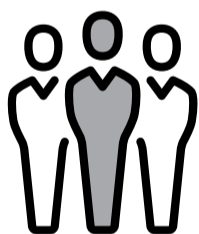


Recommend

What to do next

How it works: an overview

In order to truly deliver the best information, you've got to tap into the intelligence that resides within your organization; your people, your content, and customers - and make their knowledge and the information they've created available. Here's how:



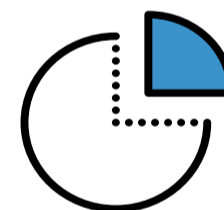
Your People

Establish a process to capture and reuse the knowledge from your employees



Your content

Identify all relevant content, wherever it resides, and make it securely searchable



Your customers

Tap into the interactions of your crowd, then measure and learn from their success

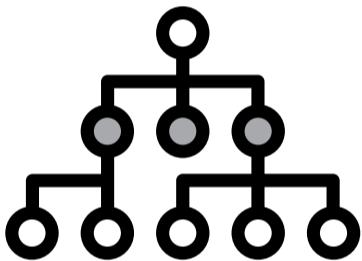
These are the most essential elements of your self-service roadmap. More on this on the next page.

The Benefits of Intelligent Self-Service



Improves Customer Experience

With intelligent self-service, the most contextually relevant content is always served up first. Reducing customer effort by getting them what they need, when they need it, results in greater engagement and a higher CSAT score.



Increases Operational Efficiency

Intelligent self-service drives the cost per resolution down, while driving case deflection rates up. This enables your organization to scale support operations without adding significant costs or hiring.



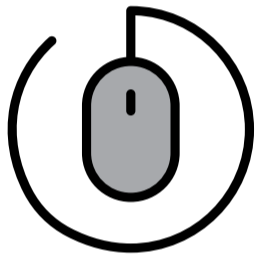
Grows Revenue

By helping to provide the right offers (products, training, etc.) at the right time, intelligent self-service dramatically increases renewal, upsell and cross-sell opportunities.

Understanding the Measurements of Success

Next, it is important that your organization is aware and in agreement of how to define and measure success. Knowing what success means to your organization will help identify which signals to track to quantify results with confidence and uncover areas which need improvement.

There are two core measurements of success when it comes to self-service, which should be tracked and measured as two separate KPIs.



SELF SERVICE SUCCESS

The rate at which customers find the information they need on your self-service portal, which may or may not have required live assistance.



CASE DEFLECTION

The rate that self-service resources eliminate a customer's need for live assistance.

Reporting on the different signals which indicate that self-service success or case deflection occurred, requires usage analytics that track customers interactions through their journey on your self-service site. Most times when customers perform a search on a support site, consult a help document and then leave without creating a case, will be considered as self-service success. On the other hand, there are situations when a customer displays a clear intention of logging a support case by accessing the case creation page, and then aborts the process because the answer is suggested to him on this page before he submits his ticket. This is considered case deflection.

Your analytics are essential for measuring success but also to your organization's overall self-service performance. Tracking your customers visits, click-paths and overall intent will help you identify and resolve content gaps by allowing you to see what they are looking for but not finding, as well as what content is most valuable in helping them self-serve.

Your analytics will also help you understand customer trends and activity by shedding light on which topics are most important and who is searching for them.

Last but certainly not least, by leveraging machine learning capabilities, your site will be able to self-learn from what is making your customers successful, and automatically make improvements in the experiences in real-time.

