

Maximizing Web Self-Service Success

Welcome!



- Thanks for joining us today!
- My name is Ben Werner.
- I'm a Product Manager in the Best Practices Center of Excellence at RightNow.
- In a former life, I performed academic research in Human-Computer Interaction (HCI).

Maximizing Web Self-Service Success



- Thanks to all of you who posted a comment in advance of the session today!
- We'll do our best to address your questions during this presentation, however given that Web-Service Service is large topic, we may not be able to answer every question during the call today.
- We will however be responding to individual unanswered questions with a few days of the seminar.

Introduction & Overview



- Introduction & Overview
- 6 common questions for Web Self-Service:
 1. *What approaches can be used to measure self-service success?*
 2. *What is a good self-service rate for my site?*
 3. *Why might I want a lower self-service rate?*
 4. *What should my target bounce rate be?*
 5. *How do I measure the effectiveness of my content?*
 6. *Why did my deflection rate go down after I upgraded?*
- Closing

What approaches can be used to measure self-service?



Self-Service Rate:

S = # of customers who start a session in the self-service area.

A = # of customers who start with (**S**) but then use assisted service.

Self-Service Rate = $1-(A/S)$

“Deflection” Rate:

wA = # of customers who want to use assisted service.

gA = # of customers who actually get assisted service.

Deflection Rate = $1-(gA/wA)$

Self-Service Success Rate:

wS = # of customers who want to use self-service.

gS = # of customers who get success with self-service.

Self Service Success Rate: $1-(gS/wS)$



What approaches can be used to measure self-service?



Self-Service Rate:

Example: Site Effectiveness Report

+100% to -100% of visitors either view answers or submit questions.

“Deflection” Rate:

Example: Questions Avoided Report

0-100% of visitors who started to submit a question actually submitted their question.

Self-Service Success Rate:

Coming up with a single number that represents this rate for your entire organization is almost impossible - however a rough parallel can be observed by measuring an individual page's bounce rate through a 3rd party analytics service such as Google Analytics or Adobe Omniture.

What approaches can be used to measure self-service?



Discussion
&
Question and Answer

What is a good self-service rate for my site?



- *Before we get into specifics, consider the following organizations:*



Organization #1 is very concerned with cost-savings and offers only self-service to their customers.



Organization #2 wants to provide high-touch and personalized experiences, and so they offer only assisted service over the phone.

- *#1 has a Self-Service Rate of 100%, and #2 is 0%.*
- ***Does either organization have the “Right” Self-Service Rate?***

What is a good self-service rate for my site?



If you target a self-service rate is too high, you risk losing customers who aren't able to achieve resolution for their issues and also missing key sales opportunities.



If you target a self-service rate that is too low, you risk frustrating customers by forcing them to use assisted service when they don't want to, and by spending more \$\$\$ than necessary.

What is a good self-service rate for my site?



According to Forrester research:

72% of customers prefer to Self-Serve.



Assuming you serve the general public, then roughly 70% of your customer interactions should also be handled with self-service.

What is a good self-service rate for my site?



Discussion
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Question and Answer

Why might I want a lower self-service rate?



The following factors may influence your target Self-Service Rate:

1. **Self-Service Success Rate:** If this is below 100%, your customers will have to use multiple sessions to solve their problem.
2. **The value of a certain segment of customers or problems:** If a certain segment is high value or high risk, you may wish to proactively offer assisted service.
3. **The complexity of the problems you deal with:** Some issues are not suitable for self-service.
4. **The human nature of the customers you serve:** Some organizations work with customers who simply prefer to use assisted service more often.

Why might I want a lower self-service rate?



Discussion
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Question and Answer

How do I measure the effectiveness of my content?



- **Content effectiveness refers to the ability of a piece of “content” to effectively communicate it’s meaning to the customer.**
- **Content could be:**
 - **A knowledge base answer.**
 - **A Sales Offer.**
 - **An interactive troubleshooter.**
 - **Any web page with words on it!**

How do I measure the effectiveness of my content?

