



NICE inContact

**Effortless
service,
happier
customers**

Using smarter self-service
to accelerate the speed
of full resolution



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Solve the low-resolution self-service paradigm

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.

Intelligent self-service benefits extend beyond the customer

- ✓ Gartner states "that live channels such as phone, live chat and email cost an average of \$8.01 per contact, while self-service channels such as company-run websites and mobile apps cost about \$0.10 per contact."¹
 - » Agent-Assisted—\$8.01 per contact
 - » Self-Service—\$0.10 per contact²
- ✓ Aberdeen research indicates self-service provides:
 - » 3.3% reduction in service costs
 - » 3.4% improvement in revenue³

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¹ Gartner: Does Your Digital Customer Service Strategy Deliver? (2020)

² Gartner: Does Your Digital Customer Service Strategy Deliver? (2020)

³ Aberdeen: State of the Contact Center 2020

Gartner found 70% of customers use self-service channels during their resolution journey. The problem is, only 9% are wholly contained in self-service.”⁴ Even so, our findings show that businesses still express a significantly increased preference for self-service versus agent-assisted channels in 2020.⁵ Likely because Gartner indicates it costs an average of \$8 per contact, while self-service channels such as company-run websites and mobile apps cost about \$0.10 per contact⁶, and when done effectively, has led to 3.4% revenue improvement, according to Aberdeen⁷. The key isn't just self-service, it's intelligent self-service, designed with the customer in mind.

Help your customers help themselves using intelligent AI-powered technology across self-service channels

 Website  Email  Chatbot  Digital Channels  SMS  Mobile Apps  IVR

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. But self-service must be considered strategically or can result in low-resolution in self-service channels.

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⁴ Gartner: Does Your Digital Customer Service Strategy Deliver? (2020)

⁵ NICE inContact: 2020 Customer Experience (CX) Transformation Benchmark

⁶ Gartner: Does Your Digital Customer Service Strategy Deliver? (2020)

⁷ Aberdeen: State of the Contact Center 2020

Create a smarter 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."

No matter what the maturity level of AI or self-service is, in your organization, asking these simple questions will be helpful in the successful execution of a smarter self-service strategy.

This exercise is, in many ways, the foundation for building your channel access strategy and customer journey maps for self-service. 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?
 - » [Do we have visibility on the full customer journey? What metrics or 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?
 - » [What metrics determine success? How will we measure these?](#)

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No matter what the **maturity level of AI** is in your organization, asking these simple questions will be helpful in the successful execution of a self-service strategy.

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. AI acts as the backbone to smarter self-service, with sophisticated and accessible AI-powered technologies that support a fully integrated self-service experience.

Businesses are using and investing in AI-powered Self-Service

- ✓ Approximately 40% of businesses' customer service experiences occur in self-service channels with a preference for website, IVR and mobile app
- ✓ 46% of businesses are offering chatbots
- ✓ 43% are offering conversational IVR
- ✓ 52% of businesses say they will be using AI and automation to improve customer service⁸

Consumer satisfaction indicates a need for smarter self-service

57% of customers have stopped buying from a company because a competitor provided a better experience⁹

- ✓ ½ of consumers who begin with self-service channels are transferred to a live agent¹⁰
 - » But, 66% say they often must repeat or re-explain information to different representatives¹¹
- ✓ 71% of businesses agree that chatbots and virtual assistants make it easier for customers
 - » But, 90% of businesses and consumers believe chatbots and Virtual Assistants need to get smarter before consumers are willing to use them regularly¹²
- ✓ 73% of customer's preferring to visit a company's website before contacting customer service¹³
 - » But, many websites don't place needed content in relevant locations.

