Customer Service – Portals and Self-Service

Achiever software

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Introduction

With increasing emphasis being placed on improving customer service and customers requiring instant access to information, organisations are looking to technology to help them meet customer demands whilst driving efficiency gains and reducing overheads.

Whether you are dealing with internal or external customers the considerations and issues are the same. Your customers need easy access to up-to-date information at any time and to be able to communicate with you via multiple channels.

The introduction of customer and partner portals offering self-serve options and access to selected information may appear to provide the answer. However, unless managed as part of an organisation-wide customer service strategy, portals could fail to deliver expected returns or worse, result in negative customer experience.

This white paper discusses the implementation of self-service portals as part of a wider customer service strategy to deliver improvements in customer service delivery and relationships.

Implementing a customer service strategy

Developing and successfully implementing a customer service strategy within your organisation often requires enhancing fundamental business processes and working practices as well as introducing cultural change.

Becoming a customer-focussed organisation will only be achieved as part of a wider business strategy with key business objectives and support from senior managers to achieve user buy-in and adoption.

Implementing a self-service portal will not eliminate the requirement for a Contact/Call Centre or Customer Service Team. On the contrary, providing customers with greater choice in the way they communicate with your business will assist in improving customer satisfaction ratings.

Introducing a customer self-service element needs to be considered in line with new and existing processes. Ensuring that the customer is handled in a consistent manner and that the same procedures are followed irrespective of contact method used, is essential to delivering quality customer service.

Establishing a successful customer portal will require some follow up work by your team. Providing your customers with the ability to raise complaints, ask questions or request a call within the customer portal offers a complete solution and promotes a culture of prompt action from your team.

Identify realistic objectives for each customer service element and measure these independently as well as part of the whole customer service strategy. Monitoring and measuring feedback on all elements of the customer service delivery is essential to understanding customers' experience and preferred channels of communication. You may think that the self-service portal is a great channel of communication but do your customers agree?

Selecting the technology to assist you in executing your strategy is the final piece in the customer service jigsaw.

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Customer portal benefits offered

When implemented as part of a customer service strategy, portals can provide numerous benefits to both you and the customer. Potential benefits can include:

- Improved customer relationships
- Increased customer satisfaction
- Enhanced communication
- Quicker response times to issues
- Improved call response times within the Contact/Call Centre
- Increased Contact/Call Centre capacity without increasing personnel
- Freed up Contact/Call Centre agents able to focus on priority tasks
- Improved data quality and integrity
- Reduced costs for service delivery
- Improved return on investment (ROI)
- Achieved and exceeded targets (Government or business)

Determining functionality and access

Determining the functionality and information available can vary in line with your business requirements and audience. Information within the portal may be drawn from a number of data sources, such as a CRM, ERP or Document Management solution. Clear understanding of any potential licence implications must be considered for any integrated solutions.

Available options and functionality can be tailored to each customer if providing a login and password protected portal. Functionality can include:

- Logging and viewing issues
- Downloading documentation/publications
- On-line payments
- Updating profile information
- Registering new opportunities and enquiries
- Registering complaints or compliments
- Requesting a call/contact
- Registering for an event/training course
- Completing feedback forms and surveys

It is essential that you have clearly identified the level of access available to each individual and have thoroughly tested this prior to providing customer access.

Security implications must be given careful consideration for internal and partner portals, for example, by removing access from individuals when circumstances change, such as leaving the company.

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Maintaining quality

Ensuring the same level of quality control that is in use throughout the organisation is in force and monitored across the customer self-service is essential. Customers will already have a certain expectation level and could react negatively if a comparable level of service is not provided.

Any reduction in quality across the customer self-service portal can lead to an increase in call volumes and cost to your organisation.

Quality is not necessarily measured by the level of functionality available to your customers within the portal. Simplicity is the key. It is essential that it is easy for your customers to access information and communicate with you. In addition, terminology used can be pivotal in achieving success. Poor access to information, complex site navigation or a lack of functionality within the portal can all lead to customer dissatisfaction.

Data quality

When providing customers and partners with access to information data quality must be assessed and addressed. Poor data quality will affect a customer's impression of your organisation. In addition, careful consideration must be given to Data Protection, Freedom of Information and any other legislation as well as data sensitivity. It is imperative that you not only ensure that the information available is correct and correctly formatted but that there are no inappropriate comments included, for example, on issues.

Any data that is entered by the customer must match the data rules set within the appropriate related system. For example, if you are allowing customers to update their profile information that updates the CRM system the same mandatory fields and data formatting rules must apply to ensure data consistency and integrity.

