

Embrace Virtual Assistants as Part of a Holistic Web Customer Service Strategy

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Customers are insisting on multiple methods to contact an organization. Customer service is being asked to meet demand and increase effectiveness, while curtailing costs and add value to every customer interaction. The increasing demand for business-to-business (B2B) and business-to-consumer (B2C) enterprises to have anytime, anywhere contact requires the service provider to be present, virtually and physically, for longer hours and in more places, to fulfill service requests through a combination of live, assisted and self-service channels.

Key Findings

- When deploying Web customer service channels, do not remove all human interaction, because these channels — chat, virtual assistants, e-mail response, etc. — need the backup of a live agent, in case the self-service capability is unable to resolve a service request.
- Focus on the experience of the customer, and ensure that it is consistent across all the channels. Start by mapping the experience in a single channel, then replicate that experience across the other channels, including the virtual assistant.

Recommendations

- Virtual assistants provide an excellent first point of contact for customer service. Combine the virtual assistant with options that will enable the escalation of an inquiry to an assisted service, if needed, with first-point-of-contact resolution as the guiding principle.
- Deploy a dedicated person to constantly review and expand the self-service knowledge base and speech-enabled technologies to become increasingly successful in the accuracy of responses.
- Review the metrics in the contact center and focus on the areas where Web customer service can reduce voice traffic and enhance service delivery.

ANALYSIS

Organizations focused on increasing the number of channels for customer care and customer service have long since turned to Web chat as the first additional channel to support voice offerings. Increasingly, such organizations are using virtual assistants to support the Web chat channel to enhance the efficiency of upfront information collection and problem resolution. Unfortunately, the link between a virtual assistant and a live agent is not well-understood. This research addresses the issues of how to determine the suitability of a virtual assistant, how to maximize the value of a virtual assistant and where to start when implementing a virtual assistant in support of the Web chat channel (see "Gartner's Strategic CRM Framework for Web Customer Service").

Identifying the Increasing Demand for Web Customer Service

Although most companies have a Web presence, few plan for (or even expect) the resulting often-abrupt increase in user expectations and demands when the first Web-based customer service channel such as Web chat is enabled. Many companies are oblivious to the evolutionary processes associated with successful Web customer service architectures. Often, they hope to bring up Web customer service channels slowly, learning the technology and tracking the impact on business processes before expanding application functionality.

However, hyperactive business cycles, coupled with the potential for instant competitive analysis, are forcing organizations to accelerate the deployment of Web customer service channels. Hence, rather than just deploying a single channel and then waiting to see what the impact should be, organizations should deploy multiple Web customer service channels to maximize the impact on the customer base. When properly deployed, Web customer service channels such as Web chat are beginning to have a significant impact on increasing the number of contact channels, improving the overall quality of service (QoS) and freeing up time for phone-based service representatives to handle tasks that are often too complicated to resolve during a Web-based interaction session.

Action Item: Investigate the migration of some of the more-mundane service activities to the appropriate Web customer service channel, but be aware of the sudden spike in channel uptake that might result from deploying these channels.

Determining the Requirement for Virtual Assistants

Web customer service, enhanced with a modern virtual assistant, is an investment that organizations are implementing to support busy resources, such as Web chat customer service agents, with the collection and answering of mundane information and basic questions. In most instances, Web chat sessions are twice as long as a similar phone-based conversation, making for an unproductive workload. The Web chat agent must also collect basic information such as the customer's name and other details, as well as a high-level description of the problem, before the live agent can start adding value to the call. These are all basic activities that can be easily channeled to a virtual assistant.

If the virtual assistant is integrated with a customer back end, then it can request customer-related data and information similar to an interactive voice response (IVR) unit requesting identifying information before passing the call to a live agent. If the virtual assistant is integrated with a knowledge base, then it can respond to basic questions by searching the knowledge base for solutions and offering answers. Once the virtual assistant options are exhausted, then the conversation can be routed to a live Web chat agent.

Action Item: If you regularly deal with basic and mundane questions, or if personalized information needs to be collected for verification prior to a Web chat session, consider supporting your Web chat agents with a virtual assistant.

Determine the Suitability of the Web Customer Service Process

The more-transactional or more-high-volume, standardized, transactional, time-sensitive and simple a process is, the more-suitable it is for a Web customer service channel. The more-complex, slow, varied and low-volume a process is, the less suitable it is for a Web customer service channel.

As part of the preparation to deploy Web customer service, take stock of (and a fresh look at) deployed processes and technologies. Create a market coverage model to define and graphically portray how a multichannel environment will help meet growth objectives (see "Not All Customer Service Channels Are Created Equal"). This model helps identify where each channel (for example, a virtual assistant and Web chat) can create the most value in an organization's overall approach.

The market coverage model could help to define how big a channel needs to be, what role it plays in the organization and how it fits with other channels in the enterprise. The model delineates what channels must be built, what market segments they will cover, and how particular products and services must be altered or packaged to make them most effective in the specific channel. Often, this model will show that your processes and technologies do not always relate to the modern, multichannel concept of self-service, Web chat and virtual assistants.

Action Item: Many mundane requests can easily be serviced via a Web customer service channel. Automate Web customer services with the support of a virtual assistant and a strong knowledge database, and design the customer experience to be similar to that of a human-serviced channel.

