



Measuring the Maturity of your Knowledge Management and Self- Service Initiatives

What it takes to optimize your self-services

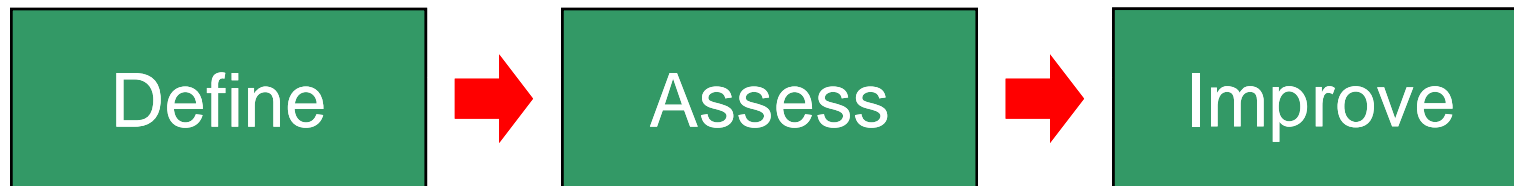
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About ServiceXRG

- Market research and business consulting firm dedicated *exclusively* to service industry issues
- A balanced perspective with views from users, vendors and partners
- Hundreds of surveys and interviews conducted annually
- Performance benchmarking, competitive analysis, trend analysis and demand drivers
- Coverage in North America, Europe and China

The Pursuit of Self-Service Excellence

- What is the optimal state of self-service?
- What does it take to get there?



Self-Service Maturity Spectrum

Advanced

- Strategic
- Dynamically updated
- Personalized
- Interactive
- Comprehensive metrics
- Customers preferred method for service interactions
- Optimal performance

Established

- Audience appropriate offerings
- Well defined goals
- Means to track and report progress
- Mature content development
- Proactive marketing
- Dedicated team
- Executive support
- Broad user adoption
- High rate of success

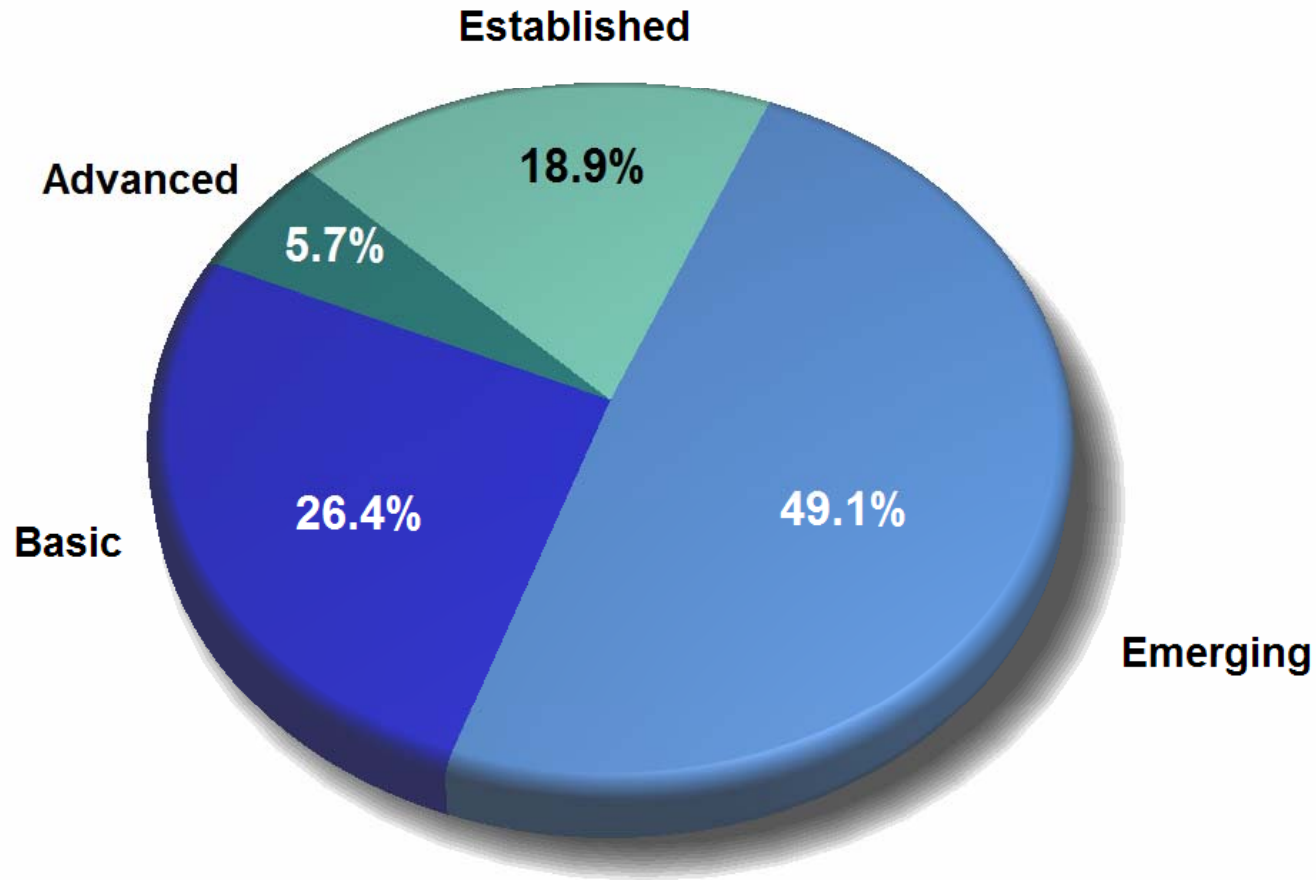
Emerging

- Emerging strategy
- Expanded offerings
- Increased use of customer feedback
- Defined goals
- Ability to track basic metrics
- Management support

Basic

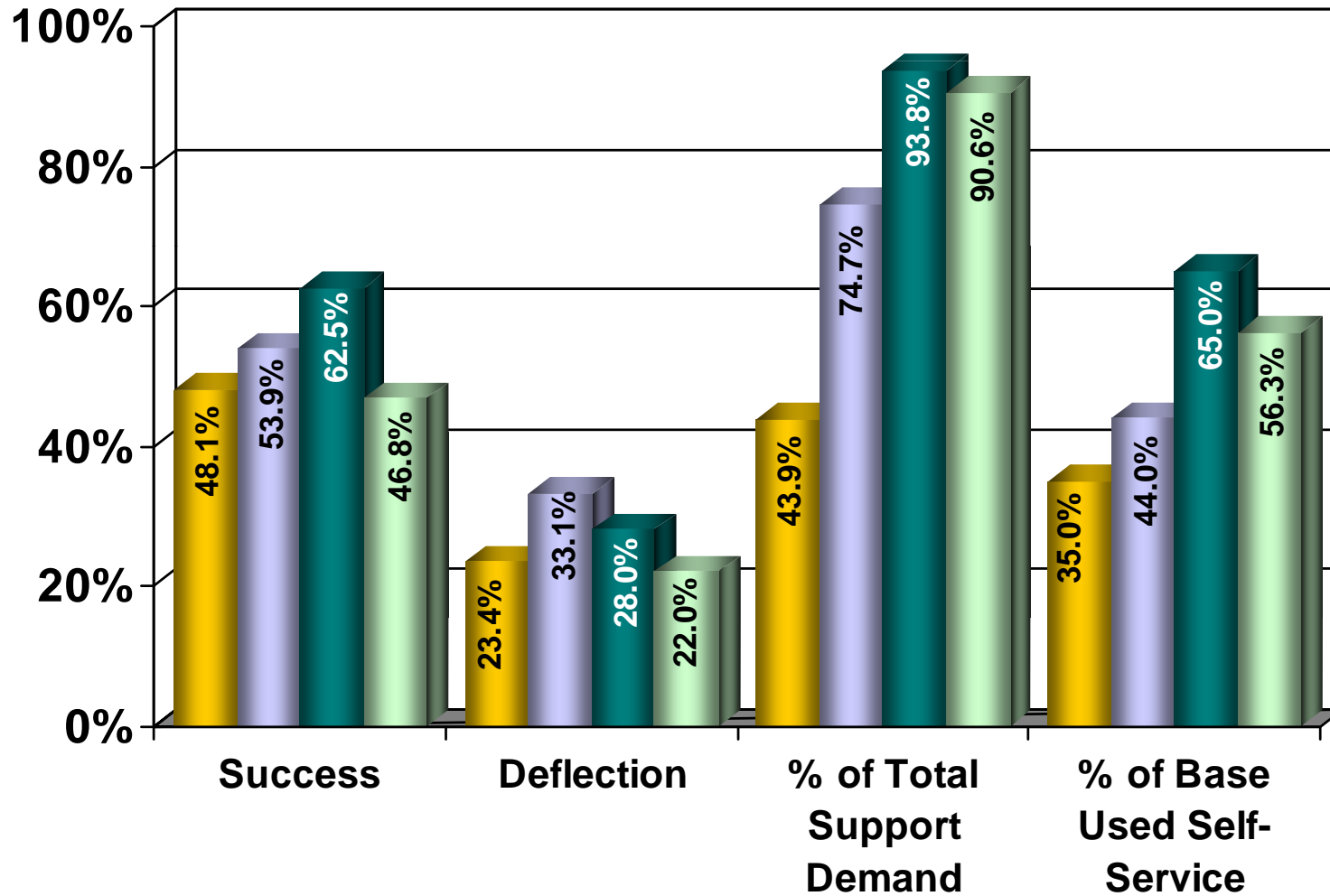
- Informal effort
- One size fits all
- Basic offerings
- Infrequent updates
- No formal metrics

Assessment of Overall Maturity



Self-Service Performance

■ Industry ■ Group ■ Advanced ■ Established



6 Competencies for Success

- A well defined self-service **Strategy**.
- **Offerings** tailored to the needs of the target audience.
- Relevant and comprehensive **Content**.
- A **User Experience** that engages the customer and encourages them to return.
- Proactive **Marketing** to raise awareness and educate customers about self-services.
- Comprehensive **Measurement** capabilities.

