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Execs In The Know

SELF-HELP SOLUTIONS

**Exploring Consumer Experiences,
Preferences, and Opinions**

In partnership with: **ptp** experience
transformation

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About the Research Methodology

Survey data captured April 28 – May 25, 2022 using the Google Consumer Survey platform. All results based on a sample size of N=300 or greater.

Google Consumer Surveys reports on the inferred age and gender of anonymous respondents based on the websites users visit, as well as their location based on IP addresses. Income and urban density are then approximated using census data for particular geographic regions. Inferences, as they relate to these categories, may not be available for all survey participants. Please note that it's possible that Google Consumer Surveys may mis-categorize people.

Provided the complexities of participant screening questions throughout the study's body of surveys, we present unweighted findings. When targeting an audience representing the adult U.S. internet population, Google Consumer Surveys attempts to find respondents that match the distribution of people in the U.S. by age, gender, and location as reported in the U.S. Census Current Population Survey (CPS). When outliers were observed in the data as they relate to the inferred age, income, gender and urban density, we made an effort to highlight these insights.

Embracing Opportunity . . .



Self-help solutions are at a crossroads. On the one hand, the industry has proven that self-help solutions are highly efficient, effective, and successful in providing greater convenience and ease for a variety of engagement types, while also giving a boost to the bottom line. On the other hand, consumer expectations have catapulted in recent years, and consumers now expect their best experience to be their every experience.

In this consumer-based research, we take a close look at the self-help journey through the eyes of consumers, including users screened for recent use of a self-help solution (pages 8-11). We also explore consumer preferences and opinions about self-help solutions.

Taken as a whole, the conclusions of this research are clear. In order for brands to succeed, two things need to happen simultaneously: 1) the customer experience (CX) needs to be in some way improved or enhanced; and 2) business interests (such as greater customer loyalty or an improved bottom line) need to be better met. Certainly, a convincing argument could be made that it is impossible to accomplish either one of these feats in isolation, and it's apparent that automation for the sake of automation is a surefire path to failure.

So, what can brands do?

Research partner PTP has provided a powerful, highly actionable self-help solution strategy guide (page 5) that highlights what it takes to get it right when it comes to self-help. A big part of that strategy is knowing your customer. Understanding expectations, and the underlying needs that drive those expectations, is key.

While it's true that this research provides strong evidence that consumers continue to look to live human assistance, there's also clear evidence on why that is. Consumers want ease, consistency, and the ability to quickly reach a human when they deem it necessary. These insights can serve as a suggestive strategic road map for brands looking to implement or improve their self-help offerings.

At the end of the day, and as PTP so correctly points out in their commentary, meaningfully improving CX is all about getting customers the right service in the right channel, whether automated or human. But to really meet or exceed customer expectations, this needs to be done quickly, with a splash of personalization, and with as little friction as possible.

Self-help solutions continue to evolve rapidly, and there is no shortage of opportunities for improvement. Hopefully, that journey begins here with a better understanding of the consumer's perspective on self-help.



**SPONSOR
COMMENTARY**



Building for Self-Help Success



PTP is pleased to partner with Execs In The Know as sponsor of Self-Help Solutions: Exploring Consumer Experiences, Preferences, and Opinions. We offer our perspective based on 20 years of delivering innovative contact center solutions, including self-help design and implementation.

Like you, we know that the best customer experience doesn't just improve satisfaction; it also improves your bottom line. We also know that more than two-thirds of companies now compete primarily on the basis of CX. To win, you must understand the trends driving your customer experiences, preferences, and opinions.

Getting Self-Help Right

This study emphasizes the importance of businesses getting self-help tools right before deploying them. Customers want self-help solutions that are capable and relevant. Otherwise, they want human agents. Therefore, the self-help solutions need to use personalization (e.g., proactive messaging and predictive intent based on customer identification) and machine learning (e.g., natural language understanding) to quickly determine intent and get customers the right service in the right channel, whether automated or human. Critical

or complex services can be handled by humans, and other services can be handled through automation.

Aligning Your Self-Help Strategy

Self-help technologies are advancing at lightning speed with the hopes of creating more and better ways for brands to interact with their customers. We see many organizations that do a great job of designing and implementing a comprehensive self-help strategy. The best strategies we see consider many variables, and ensure a balance between efficiency and effectiveness. Some key considerations include:

1. Know Your Customer

An important part of your self-help strategy is understanding what your customers want. Using Voice of the Customer and segmentation data, we recommend implementing real-time customer journey management. Customers can be routed to the best service in the best channel, or combination of channels, based on their segment value and preferences.

Further, once you know your customers, you can show them you know them to make their experiences

more personal and rewarding. Personalization is key to deepening the customer relationship. Proactive messaging and predictive intent based on customer identification and state can personalize a self-help experience. We believe delivering these types of personalized interactions is a big improvement opportunity for many brands.

2. Blend the Experience

Another important consideration of your self-help strategy is how you blend human and automated services to deliver the best overall experience. Neither can do it alone. Keeping customers happy and loyal requires frictionless customer service, which means blending automation with human interaction. This may take the form of starting with an AI-driven assistant that authenticates the customer and gathers enough information to know if the issue can be resolved through self-help or if resolution requires a human touch. For example, a customer seeking the status of an in-progress insurance claim likely would be satisfied using self-help. But a customer with multiple questions about their annual deductible, how the deductible is calculated, and whether a procedure will count toward that deductible may be better served by a human after digital authentication.

When blending the experience across channels, context is key. Customers expect companies to have enough information about them to provide great CX without repetitive questioning and requests for details. And, for information that does have to be gathered at the beginning of a contact, customers expect that to pass with them as they switch channels.

3. Test and Learn

Many of the top organizations we work with use innovation to differentiate themselves and the experiences they deliver to customers. Using analytics to know what works for your customers in your environment is a great first step. However, the best brands have robust testing capabilities and design actionable solutions based on the data. This may take the form of an Innovation Lab or a Center of Excellence (COE) that focuses on testing and learning.