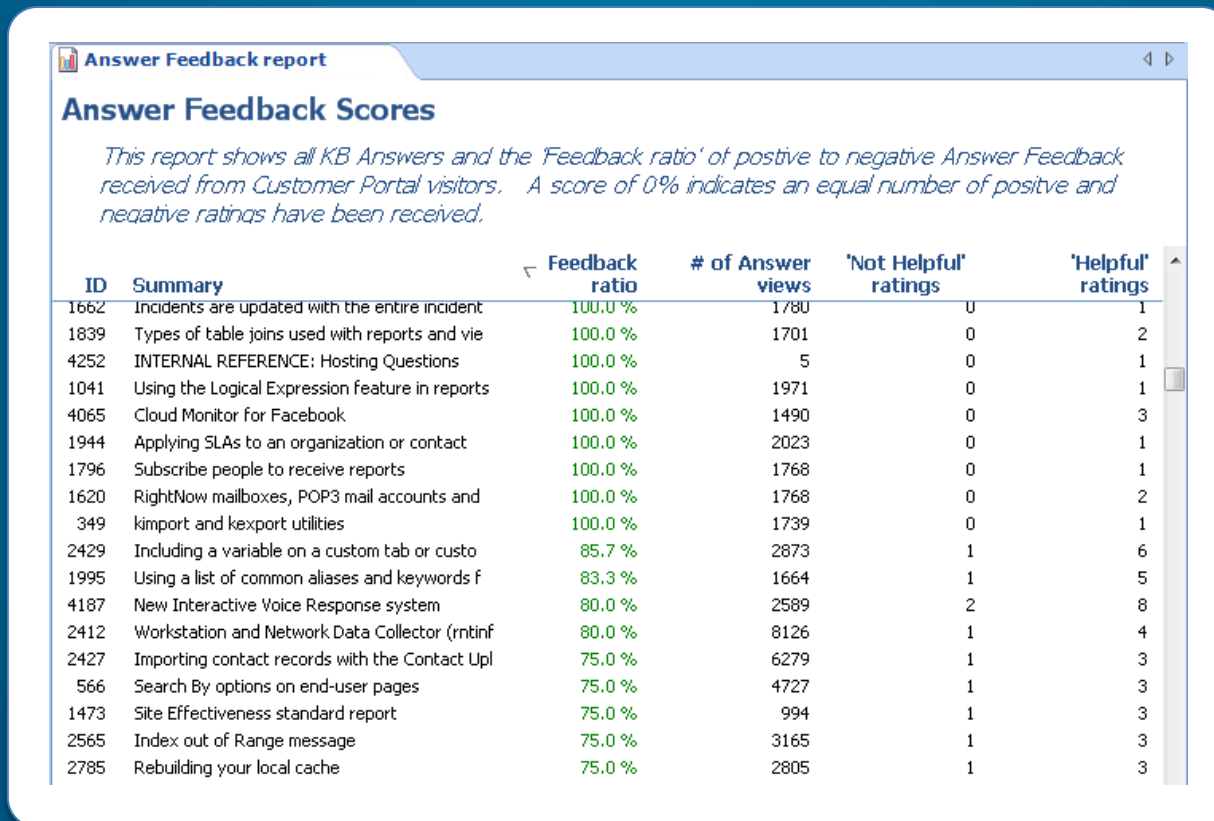


- There are several ways to measure content effectiveness, however RightNow has found a single approach to be most effective:
 - *What % of visitors rate the answer as helpful?*
- If you are RightNow customer, you can import a free custom report which shows you this information from the Community – just check out our Answer Content Tune-Up available on rightnow.com

How do I measure the effectiveness of my content?



- This report shows what the “Feedback Ratio” is for each Answer:

A screenshot of a web application window titled "Answer Feedback report". The window contains a table of "Answer Feedback Scores" with columns for ID, Summary, Feedback ratio, # of Answer views, 'Not Helpful' ratings, and 'Helpful' ratings. The table lists 20 rows of data, with feedback ratios ranging from 100.0% to 75.0%.

