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THE STARTING POINT
FOR DIGITAL TRANSFORMATION

What's the right balance between self-service and live customer support in today's B2B product support environments?

With the proliferation of technology, brands must ensure they routinely deliver customer experiences that nurture a buyer into a brand advocate so they can remain competitive. To do so, critical elements around the delivery of those products and services need to be properly aligned in a way that encourages increased product adoption and consumption. We see several approaches to building a truly delightful customer experience.

IT'S A DATA-DRIVEN WORLD

In today's data-driven world, artificial intelligence & machine learning, the customer journey, and digital transformations are three critical factors that impact business. You'll need to determine how to build a strategy that incorporates all of these elements.

AI & MACHINE LEARNING

Where to look: You can automate the hand-off between people and systems. These types of projects increase efficiency, reduce customer effort, increase accuracy, remove errors, and are available 24 hours a day.
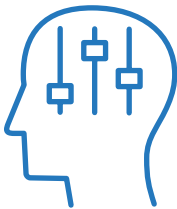
CUSTOMER JOURNEYS

Where to look: You can review the entry points of your customers to understand where they engage with your brand and the exit points to determine what they were attempting to do at the time where things went wrong.

DIGITAL TRANSFORMATION

Where to look: Customers have a difficult time finding information online. Automatically surfacing knowledge base articles as the customer describes their problem can be a useful way to provide them support without human intervention.

Leaders are asking what they should fix first and how they should do it. The big bang approach often requires significant capital expenditures, strict governance, and experienced resources while negatively impacting time to market. We see a more natural progression using digital transformation as a starting point.

The starting point depends on the maturity and future vision of your organization. In the past, organizations relied on people and their experience to make decisions and build strategies. This worked well in the age of nascent data science practices. As business intelligence (BI) tools developed promising dashboards on every computer, employees were able to react to information. The move from reactive to proactive strategies enabled such models as next best action and outcome-based solutions. It was no longer possible for people to make experience-led decisions without referring to data.

How well someone made decisions didn't matter as much as the actual outcome. The next iteration is where we build data models using what we already know about our customers. We know who they are, what they buy, when and how often they buy, use, or access, what they say to other customers, and when they contact us. So, if we know all of this about our customers, then we should deliver experiences that are thoughtful and consider all of what we already know.

SO WHERE DO WE START?

Among the leaders we've spoken with, the consensus agreement is to prioritize business ROI, weighing the risk of successful execution with the ability to pivot without losing competitive footing — risk to reward. Here you will find [five] areas to analyze and strategize for making improvements.

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SELF-SERVICE QUICK WINS	APPLICATION QUICK WINS
Improve what's already working. Revise your current top 20 articles to make them even more useful.	Launch a weekly communications update highlighting application features and promoting ease of use to prevent rapid drops in adoption.
Use analytics to prioritize and deprioritize content based on case volume and velocity.	Find a test group who will actively use and promote various application features and compare results to the control group.
Review feedback weekly and use it to fix technically inaccurate or difficult to use content.	Find utility programs that can perform one or a few simple tasks that current applications may not provide.
Highlight 10 articles used to solve cases by internal staff, but typically not found by customers to self-serve. Post these on the page used to submit a case.	Set system alerts and notification workflows to be more proactive in identifying and solving customer issues.
Find out which articles could be used by customers to solve their problems, but can't be surfaced due to nomenclature differences between the customer and product company.	

SO HOW DO WE GET STARTED?

Business leaders are asking for ways to reduce the number of times a customer needs to contact their brand when service or product questions arise. We think this discussion is really about fixing self-service while gaining a better understanding of the actual reasons customers are seeking support (intent). Many support organizations put too much focus on the resolution that was given to the customer to fix their issue rather than focusing on actually understanding why they contacted support to begin with. Leveraging our analytics platform, we have designed a digital insights process to help speed up the development of data-driven recommendations, and all we need to start this process is historical data (case data, case notes, CSAT surveys, etc.).

Most companies don't realize that the key to unlocking this puzzle is sitting in the data you collect day in and day out as you interact with customers. The problem is, the real gold sits in the data that is very hard to report on and gain insights from (customer & engineer typed case notes, CSAT verbatim, problem descriptions typed by the customer when they open a case, etc). Our platform specializes in ingesting this kind of data rapidly while understanding the concepts within as if a human was reading them. You can gain deep insights into the product and support experience when you begin to slice and dice them using the metadata in your CRM. These insights can be used to understand the current state of your business while establishing a future vision.

In establishing a future vision, we can help you determine areas that can be improved in the short-term as we help you lay the foundation for longer-term business improvements. One critical component is to understand the potential improvements that can be found within your business and making an accurate assessment.

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We use a multi-pronged approach that includes understanding how customers explain their issues, capturing words they may use and statements they may make. These data-driven insights can help identify processes that could be modified to deliver better customer experiences. Additionally, we may uncover product or service-related issues that could be permanently solved.

Knowledge management also plays a big part in transforming your support process. While companies understand the importance of people in the knowledge management process, many lack the resources and processes to improve self-service. Through our knowledge management health assessment (using our assessment and AI platform), we can assess the maturity of your knowledge management practice and propose recommendations that will help build a successful knowledge management strategy that enables business transformation.

HOW WILL THIS IMPACT MY BUSINESS?

BUSINESS RESULTS

15%	**25**%	**50**%	**30**%	↗
Reduction in time to competency	Reduction in cost to close a support case	Reduction in case escalation rates	Reduction in man power	Customer experience and satisfaction

Is your organization ready for a new model of process transformation that puts exceptional customer experiences first? For more information on how we can help you transform your process to optimize the customer experience, please visit us at www.sutherlandglobal.com, email us at sales@sutherlandglobal.com, or call 800-388-4557 ext.6123.

As a process transformation company, Sutherland rethinks and rebuilds processes for the digital age by combining the speed and insight of design thinking with the scale and accuracy of data analytics. We have been helping customers across industries from financial services to healthcare, achieve greater agility through transformed and automated customer experiences for over 30 years. Headquartered in Rochester, N.Y., Sutherland employs thousands of professionals spanning 20 countries around the world.