Improving Self-Service Containment From Search to Resolution
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Initiatives: Digital, Self-Service and Assisted Customer Service Channels

Customer service and support leaders are optimizing self-service capabilities to reduce assisted-service volume, but many customers bypass these channels entirely. This research outlines how and why this happens, and how best to address it as part of a comprehensive self-service strategy.

Overview

Customer service and support (CSS) leaders report that improving self-service capabilities is the best way to reduce assisted-service volume. However, this strategy misses crucial factors that result in customers bypassing these channels entirely. This research outlines three primary self-service failure points that drive assisted service volume and shows why and how this happens at each of the three points. Additionally, we provide guidance on how CSS leaders can begin to address these issues.

Key Findings

- Self-service containment rates fail to meet business goals despite continued investment in self-service capabilities.

- Many customers bypass organizations’ self-service solutions entirely and often before they reach the organization’s website.

- Self-service success is achieved by addressing three important failure points: external search, site navigation and self-service capabilities.

- External search and site navigation failures create avenues for customers to bypass self-service and contribute to a high-effort customer experience. Such failures also impact self-service containment by guiding customers to channels ill-suited to their issue.
Recommendations

In order to reduce assisted-service contact volume and increase self-service containment, CSS leaders should:

- Reevaluate self-service strategy by assessing the potential impact of external search and site navigation, not just self-service capabilities, on self-service containment.

- Reduce assisted-service contact volume by using search engine optimization (SEO) to remove or limit access to assisted-service channels in external searches and create a clear pathway to organization-owned customer service pages.

- Simplify the digital customer journey on the organization’s website by directing customers to relevant self-service capabilities and limiting, or reorganizing, access to assisted-service channels.

- Reallocate digital self-service investments toward improvements that facilitate external search and site navigation, guide customers to relevant self-service content and, where appropriate, route them to assisted service.

Customer service channels, the means through which customers find a resolution for their issues, fall into two categories: assisted-service channels that require a service representative, and self-service capabilities that enable customers to resolve issues themselves. Assisted-service contacts tend to make up a high amount of contact volume for service organizations and contribute toward one of its highest costs, averaging at $8.01 per contact. In contrast, contacts contained in self-service average at $0.10 per contact, a fraction of assisted service’s cost per contact, and often achieve a lower-effort customer experience (see Figure 1).
### Figure 1: Assisted and Self-Service Channels and Capabilities

#### Channel Matrix

<table>
<thead>
<tr>
<th>Assisted-Service</th>
<th>Self-Service</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Digital</strong></td>
<td><strong>Non-Digital</strong></td>
</tr>
<tr>
<td>Email</td>
<td>Telephone</td>
</tr>
<tr>
<td>Webchat</td>
<td>Mail/Letters</td>
</tr>
<tr>
<td>Social Media</td>
<td></td>
</tr>
<tr>
<td><strong>Digital</strong></td>
<td><strong>Non-Digital</strong></td>
</tr>
<tr>
<td>Website/Online Portal</td>
<td></td>
</tr>
<tr>
<td>Chatbots/Virtual Assistants</td>
<td></td>
</tr>
<tr>
<td>Messaging</td>
<td></td>
</tr>
<tr>
<td>Native Mobile App</td>
<td></td>
</tr>
<tr>
<td>Mobile Web App</td>
<td></td>
</tr>
<tr>
<td>Community Forum</td>
<td></td>
</tr>
</tbody>
</table>

Source: Gartner 731649-C

This sharp contrast in cost is a major incentive for service organizations, and as a result, many CSS leaders have been increasing their investments in a range of digital self-service capabilities. These include online portals and community forums, but chatbots, a more advanced self-service capability, are becoming particularly popular. In the last two years alone, the number of service functions deploying chatbots has doubled.²

Despite these increased investments, self-service containment remains a challenge for service leaders and assisted-service contact volume remains high. In a Gartner customer survey, only 13% of customers reported finding resolution wholly within self-service, the rest having interacted with a service rep at some point in their service journey.³ This number suggests self-service still has much room for improvement, and CSS leaders appear to agree. In our 2020 Gartner Priority Investments Poll, 82% of CSS leaders report they prioritize optimizing self-service capabilities as the best way to reduce assisted-service contact volume. However, this solution only addresses one problem driving self-service failure.
The reality is there is a greater problem plaguing self-service that undermines CSS leaders’ self-service investments. Many customers are circumventing self-service entirely and resorting to the phone or other assisted-service channels such as web chat and email. Not only is this happening earlier in the customer journey than many realize, but service organizations often enable it along the way. To increase self-service effectiveness, CSS leaders should continue to improve self-service capabilities but must also prevent customers from bypassing these channels in their digital service journey. This research will show where and why customers bypass self-service, how this affects self-service performance, and how to address this as part of a comprehensive self-service strategy.