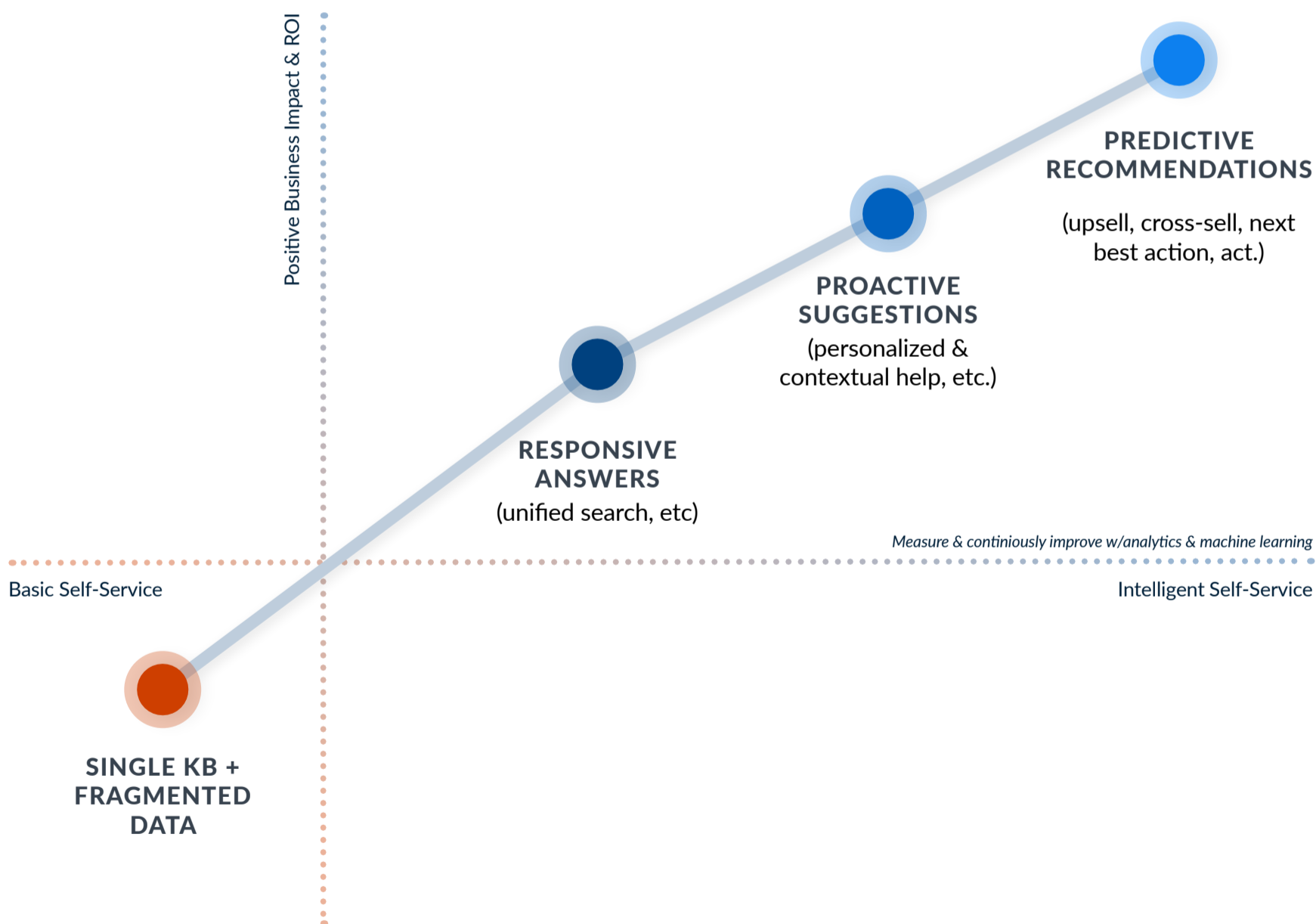
"Over the next few years, using analytics & AI to deliver greater relevancy in customer support interactions will be key to customer excellence."

Gartner, Predicts 2017: CRM Customer Service and Support, Nov 2016

Building Your Roadmap to Intelligent Self-Service

Achieving intelligent self-service does not happen overnight, it is a journey. It begins with leveraging the intelligence from your people, your content, and your customers, and - with the proper technology - that intelligence can be made available to help customers do more on their own. The good news is that each stage of the journey offers valuable and measurable benefits along the way.

See our roadmap below to assess which stage you are at.



Responsive

Responsive insights provide unified ranked results from multiple data sources, allowing your customers to find all relevant content with one single search. It also enables filtering and narrowing of results using facets or categories that let your customers really drill in to find the best content that will help them to self-serve.

Proactive

Proactive insights are used to offer suggestions that are based on your customer's context, content from input fields, as well as data that shows what has helped other customers self-serve. The relevance of results self-tunes through techniques that weigh results based upon implicit and explicit contextual factors.

