



How to Make Self-Service Work for Your Contact Center

*Use-Cases, Strategies, Challenges,
and Solutions*

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01

Introduction

- 1.1** What is Self-Service. Quick Definition
- 1.2** The No.1 Benefit of deploying Self-Service
- 1.3** Benefits for Agents & Clients

What is Self-Service. Quick Definition

Self-service in the contact center industry is the practice of making information available to customers through automated means, such as web-based portals, chatbots, automated phone systems, etc.

Self-service solutions are designed to help customers quickly find the answers to their questions and resolve their issues without interacting with a live agent.

The goal of self-service is to reduce the amount of time and resources spent dealing with customer requests and to provide customers with a more convenient and efficient way to access the information they need.

Emerging Self-Service Interactive Channels:

- Mobile Apps
- Augmented Reality



The No.1 Benefit of Deploying Self-Service

The simple math:

According to Benchmark Portal, the average contact center deals with about 15% of customer inquiries through self-service. This could result in considerable cost savings.

For example, if a 100-seat call center with agents handling an average of 10 calls per hour were to reduce the amount of time spent on each call by one minute through the use of Interactive Voice Response (IVR) technology, the cost savings could exceed \$250,000 annually.. – [source](#)

In short, yes, self-service is cheaper.





Benefits for Agents & Clients

AGENTS

- 1. Increased productivity:** Self-service systems can reduce the time spent on trivial tasks and allow agents to focus on more complex tasks.
- 2. Increased accuracy:** Self-service systems can provide customers with accurate information, eliminating the need for agents to manually verify details.
- 3. Reduced costs:** Self-service systems can help to reduce costs associated with manual processes.
- 4. Improved morale:** Self-service systems can reduce the manual labor associated with customer service and make agents' jobs more enjoyable.

CLIENTS

- 1. Faster service:** Self-service systems can provide customers with faster access to information and services.
- 2. Reduced wait times:** Self-service systems can reduce wait times as customers can access information and services without having to wait for an agent.
- 3. Access to accurate information:** Customers can access accurate information quickly and easily with self-service systems.
- 4. Improved customer experience:** Self-service systems can provide customers with a more personalized, efficient experience.
- 5. Increased convenience:** Customers can access services anytime, anywhere with self-service systems.



02

Prerequisites

2.1 Self-Service in Multiple Scenarios

2.2 Questions to Ask

2.3 General Challenges

Self-Service in Multiple Scenarios

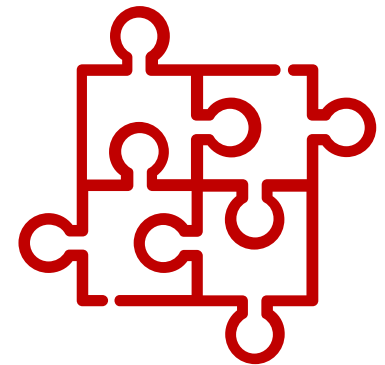
Self-service systems can work great for both **inbound** and **outbound** contact centers.

For inbound centers, self-service systems can reduce the workload on agents by allowing customers to quickly and easily access information on their own.

For outbound centers, self-service systems can be used to automate processes such as data entry and lead generation, freeing up agents to focus on more complex tasks.

Here are a few self-service scenarios:

- Operating hours
- Schedules
- Timetable data
- Balance checks
- Confidential data (medical info)
- Audio form data
- DIY technical support
- Show reservations
- Telephone surveys / research
- Automated ordering and checkout
- Financial details



Questions to Ask

1. What are the current customer service challenges that clients are facing?
2. What types of self-service options would be most beneficial for clients?
3. How can self-service options be tailored to meet specific customer needs?
4. What types of technology can be used to implement self-service options?
5. How can the self-service options be monitored to ensure that they are meeting customer needs?



General Challenges

- 1. Difficulty in creating a user-friendly self-service system:** Creating a self-service system that is simple and intuitive to use can be a challenge. It requires deep understanding of customer behavior, preferences, and needs.
- 2. Lack of customer adoption of self-service:** Some customers may not feel comfortable using a software-based system, and may opt to call in for assistance instead.
- 3. Overcoming customer resistance:** Customers may be resistant to change and may not embrace the new self-service system.
- 4. Ensuring accuracy of customer data:** Self-service systems rely on accurate customer data in order to function properly.
- 5. Tracking and measurement:** It can be difficult to track and measure the success of a self-service system.
- 6. Security and compliance:** Self-service systems must be secure and compliant with applicable laws and regulations.
- 7. Integration with existing systems:** Self-service systems must be integrated with existing customer service systems in order to function properly.





03

Types of Self Service

- 3.1** Voice-Based Self-Service (aka. IVR)
- 3.2** Text-Based Self Service Solutions (DBR)
- 3.3** Web Self-Service Portal
- 3.4** Knowledge Base & FAQ
- 3.5** Final Remarks

Interaction Voice Response (IVR) Self Service

The General Model:

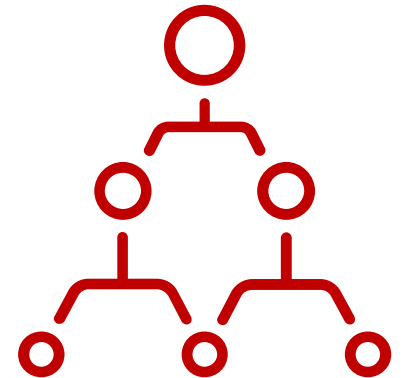
1. The customer receives an automated call with a greeting and menu of options.
2. Customer is guided through a series of automated prompts.
3. Depending on the selection, they are either directed to an automated voice response, or a live agent.
4. Customers have the option to leave a “call me back” message or switch to a live agent immediately.

