



Knowledge Management Software



**KPS White Paper:**

**Self Service User Adoption – Carrot or Stick**

## Self Service User Adoption – Carrot or Stick?

### User Adoption Drivers for Self-Service



Web based self-service for delivering customer service and technical support is one of the fastest growing areas in service delivery. In addition to the challenges in creating an effective self-service experience, the question often asked is:

*“What do we have to do to ensure users adopt self-service over the current approach?”*

The underlying question is “carrot or stick?”. Can we and should we force our customer or user base towards self-service and if so, how do we implement the change without causing a customer backlash. This applies even more so to initiatives that require investment and setup costs.

Working towards a natural conversion into self-service support channels is all about getting the user experience right and promoting the opportunity to self-serve to all users at all stages of the support interaction. Having worked with many clients across different sectors, we have gathered insights on how to create a self-service experience that encourages user adoption.

*“If something is worth doing, it’s worth doing well”*

### The Case For?

Self-service as a delivery channel seems an obvious choice. Well executed, the approach saves cost, time and is infinitely scalable:

*“If 90% of people are happy to use on-line banking, why are 90% of people not happy to self-service for internal IT support?”*

The answers could be summed up as: Because people don't like change and users don't like being forced into a different channel unless they can see the benefit from their own perspective. The key to a successful self-service implementation is to focus on the user experience and user perspective. Which means making it simple to use and providing the information needed.

### The Business Case?

Let's get over the easy bit. Self-service has the potential of an 80% reduction in call centre traffic. Call centre and IT support traffic is expensive. Self-service saves money. Recent estimates of external customer support through call centres can be as high as £15 to £30 per call while web-chat may be £2 to £3 per interaction. Automated web self-service is almost exclusively setup cost with per transaction costs being insignificant.



Transaction based services such as banking, travel and delivery logistics are already forcing self-service by removing other options. Amazon is not losing sales and EasyJet is still growing despite removal of the service agent in the booking and ordering process. When users see other benefits such as low cost or convenience they are ready to switch. What is still required is focus and attention on delivering a slick and effective self-service experience to stimulate repeat business referrals and recommendations.

Amazon and eBay's entire user experience is designed to be slick, user friendly and most importantly right first time. With users driving the action and suppliers being highly motivated to deliver good service (no supplier can afford poor ratings) there is little or no need for escalation to a call centre agent. This is handy, as the call centre escalation has been entirely removed from the service experience.

*“So what happens when information intensive services such as IT support and customer service heads the same way?”*

### **The Customers Case?**



It's already happening. This comes back to user choice. When does a user prefer a readily available solution over an alternative that includes a conversation? Typically in areas such as IT support the answer is:

*“When I am aware of the alternative and when the alternative actually solves my problem”*

Our customers have eliminated IT support night shifts without an upsurge in early morning calls. Users are not saving up requests for when the day shift arrives; even when the user has a choice to wait till the morning they use the self-service channel to get immediate support.

This sets out the fundamental challenge of a self-service implementation, which is to make the service experience equal to or better than the service it replaces. Once this is achieved the second challenge is to promote the “new” alternative at every opportunity.

*“Can / should you force users or customers towards self-service?”*

While forcing users towards self-service is an option, there is a risk of a backlash from users when forced towards self-service. Whether external customers or internal users, the risk is best managed by creating, testing and optimising a first class self-service experience that is complimentary to existing channels.

### **Self Service Challenges**

Once self-service is viewed as a complimentary channel, the challenge is simply to make it first class. In that case here are some of the issues that our customers experienced during the creation and on-going improvement of their self-service:



- **Out of date knowledge base:** Unlike service agent support, with self-service 100% of all knowledge available has to be recorded and presented through the knowledge base that is backing up the user experience. Bringing the knowledge base up to date and comprehensive is an essential step, as is establishing a process for ongoing maintenance. At the same time improvements in the knowledge base will benefit all users, regardless of channel.
- **Lack of integration with support tools:** Viewed as one of a number of channels, integration and sharing of information with other channels is necessary to allow a seamless service experience. In multichannel service delivery the user may start in one channel and switch channel at some point. Making the switch seamless for the user is key.
- **Resources to create / maintain/ update information:** Knowledge base maintenance becomes critical for delivery of self-service. The systems, processes and resources must be in place in order for this to work. As a rule every new enquiry/response, which does not deliver an answer, should lead to additional content in the knowledge base.
- **From spoken to written responses:** In expert led service environments, the service agent or expert may be used to deliver support through verbal exchanges with users. When moving towards self-service the requirement is for well written easily digested written responses to complex enquiries. This skill set may not exist and needs to be developed amongst the team where the relevant knowledge resides.