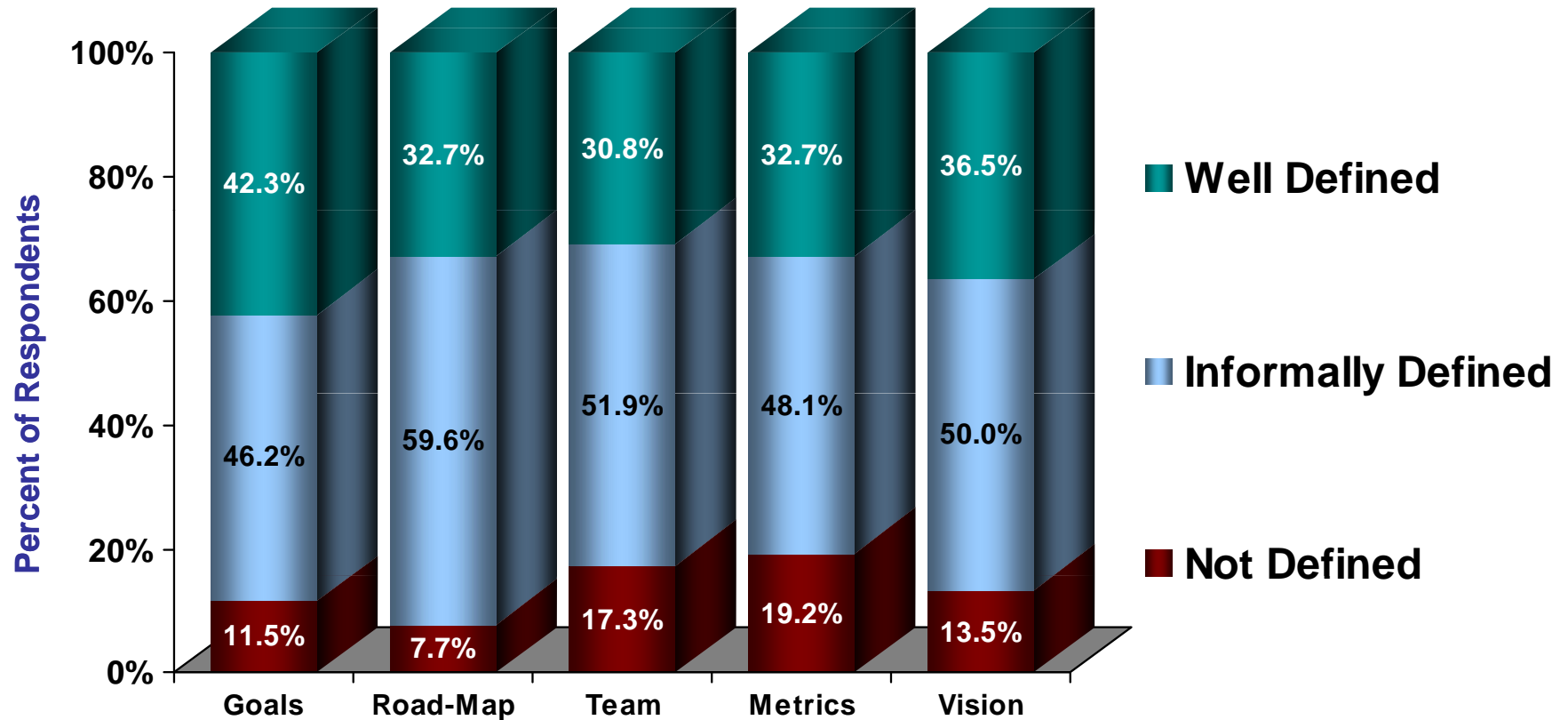
Strategy

Competency #1

Elements of the Strategy

- **Goals & Objectives** – Definition of expected business outcome and performance levels.
- **Road-Map** – Articulation of what will be accomplished and by when.
- **Team** – Allocated staff with specific roles and responsibilities.
- **Metrics** – Well defined and monitored performance metrics to report the progress against stated goals.
- **Vision** – The future direction of self-services.

How Well Defined is Your Strategy?



Maturity Spectrum - Strategy

Advanced

- Formal product management approach
- Dedicated team
- Strategy transcends department goals
- Considered strategic by executives
- Comprehensive measurement
- Ability to calculate return on self-service investment

Established

- Detailed planning process
- Well defined goals
- Vision for future direction
- Road map and milestones defined
- Means to track and report progress against goals

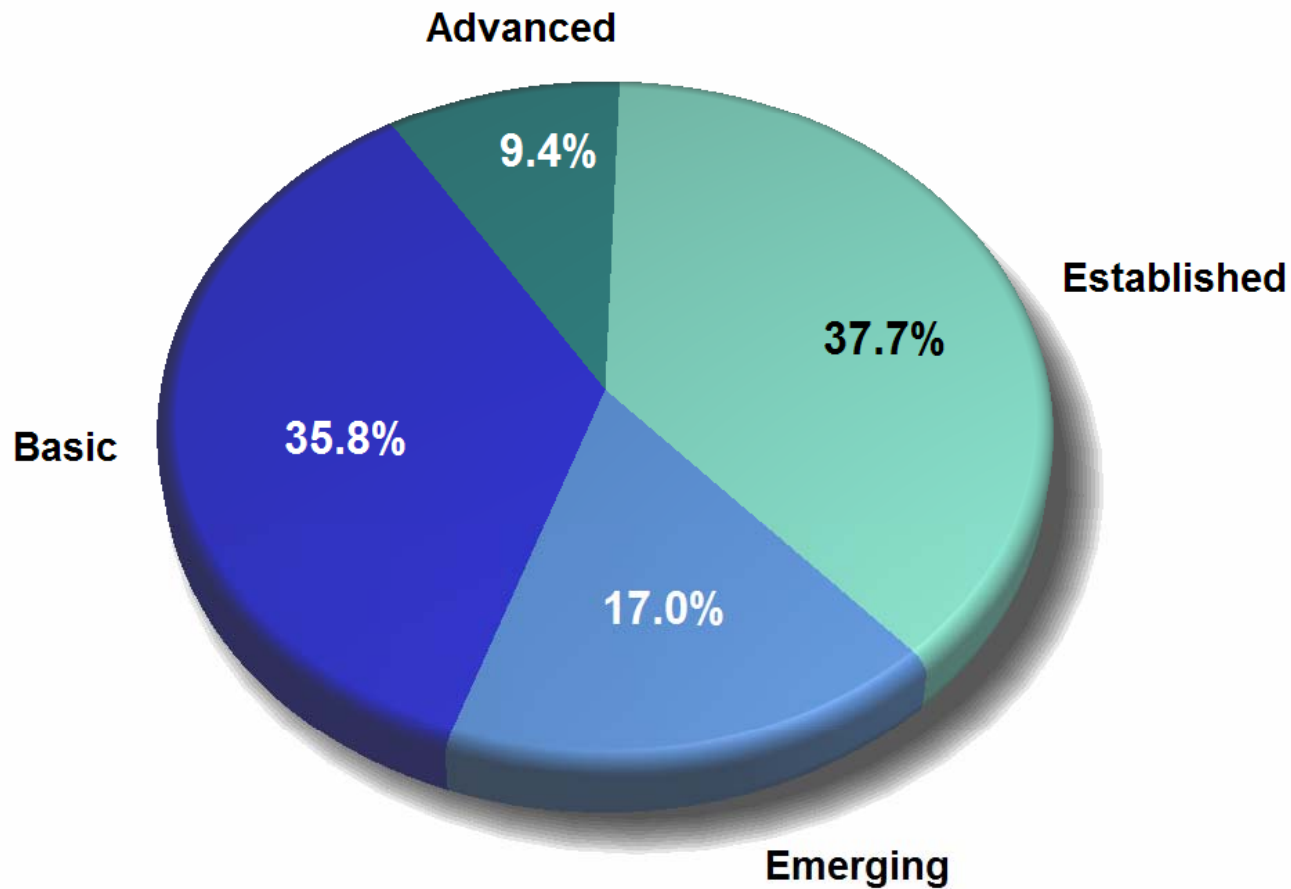
Emerging

- Initial goals defined
- Benefits articulated
- Preliminary support for effort
 - Staff
 - Infrastructure
 - Organizational Change

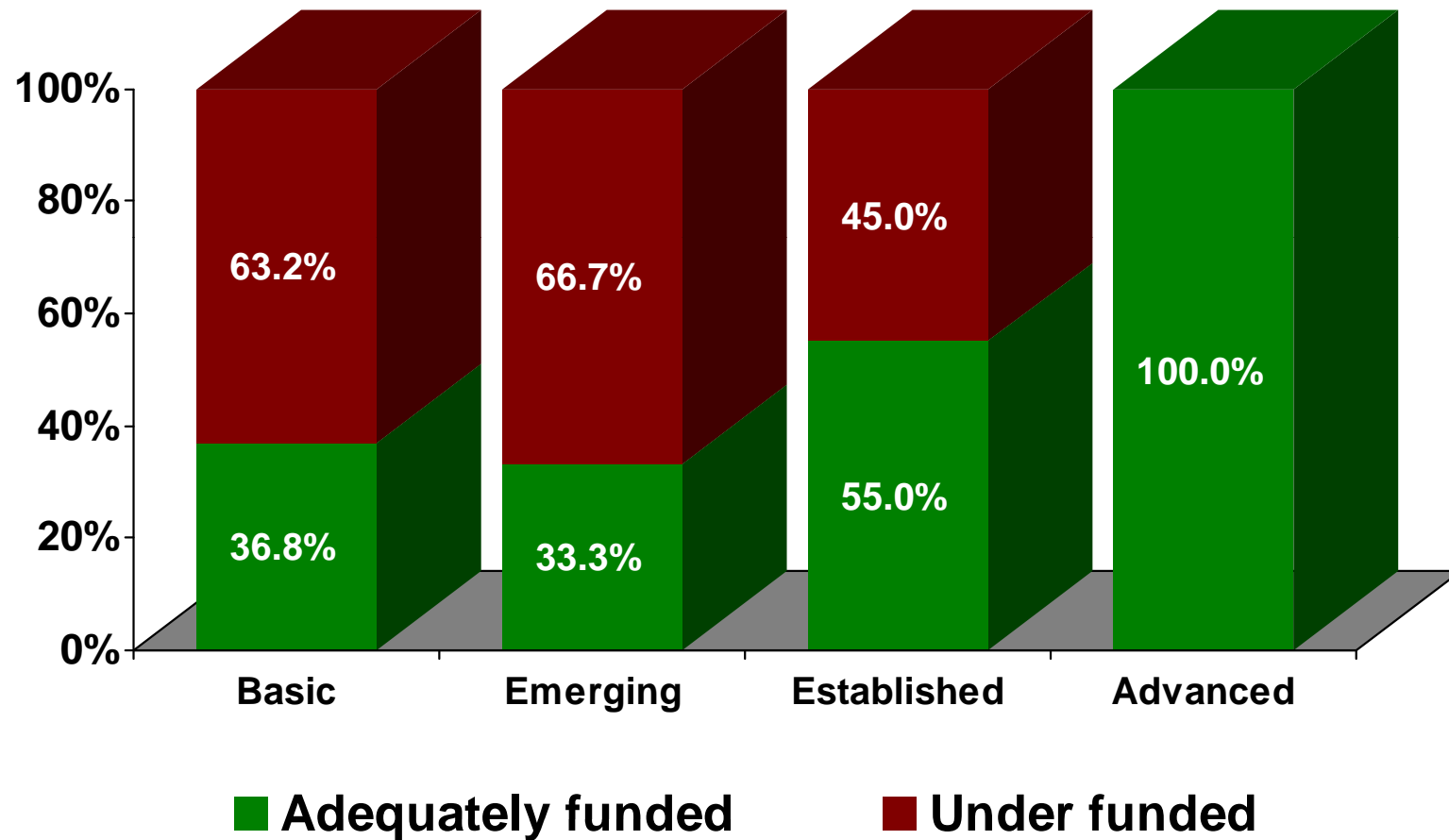
Basic

- Goals not formally defined
- Efforts constrained by lack of support

Self-Service Strategy Assessment



Strategy & Funding



Offerings

Competency #2

Offerings

What

- **Searchable Content** – Ability to search one or more content repositories such as support knowledge base, documentation, case records, forum posts, etc.
- **Download Library** – On-line repository of downloadable software such as patches, updates, templates, drivers, etc.
- **Case Management** – Systems and process that enable customers to log and review support cases on-line.
- **Community** – Content and systems that promote the exchange of information between users and the company and/or other users. May include forums, blogs, or wikis.

