

A Digital Self-Service Playbook

Five Ways to Improve Digital Self Service and Reduce Call Center Costs

This e-book covers five processes digital and service leaders can put in place today to:

- Increase digital adoption
- Reduce call volume, wait times, and call times
- Improve organizational efficiencies



Digital Self Service Has Never Been More Paramount

In today's uncharted business environment, companies have shifted into survival mode. The current operating model is to keep overhead low, maintain profitability, and guard market share.

While every industry has been impacted differently (with [retail and travel hit hardest](#)), a common pain point for many is the significant increase in calls to call centers. Suddenly, more customers are calling in to:

- Check on, cancel, or postpone travel plans
- Get help creating an online account or resetting a password
- Get help upgrading or changing media or cable subscriptions
- Check on an order for groceries, pharmaceuticals, or other essential products

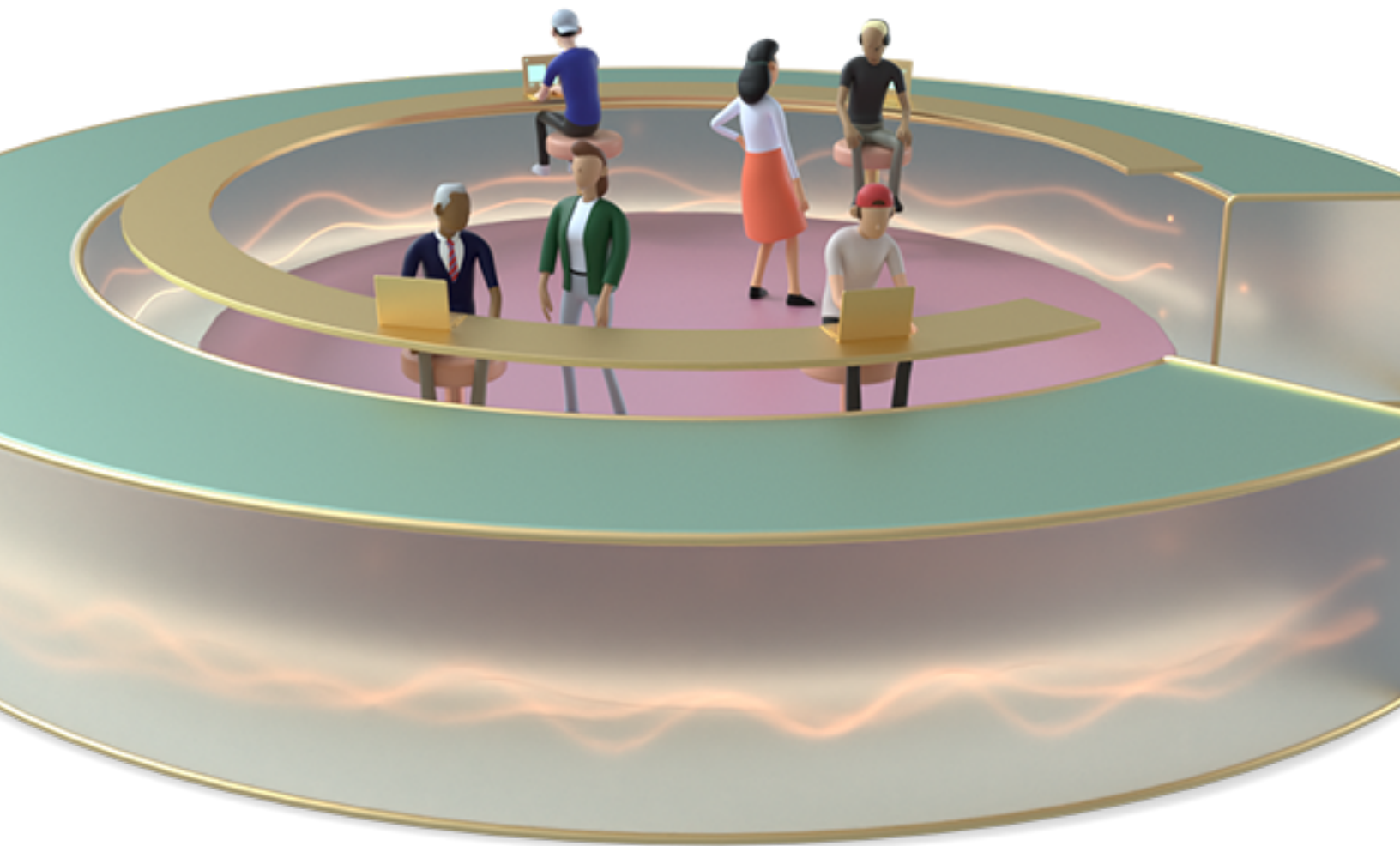
In an ideal world, customers are able to self-service on digital, accomplishing a long list of tasks easily and conveniently. But whether your business optimized your site or mobile app before Covid-19 or you're scrambling to now—a sudden surge in new digital visitors and new digital behaviors is leaving almost everyone in reactive mode.

