Conflicting Trends in Customer Support

Simultaneous shifts toward personal touch and hands-off automation
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Summary

Catalyst

It is a great challenge to analytical clarity when one study purports to have seen a development in some subject while another suggests the complete opposite. Given enough time, any topic will show movement in conflicting directions, but sometimes it seems like industrial or disciplinary progress is working against itself. Such is the case with two diverging trends in customer support: non-interventional options such as self-service, IoT automation, and peer support on one end, and high-touch, thorough, expert assistance on the other.

Ovum view

Simple reporting on business and technology trends can become overly focused on specifics and miss the big picture. Without broader perspective, the value of these reports becomes lost and may begin to look like doublespeak. This is the apparent case in the arena of customer support, where there is movement both toward shifting some support functions away from the contact center on the one hand, and using subject-matter experts, team-based service, and other more expensive methods for tickets that do come in on the other. Looking beneath the surface, these trends are less a contradiction than a case of dual specialization.

Key messages

- Customer support is diverging into low-touch and high-touch options.
- Self-service and peer support are meeting IoT automated diagnostics.
- Knowledge bases for regular agents fill the space beneath expert agents.

Recommendations

Recommendations for enterprises

Customer service is increasingly the main point of contact between businesses and their customers, with customer service representatives (CSRs) often supplementing their support role with marketing and sales functions. Success in all these roles requires observation of how customers want to be treated in different situations. Know your customers, cater to their desires and expectations, and implement support options accordingly. High volume is best addressed by self-service and peer support, both of which reduce the burden on the contact center, while high-value customers tend to benefit more from white-glove service and closer interaction. Businesses with diverse product lines or a wide range of use cases should be prepared to service both needs as appropriate.

Recommendations for vendors

Two clear trends call for two distinct messages. The recent tendency to tout the benefits of omnichannel service as shorthand for covering multiple engagement models does not tell a detailed story and will no longer fully suit marketing needs. Focusing on the efficiency benefits of self-service
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and peer support for high customer volumes and the experiential benefits of expert agent handling for premium customers should be two distinct points in any discussion of customer service offerings.

Customers are doing it for themselves

Self-service and automation advance

The face of the contact center has been changing throughout the 21st century, with call volume plummeting due in large part to curated FAQ pages, guided self-service systems, and now peer support and artificial intelligence. Contact center managers, once concerned with call deflection, now find their agents have a more reasonable workload, since customers prefer self-help and social media peers over the contact center in many cases.

Self-service has been a tremendous boon to companies seeking to reduce contact center expenses. Well-designed IVR systems, relevant FAQ documents, and detailed knowledge bases enable many customers to solve their own issues, reducing the workload on live personnel. The shift toward self-service has coincided with, and been driven by, the increasing capabilities of mobile devices and the ubiquity of public Wi-Fi. There are few technological barriers to seeking one's own answers irrespective of time, place, or platform. Ovum research indicates significant growth in self-driven digital and mobile support channels – websites and FAQ pages, mobile apps, social media, and communities – compared to two years ago.

Figure 1: Soon customer service will look very different

The Internet of Things (IoT) has expanded the concept of self-help to include devices that solve their own problems. A smartphone, for example, may detect a potential fault in its hardware or software, then automatically download an update or prompt the owner to schedule a service appointment. Cars that monitor their own functions and efficiency, appliances that report when important parts are close to failure, and similar cases are resulting in zero-call resolution, fixing issues customers never even knew they had.

It will require significant investment in IoT and analytical skills to reap the full benefits of this development. Ovum's study of IoT business potential revealed that 54% of contact center managers...
surveyed see a lack of data analytics skills in the enterprise as one of the top three obstacles to the implementation of an IoT strategy, with only legacy IT architecture and security concerns raising more questions. Enterprises seeking to take advantage of IoT in the contact center must adjust their technology and training budgets accordingly.

Peers seen as trustworthy and knowledgeable

Social networks and mobile device growth have also led to the phenomenon of peer support; motivated brand enthusiasts and knowledgeable users often provide better help to other customers than contact center personnel. Peer support increases the sense of community associated with a brand, leveraging the superior trust people place in their peers compared to CSRs. Peer support further reduces contact center workload and may produce answers fit to include in the corporate knowledge base. Simply acknowledging the existence and help of a support community may be all that is necessary to make it thrive.

Figure 2: Customers are abandoning traditional channels

White-glove service comes to the contact center

Agents focus on success, not speed

With a significant percentage of support requests being dealt with before they reach a live agent, CSRs have begun to shift their focus to providing quality answers instead of fast fixes that might not work. First call resolution is the KPI of choice, and average handle time is barely a factor. Today’s CSR is armed with guided service systems, the knowledge base, and the ability to consult with other
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agents. With the right tools, CSRs can leverage the expertise of others and become instant experts if they are not already.

As we argued in 2017 Trends to Watch: Customer Engagement, the voice channel will not disappear but will become a function mostly for specific uses, including resolution of complex technical issues, billing issues, and fraud/security calls. Although the voice channel will persist into the foreseeable future, Ovum expects the number of voice-only interactions to decrease steadily while the average number of minutes spent on a voice call will continue to rise because of the types of complex calls shifting to the voice channel. Therefore, live agents are not expected to disappear anytime soon.

Figure 3: Which channel would you prefer to use if you knew you could get a resolution on the first attempt?