Maximizing Value From Web Customer Service and Virtual Assistants

Most online help tools fail in actual problem resolution. The virtual assistant is starting to challenge this paradigm, and, although the acceptance of a virtual assistant has typically not been a challenge, customers have been upset by the poor relevance of the responses they've received to the questions asked. A great virtual assistant should offer more than just search; it should enrich the quality of the customer experience and assist the customer throughout the online interaction. Organizations deploying virtual assistants in support of other Web customer service channels will do well to add an "unresolved" component to their website, enabling the customer to engage in an online Web chat with a live agent, if the virtual assistant is unable to provide an acceptable answer.

The combination of speech technology with the virtual assistant provides a stronger customer service proposition, and Gartner is seeing the deployment of voice-enabled virtual assistants that can interact in voice-to-voice, voice-to-text, text-to-text and text-to-voice modes. Organizations deploying complex self-service technologies should, however, be careful that the costs associated with the technology in these channels do not become higher than the traditional phone channel of the contact center. The true value of Web customer service is not possible without a long-term commitment to ongoing development and fine-tuning of the speech technologies and the underlying knowledge base.

The amount of time, money and effort spent on the preparation of the underlying knowledge base is directly related to the accuracy of the answers provided by the virtual assistant. Many

organizations that were expecting a high level of accuracy on their self-service answers have discovered that they could do no better than a 45% to 50% relevant response to the initial questions. During a two-year period, the relevance can grow to an estimated 85%, but only if a dedicated knowledge management team is established that consistently focuses on the development of the speech technologies and knowledge base.

The business case for replacing telephone-based agents with virtual assistants and Web chat has not proved itself in all cases. Instead, it has moved the focus toward reducing the traffic sent to the phone-based agent, reaching new-generation clients (that is, digital natives), enhancing Web customer service experiences and deploying new products and services more rapidly. The notion of reduced traffic to the call center agent, access to a different generation of client, and an improved and consistent service experience, regardless of the channel, has proved to be a better argument when looking for funding for Web customer service strategies. Nonetheless, with the growth of Web channels as part of the consumer experience, enterprises should consider the capability of virtual assistants for competitive differentiated relationships.

Action Item: When developing a business case for Web customer service, do not focus on replacing human agents. Rather, focus on the increased efficiency of a Web-based channel and the reduction of telephone traffic that will be achieved via the deployment of a virtual assistant and other components of a Web customer service strategy.

The No. 1 Objective: Reduce Call Center Traffic

Where to begin Web customer service implementations often depends on an organization's environment and customer maturity. Customer interaction data required to make such decisions should be (or, with minor modifications, will be) readily available in the contact center activity database. The most critical of these metrics focuses on contact categories (see Table 1) — the number of contacts and the amount of time spent on each contact category, which, in turn, equates to money spent on each contact category, as well as types of calls and the process around call resolution. These categories can be mapped into areas that parallel the Web customer service technology landscape. This is not to say that the Web customer service environment will be under the control of the contact center manager; Gartner often sees the Web customer service channel managed by the e-mail or chat channel executive.

Table 1. The Impact of Web Customer Service on Call Centers

Selected Metric in Your Call Center Today	The Potential Impacts of Web Customer Service
Percentage of calls generated per call category	Specifically tie to areas with which customer service can assist to reduce the number of calls (for example, nearest branch location, password reset and status-of-service request).
Percentage of overall support time taken to resolve issues and basic inquiries	Specifically tie to Level 1 (L1) information inquiries that Web customer service channels, such as virtual assistants and Web chat can reduce (for example, outstanding balance amount and change of address).
Cost per incident	Determine this metric before implementing Web customer service, and again after implementing Web customer service, because this cost should be driven down.
Total requests/L1 analysis	Expect the number of requests per L1 agent to decrease after implementing Web customer service; this shows efficiencies gained.

Selected Metric in Your Call Center Today	The Potential Impacts of Web Customer Service
First-call resolution	This rate should increase as long as the internal agents use the same knowledge base that is used by the clients.
Mean time to resolution	This should decrease with effective Web self-service and virtual assistant support.
Customer satisfaction	Use an enterprise feedback management tool to measure the satisfaction levels not only in the contact center, but in the Web customer service channels

Source: Gartner (August 2010)

With the deployment of more services through Web customer service channels, the management of the live agent will become increasingly difficult. This will necessitate the use of a workforce management solution. The challenge, however, will be to select a product that can efficiently manage the modern, multichannel phone- and Web-based workforce environment.

Action Item: Migrate mundane service requests (for example, account balance and password resets) away from the phone to a Web customer service channel. This will increase the operational efficiency of telephone-based personnel, as well as increase customer satisfaction, due to the increased speed of answers and additional service channel availability.

RECOMMENDED READING

"Toolkit: CRM Readiness Assessment for E-Services"

"Pitfalls to Avoid Poor TCO During Web Customer Service Implementations"

"Moving From E-Service to Web Customer Service in 2010"

"Toolkit: RFP Template for a WCS Web Chat Application"

"Gartner's Strategic CRM Framework for Web Customer Service"

"How to Choose a KM Tool for IT Service and Support"

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