A Roadmap for Customer Service Digitalization

It's a tough time to be in customer service. Quality care has never been more important, yet savvy consumers have never been harder to impress. At the same time, a wrinkle has appeared in the CS paradigm. Satisfied customers aren't necessarily loyal. In fact, customers are [four times](#) more likely to leave a service interaction disloyal than loyal.

Why is this such a difficult nut to crack? The answer is hiding in plain sight. Just like all other human relationships, customers want consistency. A large [HBR study](#) found that:

1. First, delighting customers doesn't build loyalty; reducing their effort—the work they must do to get their problem solved—does.
2. Second, acting deliberately on this insight can help improve customer service, reduce customer service costs, and decrease customer churn.

This is great news for customer service managers. Getting back to basics seems easy compared with "exceed all expectations, everywhere, all the time". But customer needs change constantly. What's the key to customer service excellence? It may seem counterintuitive, but there's a case for [full-scale digitalization](#). If done right, [McKinsey](#) reported that digitalization leads to higher customer satisfaction while lowering costs. Customer satisfaction jumped almost 20% when switching from traditional channels (phone, email, etc.) to digital.

The more digital the journey, the higher the satisfaction.

Channels	Customer service journey[1]		Share of transactions	Customer satisfaction,[2] %
	Starts	Ends		
Traditional Phone Vendor Mail/fax E-mail Click to call	● → ●	Traditional only	11%	57
	● ↘↗ ●	Digital to traditional	41%	61
Digital E-chat Forum FAQ Personal account Virtual assistant Social media	● ↗↘ ●	Traditional to digital	33%	62
	● → ●	Digital only	15%	76

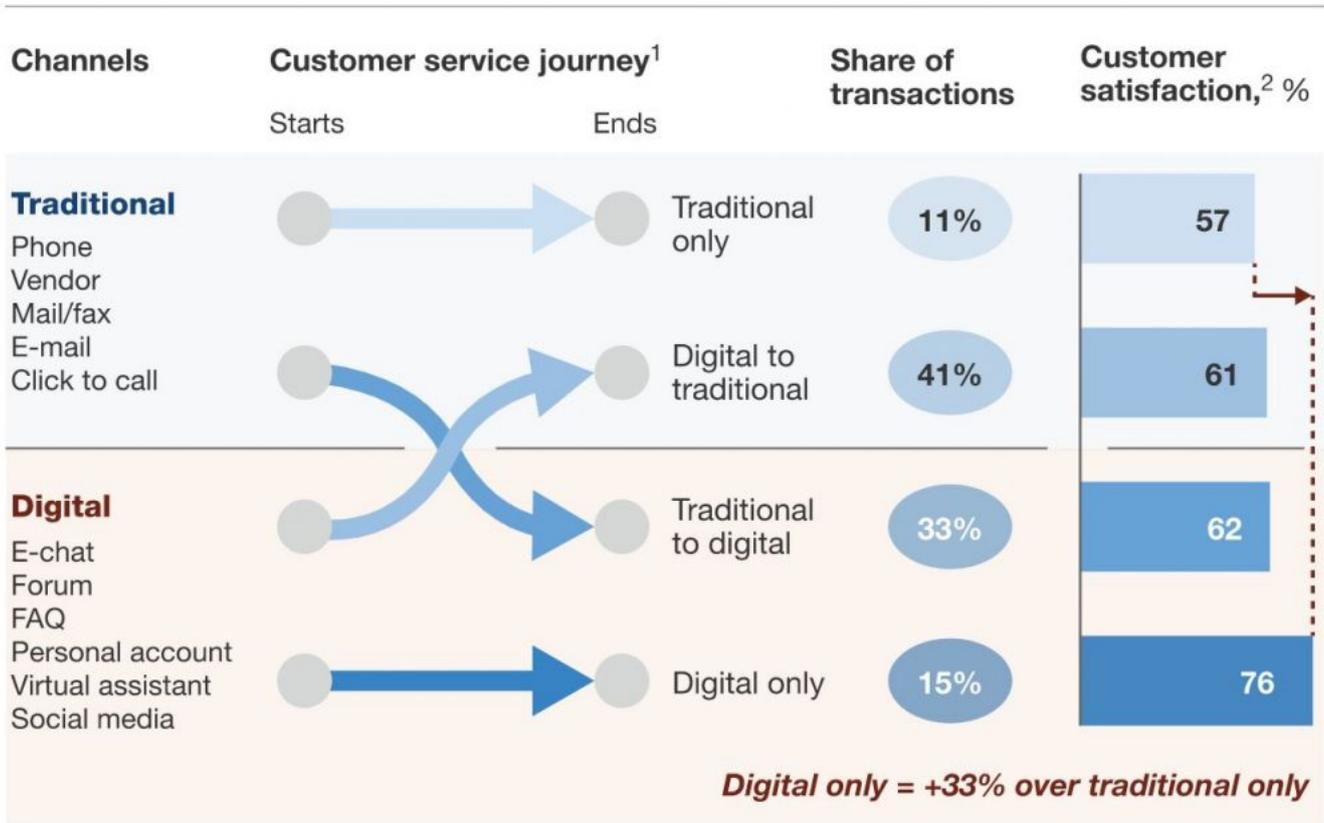**Digital only = +33% over traditional only**

