

# Personalizing Self-Service Experiences

WRITTEN BY: BRIAN CANTOR



This report is provided by



## Featuring Insights From:



**Amrit Dhangal**

CEO

Acquire



**Taylor Johnson**

Director Of Customer Service

Nathan James



**Norm Alegria**

Director of Guest Care

The Dufresne Group



**Gina Sasso**

Director of Customer Service

Thule Group (formerly of Stanley Black & Decker)

## Personalizing Self-Service Experiences

In theory, self-service is a pathway to customer satisfaction. Given that 68% of customers frequently endure long hold times and many routinely encounter impersonal or unprepared agents when they finally do connect, enabling them to solve their own problems – on their own terms – embodies the idea of customer centricity.



“Studies are showing that more and more customers would prefer to self-serve, if that option is readily available to them, so it's beneficial not only for our customer satisfaction, but also for scalability of customer service as the company grows — it's a win, win.” - **Taylor Johnson, Director of Customer Service, Nathan James**

In practice, self-service is a major source of frustration. The traditional IVR has long been the epitome of inefficiency, and satisfaction rates for modern chatbots markedly trail those for most agent-led interactions.

What is causing the disconnect? The answer is simple: self-service initiatives have long been rooted in *call deflection* rather than *customer empowerment*.

Make no mistake, successful self-service offerings should ultimately reduce inbound contact volume and improve efficiency. If customers can successfully access information, process transactions, or solve problems on their own, they will not as frequently require assistance from live agents. Agents can, in turn, focus on higher-value work.



"Imagine you have 1,000 customers in a phone queue. Resolution will be slow and frustrating. From a digital standpoint, you could automate the majority of these inquiries, and provide a resolution more quickly while reducing costs." - **Amrit Dhangal, CEO and Co-Founder, Acquire**

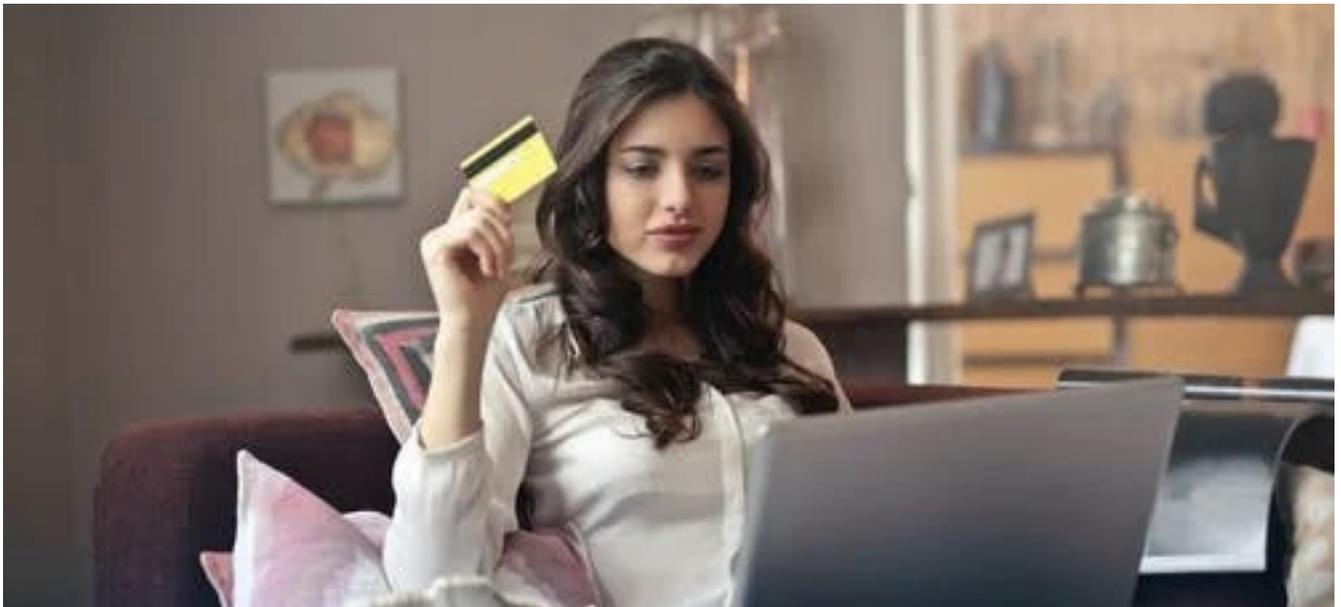
This reality can only materialize, however, if the self-service experience is effective. If customers cannot easily navigate the self-service platform, let alone solve their problem, they will still need to escalate to a live agent. Worse, the time they waste in self-service will manifest as frustration, if not outright hostility, when they finally reach someone who can help.