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Phone call</th>
<th>Email</th>
<th>SMS</th>
<th>Mail</th>
<th>Website</th>
<th>Mobile app</th>
<th>Live chat</th>
<th>Communities</th>
<th>Social media</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical issue with product or device</td>
<td>51%</td>
<td>22%</td>
<td>6%</td>
<td>4%</td>
<td>6%</td>
<td>4%</td>
<td>7%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>When purchasing items on the web</td>
<td>16%</td>
<td>27%</td>
<td>4%</td>
<td>4%</td>
<td>22%</td>
<td>13%</td>
<td>9%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Service outage &amp; restoration</td>
<td>26%</td>
<td>19%</td>
<td>7%</td>
<td>8%</td>
<td>14%</td>
<td>9%</td>
<td>8%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Billing question</td>
<td>38%</td>
<td>18%</td>
<td>8%</td>
<td>6%</td>
<td>8%</td>
<td>5%</td>
<td>13%</td>
<td>1%</td>
<td>4%</td>
</tr>
<tr>
<td>Suspected fraud</td>
<td>26%</td>
<td>19%</td>
<td>5%</td>
<td>14%</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
<td>9%</td>
<td>4%</td>
</tr>
<tr>
<td>Cancellation</td>
<td>14%</td>
<td>27%</td>
<td>20%</td>
<td>15%</td>
<td>10%</td>
<td>6%</td>
<td>3%</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td>Change a reservation</td>
<td>12%</td>
<td>21%</td>
<td>17%</td>
<td>9%</td>
<td>8%</td>
<td>16%</td>
<td>11%</td>
<td>1%</td>
<td>7%</td>
</tr>
<tr>
<td>Make account modifications</td>
<td>8%</td>
<td>24%</td>
<td>6%</td>
<td>18%</td>
<td>18%</td>
<td>12%</td>
<td>6%</td>
<td>0%</td>
<td>9%</td>
</tr>
<tr>
<td>General support questions</td>
<td>6%</td>
<td>8%</td>
<td>1%</td>
<td>0%</td>
<td>19%</td>
<td>22%</td>
<td>33%</td>
<td>4%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: Ovum

Note that the survey indicates that 78% of customers said a nonvoice channel would be their first choice if they were sure they could get first-call resolution. This is further evidence of a shift away from the traditional voice channel and the ascendancy of the omnichannel customer service environment. It is our contention that this shift from the voice channel to a digital buffet will accelerate over the next few years.

The arrival of various chat, SMS, and social media communication methods has given customers multiple new ways to interact with customer service that do not rely on voice. Text-based support happens at a different pace than a phone call and is not as reliant on continuous conversation flow. CSRs using text channels can handle two or three simultaneous support tickets without noticeable degradation in speed or quality.

That is not to say that speed is meaningless; far from it. The very factors that enable CSRs to take enough time to get the right solution the first time also increase the efficiency with which they can provide those solutions. The technology is part of a business process that keeps the call moving, from intake to diagnosis to solution. Co-browsing, for example, is not necessarily a speedy process, but it enables agents to walk customers through lengthy or complex operation with minimum chance of confusion. Nine in 13 enterprise CRM vendors tracked by Ovum have co-browsing support, five of them natively.
Actual experts are taking tougher calls

There are situations where ad hoc expertise through technological assistance is not enough, and somebody with deep subject expertise is required. For example, the user of a tax return application may need a professional level of help that regular contact center staff is unable to provide – the program is working fine but does not appear to cover a particularly tricky case. This has led to the rise of the "super agent," a professional who is formally trained in the subject matter, highly knowledgeable, and often holds a license, certificate, or degree in the topic. These super agents may command a higher wage but provide unparalleled service in return.

Super agents may be part of a traditional contact center structure, or they may be employed in other enterprise roles. Newer generations of enterprise communications systems have role-based structures that allow workers at all levels and job descriptions to participate in customer service. A super-agent employee who is not a normal part of the customer service organization will be one more step removed from the customer, but it is simply a matter of escalation to make the connection.

Super agents are a valuable alternative to the experts in the peer support channel, since it is easier to vet an employee than an enthusiast. A customer calling the company should be able to trust that a purported expert is one in fact; the credentials of another customer are harder to verify when the main currency in a social network is upvotes. On the other hand, a community member with a large following is generally going to be trustworthy, as that following has been built up over time with repeated successes.

One of the success factors for deployment of super agents is the same as one found in traditional customer support organizations: use of existing customer data to speed and inform the interaction. The ability to automatically identify an incoming service caller and know that person's history of purchases, billing, and incidents is a hallmark of well-executed support; not only does it shorten or eliminate intake questions, it acts as a tool for agents to start diagnosing the issue at hand. Ovum believes it will be even more important in the context of super agents, immediately communicating a level of competence and readiness to the customer.

Accountability must be taken into consideration before deciding to deploy agents identified as licensed or certified in a subject. Attorneys who provide bad advice as part of a customer service job are just as vulnerable to malpractice claims as they would be with paying clients, and this is true of other professions as well. That risk may extend beyond the individual to the organization. One solution is to include a disclaimer at the beginning of the interaction, indemnifying the company and placing sole responsibility on the agent, or even the caller. Choosing to accept responsibility as a company, however, is a potential draw; a company that can claim its answers come from an authority on the subject and will guarantee or insure the customer against any repercussions holds a powerful card.

Appendix

Methodology

This report is the result of interviews with vendors, enterprises, and consultants in and around the contact center (and wider customer engagement) industries. It also draws on data from Ovum customer and vendor surveys.
Further reading

2016 Trends to Watch: Contact Centers, IT0020-000161 (October 2015)

2017 Trends to Watch: Customer Engagement, IT0020-000233 (December 2016)

Understanding How Customers' Multichannel Support Preferences Change with Query Type, IT0020-000194 (April 2016)

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Ovum Consulting

We hope that this analysis will help you make informed and imaginative business decisions. If you have further requirements, Ovum’s consulting team may be able to help you. For more information about Ovum’s consulting capabilities, please contact us directly at consulting@ovum.com.

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