Start with small, focused use cases. Don't start with technology. Instead, focus on the experience and utility of the service and then deploy just enough capabilities across people, process, and technology

to prove the solution, and then iterate. Don't over-analyze – act.

For example, making a self-help tool easy to find is a great use case to consider. Creating a test environment that allows a small group of customers to use and give feedback on the tool is a great way to learn what works and what needs improvement. Testing can help create the most effective ways to promote and educate customers about a self-help offering. Similarly, a test and learn environment can reveal how easy or difficult a self-serve experience is for customers. Looking at navigation, the number of steps in a process, and the portability across devices and channels are just a few of the learnings to improve ease of use.

We are passionate fans of great CX! Delivering stellar experiences – whether through live agents or self-help solutions – is hard work. We hope the findings of this research make you curious about your own customers and how they feel about the self-serve options your organization offers. In today's experience economy, for businesses that want to win, nothing is more important than CX. The design and delivery of experiences is pivotal. How is your organization making the most of your customer experiences, preferences, and opinions?



Andy Leach

Sr. Account Executive, PTP

After 20+ years in the Enterprise Software space, the most personally rewarding achievements come from providing ideas, solutions, and value that make a significant impact on my client's business. I joined PTP four years ago because they partner with organizations to provide innovative CX solutions that transform customer engagement across marketing, sales, and contact center. Being technology-agnostic, PTP brings a unique perspective across people, process, and technology solutions.

To learn more about PTP, **contact Andy at andy.leach@ptpinc.com**. Hear about recent case studies, including a recent client engagement at a major financial services firm, as well as how PTP uses data to influence the redesign of live support and self-help journeys.



SURVEY **RESULTS**

**Consumer Experiences
with Self-Help Solutions**

Consumer Use of Self-Help Solutions

Results throughout this section of the report are derived from a pool of screened survey participants, each indicating they have recently used a self-help solution. Part and parcel of this screening process, 25% of 2,481 respondents indicated that, for various reasons, they had recently used a self-help solution to engage with a brand. It is likely the actual use of self-help solutions is even more widespread as consumers often take self-help solutions for granted, having grown accustomed to them in their daily lives.

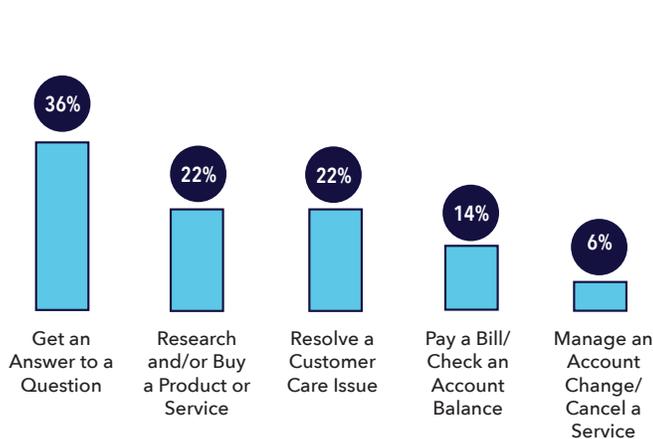
Have you recently used a self-help solution (a chatbot, website, mobile app, etc.) to resolve an issue, get an answer, or research/buy a product or service?

Yes – 25%

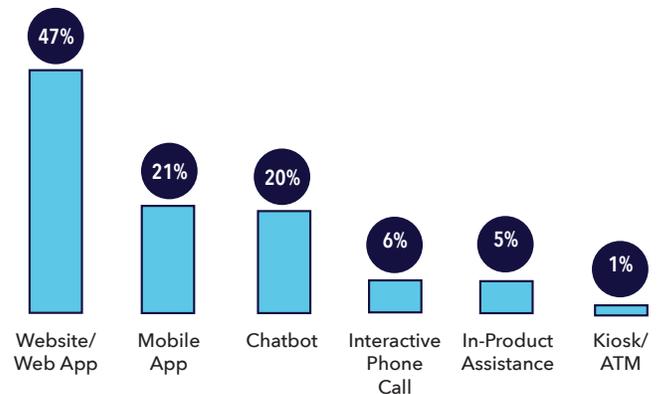
Along with being screened for their recent use of a self-help solution, survey respondents were also asked which specific solution they most recently used, as well as the reason for engagement. Website/Web App use dominated, pointing toward FAQ or other knowledge databases as a top destination, especially given the top reason for engagement: “Get an Answer to a Question” at 36%. While some brands may be tempted to focus the bulk of their efforts on training and improving their chatbot, those efforts might be better first spent on optimizing and improving the Website/Web App/Mobile App experience, as those solutions accounted for 68% of the most recent engagement traffic generated by survey respondents.

Also of note is the 22% of survey respondents who were using a self-help solution to resolve a customer care issue. Brands should seek to understand if this percentage is consistent with other channels of care. If it is not, it may be an indication that self-help channels underperform as a issue resolution channel.

What were you trying to do when recently using the self-help solution?



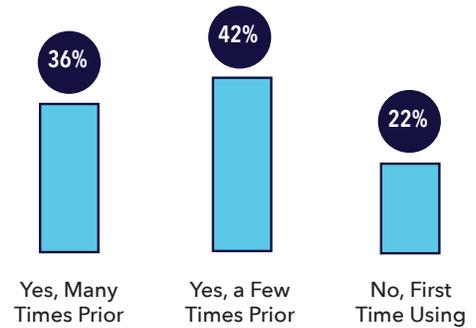
Which specific self-help solution did you use in your most recent experience?