## Self Service Solutions Some Top Tips

Accepting the challenges is half a step towards implementing effective solutions. We have collected our top tips for implementing web-based self-service.

1. **Employ Knowledge Management:** We may be biased but CRM implementers all agree: Embody knowledge management into your process or desist from considering self-service as an option.
2. **Respect Customer Democracy:** Choice of channel will ensure that the best channel wins in the long run. By offering self-service as a complimentary channel, user adoption may be more gradual but you can accelerate adoption by listening to the users and making the channel better than existing alternatives.
3. **Organise Content by Relevance:** Every user is unique and have a unique way to seek information. Create a user portal that facilitates personalisation. Features such as my FAQs, my most recent questions, most popular questions, how to solutions will help creating a familiar “go to” resource driving return traffic.
4. **Above ALL:** Deploy a SEARCH function that works. Natural language search technology enables users to get quickly to the most relevant responses and presents responses in order of relevance. With self-learning from user feedback the accuracy of what is presented will increase with usage. Search functions with suggested answers also get the user quicker to a solution faster.
5. **Integrate:** Links between search, feedback, raising support tickets, tracking responses, confirmation emails and follow up helps the user engage with the knowledge base.



Communicating with links to the original source information ensure that updates are shared when information change.

6. **Work Flow:** Follow up to service actions via emails with links to self-service portal. Follow up emails are an opportunity to promote the portal allowing users to return directly back to the response at a later date.
7. **Deflect the Easy:** Focus on deflecting the simple and repetitive calls by creating content that helps the user including step by step guides and 'how to' instructions for resolving common problems.
8. **Record the Complex:** Record complex and rare enquiries and related solutions. When these are resolved make sure the solution is published via the knowledge base / self-service portal
9. **Promotion:** Once you have established a self-service channel that works, the remaining challenge is awareness. Promote the self-service channel via other channels, including existing dominant channels. Make it easy to switch channel and make sure all interactions are captured and ideally linked to individual users regardless of channel.



## Make it Good and They will Come

Talking with prospects and customers here are a couple of questions that we are often asked:

*“Should we implement self-service as phase 1 for knowledge management or as phase 2 after we have got our agents on-board?”*

*“What about upsetting my users or customers with self-service”*

In our experience, if you have not yet reached a point where a knowledge management solution is at the centre of your service delivery, this should be your first objective. Working with your service agents at making your knowledge base central to every service interaction should be your first step towards effective self-service delivery.

Put simply, if your knowledge base implementation satisfies your service agent's needs it is more likely it will also satisfy your customers or user's needs. Simple steps can be taken to ensure the knowledge base and service experience is positive at the time of launch:

1. Make it easy to escalate and contact an agent at any point
2. Pilot the solution with “good” (relevant) user representatives
3. Communicate the value add of the self-service approach to the user
4. Ask for feedback on the self-service experience AND ACT UPON IT
5. Let users make suggestions for improvement through the portal



## Promotion of Self Service

Service with a smile, promote with a smile, share examples of the service at every opportunity: Updates, Ideas posts, self-service of the week, Tip of the week, positive testimonials. Every opportunity to remind users of the self-service option will increase adoption.