Today, reducing digital self-service friction is a matter of cost reduction and customer retention.

Tomorrow? The practices you put in place now will help you emerge from this crisis in a better position to optimize a low cost channel, deflect interactions from a high cost channel, and ultimately provide a better, more differentiated experience for your customers.

Five Ways to Improve Digital Self-Service and Reduce Call Center Costs

- 01 | Identify the Lowest Hanging Fruit in Your Digital Self-Service Journeys
- 02 | Detect and Rescue Frustrated Customers in Real-Time
- 03 | Get Real-Time Alerts on Upticks in User Friction
- 04 | Lower Call Times by Enabling Agents to Reproduce Issues
- 05 | Quantify Customer Feedback for Data-Driven Decisions



01 Automatically Identify and Prioritize the Lowest Hanging Fruit

With an increase in digital visitors and a growing backlog of enhancements, teams need help identifying and prioritizing the lowest hanging fruit. Nearly every business is experiencing the **joy** or **burden** of a sudden surge in digital visitors and behaviors. While digital leaders want to maximize customer (and executive) attention on a newly popular channel, resources are lean and budgets under scrutiny.

To put it simply, you're trying to do more with less.

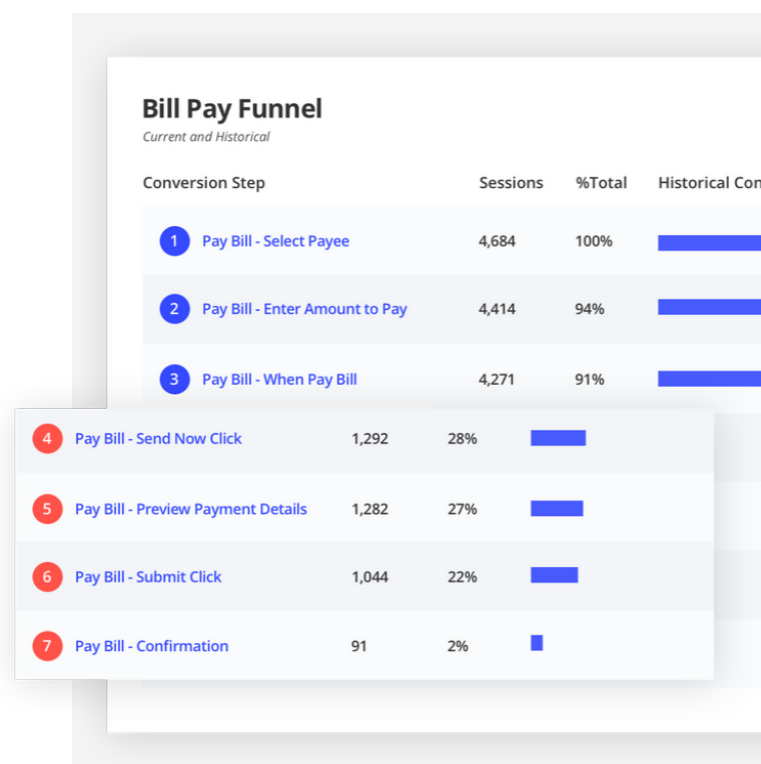
In this climate, teams need help with the critical analysis and prioritization of where to focus next—whether it be a UX opportunity, technical error, or performance deficiency. The faster your teams can identify and prioritize conversion blockers, the better you can:

- Reduce calls to the call center
- Increase self-service or revenue conversions
- Improve the customer experience

What you need to have in place:

- Automate detection of user struggles, whether behavioral or technical
- Quantify the business impact of each struggle across all users
- Reproduce customer sessions to more quickly pinpoint friction

Pay special attention to friction points along top self-service journeys.