How

- **Customer Needs Assessment** – Formal effort to establish customer needs and expectations of self-services through surveys, focus groups, etc.
- **Customer Feedback** – Systems, tools and process to actively solicit customer feedback about self-service offerings, quality and effectiveness
- **Performance Reporting** – Well defined and monitored performance metrics that report the progress against stated goals and objectives.

Maturity Spectrum - Offerings

Advanced

- Comprehensive set of self-service offerings
- Based on in-depth knowledge of targeted customer types
- Formal customer needs assessment and feedback

Established

- Wide variety of self-service offerings driven by customer demand
- Understanding of the target audience(s) and what they can and will use

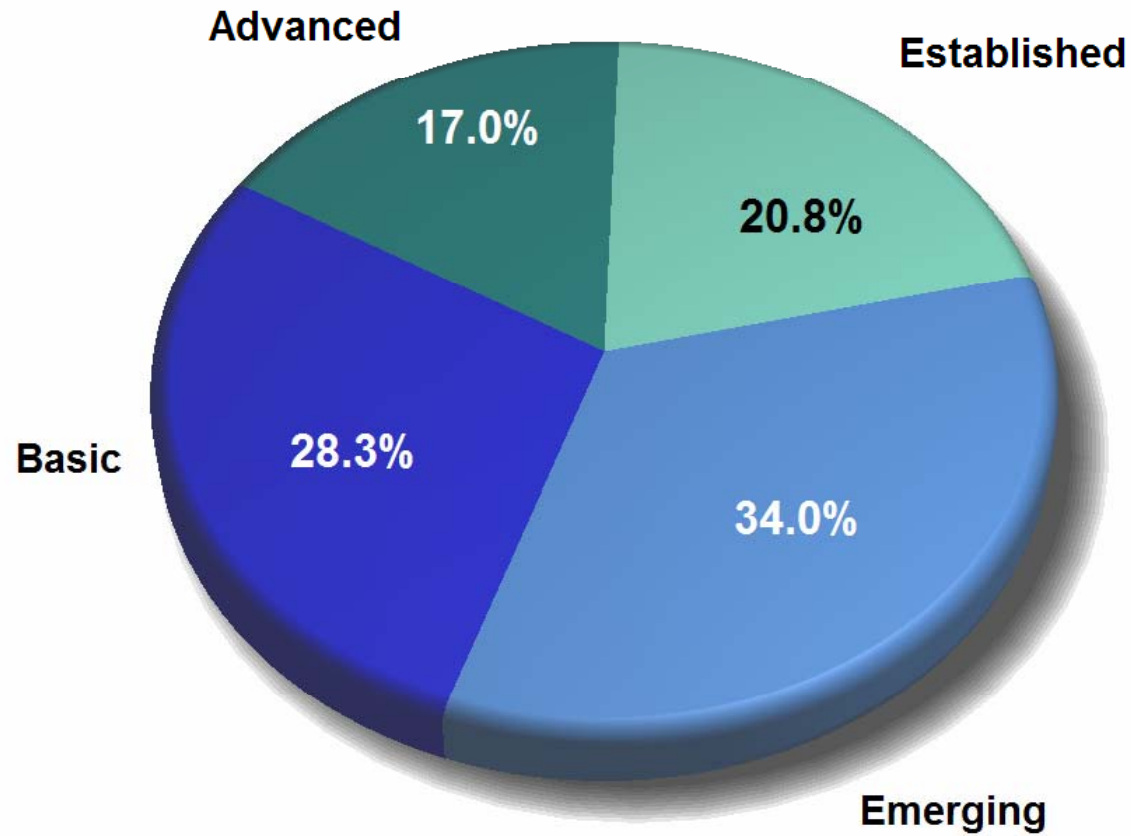
Emerging

- Basic set of offerings
- Some consideration of targeted audience
- Increasing sophistication
 - Search
 - Interaction