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⁸ NICE inContact: 2020 Customer Experience (CX) Transformation Benchmark

⁹ Salesforce: State of the Connected Customer

¹⁰ NICE inContact: 2020 Customer Experience (CX) Transformation Benchmark

¹¹ Salesforce: State of the Connected Customer

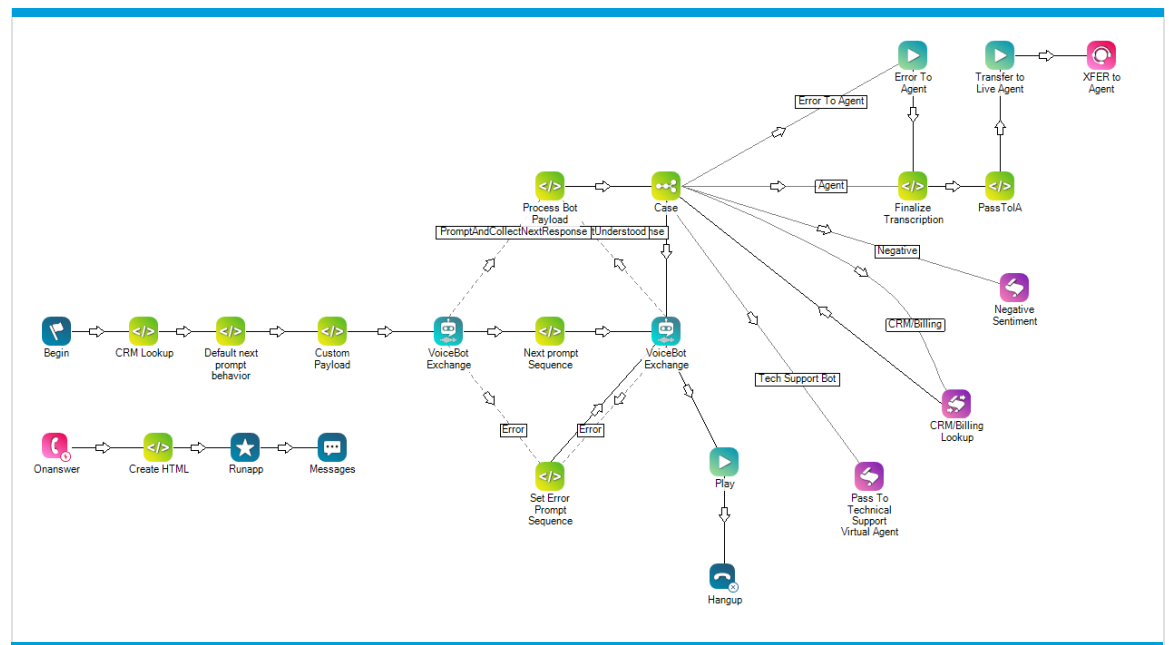
¹² NICE inContact: 2020 Customer Experience (CX) Transformation Benchmark

¹³ Accenture: Next Generation Customer Service

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.



This chat script created using drag-and-drop functionality shows how a chatbot is used as the gate to other channels and how scripting can support seamlessly blending from a bot to an agent.

Use analytics uncover the perfect blend of self-service and agent-assisted options

In the 2020 research study by NICE inContact, it was revealed that 84% of consumers are more willing to do business with companies that offer self-service, but only 61% say companies offer easy, convenient self-service.¹⁴ For a channel with that level of importance, the question for contact center leaders isn't, "Should I offer self-service?" Rather, "How do I choose the right set of self-service options and make it effortless for my customers cross-channel?"

Self-Service options are far and many. It may be a simple **Dual Tone Multi-Frequency-based IVR** to a sophisticated AI-based **conversational 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 chatbot** built with natural language processing and machine learning that can anticipate and automate with humanlike response mechanisms.

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.

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.

