



Making Self-Service Work: *the Critical Role of Content*

Introduction

Helping users help themselves has become a key business objective for organizations in 2005. While consumer self-service applications have revolutionized the way we interact with our bank, shop for a car, buy groceries or plan our travel, businesses have invested in portals and self-service models as a way to not only better serve their customers, but also to improve efficiency and employee satisfaction.

Within the enterprise, early self-service models were driven by intranet and IVR adoption, and typically focused on human resource applications like online benefits enrollment or employee directories, or simple customer service inquiries such as checking account balances or the status of an order.

However, with the explosion of digital devices, new on-demand services and more sophisticated functionality on the desktop, Web self-service applications for technical support and even product configuration or repair have moved to the forefront. The cost of supporting, configuring, administering and managing IT assets has become a huge burden. This overhead, what ABG has termed the *technology management tax*, has created tremendous demand for ways to automate and streamline service delivery via knowledge management tools, self-management of applications, and broader adoption of self-help and self-service solutions.

When self-service is deployed effectively, the value for users is simple: greater convenience, more accurate answers, and often a faster time to resolve issues or problems. For the business, the benefits are more comprehensive:

- Lower cost of service due to fewer support calls (and fewer escalations within the support center),
- Improved insight into customer behavior by monitoring self-service interactions and transactions,
- Greater access to corporate information and the ability to better leverage investments in help desk and call center applications, and
- By applying knowledge base tools, better consistency in service delivery, along with a way to capture and re-use corporate expertise, and provide a structured way for agents and users to streamline problem resolution.

Market Trends

Contributing to the adoption of new self-service models, technology spending and the focus of many software initiatives have been shifting to the “edge” of the enterprise over the past 18 months. In fact, according to a study by the Yankee Group, 70% of companies increased spending on edge-oriented applications (this includes self-service, channel management and portals) in 2003. At the same time, in ABG’s research, we have seen a shift within the CRM sector from internal process improvement to the

automation and optimization of edge processes and interactions, and an increasing focus among vendors on tapping into the mid-market, small- and medium-businesses, and areas where traditional CRM solutions have not yet been deployed.

With the next generation of self-service applications targeting more mainstream users and smaller enterprises, and being powered by advances in knowledge management and customer analytics, the vision of turn-key support portals “for the masses” is becoming a reality. To support *more sophisticated products in the hands of less sophisticated users*, ease of use and a high level of out of the box functionality are essential. So is simplified integration with existing help desk solutions. But perhaps the biggest need is pre-built knowledge and other content that can shorten the time to realizing the return on enabling users to help themselves.

Emerging Requirements and Solutions

Overall, the goals for self-service can be characterized as two-fold: enabling greater reach and delivering improved efficiency. In practice, this means:

- Service and support channels should *reach* users where they are, and enable users to reach the content or people they need to access to solve their problem—the first time, and
- Solutions should enable greater *efficiency* for users by shortening time to resolution and providing consistent answers via integrated support content, greater efficiency for the business via faster deployment, and greater efficiency for support staff and agents via re-use of content and offloading frequent requests to the Web

In both cases, it is clear that content is critical to achieving the potential of self-service. In fact, when looking at the building blocks for self-service, content and knowledge management are critical enablers, along with user presentation and access models to deliver the content, and analytics to track behavior and fill content holes, as shown in Exhibit 1.

The Critical Role of Content

Most support information falls into two categories: unstructured documents and manuals, and structured knowledge such as decision trees, flow charts, FAQs and expert systems. While the former represents the majority of content within a modern organization, it also requires expertise to find and apply the right “nugget” to a particular problem using a search engine or navigation aid. Meanwhile, the latter has been the foundation for many technical support and advanced help desk environments, with the advantage of directing an agent or user via a specific course of action, typically via a series of questions or directed “dialog.” However, the effort involved in authoring, deploying and maintaining traditional knowledge base tools can be prohibitive to all but the largest organizations.

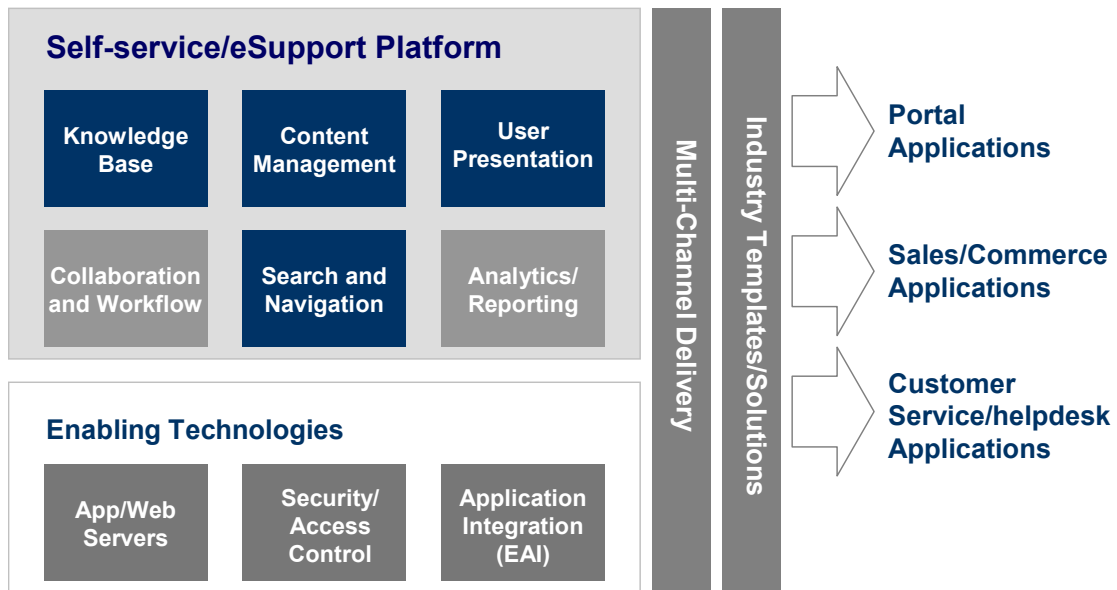


Exhibit 1. Technology building blocks for self-service and eSupport (source: ABG, 2004).