Image via [Mckinsey](#)

Customers want what they've always wanted – easy access to high-quality information, and quick and efficient resolution to questions and problems. Now, they also expect to have their pick of medium – whether this means customer forums and chatbots, FAQs, trouble ticket systems, and phone calls. Taking advantage of digital mediums doesn't let you off the hook for providing a personalized experience, however.

Digitalizing customer service is a big undertaking, but by tackling it in steps you can deliver the quality and consistent care that will create loyal customers. We've put together a roadmap for digitalization in steps, complete with the pros and cons of each route. Your exact trajectory will depend on your Let's dive in.

Digitalizing customer care in stages

Let's say you own a business which sells CAD software. Issuing a refund is going to be easier than solving an engineering issue. Take stock of the major issues your CS team handles directly

(or routes elsewhere) and sort them into the following buckets:

- **Simple** use cases for **customers**
- **Complex** use cases for **reps**
- **Complex** use cases for **customers**

Generally speaking, you want to tackle the simple stuff first, then move on to more complex cases that will only be handled internally - this allows you to experiment and work out the kinks away from customers. Finally, when you've got a working system that you feel comfortable with, roll out digital automation for more complex customer-facing issues.

Step 1) Simple use cases for customers

Your simplest use cases probably take up a large amount of you CS team's time, but condensed they probably account for only a few different customer issues. Think refunds, shipment tracking, account questions.

How can I automate this?