Predictive

Predictive insights are characterized by the most relevant information and content being anticipated, suggested and recommended. These insights allow your organization to automatically make contextually relevant recommendations, that promote products for add-on, upsells and cross-sells.

Intelligent Self-Service Requires Intelligent Search



When it comes to self-service, search is the primary way your customers, partners and employees interact with your brand. It's how they tell you what they are looking for, what they want, and where they struggle with your products or processes. Without a unified, intelligent search solution in place to capture and leverage that invaluable information, it is lost. To make your self-service experiences continually more relevant, you need self-learning search that gets smarter with every customer interaction. Intelligent search tunes itself based on the successful outcomes of your crowd, to drive success and engagement for the next customers. It also provides insights from the usage analytics of your site to help you address content gaps, and identify areas for improvement.

Understanding the ROI of Self-Service Success

Understanding how and why intelligent self-service works are important to building a business case but we know, at the end of the day, your organization will want proof that it is an investment worth making - as it should. Coveo customers have seen rapid and significant ROI upon implementing an intelligent self-service system, and you can too.

Salesforce

“We use Coveo’s analytics insights to understand the user’s true intent, as well as to find and improve content gaps.”

Andre Robitaille, Business Solutions Manager



40% increase in case deflection rate

30% increase content viewed

20% increase in new users

Ellucian

“With Coveo, people are searching more each month and submitting fewer cases.”

Jamie Battin, Director of Customer Community



49% increase in case deflection rate after 4 months

45% increase in click-through rate

76% decrease in no-results queries

Watchguard

“An overhaul of customer support is a big investment. But we believe our customers are worth it, and with Coveo, we’re getting great returns.”

Joanne Miller, Managing Director, Product Training & Publications



3x increase in case deflection rate after 4 months

Increased visibility into customer metrics

Increase in customer satisfaction

Estimate the Financial Benefit of Intelligent Self-Service

To estimate the financial impacts that an intelligent self-service strategy can have on your support organization, you can use this [ROI model, suggested by the TSIA](#):

“Using unified search to improve the customer experience and success of web self-service, organizations are able to move significantly more customers to their more preferred method of interaction, and dramatically reduce the cost of service delivery. TSIA’s most recent data shows that the industry average for fully burdened incident cost by phone was \$510, compared to only \$4 for web self-service.

To calculate the potential cost savings of shifting assisted support incidents to web self-service, multiply the projected number of cases moved to self-service per month by the cost savings between assisted support and unassisted support incidents. Using TSIA’s industry averages, the cost savings per phone incident would be:

$(\$510 - \$4) = \$506$ cost savings per phone incident moved to self-service

Then multiply the cost savings by total number of incidents estimated to be moved from an assisted channel to web self-service on a monthly basis:

$\$506 \times (\text{Incidents moved from assisted to unassisted support in a month}) =$
Monthly savings from increased self-service adoption. ”

Using TSIA's industry average incident costs, here's an example ROI from case deflection. Let's use a scenario of a company that usually receives 15,000 cases a month in its call center, and that manages to shift 10% of those cases to self-service resolutions. The monthly savings quickly add up to \$759,000, and the yearly amount reaches over 9 million.

Monthly savings: $[(15,000 \times 10\%) \times \$506] = \$759,000$

Annual savings: $\$759,000 \times 12 = \$9,108,000$

Coveo customers who implemented unified search for their web self-service site typically saw an average increase in self-service adoption of 40%.

Conclusion

If your organization has been considering a self-service overhaul, now is the time. Your customers expect to be able to get the information they need independently and conveniently. Most companies are investing in self-service this year and by not making it a priority for your organization, you are at risk of being at a significant competitive disadvantage.

If you're considering making an investment, your dollars need to be put where they can make the biggest impact. Intelligent customer service undoubtedly has the highest and most compelling return on investment. With the proper solution, implementing an intelligent self-service solution does not have to be a daunting task. Coveo offers an easy-to-implement intelligent self-service system that can be deployed within 30 days and can start delivering results within the first three months.

Speak with an expert who can help you build a customized intelligent self-service roadmap for your organization.

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