



VUI Visions

What's Behind a Great Self Service Customer Experience: Getting the Basics Right

Elaine Cascio, Vanguard Communications

*In this guest column, we ask designers skilled in creating Voice User Interfaces to highlight a particular aspect of VUI design inspired by actual deployments. In this issue, Elaine Cascio, Vice President, **Vanguard Communications Corporation**, a consulting firm specializing in customer experience, self-service, and contact center processes, operations, and technology, looks into the basics we sometimes forget in creating a voice-enabled customer service experience. For the past 20 years, Elaine's been helping companies build better customer experiences for all contact channels, including self-service. Elaine regularly conducts workshops on multi-channel strategies and self-service design, speaks at conferences, and writes about customer experience and channel strategy. She holds degrees from Dickinson College and the University of Virginia. Contact Elaine at ecascio@vanguard.net or visit www.vanguard.net.*

So many contact center professionals today are racing to get involved in social media, mobile apps and a host of shiny new things. But how effective will they be if they're not getting the basics right on all the other channels? Voice response and Voice User Interface (VUI) design is a perfect example. Not only are getting the basics right the first time important, but building in regular checkpoints to ensure that your speech applications continue to meet the needs of your customers is critical to success. We'll discuss some of the basics behind speech design, implementation, and maintenance that are often overlooked.

Incorporate the Voice of the Customer

Good VUI design starts with your customers. I recommend that you get as close to customers in as many ways as possible in order to understand their experience with your company. What do they like, what do they dislike, and how do they want to do business with you? You can do this through focus groups, surveys, observing agent calls, going out on service or sales calls, and spending time in your bricks and mortar environment.

- **Build Customer Experience Maps**, or flowcharts of your customer's experience with your company for all key applications you have – or plan – for speech self service. Put yourself in your customer's shoes and check your account or complete a transaction. Understand where you can be providing a better experience and where you can leverage a good one. Now map the ideal customer experience and build these improvements into design.
- Understand key **moments of truth** in the customer lifecycle, from research to purchase to service to re-purchase. Are there opportunities for using speech self-service to improve the customer experience at a moment of truth? If you're a health insurer, consider an outbound call with claim status, if you're a retailer provide an alert so that a customer can reorder a product.
- **Usability test.** No matter how customer-focused the design, or how state-of-the-art the user interface, having real customers give the application a "test drive" provides critical insight into the usability of your application. Usability testing is a critical step to ensuring a positive customer experience, reducing risk, and maximizing ROI.

Traditional usability testing has testers work their way through a set of exercises with a facilitator. Exercises are conducted one-on-one with a facilitator in the room and observers behind a one-way mirror taking notes on the test. The sessions are videotaped for future reference. Video clips can be used in presentations to management and are a very powerful tool for both education and decision-making. At the end of each exercise, the facilitator asks questions to understand how easy it was to complete the exercise, and how the application could be improved.

An alternative testing methodology is to recruit testers to call into a system and fill out an e-survey on the experience. That way they're testing the application in a real life environment. It requires a prototype or a draft design. This method is easier and costs less than one-on-one testing. Additionally, you can have a larger sample. However, with this approach, you're not able to get rich visual clues from participants that help you understand their experience and ask questions.

You can also combine methodologies, or perform in-person testing for a first round, then test remotely in a second round.

- **Focus groups.** The purpose of usability testing and focus groups is very different. Focus group elicit information about the kinds of features and functionality clients would like to see in an application: what would make them try a new application, or make more use of an existing application. Focus groups are held at the beginning of the design or redesign process. Keys to the success of a focus group include:
 - Tools and approaches that people can react to (e.g., sample menus, voice talent, brochures, cue cards).
 - A knowledgeable facilitator who can balance between probing for specific answers and enabling open discussion (which often yield innovative ideas).

Consider Other Channels

Your customers do business with you on multiple channels, so don't design speech self-service in a vacuum. Look at websites, mobile applications, agent-handled calls, face-to-face interactions, social media, and also consider print and other marketing media. Consider:

- Creating a similar look and feel and common branding across all channels.
- Leveraging processes, tools, and data across channels.
- Ensuring that data is updated real-time across all channels.
- Understanding channel strengths and weaknesses to provide customers with the most usable and appropriate speech self-service apps.
- Making sure that speech self-service supports your corporate customer contact strategy.