The Three Failure Points Responsible for Self-Service Failure

Self-service failure refers to any instance of customers ending up in assisted service when their issue could be resolved in self-service. While some service leaders may feel inclined to factor customer channel preference into this equation, we find this has little impact on the customer experience, and resolution is the decisive factor. 1 With this in mind, three parts of the digital customer journey contribute to self-service failure, and CSS leaders must understand and address each of them as part of a successful self-service strategy (see Figure 2).

The Three Failure Points Driving Assisted-Service Volume

![Figure 2: The Three Failure Points Driving Assisted-Service Volume](image)

The three failure points are external search, site navigation and self-service capabilities. Gartner defines them as follows:
**External Search** — External search is the part of the customer’s journey conducted via external search engines such as Google or Yahoo. It only includes the customer experience with these search engines, not with any website they may later access.

**Site Navigation** — Site navigation includes any part of the customer’s journey on the organization’s website and their search for issue resolution there. Site navigation does not include accessing self-service capabilities that may be hosted on the website, such as chatbots, or parts of the website that provide a self-service capability, such as an FAQ page.

**Self-Service Capabilities** — Self-service capabilities encompass any part of the customer’s journey in which they interact directly with the organization’s self-service capabilities. This can mean a conversation with a chatbot, or carrying out a self-service transaction in an online account portal.

These three failure points are all part of a typical customer search journey in the digital age, where most customers turn to the internet as their first source of information. For many, this means starting on a search engine, landing on an organization’s website, then navigating to the organization’s customer service channels. Of course, customer journeys are almost never linear, may not follow this exact sequence, and may even move between these points many times. For instance, a customer may start on a website, engage with a self-service capability, return back to site navigation, then resort to external search to look for a third-party solution.

Fortunately for CSS leaders, while customer journeys may not always be predictable, the drivers of self-service failure at these three failure points are.

**External Search Allows Customers Easy Access to Assisted Service and to Bypass Self-Service Entirely**

To determine the degree of the problem facing CSS leaders and where each failure point contributes toward self-service failure, we analyzed the results of a survey of over 6,000 customers with a customer service interaction in the past 90 days. We asked respondents which channels they used to engage with the organization over the course of this experience, including the channel they started on, the channel they ended on and any other channels they used over the course of this journey. Using this information, we attributed the impact of the three failure points accordingly (see Figure 3).
Thirty-seven percent of customers pick up the phone to call the service center before they even reach the organization’s website. This has serious implications for an organization’s self-service effectiveness, drastically lowering the number of customers interacting with these channels to begin with. Put another way, for every customer circumventing these channels who could have self-served, their self-service containment rate is zero.

To understand how external search drives this number, a quick Google search can provide the answer. By typing the name of an organization alongside “customer service,” contact phone numbers often appear on the first page of results. Nor is this a simple oversight of less digitally mature organizations; we executed external searches across every company in the Fortune 100 and found 87% of them listed their contact number on the first results page. What’s more, this number is often highlighted prominently at the top of the page, obscuring any other service options available to the customer (see Figure 4).
Figure 4: How ThreeDoor* Shares Phone Numbers

How ThreeDoor* Shares Phone Numbers
Sample

The presence of this number creates an immediate bypass point for customers who are trying to call from the outset or just looking for any easy pathway to resolution. The risk of this happening also rises if the first page does not provide customers with relevant search results (or a clear pathway to the answer they are looking for). This first page is particularly crucial, as the results there typically generate between 71% and 92% of website traffic, suggesting customers are unlikely to look beyond this point. 4

However, external search results are more important to CSS leaders than simply their impact on driving customers to assisted service, especially if their phone number is not immediately listed. The order and relevance of search results also influences where customers will first land on the organization’s website. Considering that half of website traffic also originates from external search, 5 this has a direct impact on the next step of the customer’s digital journey and the second of the three failure points — site navigation.
Poor Site Navigation Offers More Opportunities to Bypass Self-Service and Can Foster Customer Uncertainty

The second failure point is site navigation — the customer journey through the service organization’s website but before they engage with a service channel. Site navigation encompasses the layout of individual pages and the website's means of navigation, which is how customers navigate these pages. These means of navigation are usually simple page links, but they may include internal search bars or even more advanced capabilities such as chatbots. While self-service solutions are hosted on the website, it is important to distinguish between the website as a channel for resolution and the website as a means for facilitating customer navigation. These purposes may overlap at times, but site navigation has a distinct set of factors CSS leaders must address.

