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Planning Your E-Service System

White Paper

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Planning Your E-Service System

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Internet-based service, better known as e-service, is one of the service industry's hottest topics. Touted as the cure to all service ills, and the subject of enormous hype, its basic premise is true — service via email and web does allow a closer, ongoing connection between customer and service agent, while allowing interactions to be tracked and analyzed as never before. Careful planning, however, is necessary to take full advantage of the advanced capabilities of e-service.

I. Customer Self-Service & Service Requests

There are two components to web-based service: customer self-service and ongoing agent-based service. Each includes different procedures and requires a different approach to service.

i. The Self-Service Solution Engine

Customer self-service on the web includes any type of service which does not require agent involvement. This includes complex solution engines based on problems and solutions already familiar to the organization, as well as simple FAQs on the company website and full-text searches of past service solutions. Setting up a self-service engine for the customer for a relatively complex product requires the definition of:

1. Different possible environments for the product which may have impact on the problem;
2. Different product features which are important in understanding the problem;
3. Frequently found problems and their solutions, and how these solutions differ based on product environment and features.

Once these definitions are implemented in the solution engine, the engine can locate the correct solution based on the relevant product environment and features as specified by the customer.

- Make sure that your solution engine allows for the fact that solutions differ according to product features and environment. This level of definition is necessary for most high-tech or consumer electronics products.

- If the product is of a simpler variety, the solution engine can be based on a simple list of problems and solutions.
- You should allow your solution engine to "grow" as you learn more about common problems and solutions from your agent-based ongoing service.
- While the more complex solution-engine should be used for actual problems with the operation of the product, the self-service FAQ should include relatively simple, very frequently asked questions regarding the operation of your product.

ii. The Service Request Form

Once the product environment and features have been defined for the self-service solution engine, they can be used for the agent and customer forms describing problems in ongoing service. The initial service request form which the customer (or agent) fills out on the web describing the problem should have simple drop-down menus that allow them to define the product and environment. Remember – the easier it is for the customer to give you information, the more likely it is that you'll receive it. However, the service request form is just the beginning.

II. Defining the Service Workflow

Ongoing service over the web allows you to further define your service workflow and ensure better customer service. Internet-based service lets you involve your customers more fully in the service process by allowing them to track service and provide additional information through emails and uploads, giving your agents more complete information regarding the problem. Agents can easily transfer problems to QA and product development departments when necessary. By using email in addition to your web-based service, you can keep managers and salespeople informed of important service lags through email alerts.

i. Analyzing Your Service Department

In order to take full advantage of these benefits, you need to define how your service department will deal with different levels and different types of service. What is your service process? What is the typical "life cycle" of a service call?

Events in the service call life cycle and the different service call milestones need to be defined beforehand. For example, a typical life cycle may be:

1) New service call entered
2) Waiting for information from customer
3) Waiting for solution from agent
4) Waiting for closure by customer
5) Closed by customer/agent

Because it can be difficult to predict these milestones with accuracy before a service system has been defined, be certain to choose an e-service solution which will allow you to change definitions dynamically, even after set-up, as your circumstances and service processes change.

ii. Defining Inter-Departmental Interactions

It is important that connections between departments regarding customer service be defined as well. The service department manager needs to decide at which point the service call will be transferred to a different department.

For example, a service call may be forwarded to QA or product development so that a bug fix will be developed. Even when the service call remains in the service department, there may be a particular stage which requires notification of the relevant sales account manager. The points at which the service call "crosses departments" must be carefully considered, and your e-service system must continue to track the service call beyond these points.

iii. Flexible versus Rigid Service Structures

It is important to consider whether your service process will be rigid (with every status leading to another pre-defined status) or flexible (allowing the status to change depending on customer or agent actions).

- In general, low-level questions can be dealt with within a relatively rigid service structure where every stage leads to a specific follow-up stage.

- More complex questions (or, alternatively, questions from clients who merit special treatment) often need a far more flexible structure, in which the question can be forwarded to different people in different departments at any stage, as needed. Even when the structure is flexible, e-service allows you to track problems in customer satisfaction. Thanks to advanced tracking mechanisms, there are different ways to pinpoint problems in customer satisfaction.