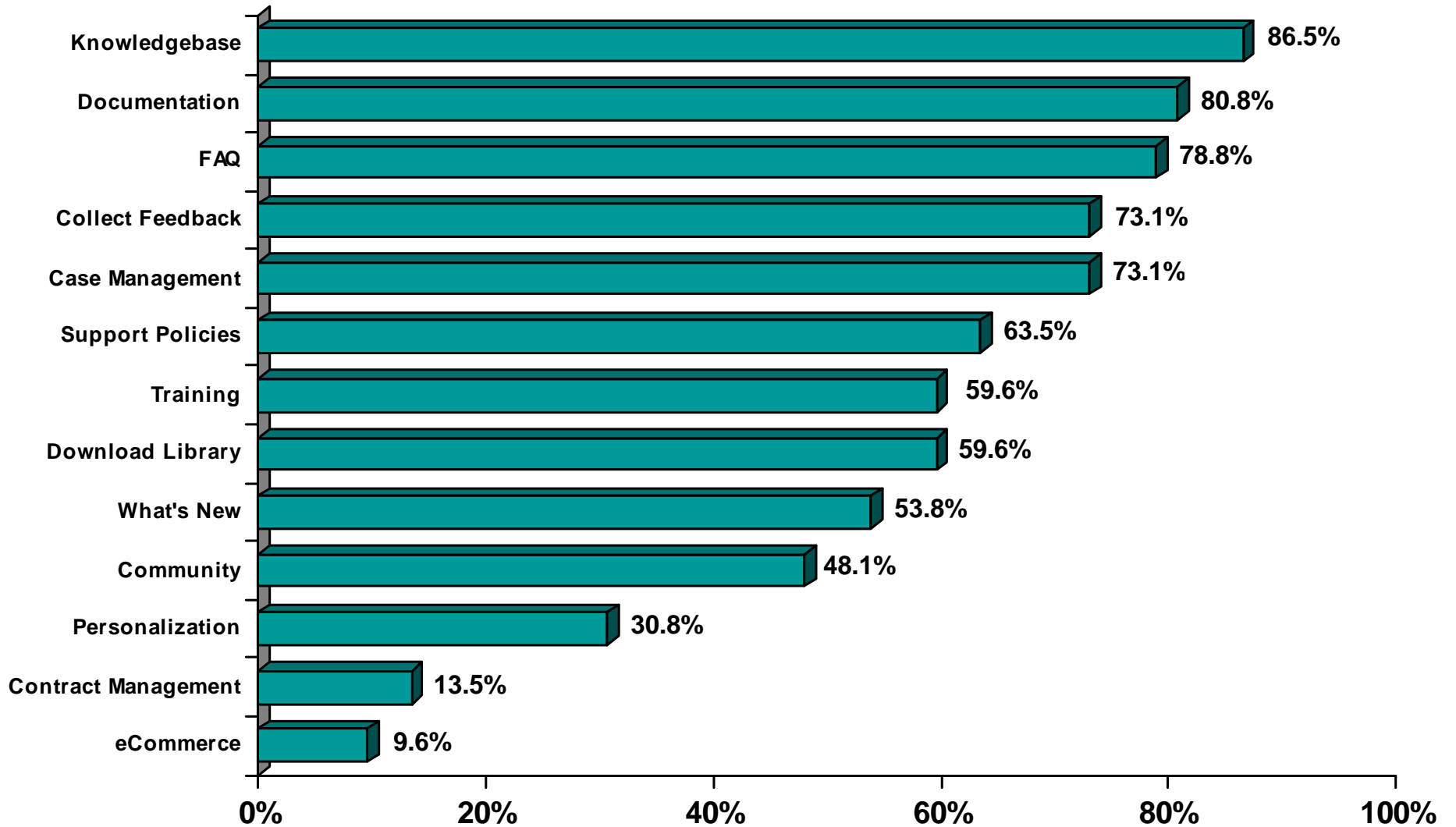
Basic

- One size fits all
- Little consideration given to customer preferences

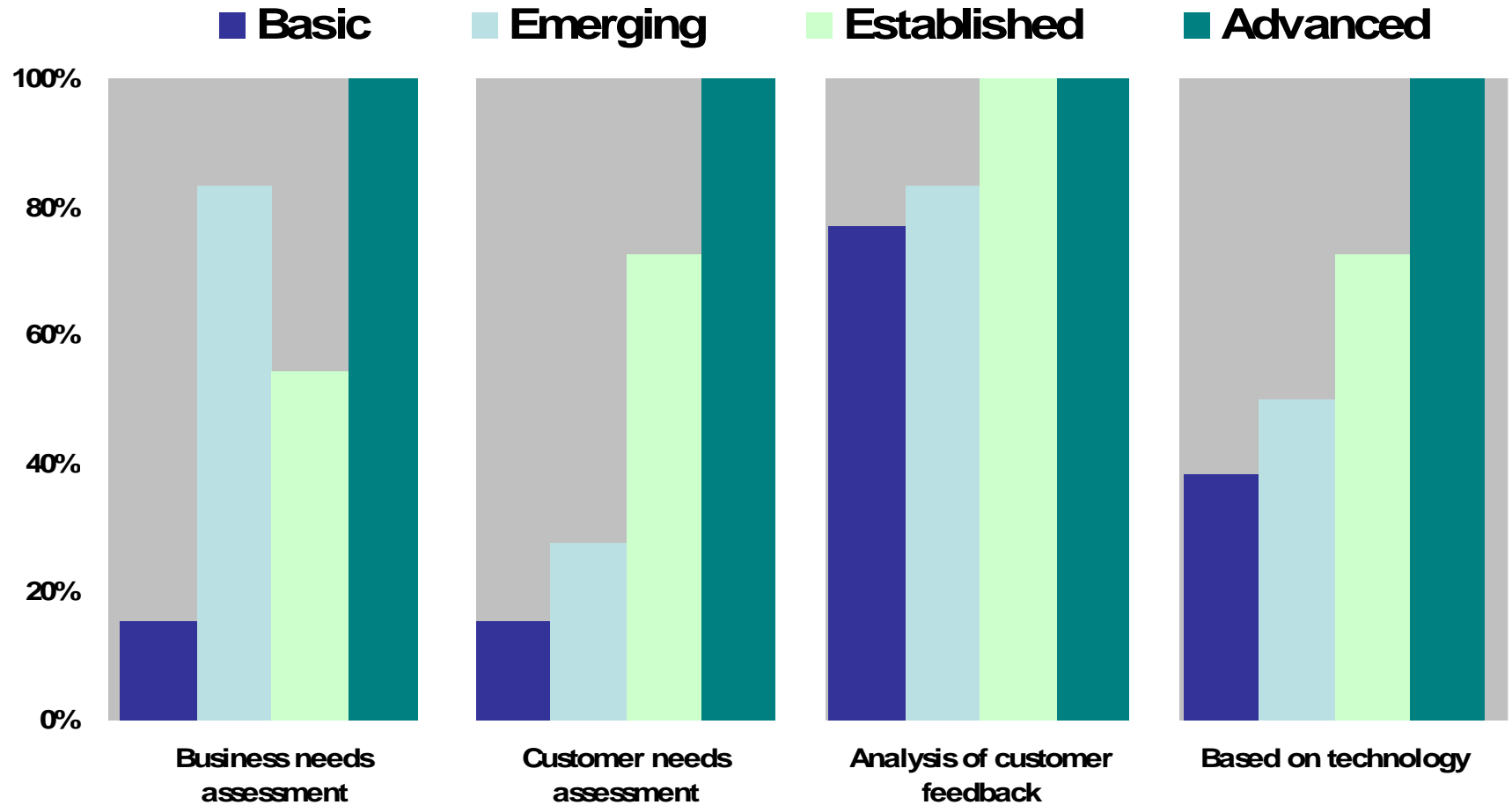
Offerings Assessment



Current Offerings



Methods to Define the Right Offerings



User Experience

Competency #3

Elements of the User Experience

- **Knowledge of Customer** - Systems and processes to require self-service users to identify themselves for tracking, personalization and entitlement purposes.
- Login, Authentication
- **Search and Navigation** - Systems and interfaces to support alternative methods for accessing data to accommodate different customer types and search and discovery preferences.
 - Natural language search
 - Full text search
 - Browse by category
- **User Communities** - Formal effort to establish service specific customer segments based on customer needs, expectations, usage and buying behaviors and provide opportunity to interact with like customers
 - Micro-sites by product or user segment, International sites
- **Personalization** - Systems and services that enable customers to tailor the user experience to their personal interests.
- **Recommendations** – Guides and prompts to suggest navigation options for site visitors.
 - Wizards
 - Resource suggestions / Lists

Maturity Spectrum – User Experience

Advanced

- Formal effort to conduct usability testing
- Ongoing session tracking and feedback to enhance the user experience

Established

- Knowledge of the customer is used to provide a more personalized experience
- Multiple methods to search and navigate the site

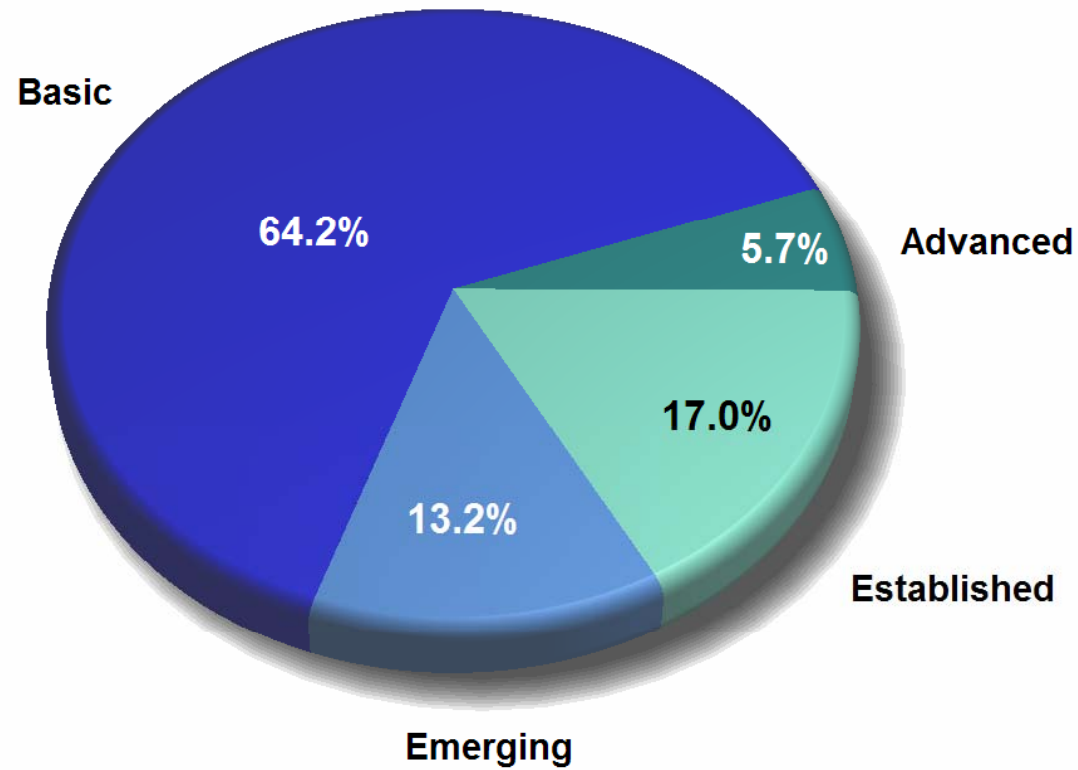
Emerging

- More robust navigation
 - Search
 - Browse
- User login
- Effort to track resource use and navigation