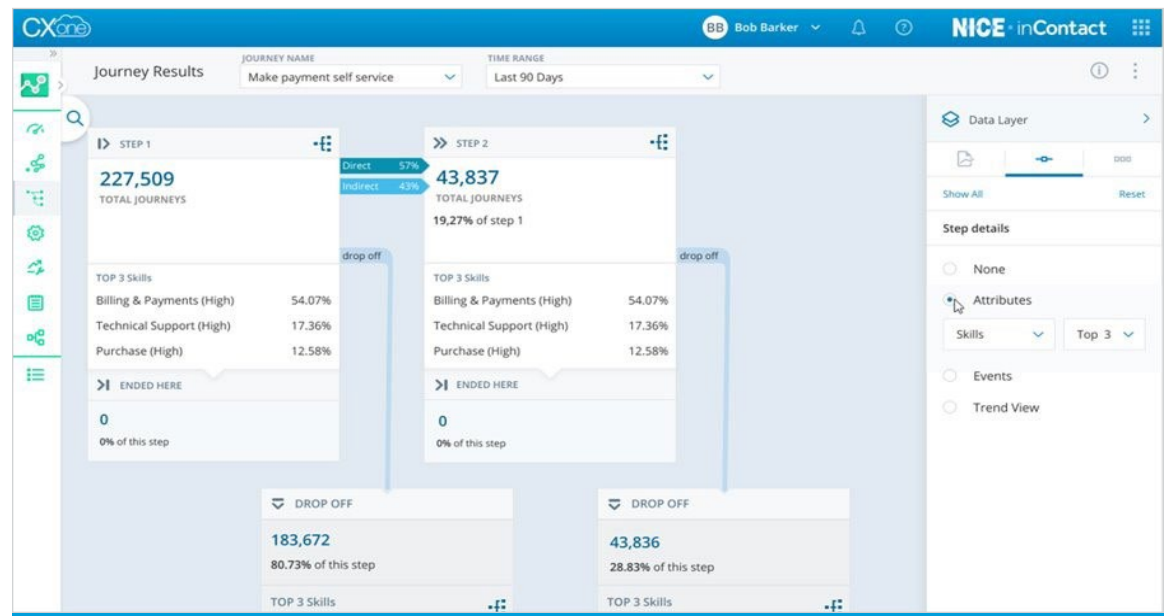
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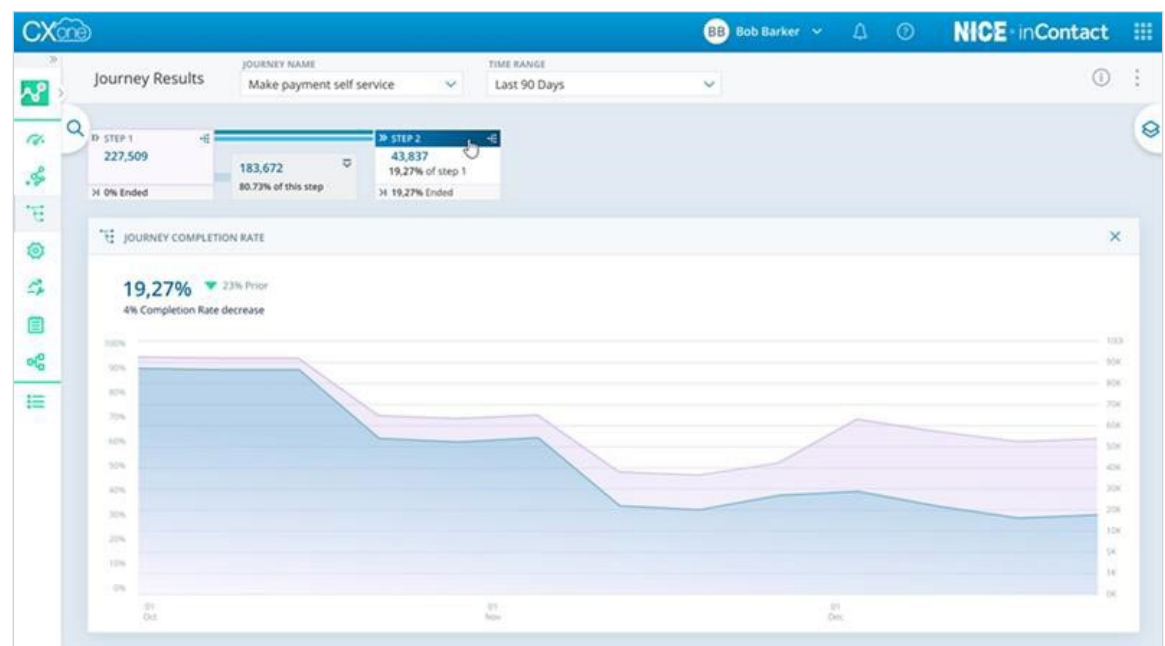
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¹⁴ NICE inContact: 2020 Customer Experience (CX) Transformation Benchmark

A table stake feature contact centers offer are built-in customer journey analytics. These metrics visualize the customer journey with dashboards that show exactly where the friction occurs, like in frequent agent transfers, bottlenecks or abandons and where unexpected interaction metrics occur. This visibility not only helps contain more calls within the IVR, it highlights areas where companies can deliver smarter self-service.