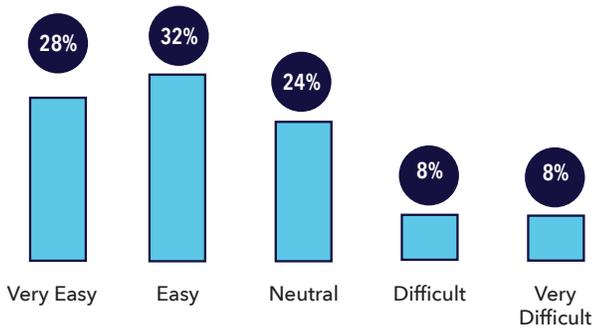
Frequency of Use, Convenience, and Ease

Fewer than a quarter of respondents (22%) indicated they were first-time users of the self-help solution most recently used. Even more interesting were the ramifications of first-time use; in cross-referencing first-time users with the results below, new users were far more likely to poorly rate the convenience and ease of a solution compared to more experienced users. Specifically, 15% of first-time users indicated the solution was “Very Inconvenient,” compared to only 6% of those who had used the solution many times prior. This suggests that consumer perception of self-help solutions are largely driven by familiarity, hinging on the frequency of prior use.

Have you used this particular self-help solution prior to your most recent experience?

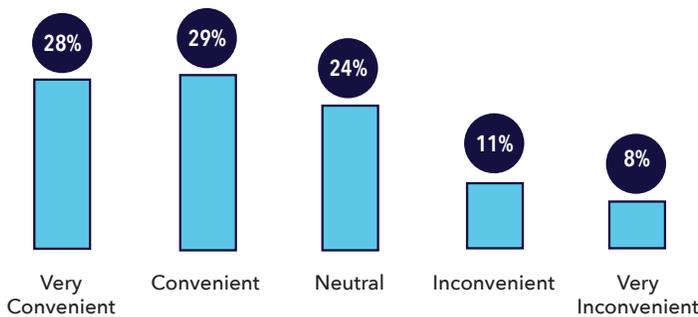


How easy or difficult was your most recent experience using the self-help solution?



Not surprisingly, most users of self-help solutions find them to be both convenient and easy to use, with only a thin minority indicating such solutions are either inconvenient or difficult. As noted above, opinions are strongly correlated with prior use. In fact, when removing first-time users from the response pool, only 16% of respondents described their most recent self-help solution experience as either “Very Inconvenient” or “Inconvenient,” and only 12% described the experience as either “Very Difficult” or “Difficult.” When including only first-time users, these numbers both come out to be 27% – a considerable difference.

How convenient or inconvenient was your most recent experience using the self-help solution?



If brands want to increase the likelihood that their customers find their self-help solutions to be convenient and easy to use, encouraging widespread adoption, as well as educating about such solutions, is essential. Above all else, a user’s first experience with the self-help solution must be exceptional.

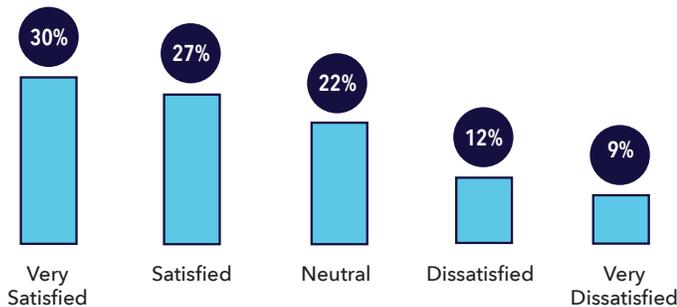
Resolution Rate and Customer Satisfaction

Overall, self-help solutions are quite effective at resolving issues and answering questions with an overall resolution rate of 78%. But when focusing exclusively on respondents who indicated they were using a self-help solution exclusively for resolving a customer care issue, the picture changes slightly, with those answering “Yes” falling to 68%, a delta of 10% compared to the overall rate. Rates among first-time users proved to be an even more dramatic departure, with only 63% of first-time solution users indicating their question or issue was ultimately resolved.

Were you ultimately able to resolve your issue or answer your question using the self-help solution?

Yes – 78%

How satisfied or dissatisfied were you with your most recent experience using the self-help solution?



Satisfaction rates tracked similarly to resolution rates, with a total of 57% respondents indicating they were either “Very Satisfied” or “Satisfied” with their recent self-help solution experience. Again, the bulk of “Very Dissatisfied” and “Dissatisfied” responses concentrated among those who were first-time users of the self-help solution, using the self-help solution to resolve a customer care issue, or both.

Among those using the self-help solution for the first time, “Very Dissatisfied” and “Dissatisfied” comprised 35% of responses, while 28% of those seeking to resolve a customer care issue responded similarly. Truly, brands should seek to create a more satisfactory experience for these two specific cohorts. Doing so would address the bulk of consumers who are dissatisfied with their self-help solution experience.

Making the Self-Help Better, and Mistakes to Avoid

In a pair of open-ended questions, respondents were asked both about improving the self-help experience and mistakes to avoid in the future. Not surprisingly, many of the answers received revolved around easier access to live agents. In fact, roughly 20% of all answers received directly pertained to the issue of agent access. Other common themes included improving ease (particularly navigation and the numbers of steps in the process), consistency of information, and various User Experience (UX) improvements (such as portability across devices).

Below are a representative selection of verbatim from the more than 600 responses received:

What could make your experience with the self-service solution better or more enjoyable?

"Fewer steps in identifying myself and my account number."

"Quicker option to get to real person."

"Make it easier to get to human for complicated situation."

"Greater detail and sophistication. These bots seem only capable of handling simple and basic problems. Not much better than a FAQ list."

"Not same info available on cell phone as on landline computer. Annoying."

What mistakes brands should avoid when developing future self-service solutions?

"Don't pretend a bot isn't a bot. Users can tell if they are getting canned responses."

"Make sure their AI is smart enough to cover great majority of situations before deploying, and have the AI recognize earlier that it needs to hand off to human agent."