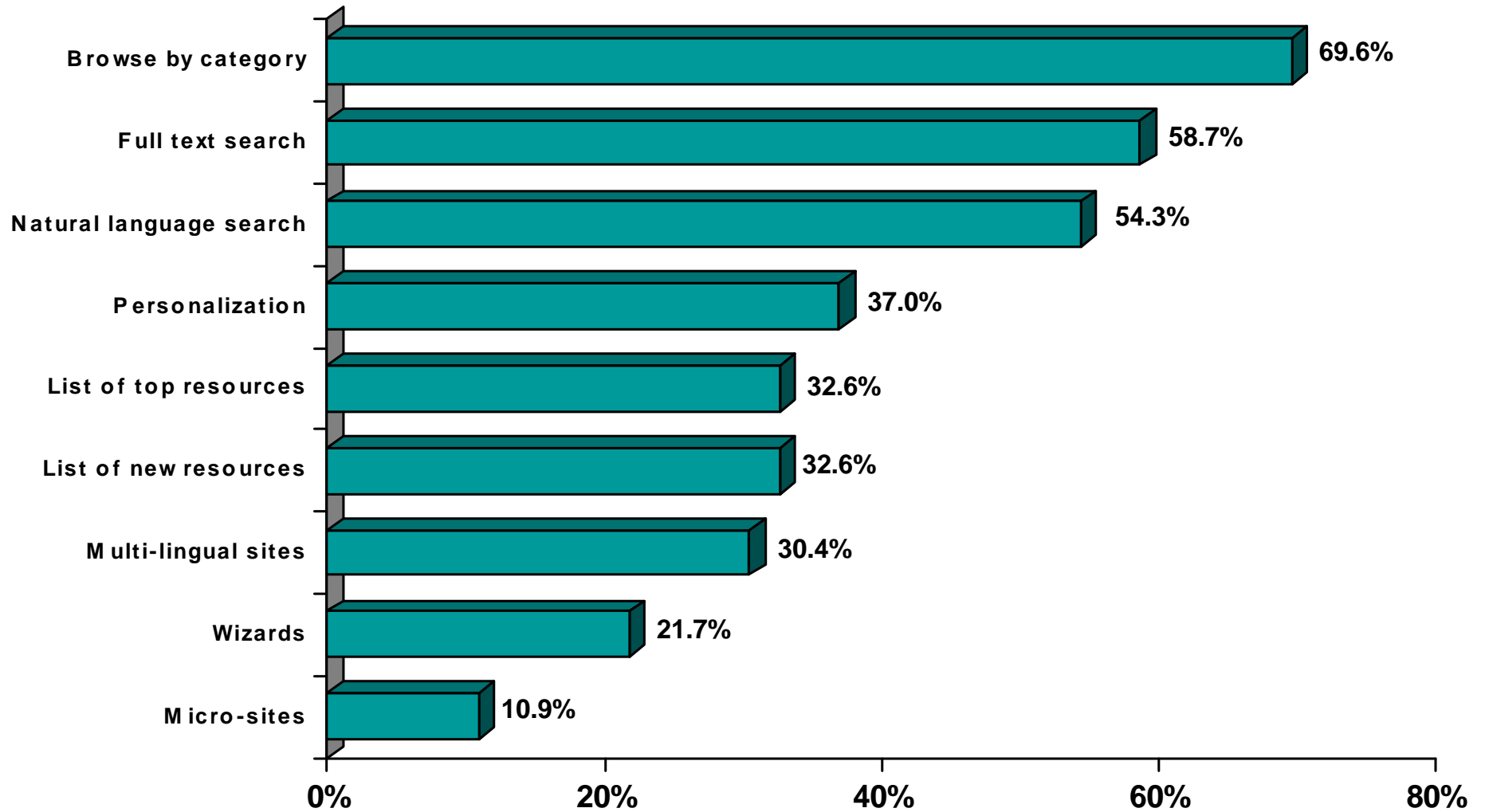
Basic

- A common user interface
- Limited search and navigation

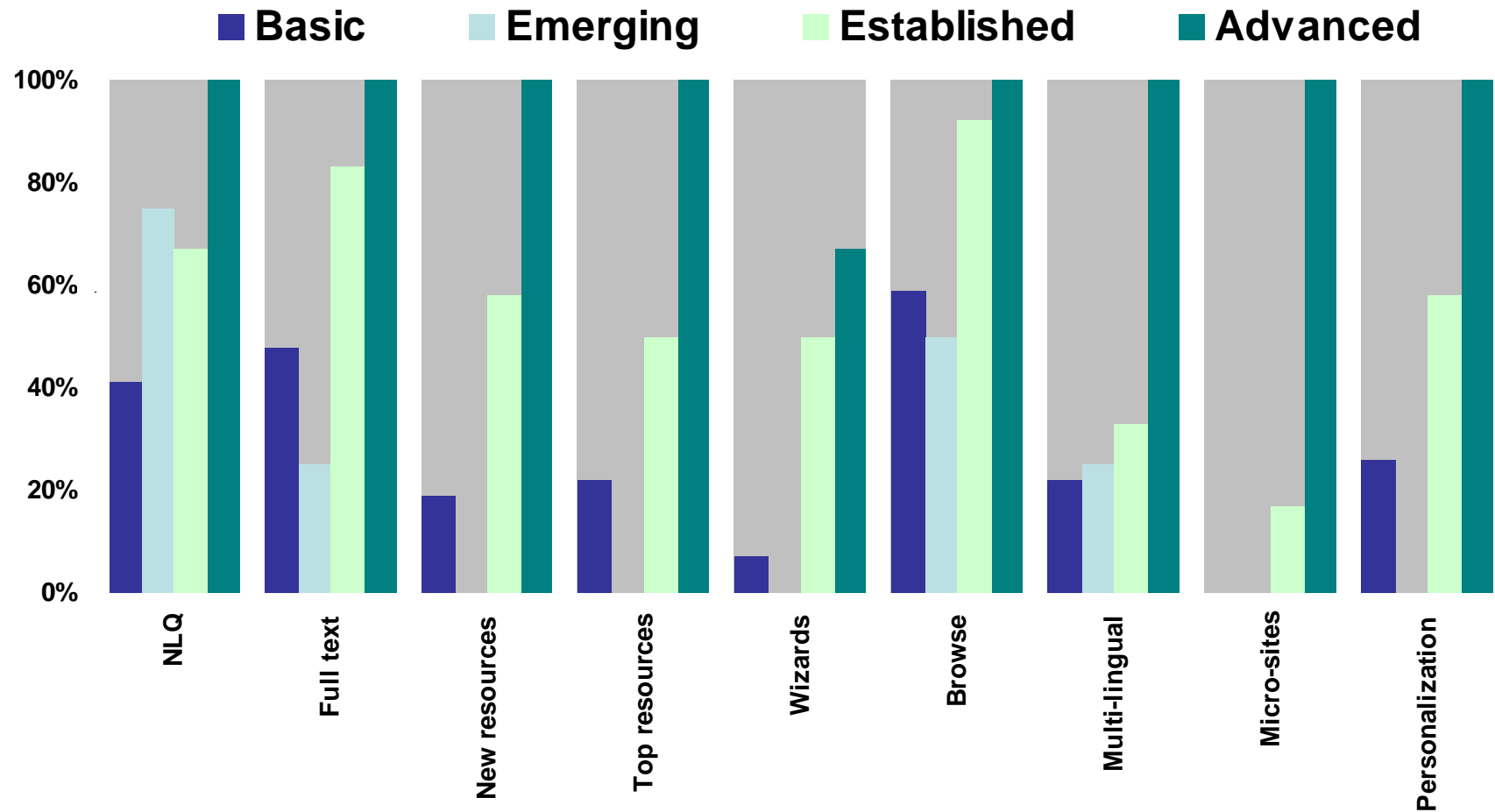
User Experience Assessment



Enhancing the User Experience



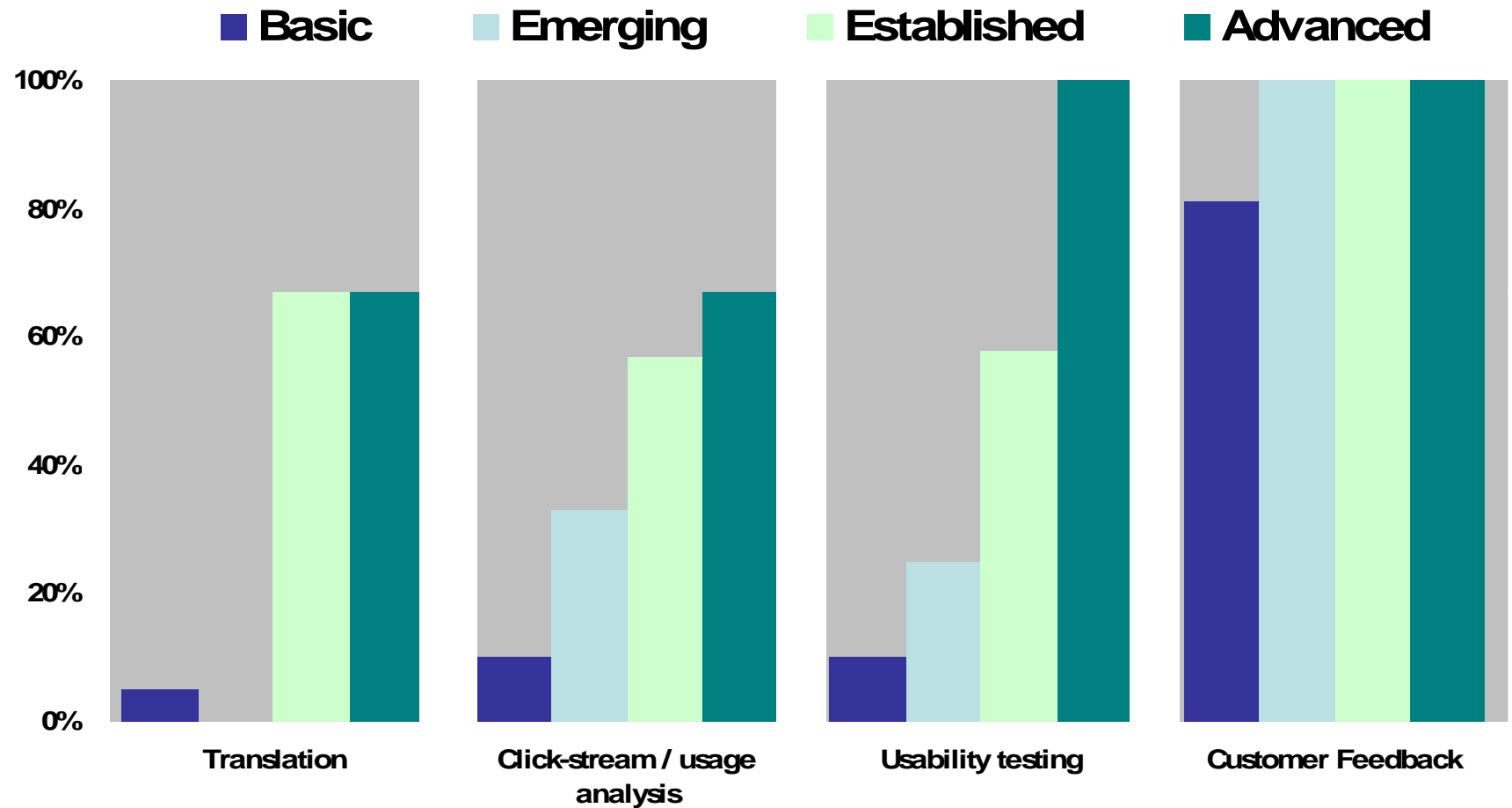
User Experience Elements Used



Methods to Refine the User Experience

- **Customer Feedback** - Established capability to measure the resources used, their effectiveness and the satisfaction of customers during their self-service session.
- **Click-stream Analysis** - Systems to track and analyze what self-service tools and resources customers use and the methods applied to navigate and find desired results.
- **Usability Testing** – Formal process to engage customers in the testing and evaluation of sites to solicit feedback to validate capabilities and/or drive enhancements.

Processes to Enhance the Experience



Content

Competency #4

Content Management

- **Technical Review** – Formal processes and assigned resources to review and verify the technical accuracy of published self-service content.
- **Content Sources** – Established relationships, systems, processes and policies to encourage the creation, enhancement and distribution of content relevant to self-service users.
- **Grammatical Review** – Formal processes and assigned resources to review the clarity and grammatical structure of published self-service content.
- **Review & Retirement** – Periodic review of published content to assure that it is up to date and accurate. Established process for retiring out of date content.
- **Quality Feedback** – Established capability to measure and improve the effectiveness of content through direct customer feedback.
- **Coverage and Performance Metrics** – Systems, metrics and processes to measure how well topics are covered, how often content is used, and the time and effort required to create content.
- **Findability** – Effort to categorize documents, add keywords and links to enhance the probability that a document will be found when appropriate.
- **Audience Appropriate** – Formal effort to review and modify content so that it can be understood and applied by the intended self-service audience.

Maturity Spectrum - Content

Advanced

- Emphasis on providing audience appropriate content
- Emphasis on making sure customers can find, understand and apply content

Established

- Well established content management processes
- Gap analysis used to provide comprehensive coverage of key topics.

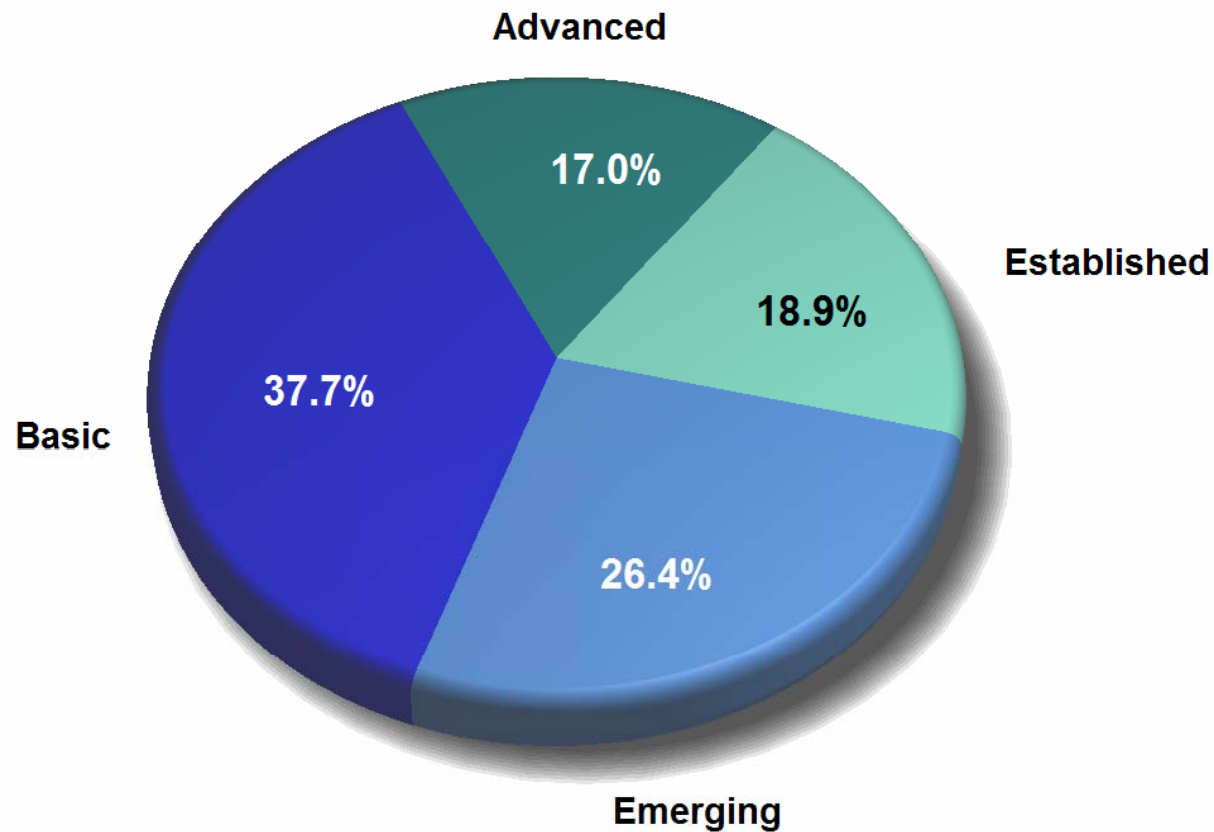
Emerging

- Defined processes for technical verification and grammatical review
- Use of feedback to better understand customer needs and content coverage and quality issues