With self-service analytics, you can pinpoint issues where callers get lost or drop out of your IVR flow.




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Full-journey analytics can help you make data-driven decisions on which paths to make changes and track your improvement.



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.

Example Use Case: 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. Although 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

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:

1. Lenders create a self-service portal that collects important customer data and preference information. This is often the first touch point.
2. Customers receive informational emails, a proactive outreach, and a personalized quote on their eligibility. 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.

96% of customers expect companies to make it easy without the need to repeat information¹⁵

In fact, ½ of consumers who begin with self-service channels are transferred to a live agent.¹⁶

Even so, 66% of customers say they must repeat or re-explain information.¹⁷ Your customers also expect to receive service in their preferred channel and be directed toward the channel with the quickest resolution. Although adding self-service and **digital channels** sounds like a simple concept, it requires a thoughtful shift in service strategy to ensure full resolution.

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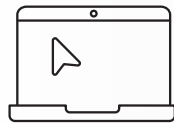
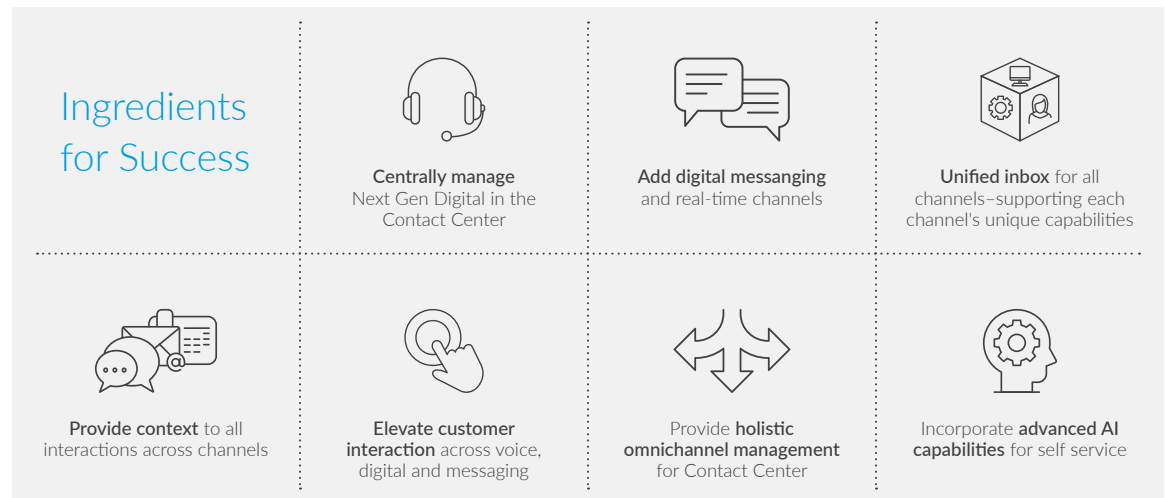
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¹⁵ [NICE inContact: 2020 Customer Experience \(CX\) Transformation Benchmark](#)

¹⁶ [NICE inContact: 2020 Customer Experience \(CX\) Transformation Benchmark](#)

¹⁷ [Salesforce: State of the Connected Customer Report 2019](#)

A successful cross-channel, self-service recipe



Interested in more tips for success integrating digital channels into the mix?

Get your instant download of “The Innovator’s Guide to the Digital-first Contact Center” today.

[Download Now!](#)

Channel switching requires integrating customer data across channels to provide a 360-degree view with new KPIs to measure cross-channel self-service success. This also means empowering agents by training them across channels, unifying the agent’s desktop to give them the historical customer context they need without wasting time switching screens, and empowering them with the relevant knowledge and context they need to resolve more complex issues. Because when a thoughtful approach to self-service works as anticipated, it moves an agent’s focus from highly repetitive tasks to more complex service.