"Wasting too much time for a problem that couldn't be resolved anyway."

"Having an app just to have an app when it really doesn't help."

"Prioritize quality of resolution service over speed."

"Not resolving the issue without offering a live conversation with an actual human representative."



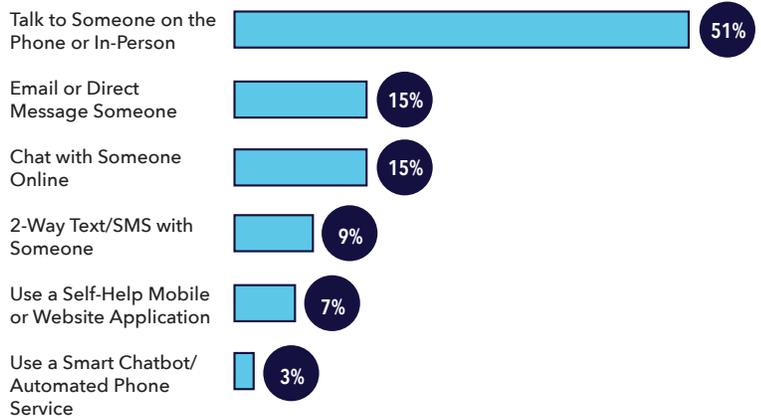
SURVEY **RESULTS**

**Consumer Preferences
Regarding Self-Help Solutions**

Channel and Self-Help Use Preferences

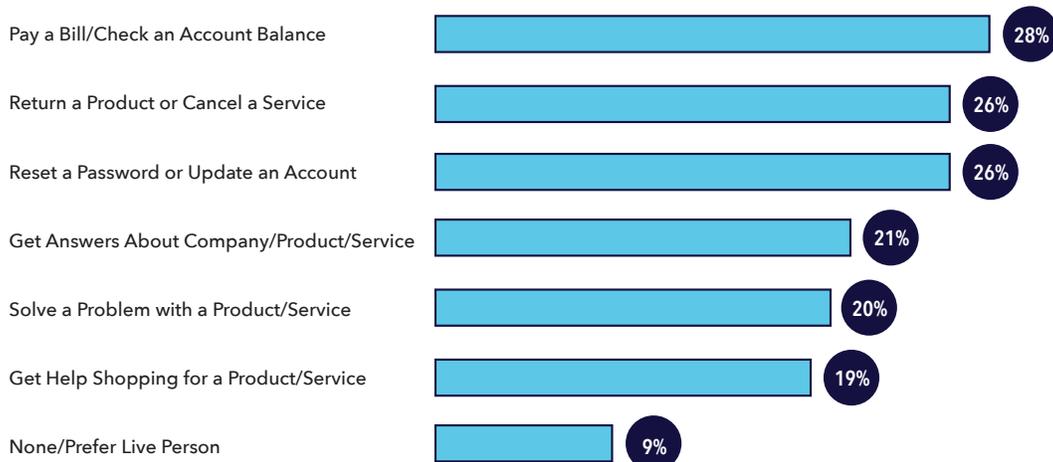
In a question designed to understand where self-help sits within the wider landscape of channel preferences among consumers, only 10% of all respondents opted for such solutions. Age was a significant factor, as illustrated by the fact that only 7% of those 55 years and older opted for a self-help solution versus 13% of those ages 18 to 54. That said, "Talk to Someone on the Phone or In-Person" was the most popular option across all age ranges.

If you had a customer care issue with a brand, which would be your preferred method of resolving the issue, assuming each could do so with the same level of effort?



When consumers were asked to select all the interaction types for which they might prefer a self-help solution over interacting with a live person, responses gravitated toward transactional-type engagements such as paying bills or updating an account. That said, "Solve a Problem with a Product/Service" wasn't too far off the lead, coming in at 20%, indicating consumers are open to using self-help solutions for a variety of interaction types. Of course, as consumers have often indicated in previous research, their use of self-help solutions is highly dependent upon those solutions being both easy to use and effective as resolving the task at hand.

Which type of brand engagements would you prefer to use a self-help solution (like a chatbot, webiste, or mobile app) versus interacting with a live person? (Select all that apply)



Consumer Preference: Human vs. Machine

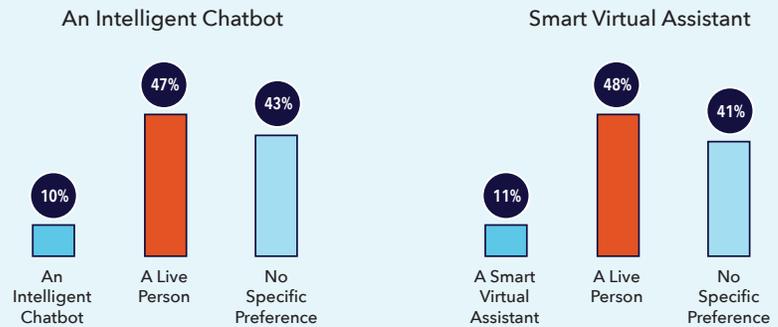
In a series of three question groupings, consumers were asked to indicate whether they'd prefer the help of a live agent or an artificial intelligence (AI)-powered assistant across three specific scenarios: Researching a Product/Service, Shopping for a Product/Service, or Resolving a Customer Care issue. Furthermore, A/B testing was conducted regarding how AI-powered assistants were described. In one survey, respondents were asked to compare a live person with "An Intelligent Chatbot," while for a different set of respondents the AI-powered solution was described as a "Smart Virtual Assistant."

This was mostly done to testing for any bias against the word "Chatbot."