### REMIND, HIGHLIGHT, EDUCATE

Call To Action Examples' to make self-service visible with seamless friendly escalation:

*“Test drive our self-service”*

*“Email Link – Thanks for your enquiry – here is a link to possible solutions”*

*“Email Link – Here is the solution we discussed – just follow the link”*

*“If you have any problems, let us know using this link”*

*“Share this solution – just forward the link”*

## Channel Integration

Multichannel service delivery is preferable to replacing one channel with another. Multichannel delivery takes into account different user preferences and by allowing “channel hopping” users gain the confidence to try out self-service. In a recent survey of UK, US and Australian consumers, 28 % use on-line customer support at least once per week. Web customer service is growing; 52% of financial service interactions are on-line, 50% of government service interactions are on-line and this number is still growing. Most importantly:

*“86 % of customers prefer self-service (when it works...)”*

Increased sales and increased on-line traffic are other benefits reported by organisations that have embraced self-service.



## Make it, then Make it better: SSP Case Study:

Working with insurance sector IT specialist SSP we mapped out their route to ensure successful implementation of their IT support services. Key to the SSP approach is to ensure that no user is left without support at any point. Self-service is an option rather than the only option.

## SSP: Experiences and Approaches:

1. Have a customer / user portal in place to log / register issues (first baby step towards self -service)



2. Enable the first step by self-logging of issues, that are then followed up by service agents
3. Its all about content, if the response to the first self-help attempt is poor the user will not try again. Make sure that early attempts of self-service are followed up
4. Invest time before going live in:
  - a. Testing with as many common questions as possible
  - b. Test with representative real users
5. Make conversion from self-service to logging a ticket a “one click approach”
6. Create a simple and streamlined workflow for self service and escalation
  - a. User login, self-serve, escalate if not served, close and update knowledgebase
7. Ensure that EVERY self-service and agent interaction include an update of the knowledge base
8. Create a simple and easy to use interface or portal with added features such as: FAQ, Important updates, Personalisation,
9. Focus on user relevance of content displayed RELEVANCE, RELEVANCE, RELEVANCE
10. Provide email confirmation with links directly to the incident
11. Get users to tell if the answer has helped / worked for them
12. Make the self-service portal a living breathing thing with fresh and RELEVANT content



### The Alternatives (Using a Stick)

Using sticks rather than carrots to drive user adoption is a possibility. If the primary objective is cost reduction and users have few alternatives it may be something to consider. At the same time, providing support services to internal or external users is ultimately about adding value. Its essential that self-service is delivered to a standard that resolves issues before alternatives are removed. At such time you may want to:

- Limit other options, by reducing availability, hours of operation, responsiveness
- Employ less staff, leading to longer queues, self-service become comparatively more attractive
- Hide the support number and email, yes a lot of organisations do
- Remove seamless escalation so it is harder for users to escalate to service agents

### Rewards for Making it Better

A number of organisations and industries are incentivising users towards self-service. Discounts for on-line ordering, on-line booking are becoming common in on-line sales. Provided the self-service experience is effective, additional incentives may just help speed up adoption.

In service rather than sales settings perhaps the most powerful incentive is prompt, accurate responses that solve the user’s problems. Given the user is best placed to comment on the efficacy of the solutions offered, it makes sense to incentivise users to participate in the refinement of questions and answers. This is what “going social” is all about.

- Make access easy and relevant, with FAQ’s and user specific portals,



- Incentivise users to participate and give feedback, using simple links and responses
- Back up the interaction with a dynamic self-learning knowledge base

## Our View

Working with many organisations where delivering web self-service remain the overall objective, choosing between stick and carrot remain a frequent topic. We believe there is a better option:

Working through a methodical approach to implementing multichannel service delivery, self-service has the potential to become the preferred option for most users.

At the same time most or all of the steps on this journey will help all service channels improve, leading to an overall improvement in service delivery and first time resolution with a corresponding reduction in delivery cost.

***Improving your service delivery AND reducing delivery cost CAN be achieved***

KPS offers Knowledge Management Software that is quick to deploy, easy to integrate, use and maintain with a wide range of features to support service desks and support agents, as well as customer self service. KPS Knowledge Management Software supports internal service delivery and customer service delivery in many areas including IT service management, Health, Education and Public sector services. KPS knowledge management solutions enable access vital knowledge quickly and easily through a simple to use natural language interface. The KPS solution also helps to identify and fill knowledge gaps making new solutions available for future use.

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