Companies have addressed the “knowledge acquisition bottleneck” by creating ways to more readily capture and re-use knowledge, and provide tools (and even incentives) for support staff to add to the knowledge base. Others have moved to index unstructured content and try to blend this “semi-structured” knowledge with structured sources and “know-how.”

RightAnswers’ Approach

However, another approach has proved both cost effective and practical: pre-built knowledge bases for common support issues and commercial software packages. The pioneer in this space is RightAnswers, a knowledge solution provider and creator of the “Knowledge-Pak,” packaged technical support content used by help desk and outsourcers to accelerate problem resolution for more than 200 commercial computing applications. The company also provides customer-specific knowledge, and as a unique point of differentiation, will create new solutions within one business day if a customer cannot find a solution to the problem in their knowledge base.

Advantages of using Knowledge-Paks and the company’s *Knowledge Cycle* approach include:

- Re-use of knowledge, and an efficient “write once, publish many times model,”
- Greater consistency and accuracy in diagnosing and resolving problems, and
- Accelerated time to delivering value – and faster ROI for self-service initiatives.

The Knowledge Cycle creates an interesting value proposition where the vendor is essentially trading “the questions” for “the answers” with their customers. This ensures that content development is in continuous alignment with the needs and demands of the real world. The Knowledge Cycle leverages the repetitive nature of support issues by ensuring that if a question is not resolved on the first submission, every subsequent instance is resolved at the content level.

Best Practices

As ABG has presented in our Self-Service Readiness Workshop, a key step in accelerating a self-service initiative and ensuring it delivers business value is identifying how to best leverage existing content, knowledge and organizational expertise. The *content readiness* process involves not only mapping structured and unstructured sources, but also examines:

- What kinds of questions users are asking—and which pertain to commercial applications and “known issues,”
- What types of information are they retrieving, and
- What knowledge sources are being accessed?

This process can identify what knowledge management and/or search solution is appropriate as the foundation for the self-service application – and where a Knowledge-Pak could be applied.

Getting Started

Following the content (and user, organization and technology) readiness assessment, and picking the right technology foundation, there are a number of deployment options and approaches that have emerged as best practices. These include:

1. Identifying and focusing on quick wins, and preparing for a process of continuous improvement,
2. Understanding users’ needs, segments and incentives needed to drive users to self-service channels,
3. Choosing performance metrics, and tracking the ROI for each phase of a new initiative, and
4. Leveraging emerging deployment models and service, such as working with a knowledge solutions provider.

What's Next and Conclusions

As self-service applications move into the mainstream, and provide a key strategy for offloading some of the burden being placed on IT support and services staff, starting with the right foundation is essential. Among the many enablers for self-service, content and knowledge management are particularly important when it comes to enterprise support. Using pre-built knowledge bases or Knowledge-Paks can shorten the time to deploying a knowledge management solution, and offer a way to realize both the benefits of better consistency – on repeatable problems – and the economies of scale of a publication-based model.

Combining this style of content capture and creation with new self-service delivery models offers to enable more efficient means of deploying support portals and bringing the power of KM *to the masses*. We expect the market for this type of turn-key self-service solution (“self-service in a box”) would be significant. At the same time, expanding the Knowledge Cycle idea discussed above has equivalent potential to not only allow knowledge solution providers to reach a larger audience, but also harness the insights gained from understanding what information, presentation options and answers create the greatest value for each user. These themes will be the topics of future ABG White Papers we will be co-developing with RightAnswers during the remainder of 2005.

References and Further Reading

“Self-Service Readiness Workshop,” Allen Bonde, *SSPA Conference*, Savannah, GA October 2004.

“Extending Your Competitive Edge: A New Model for High-Touch Self-Service,” *Allen Bonde Group White Paper*, September 2004.

“Best Practice for Solving the Self-Service Paradox,” Allen Bonde, in *CRM Magazine*, September 13, 2004.

“The Hidden Cost of Today’s Business Applications: *the Technology Management Tax Banks*,” *Allen Bonde Group White Paper*, August 2004.

“Search Effectiveness and Performance of the Web Channel at the Top US Retail Banks,” *Allen Bonde Group Research Study*, February 2004.

“2003 Edge of the Enterprise Survey,” *Yankee Group*, November 2003.



About Allen Bonde Group

Allen Bonde Group, Inc. (ABG) is a management consulting and strategic advisory firm focused on the enterprise software market and the impact of emerging business models and technologies. The information contained in this publication is believed to be reliable, but not necessarily complete and its accuracy cannot be guaranteed. All content Copyright 2005, Allen Bonde Group, Inc. All trademarks are property of their respective holders. Contact us on the Web at <http://www.allenbondegroupp.com>.