Implementing business processes

Customer portals are not simply data repositories but should be an extension of your Customer Relationship Management solution.

Implementing workflow and ensuring that it is consistent across the customer service function maintains quality across the customer experience and ensures that the correct procedures are followed in line with business guidelines.

Furthermore, in order to react proactively and respond to customer requests you need to ensure that your team is correctly notified and that the necessary procedures are in place. Portals may assist your communication processes but your team may also need to be made aware when changes have taken place or a customer has added some information, for example, if someone leaves, raises a complaint, registers a new question or a new enquiry.

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Considering forums

Forums are a great way of opening channels of communication with your customers. Including forums within your customer self-serve portal can provide you with a powerful tool for feedback and suggestions. Providing guidelines for use will also ensure maximum benefit is gained from the forums.

Consideration should be given to the management of forums to ensure that topics are relevant and of interest.

Furthermore, careful monitoring of forums should be implemented to ensure that any potential misuse is highlighted early and appropriately addressed. However, providing the right channels of communication for any grievances and handling these appropriately will aid administrators and discourage misuse.

Technologies used

When considering a customer self-serve portal it is important to undertake a software and hardware review to identify whether it can be achieved using existing solutions, hardware and skills. In addition, careful thought should be given to customer access and any solution chosen should require minimal (or no) installation or set up by the customer.

Mapping out how the customer portal will integrate with your existing business systems is an important part of the process, such as

- How is the data from the different systems to be made accessible on the portal?
- What benefits will be gained from using the functionality available within a CRM or other existing solution versus that of specialist portal software?
- If the portal includes multiple data sources how will the different data rules and processes for each system be implemented?
- If information is to be synchronised is there a time delay and how will this affect the other systems or the customer experience?
- Will the portal integrate with existing applications, such as online payment and address mapping software?

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Voice self-service

In addition to customer self-service portals, voice self-service applications are becoming increasingly popular, providing customers with the tools needed to quickly obtain answers and complete simple transactions. Voice self-service applications are offered by a number of leading telephony solutions providers.

Voice self-service offers many benefits including:

- Improved customer satisfaction by avoiding long queues
- Increased availability of agents to focus on more complex tasks by enabling customers to complete simple transactions over the telephone
- Customer service delivered 24x7x365
- Reduced costs including telephone charges resulting from hang-ups

However, careful consideration needs to be given when implementing voice self-service to ensure consistency across the customer experience, that quality of service is maintained and that it is simple to do business with you. In addition, determining which services to automate is critical as not all will be appropriate.

Summary

Implementing a customer self-service portal can offer increased benefits for your organisation but only if considered as part of a wider customer service strategy.

In addition, customer portals will not eliminate the need for a Contact/Call Centre; however, they will provide your customers with improved accessibility to services and greater choice if implemented correctly. Considerations to be made when implementing a customer self-service portal include:

- Set clear objectives for the customer self-service portal and ensure that it is in line with your overall customer service strategy
- Ensure the portal is easily accessible by customers
- Make it easy for customers to do business with you by keeping the portal simple
- Ensure consistency across the customer experience by implementing the same quality measures and processes across all communication channels
- Provide tools for customers to feedback and ensure you follow up promptly
- Monitor portal usage to minimise misuse and ensure your team follow up on the necessary actions
- Communicate changes or enhancements made on the portal to customers
- Implement the same data rules for data consistency and quality
- Be aware of legal obligations including Data Protection and Freedom of Information rules, data sensitivity issues and licensing implications for any systems accessed

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About the authors

Founded in 1992, Achiever Software is a UK-based Customer Relationship Management (CRM) solutions developer that has extensive experience of implementing Corporate Information Management solutions in the Private and Public sectors.

Achiever Software's innovative partnership approach to the delivery and implementation of the Achiever Anyware application facilitates the creation of a solution that suits the unique business process and data requirements of each customer. Achiever's flexible relational data structure allows solutions to be designed to suit diverse business requirements across multiple departments and industry sectors including Public Sector, Education, Contact Centres, Medical Information Systems and Financial Services.

Achiever is aimed at organisations requiring a Corporate Information Management solution capable of managing sophisticated and complex business requirements whilst allowing them to maintain system ownership.

Achiever's strong integration capabilities allow it to maximise the benefits of a customer's existing business systems to create a complete solution providing benefits such as improved visibility of information, increased productivity, and reduced administration work.

Data security is paramount. Achiever is designed to ensure that only authorised users have access to sensitive and confidential information whether on screen or in reports.

Achiever has been successfully implemented in organisations including Surrey County Council, Papworth Trust, Warwickshire College of Education, Momenta (AEAT), Skillset and NECC.

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