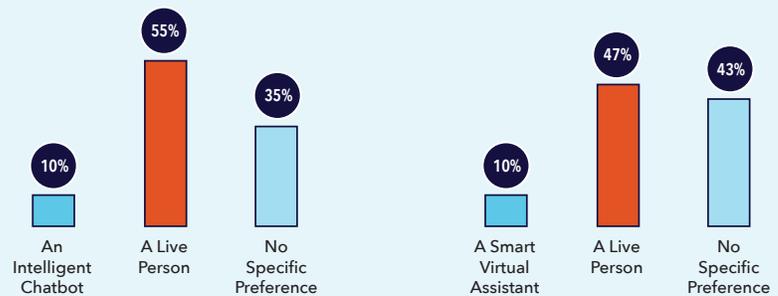
As it turns out, there was virtually no difference between the responses received, regardless of how the AI-powered assistant was described. Additionally, in every scenario, survey respondents preferred a live person over an AI-powered assistant by four-to-one or more. Below are the results from the individual surveys, as well as the combined results; and the following page contains all combined results in one single view.



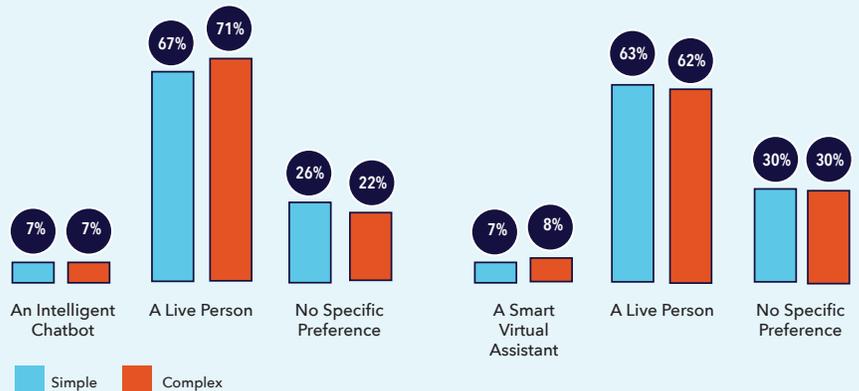
All things being equal, would you rather **RESEARCH** a new product or service with:



All things being equal, would you rather **SHOP** for a new product or service with the help of:



All things being equal, would you rather **RESOLVE** a simple/complex customer care issue with the help of:

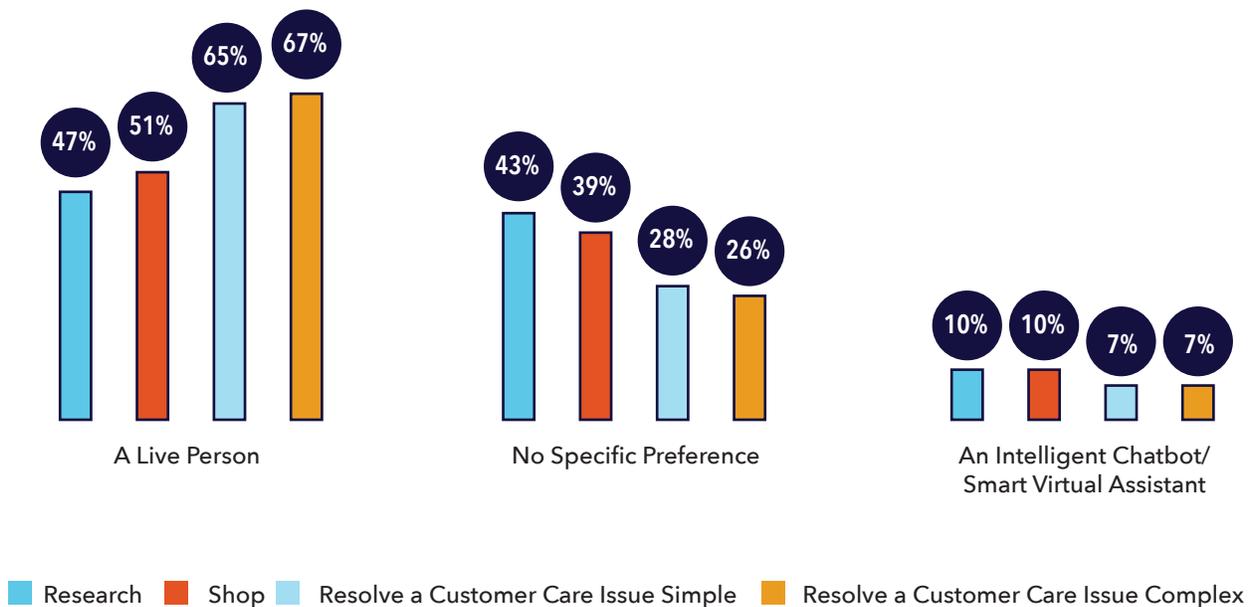


Consumer Preference: Human vs. Machine, cont.

In a single view of the combined results from the previous page, it's clear consumers have a significant desire to interact with a live person regardless of the reason for the interaction, be it to research, shop, or resolve a customer care issue. Moreover, only a slim minority of survey respondents prefer interacting with an AI-powered chatbot or virtual assistant, though consumers are more likely to lean on AI-powered assistance when it comes to researching and/or shopping for a product/service versus resolving an issue (seven percent versus ten percent).

With the level of investment pouring into self-help solutions, the below results should have brands closely investigating the dynamics behind consumer preference for self-help solutions (or lack of preference, as it were). This is especially true among their own customer base. Is it a matter of user experience? Unsatisfactory outcomes? The need to have a human-to-human connection with a brand? Certainly, consumers claim to want speed, ease, and efficiency in their interactions with brands, and that's exactly what self-help solutions promise to deliver. So, where is the disconnect? If brands aren't already doing so, they need to create opportunities for Voice of the Customer data to inform on exactly which expectations aren't being met when their customers utilize their self-help solutions.

All things being equal, would you rather resolve a simple/complex customer care issue with the help of a live person or an intelligent chatbot/smart, personable virtual assistant?





