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Making Sense of Guided Self-Service

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✸ **Spark Series**

What is guided self-service?

Help customers find the right information and complete tasks quickly and easily.

When it comes to customer support, today's consumers and employees want it to be as simple as updating their social media profile or buying a product with one click. That's why digital self-service has become their go-to approach for finding answers and resolving issues. It lets them avoid long call center wait times and puts them in control.

Guided self-service adds automated assistance to make it even more effective. It can be a chatbot asking questions that steer a customer toward the best resolution or a pop-up message that provides additional information to someone completing an online form.

Businesses that commit to digital innovation—including guided self-service—are more successful.[1]

With guided self-service, companies need fewer live agent interactions for simple tasks, so their team can focus on more complex issues. And customers benefit by getting personalized support easier and faster, making them more likely to remain loyal to your business. According to Gartner, customer effort (how easy or difficult it is for customers to find what they're looking for) is the most accurate predictor of customer loyalty—a full 40% more accurate than customer satisfaction.[2]

Why it matters today

Customers expect great
digital support experiences.

Because 40% of consumers now prefer self-service over human contact and 69% of consumers try to resolve their issue on their own,[3,4] it's critical that businesses offer guided self-service to ensure success. FAQs and contact forms are no longer enough. Automated assistance goes further to give people the guidance they need to resolve their issues, based on their particular circumstances and preferences.

Guided self-service also offers several business benefits, including:

Improved customer experience and brand loyalty: Being able to quickly find answers and resolve issues creates happy customers—and happy customers become loyal customers.
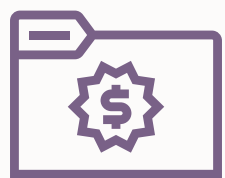
Reduced costs: With the right technology, customers can help themselves, and your company can reduce service costs because fewer service tickets and calls are needed.

Increased productivity: When self-service is automated, your team can focus on more critical, complex issues instead of simple, repetitive inquiries.

Examples of guided self-service

- **At home/On the road:** Imagine you have a flat tire. You call your road service or insurance company and the system asks you to "press one" for towing service. You are then texted a link to a chatbot that asks you questions and automatically contacts the nearest towing service to dispatch assistance. You're texted the name of the towing company and an estimated arrival time. Later, you're asked if you're satisfied with the service or need more help. The chatbot gives you a phone number you can call with a single tap.

- **In the office:** Guided self-service can help employees sign up for benefits like health insurance and complete tasks such as promotions, transfers, and raises. For insurance, automated questions appear to help you determine which benefits you're eligible for based on your location, family status, and other personal details. It then provides action items and other information based on your answers.

  Besides being easy to use and putting employees in control, guided self-service provides mobile capabilities, built-in approvals, and workflows—while also eliminating paperwork.

The basics

Guided self-service can be
your brand differentiator.

But you can't just set it and forget it. It's a continual service evolution driven by several fundamental tools and metrics to ensure its effectiveness.

A successful guided self-service strategy should include these key capabilities.

Knowledge bases: Information about your products and services often included in frequently asked questions, white papers, video tutorials, and more.

Chatbots: Also known as digital assistants or digital agents, chatbots use AI or natural language processing (NLP)-powered software to understand, analyze, and respond to customer queries.

Customer intelligence: The process of gathering and analyzing customer information—such as their purchase history, behavioral data, or customer details—to provide personalized support and develop a stronger relationship.

Decision automation: Technology that guides the customer through a series of questions and delivers personalized information and advice.

Proactive engagement: Based on customer activity, this automated assistance may appear as chat pop-ups, suggested knowledge base content (also known as contextual knowledge), or options to speak to a live agent.

Measuring the success of your guided self-service strategy may seem daunting, but there are several metrics that can be used. These metrics provide insight into how well your customers are adopting guided self-service and what is or is not working for them.

- **Abandon rate:** How often do customers abandon self-service pages and portals? Those with a high abandonment rate may need to be revised.

- **Customer effort:** Is it easy for customers to find the help they need? Are there particular pages customers spend a lot on but then transfer to a live agent?

- **Escalation to a live agent:** If your customers consistently need to escalate to a live agent, then your self-service pages are not working effectively.