02 Detect and Rescue Frustrated Customers in Real-Time

When a customer struggles on your site or in your app, why not intervene in the moment to prevent a call to a support agent, or worse yet, frustration and abandonment? If you can automatically detect customer friction in real-time, you can also rescue customers “in the moment” and deflect inbound calls.

For example, when airline sites were flooded in March 2020 with guests logging in to check cancellations or reschedule flights, one airline detected an uptick in customers struggling to reset passwords. To prevent a call to its call center on such a simple issue, the airline triggered a real-time interaction with a live chat agent anytime a guest attempted three password resets.

The results for this airline:

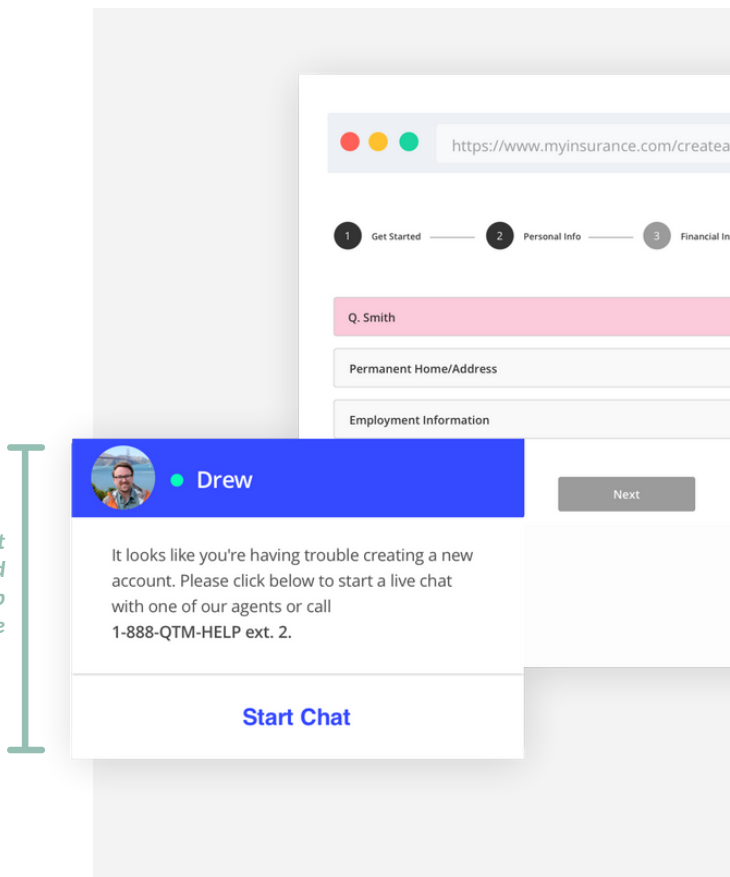
- Reduced customer frustration
- Reduced calls to the call center, a high cost channel
- Reduced call wait times

A proactive approach can be especially critical for high-value customers or high-value interactions. In fact, there may be scenarios in which you may want to intervene to encourage some customers to call, for instance, to provide a higher-level service to certain tiers of customers or interactions.

What you need to have in place:

- Automate detection and quantification of high impact conversion blockers
- Automate detection of customer friction on your site or native app
- Ensure triggers activate a real-time response in service and/or a customer data platform

Automatically detect digital friction and offer to help customers in the moment.



03 Get Real-Time Alerts on Upticks in User Friction

As you're shifting attention to digital and moving faster than ever, stay ahead of break/fix with real-time alerts on upticks in user frictions.

Suddenly things that used to take your teams four months, now get done in four days. Companies are being asked to define and deliver new digital products faster than ever: Retailers pivoted to [same-day delivery](#), banks had to spin up [new online applications](#) in response to the Paycheck Protection Program, even movie theaters got in the [curbside pick up](#) game.

