



## If You Teach a Customer to Fish: The Power of Web Self-Service

A TECHNOLOGY AND STRATEGY WHITE PAPER  
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## Introduction

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Give a man a fish and he'll eat for a day. Teach a man to fish, and he'll eat for a lifetime. In spite of general acknowledgement of this ancient wisdom, it's not a practice commonly applied to today's enterprise. Yet, in the face of demands to cut costs, while maintaining high levels of customer satisfaction, the concept of equipping customers to help themselves is becoming an appealing option. Web self-service technologies are working their way into today's enterprises, and demonstrating that integrating self-service into support practices has much to offer both the customer and the enterprise.

It is unlikely that there will come a day when Web self-service completely supplants the human touch of the call center. However, it is evident that it can provide a legitimate solution for enterprises looking to minimize call volume and call center operational costs. In addition, when implemented using the right technologies, Web self-service requires little to no customer orientation.

In this document, we will explore the power of online self-service and how it contributes to healthy customer relationships and delivers viable cost savings. We will also address how technology from Epicor Software Corporation, a leader in the CRM space, can help deliver successful self-service.

## Benefiting from Web Self-Service

### The Role of Web Self-Service

Self-Service noun ('self-'sir-vis): the serving of oneself with goods or services to be paid for at a cashier's desk or by means of a coin-operated mechanism. The Merriam-Webster Dictionary has included a definition of self-service in its tomes since 1919. While not a new concept, the depth and breadth in which self-service is applicable to today's enterprise is constantly evolving.

Presently, the term self-service refers to a customer-facing application that allows customers and partners to access information, track shipments and solve problems by themselves. So, how does Web self-service fit in today's enterprise?

According to a recent research report from the Gartner Group, "Self-service could provide a cure for the growing concern of increased staffing to handle all customer interactions. It could also provide decreased costs of customer maintenance and even increase revenue for an enterprise." (Is Self-Service the Panacea?, by E. Kolsky, March 11, 2002)

The potential for cost savings and increased employee efficiency make Web self-service an attractive option to consider. Yet, as the enterprise evolves, self-service is destined to become more of a necessity than an option. For banks, brokerage houses and other financial institutions, Web self-service has come to be expected by customers. Clients want 24x7 access to their account information and value the convenience of being able to locate information on their own. As more and more customers turn to the Web to conduct business, that expectation will expand rapidly to include other industries, making Web self-service a critical component of competitive customer service strategy. A recent survey of 75 support and service executives found 76% of respondents stating that customer demand for Web-based service channels increased within the past year. (Results of Research: Trends in Web Based Support, conducted by crministry.com and supportindustry.com; survey technology by CustomerSat.com, October 2002)

### What Self-Service Means to Your Customers

In days gone by, enterprises might have preferred a customer relationship where the customer was reliant on the enterprise. However, the convenience of self-service is a better fit for today's customer, and by equipping them with a channel for helping themselves, the online knowledge-base provides a new class of customer/enterprise relationship. Customers will value the independence self-service brings, yet appreciate the stability and security of a well-managed database of knowledge that keeps them connected to the enterprise.

A customer's actions are driven by his own needs. If a customer comes to your Web site, he is looking for certain information – perhaps to resolve an issue or to investigate a particular product or service. It is essential to incorporate this logic into your Web self-service strategy. While the cost-savings that come with self-service may be appealing to your executive board, the customer could care less. It is the effectiveness of the self-service solution, its ability to successfully help the customer, which presents a less tangible, but no less critical factor in measuring success.

### What Self-Service Means to Your Company

Delivering effective service has long been a strategy for attracting and retaining customers. However, this plan has been limited by the availability and cost of trained employees who would manage the service aspect of customer relationships. Couple that with an increase in the number of products and services that need to be supported and there is no denying the need to consider more efficient methods of providing service.

Imagine for a moment, a support solution that works around the clock, from any location, delivering timely and effective customer service and saves money. Web self-service offers the best of both worlds: the convenience and quick resolution customers desire, as well as the cost saving potential of a self-service solution. In addition to delivering increased customer satisfaction, five items stand out as benefits of Web self-service:

1. **Establish a competitive edge:** Customers require information to be easily accessible and to be delivered quickly. Providing effective, any-time support to customers can be a key differentiator and help establish a competitive advantage in an aggressive marketplace.
2. **Save money:** The cost comparison between Web self-service and telephone service is dramatic. Industry estimates put the cost per transaction (CPT) of telephone service at over \$30 – factoring in the actual call expense, as well as the value of the support agent’s time and expertise. Meanwhile, Web self-service totes a CPT of around a dollar.
3. **Drive efficiency:** Web self-service can dramatically reduce the number of first-level calls made to your support department, allowing support staff to concentrate on solving more complicated problems, while reducing support costs.
4. **Better customer tracking:** Web self-service helps round out the customer profile, recording valuable information about the customer from their visit to the support site. That information can be used to tailor service programs or to sell the customer additional products or services.
5. **Create opportunities for up-selling:** By reducing the call load Web self-service not only leaves more time for support agents to focus on more mission-critical issues, it also provides an opportunity for customer service representatives to spend time cross-selling and up-selling to customers to drive additional revenue.