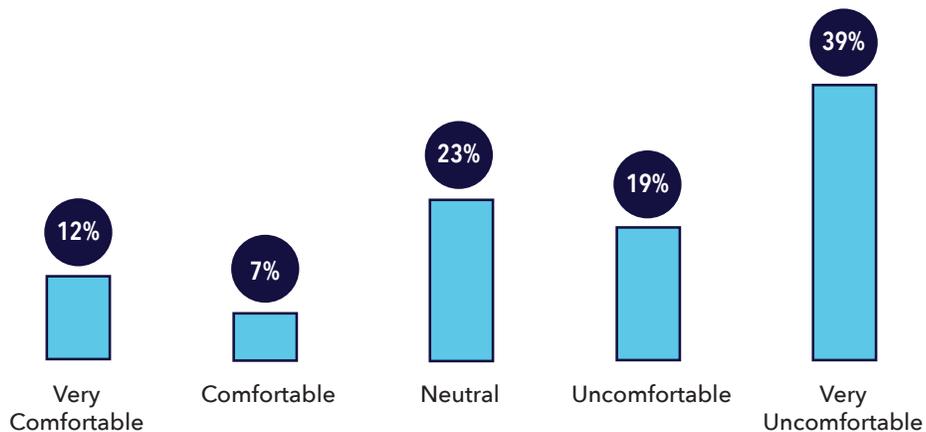
SURVEY **RESULTS**

**Consumer Opinions
on Self-Help Solutions**

Comfort with Smart Self-Help Solutions

Only a small slice (19%) of those surveyed indicated that they were either “Very Comfortable” or “Comfortable” with companies using smart self-service solutions without the need for a live person. It’s possible this results reflect some of sentiment shared in the open-ended questions covered on page 11. In the responses received, a significant portion of respondents (more than 25%) highlighted agent access (as well as restriction to such access) as a top consideration regarding the self-help experience. In order to ensure consumers are as comfortable with smart self-help solutions as they can be, designing self-help with easy off-ramping to a live agent is simply table stakes. Furthermore, consumers should be guided to the solutions best suited to meet their needs.

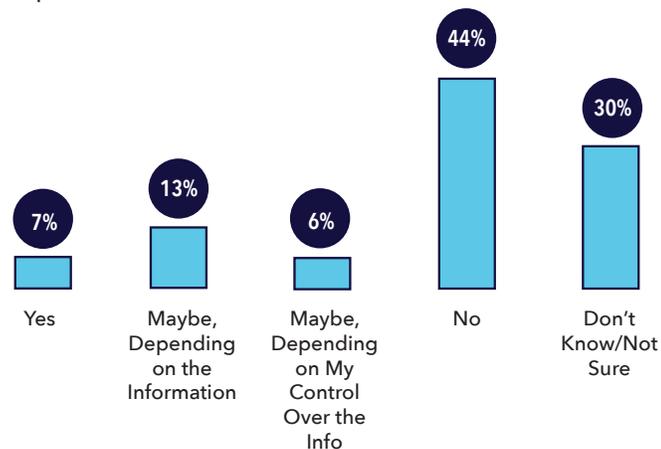
What is your comfort level with companies using smart self-help solutions (like chatbots or voice/text analytics) to help customers without the need for a live person?



Giving More to Get More

At this point, most consumers understand the simple fact that in order to provide a personalized experience, brands need information. This is especially true when it comes to self-help solutions. The challenge is that while most consumers want a better, more personalized experience (and they understand what it takes to get there), very few are okay with the idea of actively providing the information needed. This means brands will need to find passive ways to create personalized experiences (specifically, self-help experiences) without relying on its customers to either provide additional information or even explicit consent to use existing information. At the same time, brands need to be more transparent about how they are using information, being sure to communicate and reinforce the value they return to customers through greater personalization.

Would you agree to provide a company with more information about yourself if you knew it would only be used to create better, more personalized self-help experiences?



PRACTITIONER'S PERSPECTIVE

Unlocking the customer data is key to fueling ever-improving end-to-end customer experiences.



Francisco Toledo,
Director, Global Vendor Management and Instructional Design

GROUPON®

This is a very interesting perspective that lands right in the middle of a conjunction between customers' growing concerns around data privacy and their ever-constant need for a flawless, end-to-end experience.

While the 44% that responded "No" represents the majority of the sample, it's also surprising to see that number below the high seventies. It's widely known that consumers have a growing concern about the practice of collecting data, and especially around risks of how their data may be compromised in the future.

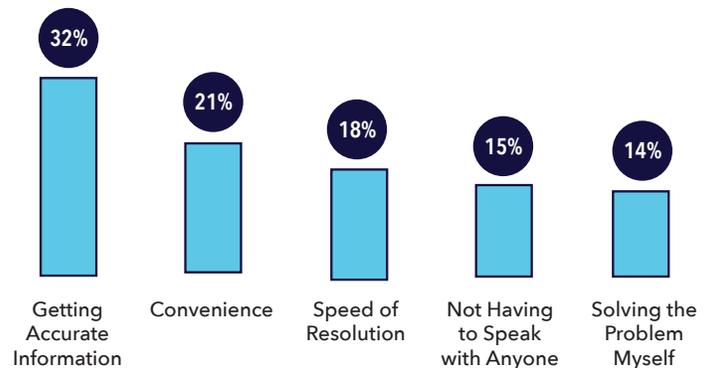
However, there are several trends that have evolved in the past few years that might be outweighing these concerns. One of them is the dissemination of knowledge around machine learning, automation and, ultimately, self-service. As the demographics of consumers shift, the bulk of consumers also become more familiar with these technologies and how they work. Most of the self-service engines available are fueled not only by companies' CRM transactional data, but also from the consumers themselves. Those companies willing to create self-service journeys that really wow their customers understand that building and using data focused on consumer intent and need is fundamental to driving a more refined experience.