When brands put the cart before the horse and focus solely on deflection, they do not sufficiently consider the voice of the customer. They do not sufficiently think about what types of issues customers want to solve on their own, how they want to communicate with bots, or how self-service tools should connect to the overall journey. They end up creating experiences that are ineffective, inconvenient, impersonal, and wholly dissatisfying.



“What I think customers are looking for is this immediate gratification, this information at your fingertips, self service with a personalized option. They want to be able to have this connection with companies, but they also want to have immediate gratification so it's a really hard balance in our industry.” - **Gina Sasso, Director of Customer Service, Thule Group (formerly of Stanley Black & Decker)**

Insofar as two-thirds of customers consider switching to a competitor after just one or two bad experiences, the stakes are too high to let poor self-service experiences linger. The time has come to tailor experiences to your customers and ensure they actually enjoy the convenience benefits self-service is meant to provide. The time has come to personalize self-service, and this report will reveal how to proceed.



## Where Self-Service Goes Wrong

Given that 86% of customers are comfortable solving some or all issues on their own, it is not the idea of self-service that is the problem. Customers very much *want* the flexibility to solve problems on their own terms in their preferred digital channels.

The issue stems from poor execution. By succumbing to the following pitfalls, companies routinely provide self-service options devoid of the convenience, relevance, and usability today's customers are demanding.

### Improper Use Cases

Too often, brands ignore the crucial distinction between issues they feel customers *can* solve on their own and those customers actually *want* to solve on their own. In turn, they end up imposing self-service interactions on those who truly require live agent support. Some go so far as to *require* digital customers to use a chatbot before accessing a live chat or phone option.

Obviously, if self-service is ill-suited for a particular issue or customer intention, the interaction is going to fail. The customer will not get the answer or resolution for which they are looking and will inevitably need to escalate to a live agent anyway. Satisfaction and loyalty rates will suffer.

The harm, however, runs even deeper than a specific interaction. If customers increasingly deal with bots that are hard to use or cannot solve their problem, they will lose faith in the very idea of engaging with the brand's self-service options. They will directly pursue live agent assistance even in situations where a bot could be helpful. Both customer effort and cost-per-call will rise as a result.

When customers feel they are being deflected to self-service at inappropriate times, they will also worry that the brand does not know, let alone respect, their unique preferences and behaviors. Without sensing any degree of personalization, these customers will have no incentive to reward the brand with their loyalty and advocacy.

### Incorrect Channel Mix

Convenience is a cornerstone of successful self-service, and respecting channel preference is a cornerstone of convenience. Unfortunately, far too many brands ignore this reality. Rather than providing self-service options in customers' preferred channels, they ask customers to do the accommodating.

Many modern customers, for example, enjoy communicating via SMS or social messaging platforms. A customer-centric brand would deploy virtual agents *within these channels* so that customers could access automated help in their preferred environment. Far too many companies, however, require customers to navigate to another platform before they can access the bot (let alone a live agent). Even if the process ends in a resolution, the additional effort will leave a sour taste in customers' mouths.

As noted earlier, another scenario involves requiring customers to engage with a digital self-service tool *before* they can speak to a live agent over the phone. Both disrespectful to the customer *and* inconvenient, this approach runs counter to the very purpose of self-service.



“Companies are trying to add channels and customers are trying to move through these channels, but the experience doesn't match. Now the shift is towards creating something called a digital agent. Instead of separating teams, the digital agent is well versed across multiple channels, creating a more streamlined customer experience.” -  
**Amrit Dhangal, CEO and Co-Founder, Acquire**

## Isolated and Impersonal Interactions

Omnichannel communication hinges on the idea of delivering a seamless, consistent experience across all touch points. Personalization hinges on the idea of tailoring interactions to a customer's unique preferences, intentions, and interaction history.