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.

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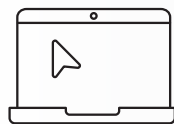
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Ensuring that the human touch is delivered well requires an understanding of your agent's expectations. At the most basic level, agents want clearly defined expectations that make sense and aren't designed to burn them out. They also want to have the 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 seamlessly blend self-service and agent-assisted channel. Using natural language processing to interact and understand human conversation, and 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.



Interested in learning more about how you can improve the agent's role in self-service?

Get your instant download of the helpful **"ICMI Agent Experience Maturity Model Toolkit and Self-Assessment."**

Download Now!

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Fully resolve your customer's needs effortlessly for big impact

After conducting in-depth research, NICE inContact realized that although 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. When smarter self-service using increasingly accessible AI technologies is considered, the benefits are clear:

When applied strategically, AI-powered self-service can show significant impact. Leading AI users report

- ✓ 7.2% higher YoY customer satisfaction
- ✓ 7.3% higher YoY customer retention
- ✓ 3.5% higher FCR
- ✓ 4.3% higher YoY agent productivity¹⁸

Recognizing these benefits, **52% of businesses say they will be using AI and automation to improve customer service.**¹⁹ A wise decision, 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 stakes are too high to implement the wrong systems. A smarter self-service system seamlessly integrated into your contact center's customer and agent experience is the solution to full resolution—regardless of whether they use self-help, assisted service, or both.

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¹⁸ Aberdeen: Best Practices for AI in the Contact Center, 2021

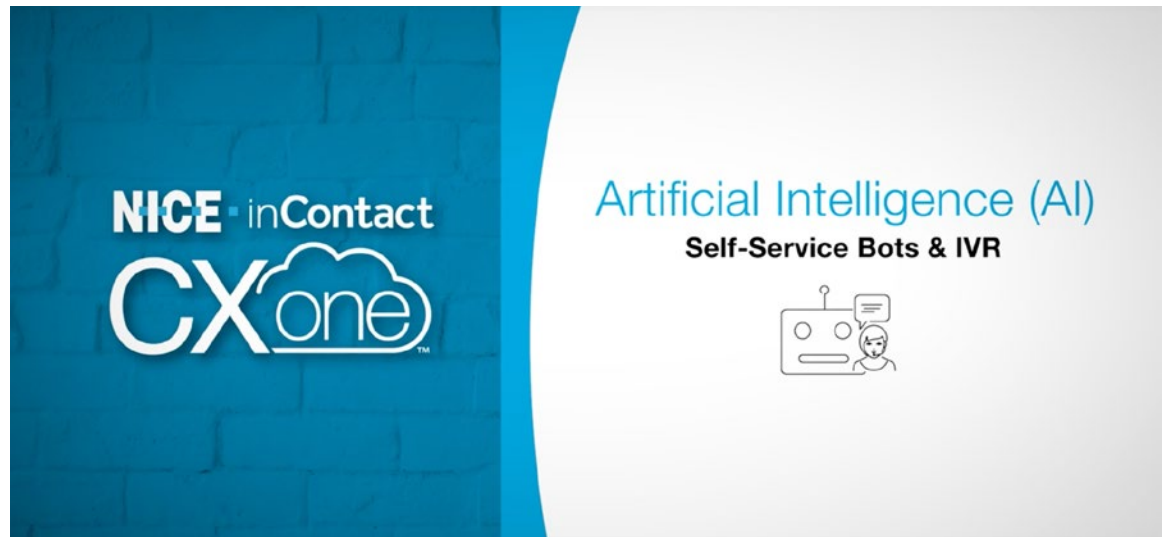
¹⁹ [NICE inContact: 2020 Customer Experience \(CX\) Transformation Benchmark](#)



Don't leave any interaction to chance.

Use AI-enriched self-service to accelerate the speed of full-resolution. Take the next step in providing your customers effortless, smarter self-service today.

CXone integrates effortless cross-channel self-service in a unified experience for agents and customers.



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