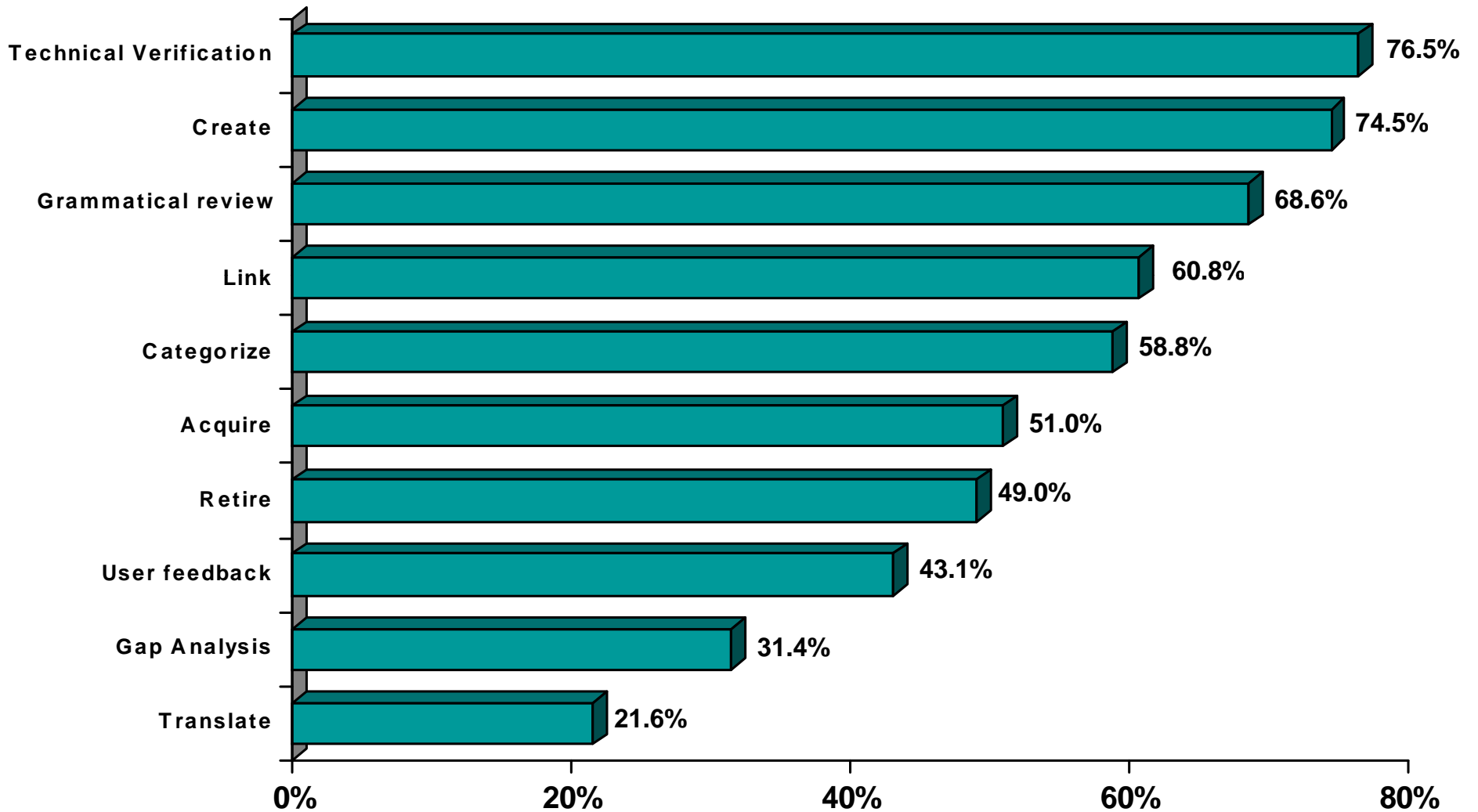
Basic

- Ad-hoc capture of content.
- No formal review processes

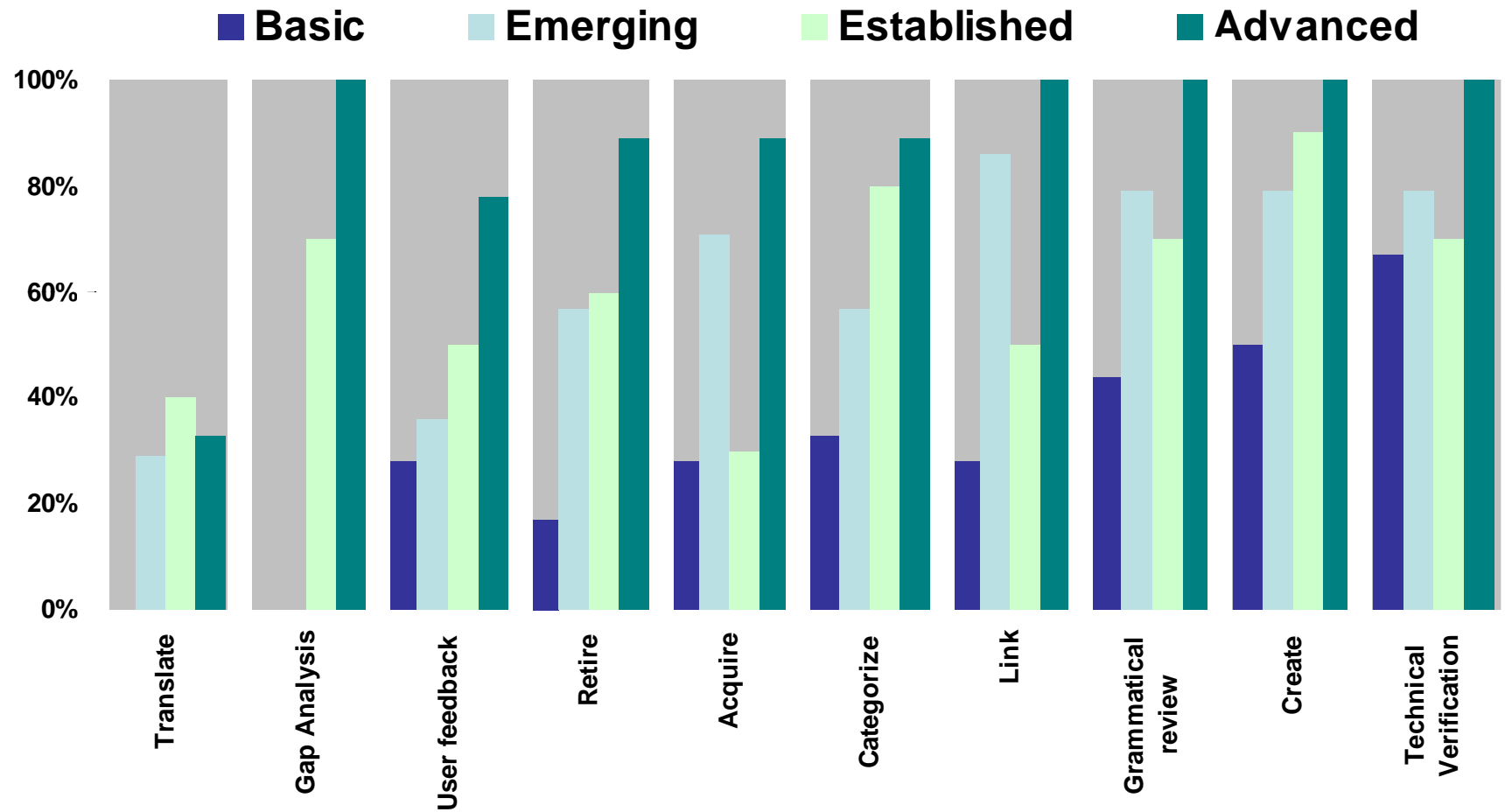
Content Assessment



Content Management Processes



Content Processes Used



Marketing

Competency #5

Marketing & Awareness

- **Awareness** – Formal methods to raise customer awareness of self-services tools and resources.
- **Self-Service Offerings Maturity** – Has reached Established or Advanced Self-Service Offerings Maturity.
- **Established Value Proposition** – Well established ability to describe how support self-service tools and resources translate into tangible customer value.
- **Reinforcement** – Established policies and procedures employed by support, sales and other customer facing employees to encourage the use of self-services.
- **Education** – Capability and resources to educate customers about the effective use of self-services including assistance by support reps, webinars, support guides, self-guided training, etc.

Maturity Spectrum - Marketing

Advanced

- Formal marketing programs designed to promote the value of self-services
- Efforts to educate customers to use self-serve tools and resources

Established

- Ability to describe benefits of self-services
- Preliminary efforts to build marketing initiatives and programs to promote the use and adoption of self-services.
- Well defined portfolio of self-services

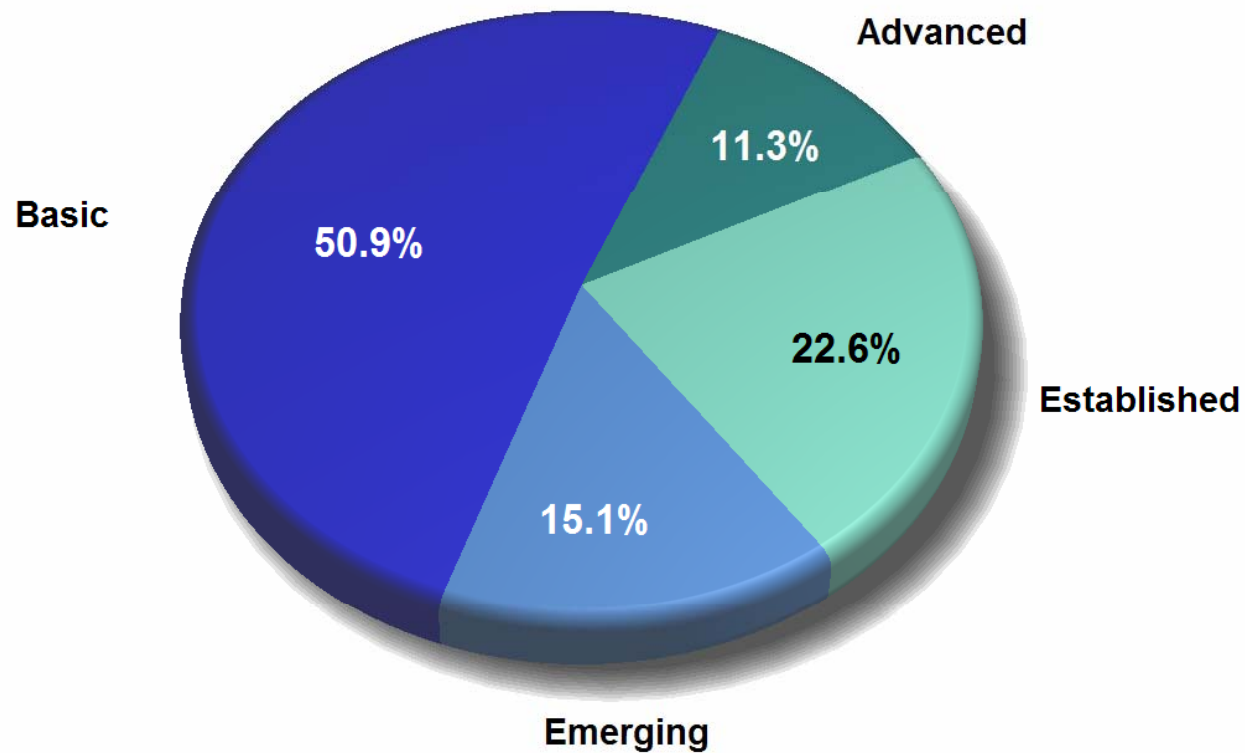
Emerging

- Formal efforts to raise awareness of self-service as an alternative to assisted support
- Enhanced portfolio of self-service offerings