Many of today's self-service offerings do not adhere to these principles. Instead of feeling as if they are a cohesive part of a singular customer experience journey, they come across as an alternative option. Neither customers nor their data can seamlessly move between agent-led and self-service channels.

Some bots, moreover, fail to demonstrate the personalization that is so essential for today's customers. Instead of recognizing a customer's account information, predicting their needs, and surfacing relevant information, they expect customers to navigate a generic support knowledge base from scratch.

When self-service is so impersonal and generic, finding a suitable answer or resolution becomes difficult. Achieving such an outcome *quickly* becomes almost impossible.



“Customer experience in 2022 will be centered around context. The biggest challenge— and what data silos end up creating— is lack of context. Whether you’re using self-service as a chatbot, a phone call or live chat that routes to an agent you need context— that is the key. Who is the customer and what do they value? The bottom line is that customers want their issue resolved as soon as possible.” - **Amrit Dhargal, CEO and Co-Founder, Acquire**

## Misguided Approach To “Human” Engagement

Thanks to the rise of artificial intelligence technology, today’s self-service platforms do not have to resemble the static, impersonal FAQ pages of the past. They can understand natural language and engage in more conversational interactions.

Few modern chatbots, however, take full advantage of this opportunity. Sandbagged by minimalist knowledge bases and low-effort programming, they are simply FAQ pages by another name. They do not recognize customer language preferences, they do not anticipate and proactively address needs, and they do not learn from - and adapt based on - the vast customer data they are collecting. They come across as half-hearted efforts to *deflect* rather than ever-evolving ways to *empower*.

If there is a “human” element to these bots, it is of a less useful variety: insincere identity. Some companies give their bots names and try to pass them off as real-life agents, even though they are neither equipped with the knowledge nor conversational capability to engage in a human manner. Customers gain no benefit from these poorly conceived bots, but they absolutely lose faith in a business that is choosing not to be transparent and honest.

Such dishonesty also threatens long-term adoption of self-service. When a brand feels the need to conceal the fact that customers are speaking to a bot, it sends the message that live agents are inherently superior to automated options. If that is true, why should customers *ever* choose self-service?

