When Self-Service is Not Enough:
Using Channel Escalation to Enhance the Service Experience

Web self-service is currently the most widely used communication channel for customer service, surpassing use of the voice channel for the first time.[1] This can benefit your organization in a number of ways, from decreased costs to improved customer satisfaction. But with so many of your customers helping themselves, how can you be sure they are getting the information they need? And what can you do if they aren't?

Many organizations are investing in self-service channels, including web, mobile and IVR. Enhancements such as natural language understanding, speech recognition and virtual assistants can help you understand users' inquiries and guide them to the best answers available. However, self-service alone is rarely enough to solve every customer request. Whether it's due to the complexity, security, or uniqueness of a particular issue, there will always be times that customers cannot resolve their concerns with self-service.

Data from Forrester Research shows that 55 percent of US online adults are likely to abandon their online purchase if they cannot find a quick answer to their question.[2] To help prevent these customers, or potential customers, from abandoning your website, you must offer them a lifeline — an escalation path.

Route Channels from Self-service to Assisted Service Appropriately

Escalation paths from self-service to assisted service can be just as important as the self-service capabilities themselves. Escalation should be seamless and effortless, enabling customers to swiftly contact your organization and pick up the conversation where their self-service sessions left off. Escalation to your contact center requires thoughtful understanding of customer context, not simply placing the customer support phone number on the corner of a web page.

For example, a time-sensitive question about a shopping cart item may be best handled with a live chat, while a credit card billing error may be better handled over the phone or through a secure message. Likewise, a technical question should be routed to a different employee than a request for a payment date extension.

Agile channeling is a method of providing multiple escalation channels to customers and offering the right channel, at the right time, given the customer's circumstances. By leveraging contextual information about customers and their current and previous activities, organizations can help ensure the customer is assisted by the right employee, in the right channel.

[1] Forrester Research, Inc., *Channel Management: Core To Your Customer Service Strategy*, January 20, 2015

[2] Forrester Research, Inc., *Contact Centers Must Go Digital or Die*, April 3, 2015

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Provide a 360-Degree View of Customer Interactions

As self-service interactions escalate to assisted service, employees need to be equipped with detailed information about the customer's current online session. Providing employees with this information can help prevent further customer frustration and speed resolution time.

By joining the escalation channels with self-service channels, organizations can deliver a 360-degree view of customer interactions to their employees. Employees need the ability to see current actions customers have taken in their self-service ventures, as well as any previous contacts, open cases, and any additional activities that have taken place. Supplying employees with such information can help advance the conversation without any undue repetition.

Consolidate Communication Channels with Knowledge Management

The last piece of the puzzle is to make sure that all channels of communication, from self-service to assisted channels, rely on a consistent source of knowledge. Having a central knowledge base can help ensure customers will not receive different information from a contact center agent than from the web, and that they will not receive differing answers when speaking to multiple employees. Although assisted service employees may have access to additional information that is not available via self-service, the same central repository can be used to help enforce consistency.

While it's unlikely that self-service channels can address 100 percent of customer inquiries, following these best practices can help you improve customer service across all of your communication channels, and may prevent escalations from resulting in customer dissatisfaction.

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