Extra Options:

- The IVR can recognize spoken key words and phrases and route the call to the appropriate agent or dept.
- The system can use natural language processing to interpret responses and provide further assistance.
- The IVR is able to track customer data and provide analytics about customer interactions and preferences.

Challenges:

- Callers may prefer to speak to a live agent
- Technophobic callers may not understand how to interact with the system
- Callers may have had bad experiences with automated services in the past
- Bad scripting renders bad client experience



Text-Based: The Key to Omnichannel Communication

Dynamic Routing

The NobelBiz Dynamic Routing system takes the functioning concept of an IVR and applies it to text-based communication channels, using keywords to automatically route incoming emails, SMS, or other text messages.

Omnichannel Self-Service

When you open up your contact center to omnichannel communication, intelligent routing becomes a necessity. The Dynamic Routing allows NobelBiz OMNI+ to sort and route inbound text-based messages in an innovative, clean, and efficient manner.

Text-Based Channels Covered:

- SMS
- Email
- Webchat
- Facebook Messenger
- WhatsApp
- Telegram

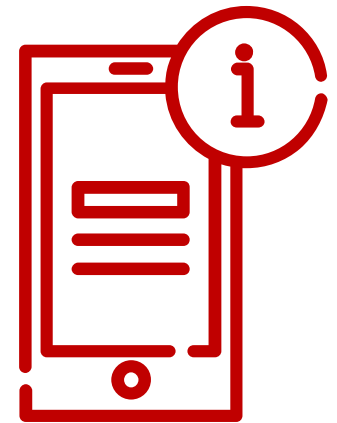


Web Self-Service Portal

A Web Self-Service Portal is an online website or platform that allows customers to access information, submit inquiries, and track orders - without the need to speak to a customer service representative.

It often provides customers with an interactive experience, allowing them to search for answers and find the information they need quickly and easily.

Customers can search for answers to their questions, submit tickets, and even chat with customer service agents in real-time. This type of customer service solution is beneficial for both the customer and the company, as it reduces costs and improves customer satisfaction.



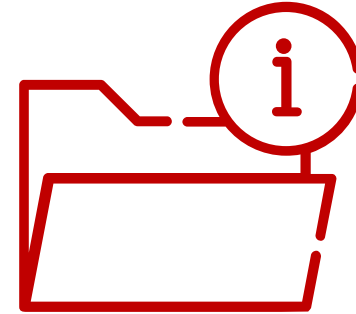
Challenges:

- 1. Increased customer expectations:** Customers expect a web self-service portal to be easy to use, intuitive, and tailored to their needs.
- 2. Security and privacy concerns:** Customers are hesitant to share sensitive information and personal details online.
- 3. Limited customer support:** A web self-service portal cannot provide the same level of customer support as a traditional contact center.
- 4. Technical complexity:** A web self-service portal requires technical knowledge and expertise in order to set up and maintain.

Knowledge Base & FAQ

A Knowledge Base is a collection of information and resources, typically in the form of frequently asked questions (FAQs) and answers, that customers can access to find the answers they need.

Unlike a web self-service portal, a knowledge base does not provide customers with an interactive experience and does not allow them to submit inquiries or track orders.

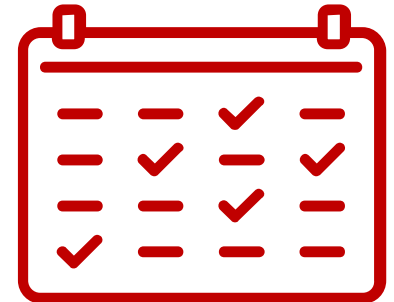


Challenges:

- 1. Ensuring that the Knowledge Base is up-to-date:** Ensure that the content is current in order to provide accurate and helpful information.
- 2. Keeping the Knowledge Base organized:** The information needs to be organized in a logical manner so customers can find what they need quickly and efficiently.
- 3. Building a Knowledge Base that is comprehensive:** It is important to ensure that the Knowledge Base is comprehensive in order to provide customers with all of the information they may need.
- 4. Measuring the effectiveness:** It is important to measure the effectiveness of the Knowledge Base in order to ensure that it is providing helpful information to customers and is meeting their needs.

Final Remarks

1. Self-Service in contact centers can be a great way to provide customers with a more efficient and convenient service.
2. Automation of customer services is rapidly becoming the norm in today's digital era.
3. Self-Service technology can help reduce costs and improve customer satisfaction.
4. Companies should consider the benefits of Self-Service in contact centers when making decisions about their customer service strategy.
5. Self-Service can be the key to providing a more personalized and streamlined customer experience.
6. With the right implementation, Self-Service can be an invaluable asset to your contact center.
7. As the demand for customer service grows, companies should consider the benefits of Self-Service in contact centers to remain competitive.





Thank You!

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