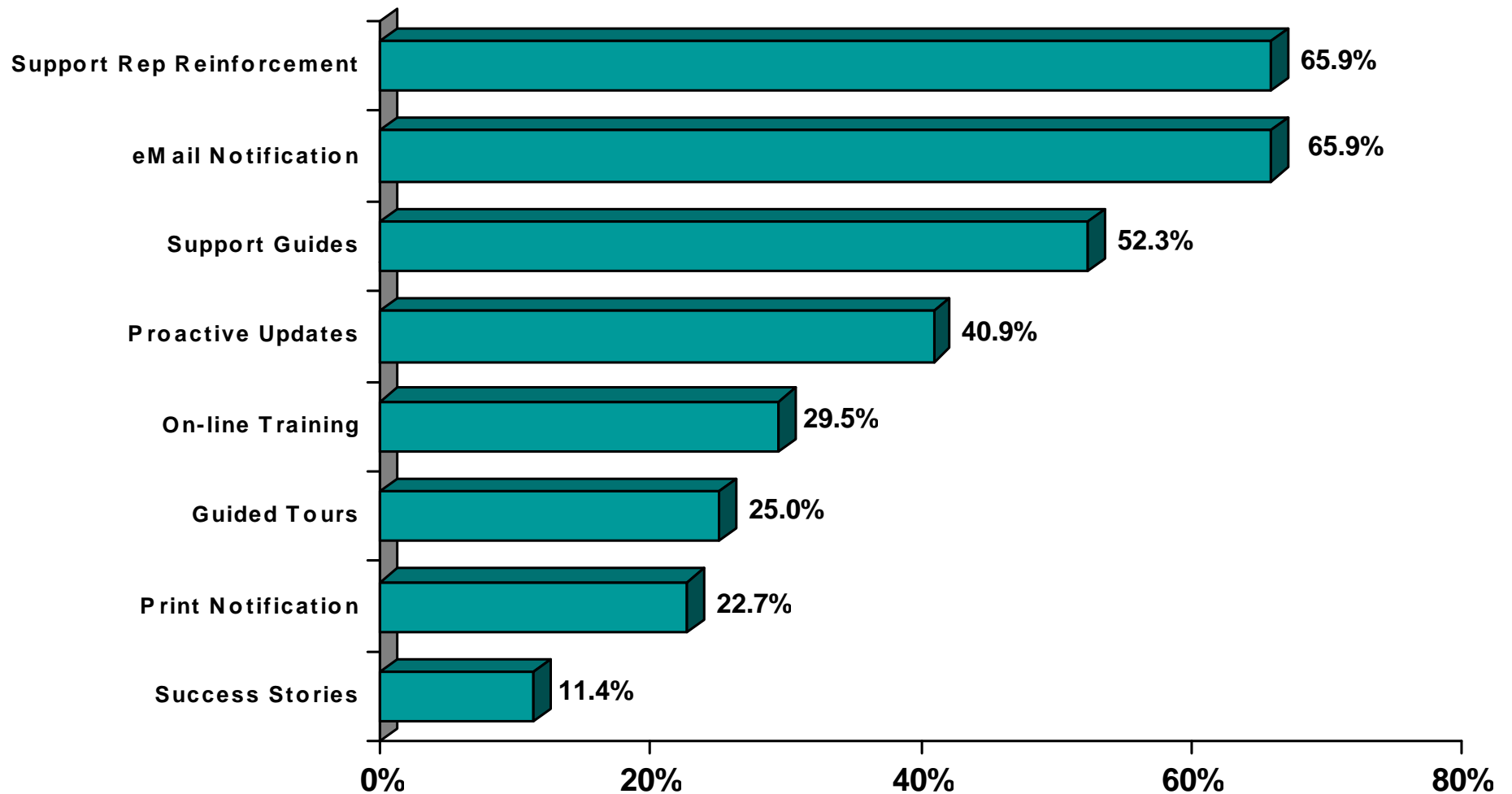
Basic

- No formal effort to promote awareness or benefits of self-service
- Basic offerings

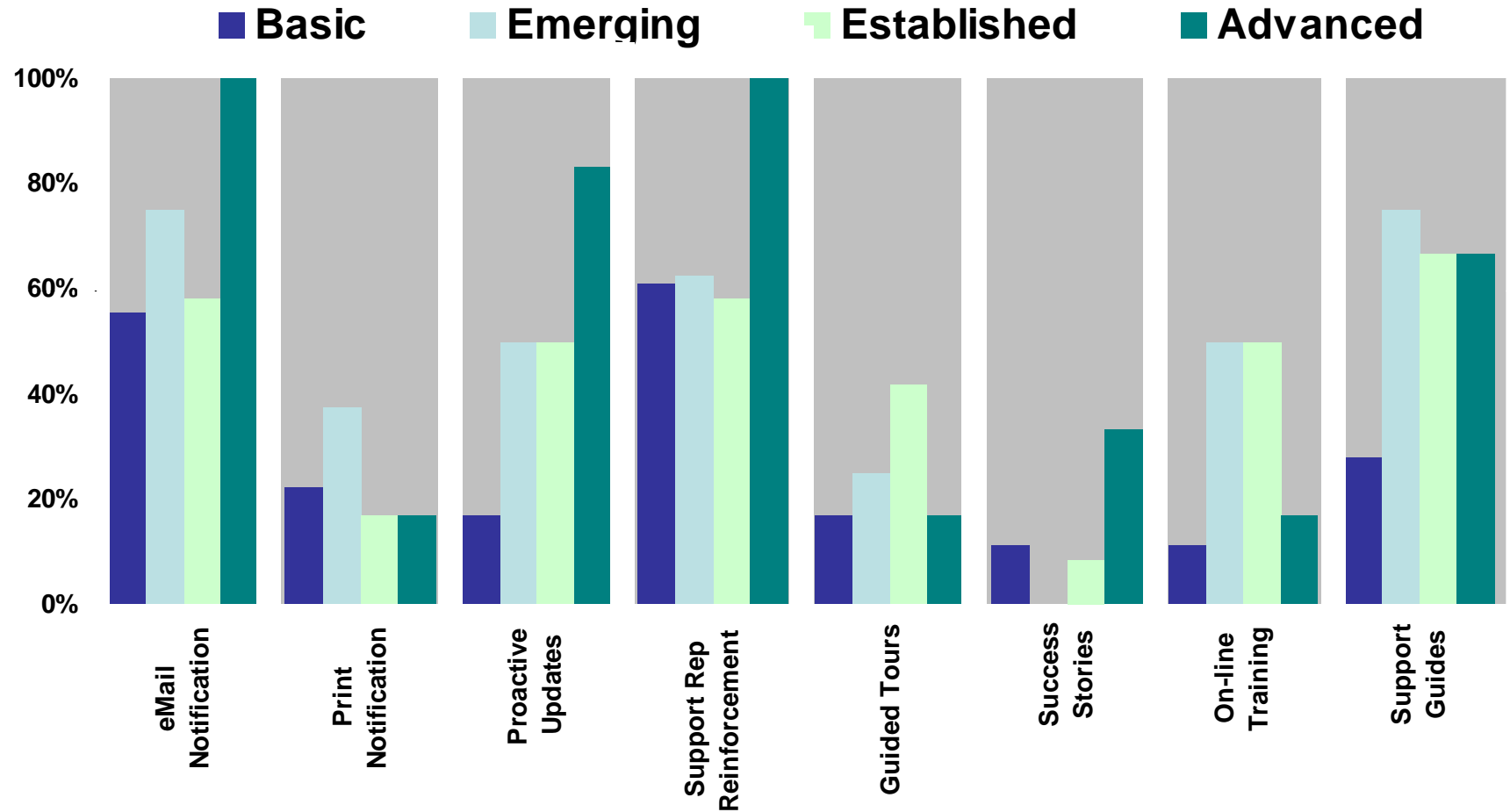
Marketing Maturity Assessment



Self-Service Marketing Techniques



Marketing Techniques Used



Measurement

Competency #6

Performance Measurement

- **Use & Adoption** – Ability to track how often customers use self-service resources through login and user session tracking capabilities.
- **Intent** - Established methods to understand the reasons why customers use self-service.
- **Success** – Systems, surveys and processes to determine if customers successfully achieve their desired results using self-service.
- **Deflection** – Capability to measure the extent to which self-services reduce support demand that would otherwise be directed to assisted support channels.
- **Content Coverage and Quality** – Systems, metrics and processes to track how well topics are covered by existing content and capability to measure the effectiveness of content through customer feedback and usage tracking.
- **Business Impact** – Systems, metrics and algorithms to measure and quantify the impact from customer use of self-service tools and resources.
- **Customer Satisfaction** – Well established means to collect ongoing customer feedback and measures satisfaction levels with self-service tools and resources.

Maturity Spectrum - Measurement

Advanced

- Comprehensive self-service performance metrics tracked
- Achieving optimal performance

Established

- Well-defined metrics
- Currently performing at or above industry standards.