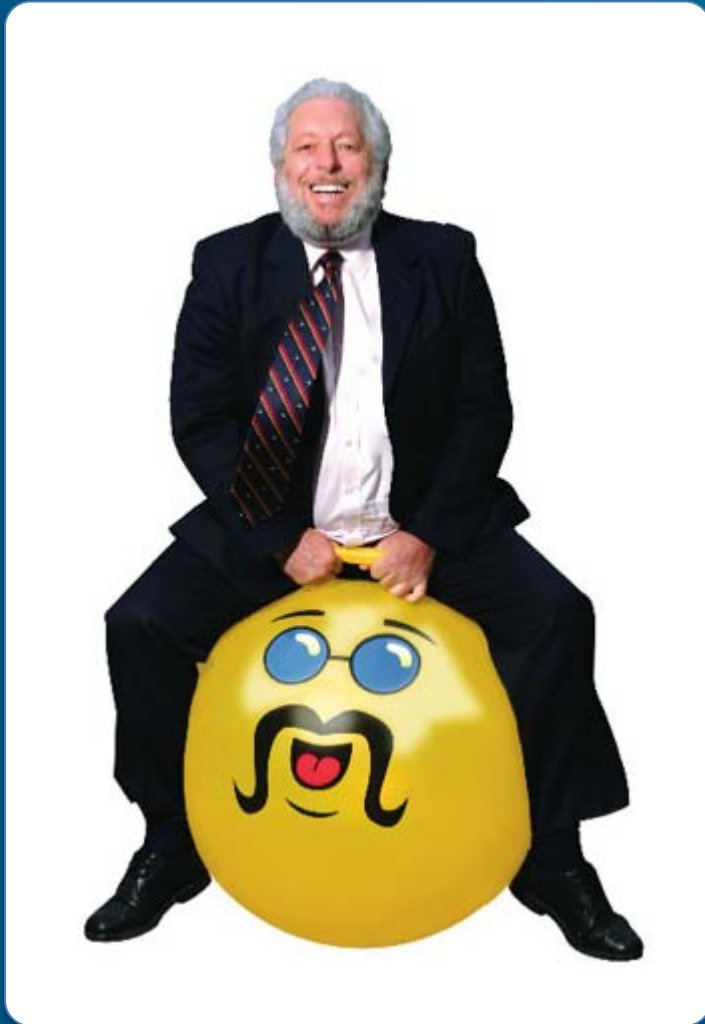
ID	Summary	Feedback ratio	# of Answer views	'Not Helpful' ratings	'Helpful' ratings
1662	Incidents are updated with the entire incident	100.0 %	1780	0	1
1839	Types of table joins used with reports and vie	100.0 %	1701	0	2
4252	INTERNAL REFERENCE: Hosting Questions	100.0 %	5	0	1
1041	Using the Logical Expression feature in reports	100.0 %	1971	0	1
4065	Cloud Monitor for Facebook	100.0 %	1490	0	3
1944	Applying SLAs to an organization or contact	100.0 %	2023	0	1
1796	Subscribe people to receive reports	100.0 %	1768	0	1
1620	RightNow mailboxes, POP3 mail accounts and	100.0 %	1768	0	2
349	kimport and kexport utilities	100.0 %	1739	0	1
2429	Including a variable on a custom tab or custo	85.7 %	2873	1	6
1995	Using a list of common aliases and keywords f	83.3 %	1664	1	5
4187	New Interactive Voice Response system	80.0 %	2589	2	8
2412	Workstation and Network Data Collector (rntinf	80.0 %	8126	1	4
2427	Importing contact records with the Contact Upd	75.0 %	6279	1	3
566	Search By options on end-user pages	75.0 %	4727	1	3
1473	Site Effectiveness standard report	75.0 %	994	1	3
2565	Index out of Range message	75.0 %	3165	1	3
2785	Rebuilding your local cache	75.0 %	2805	1	3

How do I measure the effectiveness of my content?



Discussion
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Question and Answer

What should my target bounce rate be?



- A **bounce** is defined as a visitor to a web page who views only that single page on the site before leaving.
- Bounce rate typically does not take into the **time spent on page**.

What should my target bounce rate be?



- Bounce rate is generally a good leading indicator of an individual page's self-service success rate.

Bounce Rate	WSS Support Home Scoring
Below 20%	Excellent. Can be difficult to achieve in practice.
20-35%	Good.
35-50%	May be cause for concern. Needs additional investigation.
50% and above.	Bad. You have a significant UX problem on your support home page.

- Do remember a **LOW** bounce rate is good for your Support Home page, but a **HIGH** bounce rate is a good thing for individual Answer pages.
- For more information, please download the “User Experience Best Practices for WSS guide from rightnow.com.

What should my target bounce rate be?



Discussion
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Why did my deflection rate go down after I upgraded?



- The Smart Assistant user interface was redesigned in Nov '09+ to reduce Customer Abandonment.
- In versions prior to Nov '09, each time a customer abandoned the question submission process this was “counted” as a deflection.
- This decrease in deflection is largely a good thing, as it eliminated abandonment.

Why did my deflection rate go down after I upgraded?



- There are some additional User Interface changes that will be released in May.
 - These changes increased answers viewed by 57% during the question submission process.
- This number was recorded during testing on a Live client site with real users.

Why did my deflection rate go down after I upgraded?



Discussion
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Question and Answer

User Experience Best Practices White Paper:

<http://www.rightnow.com/files/whitepapers/RightNow-Web-Self-Service-Best-Practices-WhitePapers.pdf>

RightNow Guide: Answer Content Best Practices:

http://www.rightnow.com/files/guides/A_Guide_to_RightNow_Answer_Content_Best_Practices.pdf

RightNow Guide: Web Experience Best Practices:

<http://www.rightnow.com/files/guides/RightNow-Best-Practices-WebExperience-Guide.pdf>