It's likely that the 30% behind "Don't Know/Not Sure" represents that group of consumers only now beginning to understand that sharing enough information to fuel these technologies can enrich their immediate experience without necessarily increasing risks of compromising their privacy.

Benefits of Self-Help Solutions

Consumers are only going to use self-help solutions if they can deliver benefits. But, which benefits do consumers value most? To understand this, survey respondents were asked to indicate which benefit would make them most likely to use a self-help solution. "Getting Accurate Information" gapped to the top of the list, followed distantly by "Convenience" and "Speed of Resolution." Interestingly, "Not Having to Speak With Anyone" checked in at 15% overall, although this was the top response among those ages 18-24 at 28%, compared to 13% for those 35 and older. In other words, most middle-aged and older consumers use self-help solutions not in avoidance of anything, but because they are seeking a more beneficial experience.

Which benefit would make you most likely to use a self-help solution to resolve a customer care issue or find an answer about a specific product or service?



PRACTITIONER'S PERSPECTIVE

Sunbasket's best practices for building accurate, convenient, and quick self-help solutions.



Sam Philips CS Systems Developer, Sunbasket



Focus on Top Customer Issues. Your first question should be: What are our customers reaching out about? In order to pinpoint any low-hanging opportunities for automation, start by looking at volume by interaction type. Prioritize the interaction types that are consistently and repeatedly resolved with just one response, and start with those that have the highest volume/ROI.

Map Out Top Experiences Across Channels. For each identified opportunity, visualizing each possible contact point across all channels can shed light on any loops, frustrations, or opportunities for improvement. Make sure to include paths for during and outside of business hours, especially for solutions requiring an agent hand-off. This ensures a consistent and standardized experience and reduces friction.

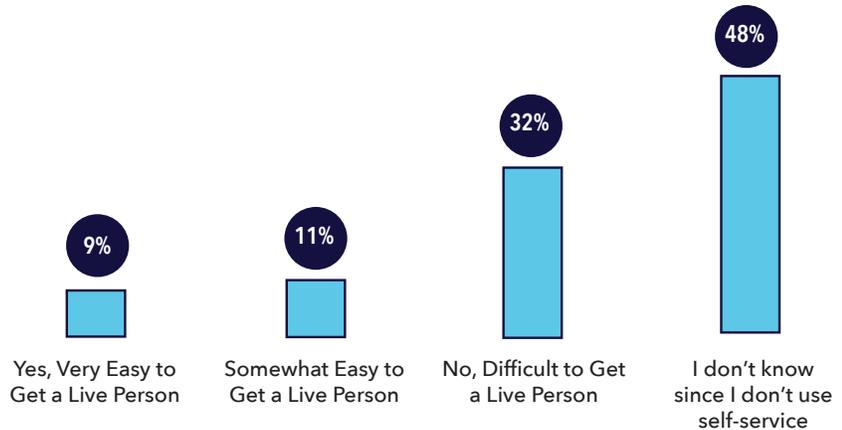
Aggregate Relevant Customer Information to Personalize. The most powerful tool for providing accurate, convenient, and personalized automated solutions is the connection between your solutions and your customers' data. With your customers' orders or account information connected to your support platform, each self-help solution can be curated and customized to the specific customer situation presented.

When Sunbasket first started thinking about the idea of adding self-help solutions for our customers, we reviewed for trends in the prior 12 months of interaction-type data. This identified that the most common but easiest to resolve contacts were related to "Deliveries," a customer's Sunbasket arriving at their doorstep, and the quality and accuracy of the ingredients inside their Sunbasket "Fulfillment." To resolve these issues using our standardized solutions, our team got to work building both a help center with self-help flows and a chatbot. We designed the experience and resolutions of both channels to be consistent. Both solutions were built to pull customer data from one source of truth and use the same logic to handle each issue type. If a customer chose to interact with our chatbot about a missing delivery, it would "grab" the customer's delivery tracking information, dynamically interpret the current status, decide what type of issue it was (late or missing) and apply a credit or refund, as appropriate.

Access to Live Agents

A combined 20% of survey respondents think companies make it “Very Easy” or “Somewhat Easy” to transition from a self-help solution to a live agent, far outstripped by the 35% of respondents who think the transition “Difficult.” Removing those who don’t use self service, and the numbers look more like 38% “Very Easy” and “Somewhat Easy” compared to 62% “Difficult.” If brands want to have more engagement traffic funneled into self-help solutions, the ability to easily transition to a live person is a notable pain point for almost two-thirds of users of self-help solutions. And, expansions or new initiatives in the self-help arena should certainly address such customer concerns.

When using a self-help solution (like a chatbot or mobile app) to resolve an issue, do you think companies make it easy to get to a live person for further help?



PRACTITIONER'S PERSPECTIVE

Anchoring the experience based on customer need while decreasing the distance between humans and customers.

Guneet Singh, Head Customer Experience, AppFolio

Quite fascinating to see that four out of five research participants feel that companies using artificial intelligence (AI)-powered chatbots either don't make it easy to get human help or are indifferent to the question. The intent of bringing in AI to reduce friction and deflection simultaneously does not always go well when it comes to execution.

The root cause lies in bad strategy, in scenarios where companies trying to meet fiscal financial obligations pivot toward the bottom line and inadvertently introduce friction in the customer journey by the increasing the distance between humans and customers. Lack of thorough customer understanding within customer segment – not understanding the various user personas – forces all customers/users through one issue resolution process. As an example, what I have done over the years is, while rolling out any technology or AI solution or automation, I ensure we optimize and lean out the process and identify moments of truth that matter for company growth and the bottom line.

Brands need to design experiences inclusive and integrated with human and chatbot touchpoints anchored on customer types, needs, and outcomes, and present multichannel options for customers to choose from (in case a company cannot help a customer navigate based on need). The key resides in understanding customer needs and building experiences to meet those needs, factoring in emotion, success, and effort – irrespective of whether the help is from a human or an AI-powered solution.