First, site navigation can have a substantial impact on the success of self-service due to the sheer volume of customers who use the website. In our survey, 44% of customers reported accessing the website first before accessing an assisted-service channel. Once on the website, self-service failure is driven by how much harder service organizations make it for customers to navigate to the relevant self-service solutions than to access assisted service.

Similar to external search, the service landing page often provides immediate avenues for customers to access assisted-service channels. In fact, 29% of customers we surveyed reported that they use the website solely to locate a phone number for the contact center. For other customers, their likelihood of resorting to phone or other assisted-service channels will be determined by a combination of how much they prefer assisted service, how easy it is to access those channels and how easy it is for them to locate a relevant self-service alternative. Simply put, if the website is not easily navigated or does not have clear pathways to relevant self-service capabilities, assisted-service channels will appear as the more accessible and immediate path to resolution (see Figure 5).
Much as external search impacts the customer journey through site navigation, site navigation can have an impact on self-service containment that CSS leaders must consider carefully. If unclear site design leads customers to a self-service capability ill-suited for their issue and they engage with that channel before resorting to assisted service, this may ostensibly appear as a containment failure for that channel. This result may blur the line between site navigation and channel failure, but it should also inform and reframe how customers view their self-service strategy.

**Self-Service Capability Failures Are Also a Result of External Search and Site Navigation**
Self-service capabilities are the third and final failure point of self-service and where CSS leaders indicate they primarily focus. Specifically, failure in self-service capabilities refers to a failure of self-service containment, which means the customer could not resolve their issue in self-service and resorted to assisted service. This may be the result of self-service capabilities lacking the content or functionality necessary for customers to resolve their issue. This will always be a baseline necessity CSS leaders must address as they adjust their self-service portfolio. However, resolution and containment failures may not always result from self-service capabilities or content but rather from how they are situated within the customer journey.

In the same way external search and site navigation can either promote or discourage assisted service, the design of self-service capabilities and presentation of their content can have a similar impact. It is not enough for the relevant self-service content or functionality to be present, it must also be accessible. This is especially true for self-service capabilities that require a degree of navigation such as online account portals or FAQs.

Additionally, poor self-service design may even contribute to the volume of customers bypassing self-service in external search and site navigation. If a customer previously had a poor experience navigating self-service resources, they are less likely to engage with them a second time. This further underscores the importance of facilitating an easy experience within self-service capabilities as well as in the entire digital customer journey from search to resolution.

Understanding the impact and drivers behind each of these three failure points will help CSS leaders deliver a better customer experience and improve self-service containment. To do so effectively, CSS leaders first need a comprehensive understanding of their digital presence.

Assess Your Organization’s Digital Presence and Address Each Fallout Point Accordingly

While CSS leaders should address the three failure points as a whole, every organization should conduct a thorough assessment of its performance in each area to determine which needs the most focus. With that, each of the three failure points has its own set of considerations that CSS leaders can use to benchmark and identify gaps in their current strategy.

Optimize External Search to Reduce Assisted-Service Options and Guide More Customers to Self-Service
Organizations play an important role in influencing and optimizing search engine results. Search results will vary based on what the customer searches for and the prevalence of third-party sites, but organization-owned pages should dominate the first page of results. Given this, service organizations must make sure those results are serving two objectives — to effortlessly guide customers to their self-service portfolio and to mitigate or eliminate unnecessary assisted-service contact volume. To address the external search failure point, CSS leaders must incorporate SEO into their overall self-service approach or ensure customer service is considered in SEO if this is owned by another function.

Table 1 lists key considerations CSS leaders must understand and focus on in implementing an external SEO strategy.