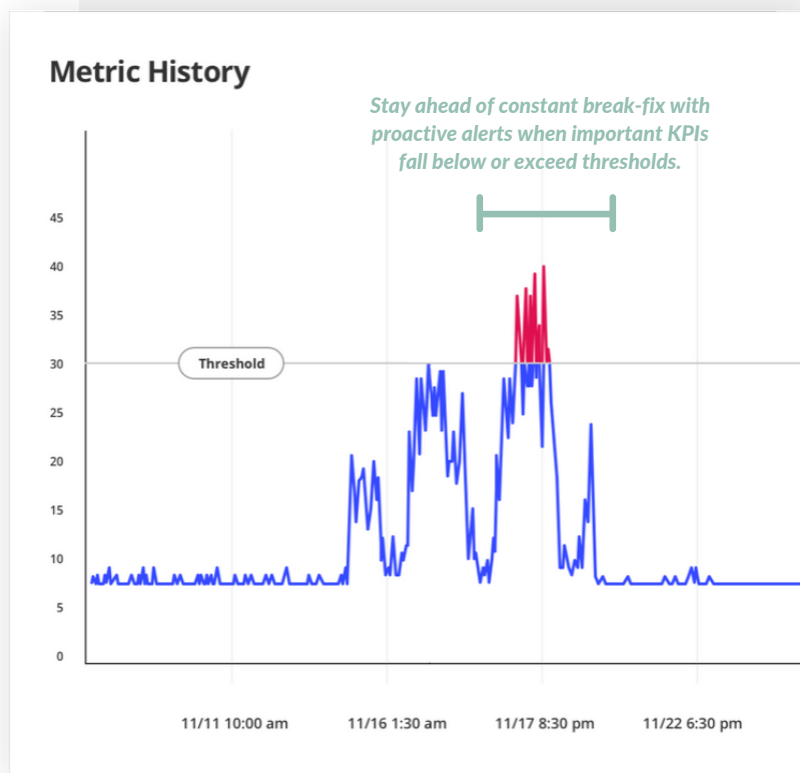
Moving faster is the only option, but how can you do it while minimizing risk and ensuring positive digital experiences? In this fast-paced environment, it's critical to have real-time monitoring of both behavioral and technical friction so teams can course correct quickly, spin up a real-time rescue modal (see last page), and get all teams on board to escalate a fast fix. You shouldn't have to wait to see a sharp drop-off in conversions or a spike in call center volume.

The results:

- Reduce mean time to identify and resolve
- Reduce negative impact on customers
- Reduce call center calls

What you need to have in place:

- Automate detection of customer friction on your site or native app
- Initiate real-time monitoring and alerts



04 Lower Call Times by Enabling Agents to Cobrowse

Some call center calls are inevitable—there will always be some level of customer friction or technical deficiencies, especially as you’re moving more quickly to address the surge in new visitors and new customer behaviors.

When a call center call results from digital friction, empower support teams to resolve issues faster with cobrowsing. In our current reality, giving your agents the tools they need to help customers faster can have an important and positive impact on customers who may be less patient and more anxious than normal.

By enabling agents to cobrowse, or visually reproduce a customer session during the call, they can simply watch a recording of the user session, troubleshoot the issue, and offer faster resolution. This can eliminate long minutes of frustrating back and forth, as the agent asks a caller to explain where he or she struggled on the site.

Empowering agents with the ability to reproduce sessions can help resolve customer issues faster and:

- Reduce call times
- Increase customer and agent satisfaction
- Reduce call wait times

What you need to have in place:

- Enable cobrowsing with real-time session replay and customer look up
- Coach agents on best practices, e.g. avoiding the use of the word “recording”

Enable agents to watch a customer's replay only after the customer has provided identifying informations, such as an email.

Search Users

john.r@email.com

Search Sessions

Session ▼	Users 🔒	Events	Engagement	Context
<div>▶</div> <div>12/05 2:41 pm - Online</div> <div>Engaged 44s over 7 pages</div>	<div>🔒</div> <div>User 237200561</div> <div>1 Visit - 173.88.48.232</div>	<div>UPT 3</div> <div>UDO 7</div> <div>AA0 3</div> <div>SSs</div> <div>msi</div>	<div>🔍</div> <div>📄</div> <div>📌</div>	<div>🖥️</div> <div>Macintosh</div> <div>Chrome 78</div>

05 Quantify Customer Feedback for Data-Driven Decisions

With the surge in new visitors, customer feedback is increasing. You'll need a better way to instantly quantify and segment that feedback.