## Creating a Self-Service Vision

### Put Yourself in their Shoes

Web self-service may be the greatest thing to hit the call center since the headset, but it's not going to be effective if customers aren't using it. Therefore, it is essential to consider the customer perspective when developing a strategy for implementing Web self-service. It is imperative that a self-service system be fast and easy to use. Knowledgebase searches should produce useful results. In the event that a customer can't be helped through the online knowledgebase, Web self-service technology should be integrated with support systems to smooth the transition from self-service to assisted-service and streamline communication between the customer and the enterprise. Remember: the goal of self-service should be to provide more effective service to customers.

Your Web self-service strategy should be marketed aggressively. Some companies have taken actions to make phone support less desirable, such as listing a support phone number that is not toll free. Web-self service should feel human. It should be like hiring an around-the-clock customer support agent, providing all the necessary information and solutions customers require to help themselves, anytime, anywhere.

### Roadmap for Success

As the corporate culture evolves, defining itself through changing business processes and customer demands, it is necessary to consistently evaluate customer-facing strategies.

It has been concluded that Web self-service can reduce the costs of customer maintenance. Yet, the proper application of this conclusion - from integration with existing systems to educating customers on its attributes - requires strategic planning for success. The following strategic elements are critical to the success of Web self-service:

1. **Provide a comprehensive knowledgebase:** Analysts agree that the quality of the knowledgebase will dictate the success or failure of a Web self-service implementation. A well-maintained knowledgebase is essential and serves as useful to customers and employees, as the entire support team benefits from the knowledge of the group. Don't let your knowledgebase get out-of-date and post new information immediately. If customers fail to find answers during their initial experiences with your self-service offering, they will skip self-service next time and just pick up the phone.
2. **Integration is essential:** Without integration, if a customer searches an online knowledgebase and is not able to find a satisfactory answer, the issue is escalated to email or phone creating multiple, separate incidents and possibly forcing the customer to wait until the call center is open to place his call. Integration allows the customer to immediately request assist-service and arms the support team with an overall view of the customer's issue and the actions he has taken to resolve it. It also provides the customer with a positive experience by providing continuity throughout the service experience.
3. **Create a layered support structure:** Customers should be encouraged to make self-service their first stop because it is the least expensive. From there, communication can be facilitated through other channels such as e-mail or chat, leaving phone communication as a final resort. Providing these channels to offload phone support can dramatically improve service department morale – no small thing in an age of extremely high turnover.

While Web self-service certainly alleviates some of the call traffic to the support center, it is not a license to reduce staff. Its purpose is to increase the number of customers you are able to serve without incurring additional training and human resource costs. Web self-service should be viewed as an addendum, a supplementary tool that provides cost savings and allows you to accomplish more.



## Choosing the right Self-Service Solution

### Selection is Strategic

Selecting a Web self-service technology should follow the same logic behind the implementation strategy. It should be a quest to provide better customer choice, convenience and control by means of a functional, flexible and cost-effective solution. Recent technology advances have made it possible to integrate corporate data residing on mainframe and back-office servers to the Web in real-time through web portals. By bringing this data to the Web, enterprises are able to provide customers with distinctive data in a secure environment. A self-service solution should seamlessly unite customer to enterprise through provide an efficient and user-friendly Web environment. The following is a sample of key factors that should be considered when selecting a Web self-service solution:

1. **Natural language searching:** This highly intuitive search methodology provides a user-friendly experience, allowing customers to ask questions in everyday conversational language. Natural language searching is complemented by the Boolean searching which uses computational operators such as AND, OR, NOT and IF to filter data. A self-service solution that utilizes both search methodologies will enable functional knowledgebase searches.
2. **Automated e-mail response systems:** To ensure that Web self-service is continually improving customer satisfaction, it's wise to use a solution that enables automated customer follow-up. After a support interaction, an e-mail is automatically sent to the customer soliciting feedback on the experience. And if the customer moves from self-service to assisted service by filling out a web form requesting assistance, the customer should receive an acknowledgement of their request accompanied by a tracking number to reference if they need to call the contact center directly.
3. **High-level of security:** One of the primary concerns of conducting business online is ensuring that information is safeguarded. A self-service solution should be based on industry-accepted security standards, to ensure that content is controlled and protected.
4. **Select a strong, agile architecture:** When looking at Web self-service technology it's important to look beyond product features and functionality. What's under the hood can impact the effectiveness and overall cost savings of a self-service implementation. Web services technologies have introduced new levels of stability to protect the investment in IT resources and flexibility for simplified integration and maintenance.