Note: The views expressed above are those of Guneet Singh and do not necessarily represent the views of AppFolio.



Access to Live Agents, cont.

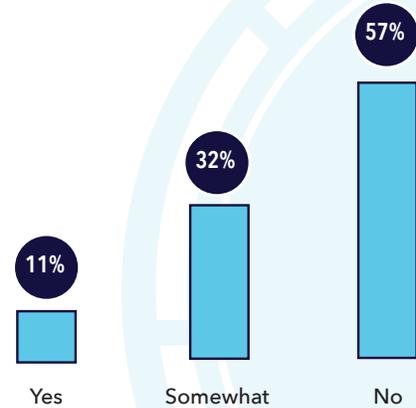
Difficulty accessing a live customer care agent has become almost a customer care trope over the years, and consumers are persistent in their desire for easy access to live help. So, it's of little surprise that more than half (57%) of consumers do not feel that brands make it easy enough to get live help. Combined with the results below, it's clear that brands need to prioritize live agent access regardless of how much they plan to invest in and develop self-help solutions. At least in the eyes of consumers, self-help is not a replacement to assistance from live agents but is, instead, an accompaniment.

Where to Focus Improvement Efforts

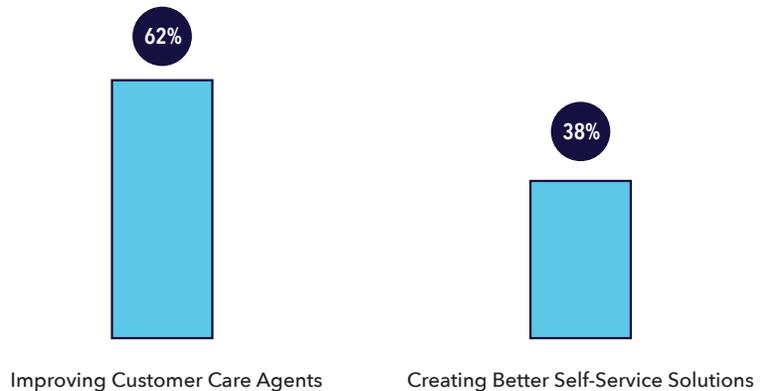
As seen on pages 14-15, most consumers prefer to interact with a live agent regardless of the type of help they seek, be it product/service research, shopping, or customer care. Given these preferences, it's reasonable for consumers to expect investments to be directed to where they prefer to engage ... that is, with live agents. Based on prior consumer-focused research, the areas where consumers want agents to improve remains consistent over time: better communication skills (listening, specifically), more reliable follow-up, greater empowerment, and improved knowledge when it comes to the products/services they support.

While the result to the right isn't to say brands should abandon or reduce their investment in self-help solutions, it should serve as a strategic insight that inspires brands to find ways to better inject the value of live agent assistance into the self-help solution experience. Certainly, this means understanding not only the limitations of self-help solutions, but the benefits of live agent assistance as well.

Do you feel brands/companies make it easy enough to contact a live person in the event of a problem with a product or service?



In your opinion, should companies focus on improving their customer care agents or on creating better self-help tools and solutions?



Key Takeaways and Considerations . . .



Self-Help Is Here To Stay — Though the Time To Build For Success Is Now

Self-help solutions have come a long way from the early days of rigid IVR systems and web portals that offered perhaps an FAQ and a few basic functions. Today, AI-powered chatbots and other self-help solutions can tap into massive knowledge bases and broad data sets to solve for a variety of consumer needs, doing so with great speed, accuracy, and ease for end users. And, while self-help solutions are here to stay, there are clear opportunities for improvement.

First, some good news on the performance of self-help solutions (from the perspective of the consumer):

- Self-help solutions resolved the issue or answered the question 78% of the time (among consumers screened for recent use of a self-help solution)
- 60% of recent users of self-help solutions described the experience as either “Very Easy” or “Easy”
- 57% of recent users of self-help solutions described the solutions as either “Very Convenient” or “Convenient”

Generally, these results reflect very positively on self-help solutions. But, it must be kept in mind that only a sliver of these results (22%) pertain to the use of self-help for the purposes of resolving a customer care issue. So, while the news on self-help is generally positive, there is a

deeper story that needs to be understood, and it starts with this stat:

- 90% of consumers prefer to interact with a live person versus a self-help solution when it specifically comes to resolving a customer care issue

At face value, this means self-help solutions excel at transactional engagements, while self-help solutions for the purposes of issue resolution are in need of some fine-tuning. Luckily, consumers are clear and consistent on where they’d like to see improvement:

- Easier access to a human agent should the need arise
- A more consistent experience between live help and self-help solutions
- Greater flexibility and sophistication on the part of self-help solutions

At the end of the day, consumers care intensely about the experience. An engagement channel shouldn’t be automated simply for the sake of automation. It must add value. It must enhance the experience. In order to increase adoption and acceptance of self-help solutions, an improved customer experience must be at the top of the list.

About Us . . .



About Execs In The Know

Execs In The Know brings together customer experience (CX) leaders from across industries in an effort to advance the conversation and set a new agenda for delivering amazing experiences for consumers. As a global community of the brightest minds in CX, Execs In The Know provides opportunities to learn, share, network, and engage to innovate.

Operating under the motto, "Leaders Learning From Leaders," Execs In The Know facilitates many opportunities for community engagement, such as its bi-annual national event, Customer Response Summit; virtual CX series, CustomerCONNECT; and private, online community, Know It All "KIA." There are also exclusive, laser-focused engagements like industry briefings and executive roundtables.

Execs In The Know also guides and informs the industry with a rich tapestry of CX-related content that includes *CX Insight* magazine, industry research, webinars, blogs, and much more.

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