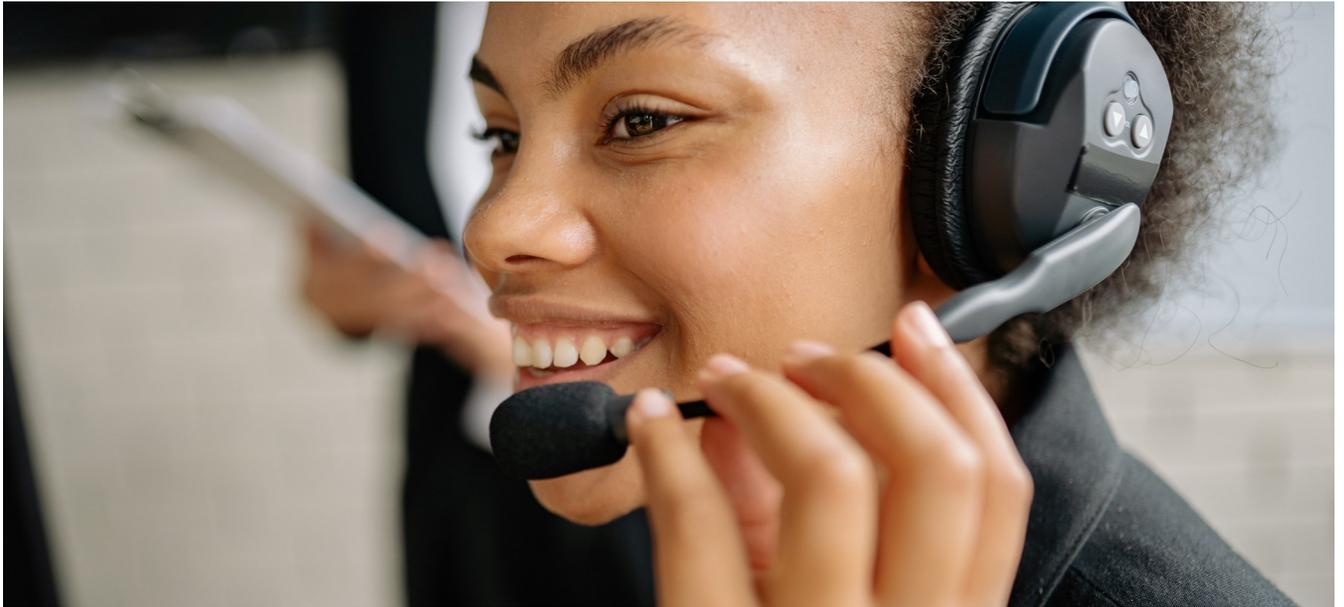
## Ineffective Escalation Journeys

Even the best bots and IVR platforms have limitations: they cannot help *every customer* conveniently resolve every issue. Some customers will inevitably have to escalate to a live agent.

In many cases, this escalation process is a major source of friction.

Some self-service platforms greatly complicate the escalation process. They do not provide any clear option for reaching a live agent, instead making customers bounce around a series of unhelpful menus and prompts before acknowledging the dead-end.

Making matters worse, they do not support a seamless data exchange between bot and human. Customers, in turn, will have to repeat everything they already shared – to agents who have no preemptive context about why the customer is interacting.



## 5 Keys to Personalized Self-Service

Contact center automation technology continues to improve, but the reality is that bots are *already capable* of delivering timely and relevant support. They are already capable of facilitating a personalized self-service experience.

The key to overcoming the aforementioned challenges will be to deploy these advanced, ever-improving bots in a strategic and customer-centric manner. Guidelines for creating a more effective and personalized self-service experience follow.

### Unified, Omnichannel Experience

The first step to delivering a customer-centric experience is to establish a cohesive one. When a company unifies its channels and communication, it ensures that customers can seamlessly access the help they need, whenever and wherever they need it. Data can also move freely between channels, ensuring all agents – and bots – have a 360-degree of the customer experience.

An omnichannel contact center framework, therefore, is a prerequisite to a personalized self-service experience. Customers will be able to access bots in their preferred channels and seamlessly move to other self-service or agent-led environments whenever necessary. These bots, moreover, will be able to access vital company and customer records to ensure timely, relevant, and personalized communication.

Instead of feeling as if they are being deflected by a brand that does not have the resources (or desire) to provide live support, they will feel like they are empowered to get help however they prefer to get it.



## Journey are Orchestrated Based on Customer Intent

By unifying their entire customer contact operation, companies stand to uncover vital data about customer preferences, behaviors, sentiments, and intentions. They will know exactly which customers will select which channels for which issues, while gaining a better ability to predict when and why certain customers will need to escalate.

In turn, they can not only program bots to be more relevant for today's customers but deploy them at the most opportune times throughout the journey. They can also proactively escalate "at-risk" customers when effort and negative sentiment are at risk of increasing.



"What channels are your customers on? What are their preferences? For example, I am not on TikTok, Instagram or WhatsApp; I prefer SMS. As a customer of your company, that's how I prefer to be communicated with. Every day, I am in meeting after meeting. I don't have time to pick up the phone and make a phone call, I don't have time to sit on chat either. But I have time to maybe have a standard live chat conversation and may be able to use SMS. It's good to start knowing your customer and how they prefer to communicate." - **Amrit Dhangal, CEO and Co-Founder, Acquire**

Data about customer intent plays a particularly vital role in this process. Rather than taking the binary "automate simple issues, pass complex ones to agents" dichotomy, companies that know customer intent can take a more nuanced – and customer-centric – approach to the journey.

Consider, for example, a customer who is inquiring about a late delivery. On the surface, a delivery issue would seem like a "simple issue" tailored for a chatbot: the bot can instantly look up the customer's record and provide the latest delivery information.

In reality, however, the customer may not be looking for an update on delivery status but for an opportunity to vent about, and receive a sincere apology or compensation for, the delay. The supposedly "simple issue" involves a complex intent for which agent assistance is likely appropriate. By making it easy for the customer to reach the live agent, the company demonstrates a higher degree of personalization and provides a more valuable experience.

## Context is a Priority

Today's customers are generally not demanding bots that have names and tell jokes. They are, however, looking for self-service platforms that recognize them as individual people with nuanced needs that can oscillate between high-urgency and high-touch.