### Clientele Self-Service Portal from Epicor

The requirement amongst enterprises to reduce costs and improve customer satisfaction in 2003 will push companies even harder to strengthen CRM with a variety of technologies. Web self-service can provide a competitive advantage to small and midmarket enterprises by providing customers with access to account information and answers to questions at their convenience. Effective Web self-service starts with the right strategy, complemented by the right technology.

The Clientele Self-Service Portal from Epicor is a complete self-service portal application that works with common Internet browsers to give enterprises in the small to midmarket a global support presence. Customers can use the Clientele Self-Service Portal to submit support calls as well as check on the status of existing calls, view their detailed product information, returned merchandise authorizations, and service agreements directly over the Web. Customers can also personalize the look and feel of their online support experience including layout, content and theme, using simple configuration tools.

## **Tight Integration Equals Seamless Communication**

The Clientele Self-Service Portal tightly integrates with Clientele Customer Support, part of Epicor's Clientele CRM.NET suite. The Clientele Self-Service Portal allows you to provide your customers access to your contact center knowledgebase, right on the Web. The AnswerBook feature, an online store of answers to customers' most frequently asked questions, provides a user-friendly environment for finding answers quickly.

The Self-Service Portal can query the Answerbook using either Boolean or natural language searching for maximum accuracy in retrieving information. When a new service call is initiated by a customer through the online portal, the information is automatically updated in the Clientele system. The flexibility of having the two applications working in-sync further extends the quality of service delivered to your customers. If a customer cannot answer a problem using the Clientele AnswerBook, they have the option to enter their phone number into a specified field and a call will be placed to both the call center and the customer to connect them.

## **Make Customers Happy, While Building Your Brand**

The Clientele Self-Service Portal allows you to customize the look and feel of the portal. You may choose to create consistency between your web site and your support site. Or you can create a unique look and feel for your customers. Within your look and feel, customers can customize their view of the data you provide via the Clientele Self-Service Portal. They can arrange the layout of the portal's content to match their priorities and they can hide information unimportant to them.

## **Leveraging the Benefits of Web Services**

The Clientele Self-Service Portal takes advantage of the benefits of the Microsoft .NET Framework in order to further increase customer satisfaction and enterprise efficiency. A browser-based solution, it uses the Internet to reuse XML Web services from Clientele Customer Support providing complete access to data while processing information according to specified business rules. By utilizing the Microsoft .NET Framework, the Clientele Self-Service Portal delivers extensive flexibility, scalability and customization capabilities as well as quick and easy integration.

The Clientele Self-Service Portal works with common Internet browsers, ensuring that information is available when needed, regardless of platform or location. Information is safeguarded through a standard login and password process so customer data is protected from competitors. In addition to increased customer satisfaction, The Clientele Self-Service Portal can dramatically reduce the number of first-level calls made to your support department, enabling your support staff to concentrate on solving more complicated problems, while reducing support costs.

## About the Author

Greg Horton, director of marketing for The Clientele Group, joined Epicor Software Corporation in 1997, and brings over 18 years of product marketing and software engineering experience to the company. In his current position as director of marketing for Epicor's Clientele Group, Horton oversees all aspects of product marketing, marketing communications and demand generation for Clientele, the company's customer relationship management software solution for small and emerging enterprises. Horton received both his Master of Science degree and Bachelor of Science degree in Mathematics and Computer Science from Pepperdine University in Malibu, California.

## About Epicor Software Corporation

Epicor is a trusted provider of enterprise solutions for the midmarket. Clientele, Epicor's award-winning customer relationship management solution, enables enterprises to manage their entire customer lifecycle. With more than 10 years of functionality, innovation and technical expertise behind them, Clientele solutions can help boost revenues and increase customer satisfaction. With more than 15,000 customers worldwide, including over 3,000 CRM and HelpDesk customers, Epicor supplies small and midsize enterprises with everything they need for a successful implementation: quality products, experienced professional services, and excellent support.