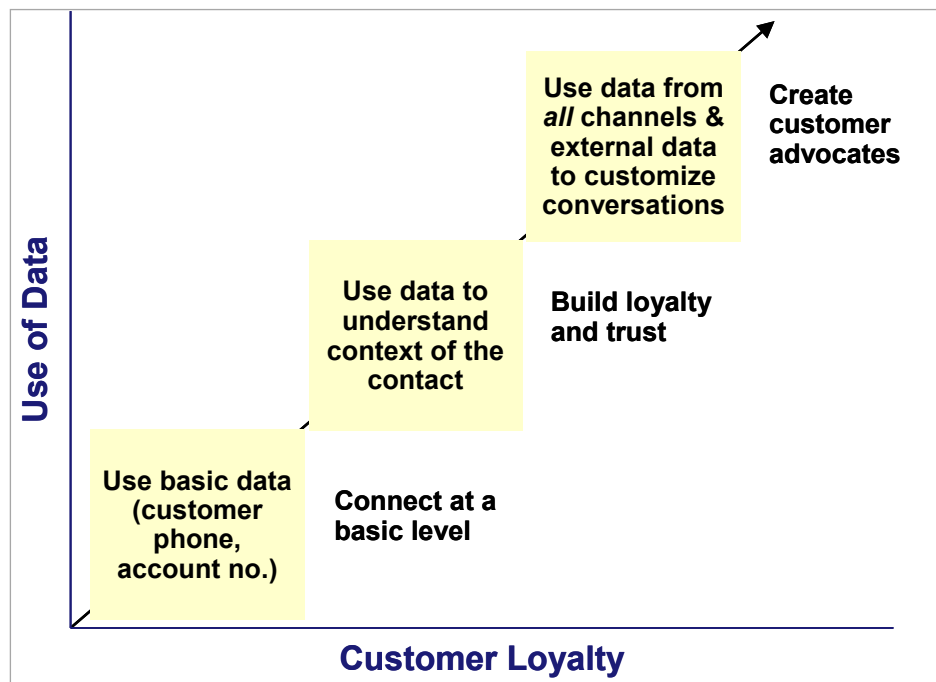
Build Customer Intimacy

One concept that's behind many of the trends in contact centers today is personalization. We use history, memory of past transactions, and the knowledge we have from internal or external data sources to engage a customer or a group of customers in a personalized conversation. Make sure that you're building intimacy in speech self-service, too.

- Personalize the experience
 - Streamline identification processes by using data you have about the caller, like a phone number.
 - Match customers to the appropriate resource based on their segment, or stage or relationship lifecycle, for example. That resource can be speech self-service, an agent, a specialist, or partial automation.
 - Understand caller preferences and patterns and use logic to create dynamic, personalized conversations.
- Anticipate customer needs
 - Understand the context of the call – does the caller have a flight on your airline today or is their power out?
 - Understand customer needs based on their last channel contact. For example, was the customer just on the website trying to troubleshoot a problem?
 - Leverage customer history to determine reasons for the call based on where customer is in the product or service lifecycle. For example, does a caller have an outstanding claim or have they just received a new product that they may be setting up?
 - Create outbound notifications and updates to reach out to customers before they contact you.

Create High Tech High Touch Experiences

One of the keys to creating an intimate, natural and productive customer experience is to blend high tech with high touch in ways that leverage the best of technology with the best of the human touch. This is often done by splitting an interaction between automation and an agent so that it becomes a single, seamless transaction.



Use of data to build customer intimacy plays a key role in creating customer advocates

For example, an airline collects data such as city pairs, travel dates and number of travelers using self-service. Then they route callers to an agent to complete the transaction. The agent provides the human touch needed to help the caller decide on specific flights, seats, and more. This type of partial automation cannot only improve customer satisfaction, but also reduces call handle times. Can you apply partial automation to any of your customer interactions?

Measure Your Success

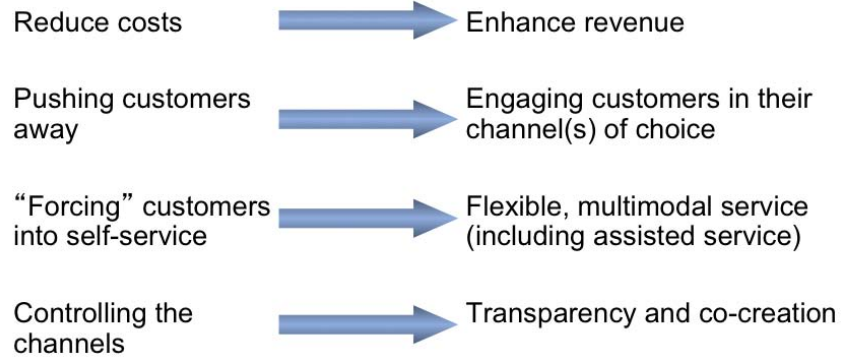
Another place many companies fail is not having ways to measure the success of speech self-service. Often they aren't even running reports, conducting testing, or tuning at regular intervals. Establishing key metrics and developing baselines should be part of the design process and baked into reporting. What are people trying to do? How successful are they and how do they feel about it? These are just some of the basics.

- Quality monitor speech self-service calls just as you do agent-handled calls. Use standard QM forms, score and be sure to calibrate regularly and create action plans based on what you find.
- Examine trouble tickets and emails in order to understand patterns that can be addressed using speech.
- Understand why customers may use multiple channels and how improving channel design can enable them to complete their task on a single channel.
- Use baseline customer experience maps to measure success. Continue to map customer experiences across channels for continuous improvement.
- Measure how well you meet customer expectations at key moments of truth in the customer lifecycle.
- Understand the costs associated with key metrics – the cost of a transaction that isn't once and done, on each channel and across channels, and how much each customer complaint costs you.
- Make sure that all of these roll up to clear measures of success that your CEO understands. Measures should be customer-centric, strategic – and make a difference in how the business operates.

Conclusion

Finally, I suggest that we rethink the value proposition for self-service. Many of the drivers that worked in the past are less relevant in this competitive world where customers are willing to jump ship based on a tweet from a stranger. Here's my model for the new value proposition:

Rethinking the Value Proposition for Self-Service



Vanguard Communications Corporation

Morristown, NJ

(973) 605-8000; www.vanguard.net

Copyright TMA Associates 2011; All rights reserved. **TMA Associates, P.O. Box 570308, Tarzana, CA 91357-0308 USA. Tel: (818) 708-0962. Fax: (818) 232-0368, or go to www.tmaa.com/subscribetossn.**

Speech Strategy News is published twelve times per year by TMA Associates, Editor: William S. Meisel.