<table>
<thead>
<tr>
<th>Consideration</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Understand which function owns external SEO and work together to develop a strategy that takes service into account.</td>
<td>External SEO is often owned by the sales and marketing functions of an organization, which results in a customer external search journey that is not optimized for service and support. As a result, customers in need of support may be directed to a sales resource instead, which unnecessarily complicates their journey and increases the likelihood of an assisted-service contact. CSS leaders should work with SEO-owning functions to ensure customer service needs are taken into account and the organization’s SEO strategy supports the service function’s objectives.</td>
</tr>
<tr>
<td>2. Remove or minimize service phone numbers from external search results — or at least provide the relevant ones.</td>
<td>The accessibility of the service function's phone number is the No. 1 driver of assisted-service contact volume in external search. Assisted-service channels may be necessary for some contacts, but ideally this access should be controlled as part of a process that encourages customers to self-serve. The location of the phone number in external search removes that control. Service organizations should seek to remove or reduce the prevalence of their service number in search results from Google or other search engines. At the very least, CSS leaders should ensure the number shown routes customers to their service IVR and not to another function such as sales.</td>
</tr>
</tbody>
</table>
3. Remove or minimize search results with direct access to “contact us” pages.

External search results for an organization’s customer service often include links to “contact us” pages that list service phone numbers and other assisted-service channels such as email or web chat. Service leaders should instead strive to promote search results that “deep link” customers to self-service capabilities. Chatbots in particular are an effective self-service capability in this regard, as they enable the service organization to address basic issues while identifying and routing customers with more complex issues to assisted service.

4. Guide customers to the main website service page.

While getting customers to the organization’s global homepage is a good goal, getting them directly to the main service page via deep linking, is the optimal result. CSS leaders should ensure their organization’s SEO strategy accounts for customer support searches and offers the primary customer service page over a general homepage. This recommendation assumes the guidance of the previous step: avoid bringing customers to pages that offer assisted service first if possible, or reconsider the layout of the service section of the website if this is the case.

5. Allow customers to search the site directly from Google.

Getting customers to the organization’s website should be one of the primary goals of optimizing external search. Providing customers with an embedded search bar encourages them to engage with the site from external search, and CSS leaders should include this option if possible. As with SEO strategy, ensure this search bar also accounts for and includes service pages if it is owned by another function.

Source: Gartner

Streamline the Site Navigation Experience for a Low-Effort Experience Centered on Self-Service

The organization’s website is the best opportunity for service functions to orchestrate the customer journey, as this resource is fully within the organization’s control. In addressing this failure point, CSS leaders should consider and account for the possibility that customers may be arriving at the website as a result of their external search journey or accessing it directly. However, once a customer is on the website, there should be a single aim: effortlessly guiding the customer to the best-fit service channel for their service issue. This means pushing customers who can self-serve toward the appropriate self-service capability while identifying and routing customers who actually need assisted service to those channels.

Table 2 lists the key considerations that should direct CSS leaders’ efforts to optimize customer site navigation.
### Table 2: Key Considerations for Addressing Site Navigation

<table>
<thead>
<tr>
<th>Consideration</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The service section of the website should be noticeable immediately from</td>
<td>An effortless site navigation experience means customers should be able to immediately locate which part of the website addresses service-related issues upon landing. This helps build customer confidence in further self-service navigation.</td>
</tr>
<tr>
<td>the global homepage.</td>
<td></td>
</tr>
<tr>
<td>2. The main service page should be as clean and simple as possible.</td>
<td>Once on the service landing page, it should be easy for customers to identify the next step they should take. This can be facilitated with broader help categories that help customers narrow down the right page to pursue or by providing additional “top issues” other customers frequently search for answers to.</td>
</tr>
<tr>
<td>3. Assisted-service channels should be escalation options, not first options.</td>
<td>Self-service capabilities should be the first point of contact for customers when possible, with assisted-service channels provided only if necessary. For example, an FAQ can provide escalation options with a simple, “Did this answer your question?” prompt. A chatbot can be used to route customers intelligently to knowledge-based articles or to connect them with a service rep if it determines the issue is not suitable for self-service.</td>
</tr>
<tr>
<td>4. Redesign the website to introduce the customer service phone number at the</td>
<td>Service organizations may still want to provide customers easy access to assisted service, but these options should be introduced strategically, ideally after the customer need is identified. However, search engines such as Google or Yahoo can lift a service organization's phone number, as long as it appears in any readable form on the website, and display it in search results. Effectively, this removes the option for CSS leaders to orchestrate this experience. While service organizations may not want to remove access to assisted service completely, they can still limit its appearance in external search by hiding their phone number behind links or restructuring their assisted-service options around callbacks so the organization needn't list its number on the website.</td>
</tr>
<tr>
<td>right time in the customer journey.</td>
<td></td>
</tr>
</tbody>
</table>
5. Provide FAQ recommendations or autofill results in internal search bars.

Guiding customers to the right channel involves providing the right information, clear pathways to that information and reassurance that they are on the right pathway. Autocomplete results can help provide that reassurance to customers by reducing uncertainty. The same guidance applies to FAQs, which can help customers quickly spot a common issue or articulate the issue for them in a way that makes it clearer.