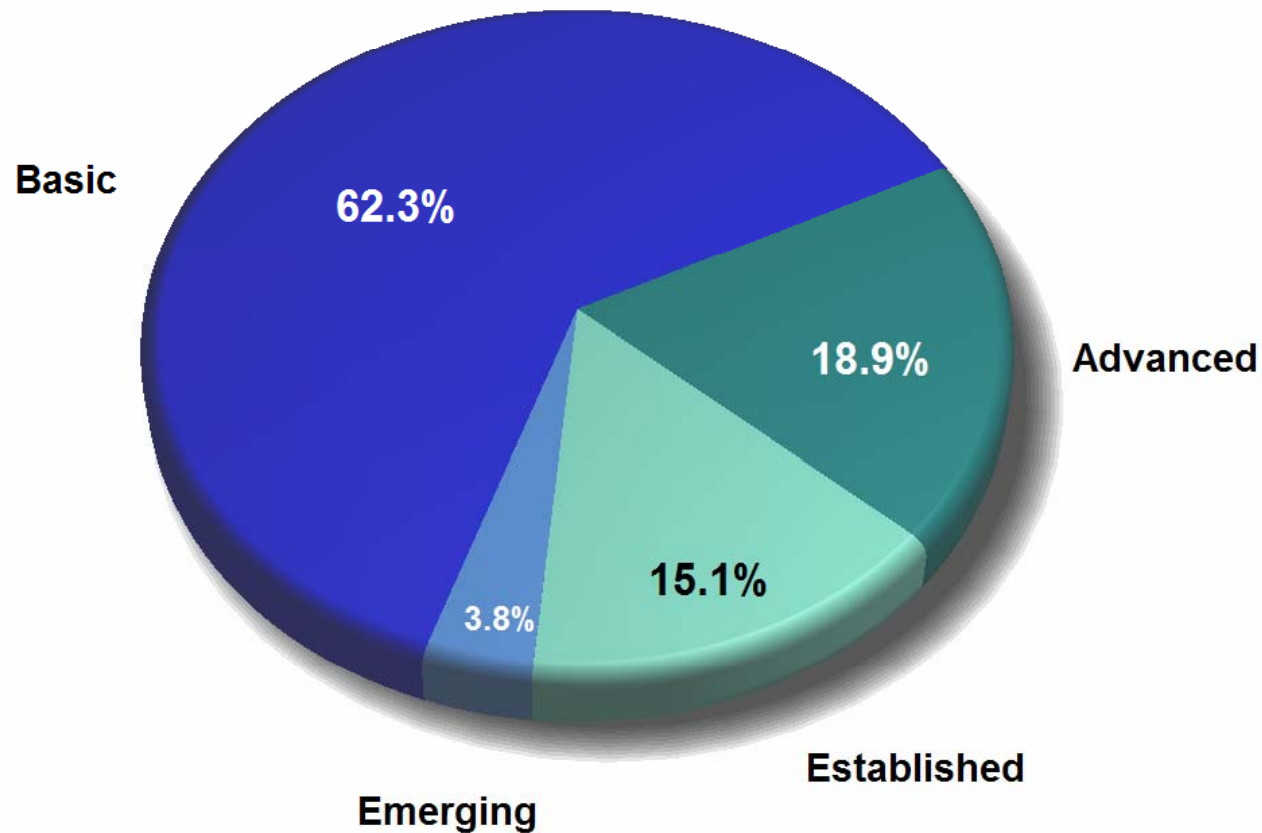
Emerging

- Ability to track basic metrics
 - Use
 - Success
 - Deflection

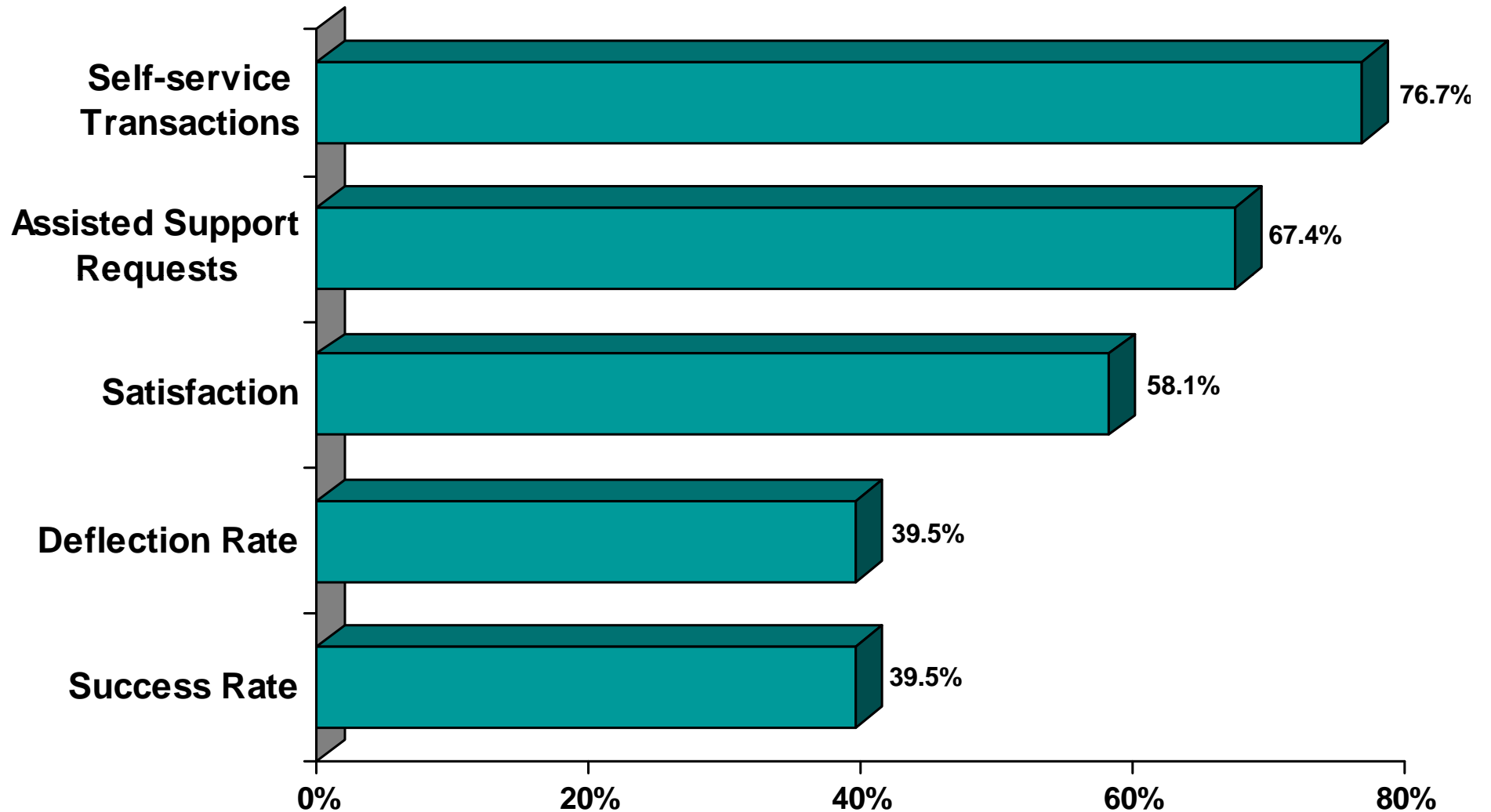
Basic

- No formal measurement

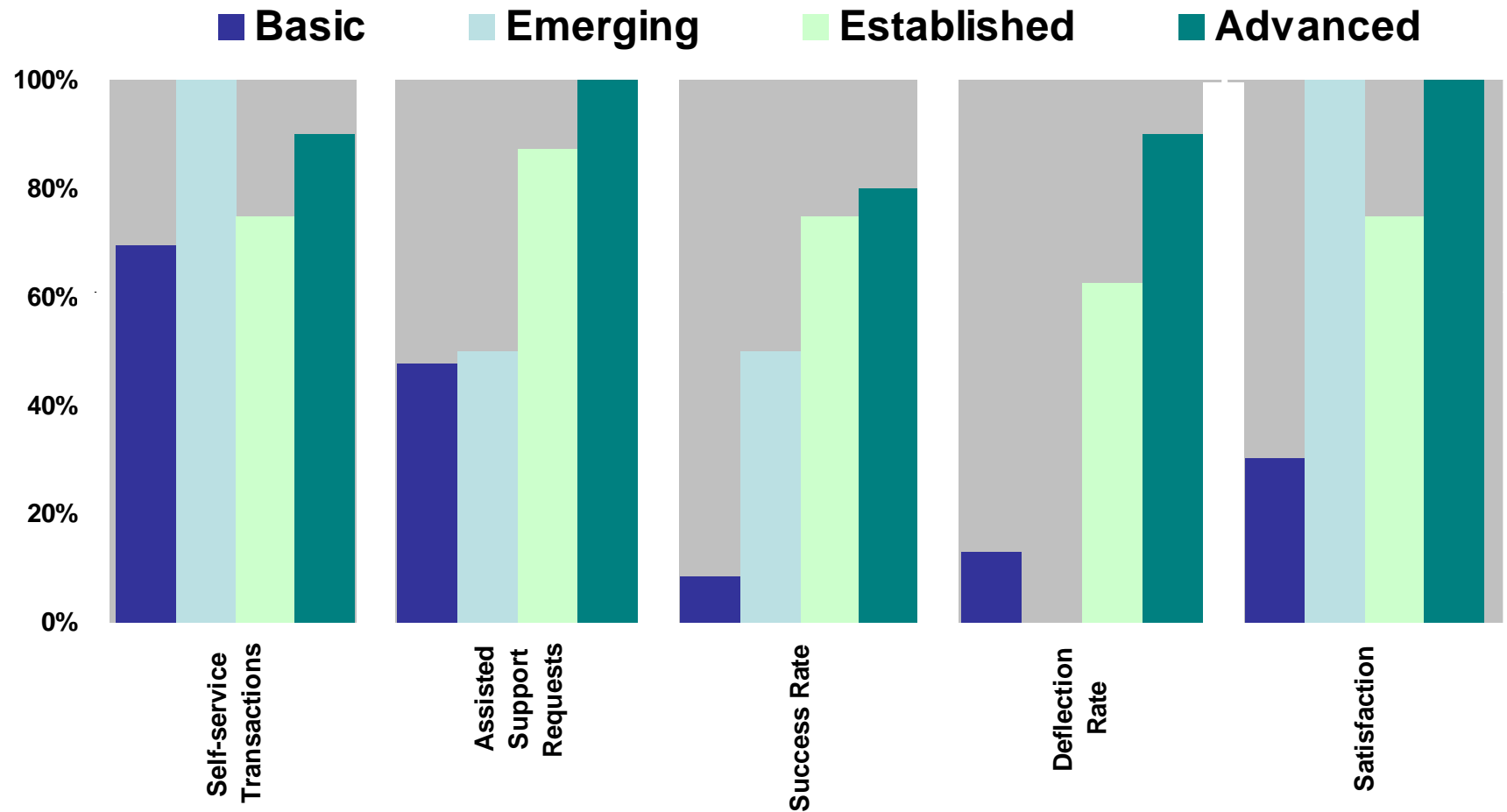
Performance Measurement Assessment



Performance Metrics



Metrics Used



Conclusion

- Maturity affects performance
- Overall self-service success is tied to 6 key competencies
- Optimal performance does not necessarily require “advanced” competencies in all categories
- Moving up the maturity curve depends on the assessment of current state