- **Recontact rate:** Do you see a pattern of customers continually visiting the same self-service channels for the same issue? High recontact rate means customer issues are not being addressed.

- **Contact deflection:** If your self-service pages are solving customers' issues and deflecting inbound calls to your contact center, you're doing it right.

What's next?

Digital self-service is here to stay. Make sure you enhance it with guided experiences.

Basic self-service is a great first step, but customers are demanding more. To meet their expectations, you'll need:
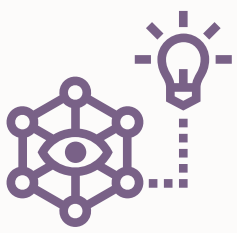
Artificial intelligence and machine learning: These technologies will continue to be the foundation for successful guided self-service because they deliver a more personalized, seamless customer experience. Chatbots can now understand natural language, learn from previous customer interactions, and be trained to handle increasingly complex customer issues.

Communities: Gaining traction in the world of self-service, these online public forums allow customers to ask questions and share knowledge with others to resolve issues at their convenience. The information is saved and searchable, allowing customers to see if others are experiencing the same issue. It's also an opportunity for service teams to monitor the discussions and respond directly to avoid escalation.

Self-service blended with human support: Customers are happiest when they can choose how to connect. Continuing to offer self-service and live assistance can empower customers because they get the information they need the way they want it. It also allows your live agents to provide the best possible customer experience.

Advanced search capabilities: With the help of natural language processing, search can understand the customer's intent and serve up answers based on the perceived meaning. Instead of frustrating users with irrelevant search results, advanced search can guide customers to the right information in knowledge bases even if they didn't enter the right keywords.

Customer intelligence: Self-service is most effective when you have a complete picture of your customer and what they need. Gone are the days of an FAQ chatbot solving only the generic issues. By incorporating customer intelligence into service journeys, you can tailor self-service experiences for each customer.

A view toward practical solutions

Once you've implemented guided self-service, you'll need to measure its effectiveness and refine it to ensure continued success.

Make it part of your ongoing digital strategy

Use data and metrics to identify if and where customer engagement and retention needs to be improved. Ensure self-service prompts are clear, concise, and easy for customers to use to resolve an issue.

Connect knowledge to digital channels

Ensure your comprehensive knowledge base is easy to access across the entire customer journey. For example, add a knowledge pop-up to your product page, allowing customers to quickly find answers without having to navigate to a dedicated support page.

Anticipate customer needs

Are customers leaving products in their shopping carts? Are they frustrated with your return policy? Find out where they're struggling, then add quick and easy access to support—such as a chatbot window—in the places where they need it.

Expand channels to meet customers where they are

Offering self-service on your website is a good first step. But customers want to engage with you across a variety of channels. It's critical to offer guided self-service on mobile and social media platforms.

To the experience-maker who's always moving forward

At Oracle, we know great experiences come from great inspiration, and we're providing the spark for your next idea. Packed with powerful info, the Spark Series will get you up to speed on core CX concepts—such as guided self-service—quickly.

Think of it as a way to hone your understanding before turning your eyes toward a new strategy. Because if anyone's going to create CX gold, it's you.

What will you discover next?

- eBook: Essential Strategies for Digital Customer Service

- eBook: Making Sense of Chat

- Product Info: Explore Digital Customer Service

About Oracle Advertising and CX

Make every customer interaction matter by connecting all your business data across advertising, marketing, sales, commerce, and service. Oracle Advertising and Customer Experience. (CX) is a connected suite of applications that goes beyond traditional [CRM](#) to help you create and nurture lasting customer relationships. Build a complete view of every interaction and every customer, no matter how and when they engage. Empower your entire business to deliver exceptional customer experiences—from acquisition to retention—and everything in between.

Sources

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2. Jordan Bryan, "Reduce customer effort in service interactions to build customer loyalty in your service organization," Gartner, February 11, 2020

3. Toma Kulbytė, "The Value of Customer Self-Service in the Digital Age," updated May 4, 2021

4. "Zendesk Customer Experience Trends Report 2020," accessed August 9, 2021

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