III. Grading and Tracking Customer Service

The grading and tracking capabilities of Internet-based service allow you to gauge problems in customer service as they occur, using the following indicators.

i. Low Grades

The most obvious indicator of customer dissatisfaction is a trend of low grades given to service received. Your e-service solution should allow (or, in certain cases, require) your customer to rate service when closing a service call. A report on trends in these grades, according to customer, service agent or service department, will give you a good general indicator of problems with service quality.

ii. Status Patterns

You can often pinpoint customer problems based on certain status patterns appearing in the customer service call process, for example:

1) **Status "ping-pong"**
This occurs when, rather than moving forward in the service call life cycle, a service call "ping-pongs" between two statuses. For example, if a service call keeps moving between "waiting for information from customer" to "waiting for solution from agent" and back again to "waiting for information from customer", it is apparent that the current agent is not succeeding in solving the problem, and the problem should be escalated to a service manager.

2) **Constant service-call reopening**
If a customer keeps re-opening a service call which has been closed by the agent, it is clear that the customer is dissatisfied with the service he or she is receiving. In this case, especially if it is an important customer, the sales account manager may wish to step in to save the customer relationship.

iii. Real-Time Business Pulsing

"Real-time business pulsing," in which the e-service system constantly "takes the pulse" of the service center, automatically identifying trouble spots, will allow you to define which pre-defined status patterns, such as those above, will trigger alerts to management. Different types of problematic patterns can be referred to different people. For example, status "ping-pong" could be referred to the service manager in order to solve the problem once and for all, while in service-call reopening the problem could be automatically referred to the relevant sales account manager. Using real-time business pulsing as implemented in email and web, these alerts can be implemented automatically, allowing all relevant members of the enterprise to stay on top of customer satisfaction issues.

IV. Internet Service: How Does it Differ?

In defining your e-service system, it is important to be aware of how Internet-based service differs from telephone-based service. For example, it is important for Internet service agents to realize how subjective time promises can be. Internet service agents, for example, should avoid saying "ASAP" to a customer. While this may mean 24 hours to the agent, it can mean one minute to the customer. This is a difference of opinion not often encountered in simple help desk telephone service, which deals with problems that can be solved in the course of the call.

i. The Customer/Corporation Border

In addition, the Internet's potential of bringing customers and service agents closer together, allowing customers to track their own service calls' progress, also raises unique issues which must be resolved by the service department manager.

- Will the customer be able to see absolutely everything regarding the progress of the service call, or will certain statuses be hidden?

- Can only the customer close a service call?

These are important decisions, and your Internet service solution should allow you to make them based on your corporate culture. Where you draw the line between customer and corporation should be based on your own approach to corporate openness and customer involvement.

ii. Templates in Internet Service

Finally, Internet-based service allows you to structure customer treatment far in advance, by preparing email and web templates that service agents will use automatically for service calls in different statuses and stages. This allows your service department to give your customer a single interface for interacting with the company and a single style of interaction, regardless of the particular agent. Of course, these templates need to be editable by the agent as circumstances require.

iii. Internet Service Reporting

Because Internet-based service allows you to keep track of the entire service process from the perspective of both customer and agent, the reporting potential is enormous. This is the second part of "real-time business pulsing": the availability of snapshot reports which can give you the status of service center resources and profitability in real-time, as well as forecasts based on current service trends. Agent time and success can be tracked, in addition to interactions with customers and other departments.

- To get the most out of your reporting, you should define the cost of agent time and the fee received for service contracts within your e-service system.

- Your system should require the agent to record the time spent on email interactions before they are closed or sent. Once this information is in the system, your e-service solution should be designed to give you reports accurately reflecting your department's profitability and resource availability.

V. Magic eService

Magic eService is designed to give you all the benefits of ongoing Internet-based service, with the flexibility to ensure that your Internet-based service follows your business rules. With Magic eService, you can fully define your service workflow to meet your business and customer needs. Magic eService's real-time business pulsing™ allows you to monitor your service department in real time, giving you snapshot reports of your service department's effectiveness and profitability and notifying you before problems affect your bottom line, whether it be contract profitability or customer satisfaction. Magic eService's comprehensive reporting capabilities allow you to run your service department as a profit center, based on contract fees and resource costs.

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