Rules-based chatbots are going to be your go-to for these cases. If the question and solution can be mapped to a decision tree (see below) you're golden.
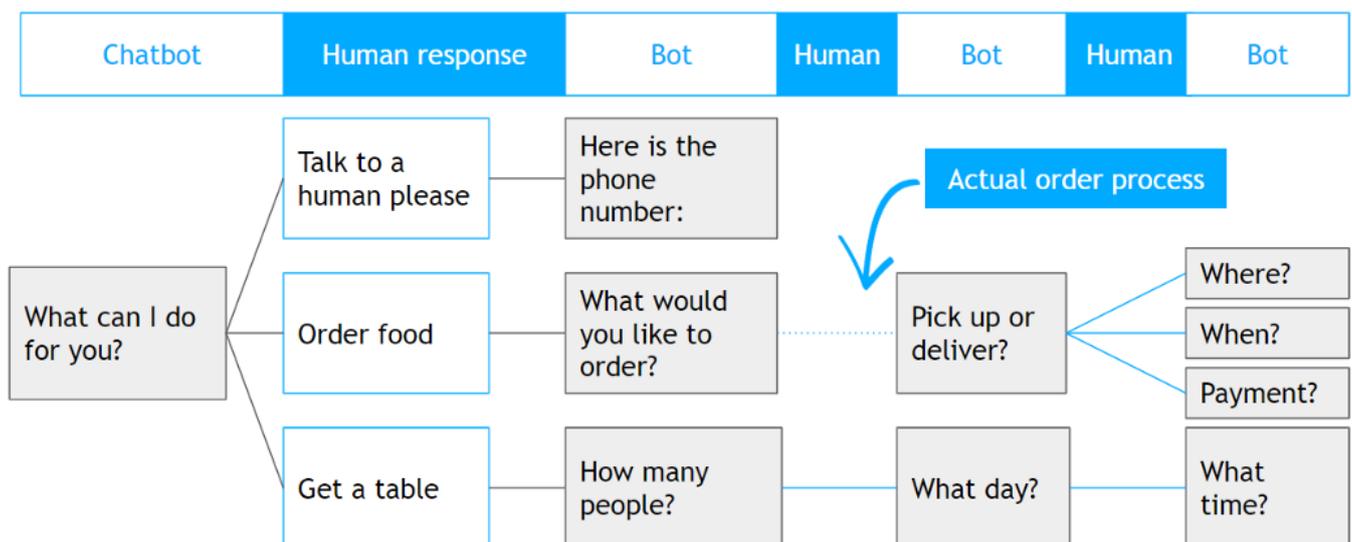

Image via Chatbots Life

Pros:

- Chatbots are by far the quickest and easiest intelligent automation to deploy.
- They're cost effective
- If [done right,](#) any deviation from the decision tree will be escalated to humans right away, so there's limited chance for error.
- Customers are familiar with chatbots, so there's no learning curve for your users.

Cons:

- Not scalable beyond a few very simple use cases. Decision trees quickly get out of hand for even remotely complex problems.
- No leverage from AI, which means your chatbot will never learn. Your chatbot will always perform exactly as programmed, and every change to your process must be carefully managed by your team.

Step 2) Simple use cases for customers

Once your decision tree is working well for the simplest customer questions, you can move on to more complex tasks. Before you do, it's important to understand the concept of **intent** as it relates to digitalization.

Intent is the user's intention, regardless of the language they choose to communicate. For example, a customer who has lost their password wants to get into their account. They may say "Lost password", "forgot password" or even "I need to access my account", but the intent is the same - to regain control of their account.

You can probably guess that this gets complicated very quickly. Forget simplicity for a moment - imagine you're in charge of customer service at TurboTax or SAP. Think of all the details and combinations of customer entries you'd have to map on a decision tree if you wanted to automate. Dizzying, isn't it?

Thankfully, this is where Natural Language Search steps in.

How can I automate this?

Because it takes time to train an NLS-powered AI solution, we recommend that you bring NLS to your backend CS processes first so that your customers don't witness the adjustment and training period. Instead, your customer service agents will still answer customer calls, but instead of finding and delivering the right answers themselves, the AI will do the heavy lifting.

Depending on your data strategy, you'll need the help of an AI vendor or your in-house team. Feed all relevant documentation into the AI, and introduce your CS reps to the system. Using the AI should be very intuitive since NLS is built for human language and they won't need to worry about keywords.

You'll be surprised at how easy your employees take to a tool that speaks their language. This

is called the [virtuous cycle of AI](#) - accurate, easy-to-use systems reward the user by making their jobs easier. This drives more traffic to the AI, which trains it better, improving it further. Don't be surprised if you're able to completely avoid the painful learning curve you're probably used to when implementing new software.

Pros:

- NLS-driven AI scales to infinite complexity without any hand-holding. It learns through use, so it will stay in sync with your team without you programming in every little change to procedure.
- It personalizes for every user, based on use.
- Your CS rep is still in the driver's seat at this stage, ensuring accuracy and a positive experience for your customers
- Automating backend processes first give your organization a chance to learn the ins and outs before end users gain access.