It's no surprise that one major survey vendor reported a [30% increase in digital survey responses](#) in March 2020. With social distancing part of our new normal, more customers will be turning to your websites and mobile apps to shop, transact, or get information.

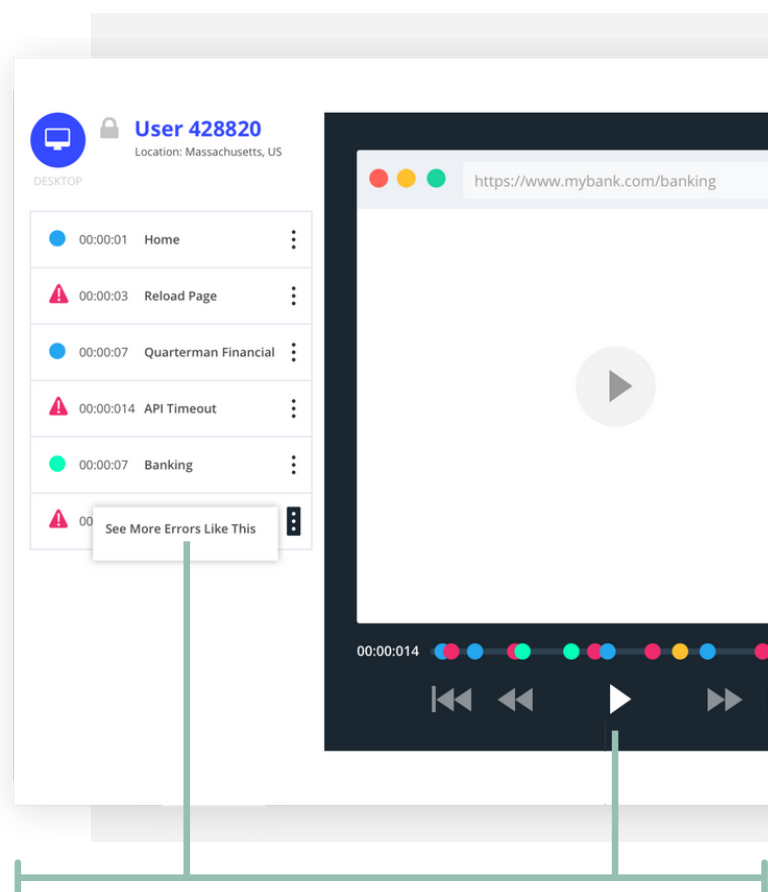
As customer feedback increases—and is amplified or escalated internally—it gets harder to filter through the noise or know what should come first. With many companies in cost optimization mode, it's more critical than ever to prioritize action based on quantitative data.

By instantly quantifying the business impact of every survey, this retailer was able to:

- Reduce time to identify and resolve issues
- Improve self-service or revenue conversion
- Increase customer satisfaction
- Focus product and engineering resources

What you need to have in place:

- Integrate session replay with your survey solution
- Tag common user events, friction, and errors
- Segment and quantify the impact of every event, friction, or error



Enable CX teams to watch a user session from any customer survey response, find the exact moments of friction, and "See More Like This" to immediately quantify how many others were impacted.

Conclusion

You know that meme: “Who led digital transformation at your company?” Not your CEO, CIO, but Covid-19.

With more attention than ever on digital, there’s no better time to put into place the processes and technologies your teams need to:

- Identify the value leaks: lost revenue conversions and increased support calls
- Optimize lower cost digital channels
- Transform how your teams will respond to our new normal

Act On Our Digital Self-Service Recommendations

If you’re looking to jumpstart an initiative to drive digital adoption and reduce call center costs, how about explore how Quantum Metric can help?

Quantum Metric gives companies real-time visibility into how their digital business is impacted, where exactly customers are struggling or engaging, and what efforts need to be prioritized based on economic impact.

Watch a recorded demo or request a live demo at:

<https://www.quantummetric.com/watch-a-demo>