6. Keep the site navigation journey as simple and as linear as possible.

A simple and linear site navigation journey helps guide and contain customers in self-service. This means reducing the number of options available to customers and strategically guiding them to where the service organization wants them to go.

Source: Gartner

**Adjust Strategy for Self-Service Capabilities With the Digital Search Journey in Mind**

Continuing to improve digital self-service containment will remain an important objective for CSS leaders. More self-service volume means more opportunities to contain customers there. However, in addition to accomplishing this by improving the capabilities of these channels, CSS leaders should also approach this objective in light of the other two failure points in the customer search journey.

Table 3 lists the key considerations that can help realign self-service capability improvement strategies with this customer journey.

**Table 3: Key Considerations for Self-Service Capabilities**

<table>
<thead>
<tr>
<th>Consideration</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Reduce and simplify redundancies in self-service</td>
<td>Certain self-service capabilities, particularly FAQs, are navigated very similarly to websites and can benefit from the same optimized site navigation principles. Collapsing redundant articles and reorganizing the knowledge articles that make up an FAQ will provide a better experience for the customer and be easier to structure a customer's site navigation journey around.</td>
</tr>
</tbody>
</table>
2. Orchestrate the customer journey from the self-service portfolio then move backward. While a customer journey may move from external search to site navigation to self-service capabilities, the service leader should orchestrate this experience starting from the opposite direction. CSS leaders should organize and assess their self-service capabilities first, then optimize their website and the site navigation experience around these. This in turn helps determine the best way to tag and optimize how the website appears in external searches.

3. Consider the role of your self-service capabilities in facilitating site navigation. Self-service capabilities such as chatbots are blurring the lines between the customer search journey and the customer service journey. Chatbots can act as a means of site navigation by guiding the customer to the appropriate self-service capabilities.

4. Use self-service capabilities as a gatekeeper to assisted service. Just as self-service capabilities can assist the customer site navigation journey, they can also act as a gatekeeper for contact volume by catching customers, assessing their issues and routing them to assisted-service channels where necessary. This function is also well-suited to a chatbot but may also be carried out by a series of question prompts in a web portal or an FAQ.

Source: Gartner

**Conclusion**

To optimize self-service performance and reduce assisted-service volume, CSS leaders should orchestrate customers’ digital journeys through external search, site navigation and self-service capabilities. Service organizations should conduct a careful assessment of their digital presence at these three failure points to determine which area has the most pressing need, but they should ultimately take a holistic approach to all three. This means removing or mitigating easy access to assisted-service channels, making the path to self-service simple and easy to navigate, and optimizing self-service capabilities with these principles in mind. While self-service containment will ultimately rest upon those channels’ ability to resolve customer issues upon arrival, getting customers to those channels is a critical part of this strategy.
Recommended by the Authors

The Costly Mistake of Confusing Digital and Self-Service Channels

This research lays out the key differences CSS leaders need to understand when directing investments between digital and self-service channels.

Delivering on the Digital Promise

Our signature research equips CSS leaders with the insights and guidance needed to shift to a self-service dominated portfolio that reduces live contact volume and improves the quality of customer service interactions.

Why Customers Abandon Self-Service

Understand why customers abandon self-service and how to design these channels and capabilities to mitigate channel switching.

Driving Customer Retention and Loyalty Through Service

This 2020 signature research shows CSS leaders how to pivot from mitigating disloyalty by reducing effort to increasing loyalty through value enhancement.

About This Research

This research was conducted in consultation with Gartner's experienced customer service and support analysts. It is also based on analysis of data from our 2020 Gartner Value Enhancement Survey, in which we asked over 6,000 customers to report on a recent customer experience interaction and the channels they utilized to engage with that organization.
Endnotes

1 Delivering on the Digital Promise

2 Technology Trends in Service 2020

3 2020 Gartner Loyalty Through Customer Service and Support Survey

4 The Value of Search Results Rankings, Forbes

5 Channel Performance Report, Brightedge (download requires free registration)

6 2014-2019 Gartner Effortless Experience Survey

Recommended For You

Why Customers Abandon Self-Service
How to Contain Customers in Self-Service
Focusing on Customer Preference Is a Trap
Self-Service Showcase: Designing for Containment
The Costly Mistake of Confusing Digital and Self-Service Channels

Supporting Initiatives

Digital, Self-Service and Assisted Customer Service Channels
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