Cons:

- You're not yet truly automated, as your reps manage the whole process. This won't last for long, however.

Quick note here - although we do recommend rolling out AI to your agents first, we have had success in direct deployment as well. If your business is relatively simple or your on a deadline to digitalize, we can advise on whether you can skip this step.

Step 3) Complex use cases for customers

By now your AI is running smoothly and reliably - time to roll it out to your customers! Don't be nervous - your team is still ready and waiting to assist when needed, but with the repetitive work offloaded, they're fresh and ready to tackle more complex customer issues.

How can I automate this?

Final implementation is not much different than rolling out AI for your reps. We encourage you to be very clear with users about what to expect. Let them know that they're not using a "dumb" search too - they can ask questions in full sentences, and in natural language. They won't have to sift through huge documents to find answers hidden on page 126 - the AI will deliver the exact answer needed. If they still can't find what they're looking for, a human is always available to help them out.

Pros:

- Scales to infinite complexity while allowing for a personalized customer service experience with every use.
- Saves big on cost, as human involvement is minimal.
- Most importantly, your customers will like it. With [60%](#) of customers already turning to digital self-service tools when they have an issue, making these tools more helpful and easier-to-use will make your customers happier and improve NPS.

Cons:

- Needs sufficient training and investments (this can be minimized through deployment on the backend first, and training time can run as low as four weeks).

The bright future of AI-enabled customer care

Digitalization isn't a nice-to-have, it's critical for 21st century organizations. NLS and AI-based solutions may seem futuristic now, but they're already taking intelligent workflows by a storm at companies large and small.

Let's take this a step further. A customer-centric business model is one which makes customers' lives easier at the end of the day. As simple chatbot technology and NLP evolve over time, more and more processes will become automable - freeing up humans to tackle ever-bigger challenges.

If your AI is solving customer issues, you've nailed down customer intents. Why not take more off their plate?

You know what they want (your AI figured it out when answering their question). Why not take action?

We call this an [actuatebot](#), and they're not science fiction - they're real, and working diligently in pharma. Scientists at a top-10 pharmaceutical manufacturer interact with technical documents daily. When they ask questions about different chemical compounds or processes, they're not looking out of pure curiosity - there is action to be taken. Add to a report, send to another user, find the best deal at a supplier - the opportunities seem endless at first, but they're predictable.

Search tools become truly powerful at this point. Finishing tedious tasks with a single click gives scientists back time to do what they love - working on life-saving treatments. This type of tool is possible in all industries, in all fields. Wherever there is tedious work to be done, an actuatebot can speed it up.

Simple ideas lead to powerful outcomes. We have no doubt that it won't be long before workplaces change significantly. The pace will slow - colleagues will talk directly to computers, and ideate with each other. A few taps here and there. Lot's of thinking time. Less stress, and better ideas - all powered by bots.

[Setup a call](#) with us to learn more.

What is Next-Generation Enterprise Search?

Coseer's search solutions are transforming industries from healthcare to finance. Our point-and-shoot AI trains finds answers and insights with 95%+ accuracy within 4-12 weeks - all of this in 100% security. The reason? We founded Coseer on the principle that computers should take care of the boring stuff so that humans can focus on creativity and judgment. To that end, we've built enterprise search solutions to complete complex workflows just as humans would in a fraction of the time. Fortune 500 leaders are using Coseer to speed up and automate their most complex work.

We follow a tactical approach to enterprise search:

- We deliver 95-98% accurate solutions within 4-12 weeks.
- Our solutions deploy entirely behind your own firewall for 100% security, and every decision point is logged for full transparency.
- You add the finishing touches, but our point-and-shoot AI practically trains itself. No more huge training data sets or time wasted annotating and tagging.

Visit our [website](#) for in-depth case studies, ROI breakdowns per industry, and other insight.