

# Finding the Knowledge “Sweet Spot” for Self-Service

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Self-service is one of the most powerful applications of knowledge management. Customers can get answers quickly, and organizations can maintain customer satisfaction while spending pennies on the dollar over assisted support options.

To get the most out of self-service, your organization needs to provide the best knowledge for each support tool, while preserving the accuracy and efficiency of managing “one source of the truth.” This requires a clear definition of the customer expectations and best knowledge interactions within each knowledge delivery tool.

Self-service can encompass a wide variety of knowledge delivery environments, as shown in the graphic.

## The Customer Self-Service Spectrum

Each support channel has a “sweet spot” where customer needs, knowledge, and channel interactions meet. It’s critical to define what knowledge to deliver, and how to get the most out of each environment. These definitions drive knowledge management actions to help ensure consistent, reliable outcomes for each interaction. Here are some considerations for the top self-service channels:

### IVA, Automated Chat, Assisted Chat

Usage scenarios include conversational, contextual “chats” processed by AI, with

robotic technology (or humans) to respond to natural language questions and provide interactive sessions. As questions are asked, the system processes and responds to the evolving context of the question or topic and can ask clarifying questions, provide examples and responses, and hone in on the best answer. This enables the system to deliver concise information that directly answers a question, data that supports a structured inquiry (e.g., schedules), or lists of relevant knowledge results. **Sweet spot:** Driving knowledge that fits the scope of each type of interaction from direct, short answers, to database-driven results, to simple knowledge articles.

### Web Knowledge Base

Usage scenarios include natural language or keyword queries, browsing targeted topics, or reviewing results generated from pre-set context. The search engine derives the best results and the system has the capability to filter in more advanced ways if a topic needs to be explored in greater detail. This channel enables users to hone in on knowledge items, including filters, suggested queries, landing pages, links, and content types. Articles and content with support focus can leverage good knowledge structures and inter-relationships to enable accurate navigation to potential answers.

**Sweet spot:** Defining consistent, task-focused content structures, accurate and intuitive tagging, and customer-focused language for ease of use.

### Mobile Support

Usage scenarios include mobile inquiries for quick, basic information that can be read and absorbed on smaller devices. These interactions can include short text queries or browsing topics on common issues. This channel provides simple filtering and the ability to respond to one- to two-word queries, requiring a smaller content set focused on top questions and topics.

**Sweet spot:** Clear, short focused content and titles that can be quickly found and read on mobile devices.

### Email

Usage scenarios include a user who has time to compose and wait for an answer to a specific question or request. These situations could require more than one interaction to complete a set of asynchronous questions and answers, where the user provides a sentence or paragraph of context (not just a query). This allows for the ability to process the email text as the search context and incorporate the most important query terms or topics to return best results to a respondent. Knowledge items provided can include templated email responses that are complete and concise, with all the relevant steps or details to answer the request.

**Sweet spot:** Focused, reusable templates that provide sufficient detail for amenable topics.

### Community Support

Usage scenarios include online participants sharing posts, questions, and ideas to help each other, with targeted company assistance. Users typically post questions to get direct answers or clarifying interactions to arrive at the best answer. Community posts are the focusing mechanisms where users can confirm each other’s needs and terminology. This channel can provide additional value when online experts answer known questions with targeted knowledge to drive “best answers” across the community space.

**Sweet spot:** Targeted content answering common questions that can evolve in relation to the threads and posts in the community.

### Summary

Channel-focused KM drives self-service value. Self-service takes place when customers feel empowered to define and receive the answers to their questions, on any channel, quickly and intuitively. The degree to which each channel clearly and consistently delivers knowledge appropriate to those expectations determines the effectiveness of that channel. ■

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