They, to put it simply, seek self-service experiences that understand and act based on context. Thanks to connectivity with the customer's account and other channels, the bot should never have to ask customers to answer basic profile or identity questions (beyond what is required from an authentication standpoint). They should never ask generic questions of no relevance to the products the customer owns or the business division with which the customer works.

On the other hand, they should always be able to adapt conversation flows based on the information a customer does provide. They should always be able to self-assess when escalation is necessary, and make the process as simple as possible.

A successful self-service experience, therefore, hinges on ensuring bots have seamless access to all customer data. It also hinges on rigorous conversation design – made immensely possible by the rise of no-code technology – that adapts to the customer's profile and specific situation.

## Natural Language is Understood—and Leveraged

When bots are deployed correctly, companies will not have to pretend their customers are talking to humans. Instead, they can loudly trumpet the availability of the bot, since they know it represents a faster, easier, and downright superior way to resolve certain issues.

Bots that make effective use of AI reach this standard. Those with the ability to process, understand, and evolve based on natural language can communicate in a meaningful way, empowering customers to seek support through organic conversation rather than stilted menu navigation.



Allowing customers to speak in their natural language can also be a more literal concept. With so many businesses appealing to different demographics in different regions, it is highly unlikely that all customers will speak the same language. By leveraging AI-driven translation, chatbots (and live chat agents) can accommodate any number of languages – without any risk of inefficiency or inaccuracy.



"With the Acquire Platform's translation feature, people feel comfortable talking in their own language— as my parents prefer— so let's give them that option."

- Norm Alegria, Director of Guest Care, The Dufresne Group

Not simply beneficial within the interaction, natural communication plays a pivotal role in customer data analysis and journey design. When customers can ask questions and express concerns in an organic fashion, companies can learn how their *users* frame certain issues. They can use this insight to update knowledge bases, refine scripts, and retrain agents to speak the language of customers – as opposed to that of their executives and product developers.

The result will be interactions, in both self-service and agent-led environments, that feel easier and more personalized.

## Streamlined Escalation Process

There is nothing wrong with evaluating metrics like containment rate. Contemporary bots *are* capable of solving many issues, and many customers *do* hope to avoid waiting for a live agent.

There is, however, something wrong with mandating containment at the expense of customer satisfaction. Customer-centric brands know that self-service experiences will reach dead ends, and they do not ignore that fact in an effort to keep call volume down or boost their containment metrics. They simply provide an easy “out” for the customer – and the customer's data – to reach a live agent.

Granted, the handover process requires more than unified channels and data systems. It also requires an agent pool that can quickly interpret the relevant customer data and tailor the conversation accordingly.

The good news is that modern technology simplifies this entire process. By virtue of their ability to capture and analyze data, digital platforms ensure that the relevant handover data *does* exist. Whereas a phone agent may have trouble briefing a supervisor on exactly what a customer said and why escalation is necessary, a chatbot should have no trouble communicating that context to an employee.

Additionally, AI-driven knowledge platforms can rapidly interpret the data and provide “next-best action” guidance to agents. This further increases the efficacy of the escalation.

## About the Author



**Brian Cantor, Principal Analyst & CCW Digital Director, Customer Management Practice**

Brian Cantor is the principal analyst and director for CCW Digital, the global online community and research hub for customer contact professionals. In his role, Brian leads the customer experience, contact center, technology and employee engagement research initiatives that drive CCW Digital's complete portfolio of content.

A passionate advocate for customer centricity, Brian regularly speaks on major CX conference agendas. He also advises organizations on customer experience and business development strategies.



## Meet Our Analysts



**Brooke Lynch**  
Analyst & Staff Writer



**Michael DeJager**  
Principal Analyst & Head of Product Development



**Nadia Chaity**  
Senior Analyst, CCO Series



**Sandy Ko**  
Senior Analyst



**Amanda Caparelli**  
Analyst

## Get Involved



**Ben McClymont**  
Business Development Director  
E: [Ben.McClymont@customermanagementpractice.com](mailto:Ben.McClymont@customermanagementpractice.com)  
P: 212 885 2662



**Simon Copcutt**  
Head of Strategic Accounts  
E: [Simon.Copcutt@customermanagementpractice.com](mailto:Simon.Copcutt@customermanagementpractice.com)  
P: 212 885 2771