Self-service for field service: how to turn your customers into fixers

When a piece of equipment goes wrong, what's the first thing you do? Contact your supplier and ask them to fix it? Or Google it and try and fix it yourself?

If you're like most people, you take the "Google it" option. For some it's because they don't like talking to other people—YouGov published a [study](#) revealing the reluctance of those aged 18 to 34 to talk to, well, *anyone* as being a key trend. But there's a more likely reason. Simply, it's often quicker to fix a problem yourself than wait for someone to do it for you.

We're living in a do-it-yourself age where everybody wants to find their own answers and solve their own problems. [Research](#) shows an overwhelming preference for self-service: 81% of customers across all industries attempt to take care of things themselves before reaching out to a human being. Self-service is becoming hard-wired into all aspects of our lives, whether it's using apps to shop, bank or order food, buying train tickets from machines instead of ticket staff, or going through the self-checkout at the supermarket.

That's why there's increasing demand for comprehensive online portals that give today's savvy and self-reliant customers a bigger role in their own service experiences. This article looks at the benefits of better self-service and how you can go about building a powerful portal to help your customers help themselves.

From "I want more control, please" to "I'll fix it myself, thank you"

Field service—the industry of "fixers"—was founded on the concept of someone else coming and fixing your broken machine. Self-service in this industry has traditionally been about giving customers more control over this process. So, enabling customers to log faults, schedule service visits, order supplies, view job and account information,

move assets etc. But customers already expect this level of control over what their fixers do. Now they want to become the fixers themselves.

The best thing for a field service provider to do is let them. Self-service in this industry is now about giving customers the ability to diagnose and fix equipment issues without having to talk to their provider. That means allowing them access to a powerful and intelligent customer service portal with a rich knowledge base through which to do so.

Of course, self-service isn't just great for customers. Providers benefit extensively as well. Self-service reduces the amount of inbound service requests, enabling first-line support agents to focus on answering the tougher questions. [Gartner](#) says that a good self-service solution can reduce customer support costs by up to 25%. And the more tools and knowledge you give your customers to solve their problems, the more you'll save. An extensive knowledge base also helps the agents themselves, enabling them to find answers to customer questions quicker, thereby improving their own productivity.

However, despite customer demand for self-service and the obvious benefits of it, the [Zendesk Customer Experience Trends Report 2019](#) reveals that only 20% of companies currently offer it. This slow rate of adoption presents a huge opportunity for field service providers to get an edge over their competitors. That's if they invest in a customer service portal that truly delivers the control, insights and seamless experience that customers are hungry for.

Building a knowledge base

Support teams have a lot of knowledge about the issues customers face and how to solve them. But you can't harness that knowledge efficiently without an intelligent self-service portal with a knowledge base. You're likely to have customers who come to you with the same problems, leading your support teams to have to keep repeating the same

advice. Meanwhile your customers have to wait longer for a resolution, potentially losing business while they do so. The point of a knowledge base is to turn that advice into an article that customers can find and use to resolve the issue themselves. It's about building a library of FAQs, tutorials and other relevant information and resources to take care of common or routine queries so your agents don't have to.

Customer knowledge is important, too. It's not just your support agents who have good ideas. Your customers are the ones using your equipment all day, every day and sometimes the more complex questions are best answered by peers in their industry. In addition, customers have different perspectives on how your equipment is best used and it's important to capture their experiences for other customers who are just getting started.

An online customer community or forum is, therefore, becoming an essential component of a good self-service solution. It helps customers share first-hand insights into what works and what doesn't and discover solutions that perhaps your support agents might not have thought of. Moreover, an online community gives customers a voice, keeps them engaged with your brand, and strengthens their connections with your company.

Building and maintaining a knowledge base and online community can be a daunting task. It takes time and lots of feedback to create enough self-help articles to really empower your customers, and these need to be continuously updated and built on as products and services change. Online forums need to be managed and moderated. And it's essential that your knowledge base is integrated seamlessly with your helpdesk, so that if a customer can't find an answer, they're put in touch with an agent who can help as quickly as possible.

Zendesk: a best-of-breed solution for self-service and customer engagement

Asolvi has been looking at how we can empower providers in the field service space to improve their customer service. Our field service management solutions improve the customer experience by giving customers more control and transparency, and by enabling service teams to work more efficiently. But full customer autonomy is what providers are now after. The future of customer service is self-service.

To fill this gap, we've partnered with Zendesk in order to offer a best-of-breed solution for self-service, support and customer engagement. Enhanced with artificial intelligence (AI), the Zendesk platform makes it easy to create a customisable help centre with an extensive knowledge base that taps into your company's institutional knowledge and puts it to work. You can also create an intuitive and inviting online community forum to strengthen your customer engagement and empower your customers to help each other. And you get analytics tools for measuring the performance of your help centre, e.g. resolution times and the percentage of issues resolved by staff versus those resolved by the help centre. This helps you understand if your knowledge base is effective and where it could be improved.

Upgrading your helpdesk

Self-service is all well and good, but if the customer can't fix the problem, that's when your first-line support team has to step in.

In addition to being a powerful platform for self-service, Zendesk is an upgrade on your helpdesk. That's because Zendesk is more than just a helpdesk. It's a full-scale customer service and engagement platform that offers omnichannel support. That means customers can reach you in whichever way is convenient for them—phone, email, chat, social media and so on—and your agents can continue the dialogue across any channel. This is thanks to a single, dynamic and intuitive interface that integrates all channels and interactions and is built with both customers and first-line agents in mind.

The Zendesk support platform is also fully integrated with the Zendesk self-service portal and knowledge base. This enables self-service activity to be tracked and sent to the helpdesk so that support agents can analyse the activity and solve tickets faster. Moreover, instant knowledge base access allows them to point customers in the direction of self-help articles they may have missed, or identify areas where the content could be improved.

Start with some goals

Whether you're just starting to think about launching a self-service portal or you're looking for an improvement on the one you have, the first step is defining what you want to achieve. Do you want to reduce the number of support tickets your agents receive? Do you want to foster stronger relationships between customers and employees?

Defining your purpose will help you pinpoint the ideal self-service solution for your company. It could be that you're looking to create a knowledge base centred on documentation, e.g. guides and instruction manuals. Alternatively you might be looking to give your customers the opportunity to browse through a forum, read about the experiences of other customers, and learn about different ways of achieving an outcome. In which case you want something more community-driven.

Fortunately, Zendesk allows you to set up a community-driven forum, a context-oriented encyclopaedia or something more in the style of an instructional user guide. Better still, it could be any combination that works for your business.

Conclusion

Customer expectations are high and patience is thin. Market research by Accenture shows that a majority of customers (52%) will switch providers due to poor customer service, and an even bigger majority (68%) won't come back. At the same time, Forrester Research finds that although 84% of companies want to be customer experience (CX) leaders, only one in five actually deliver good or great CX.

Customer service was traditionally perceived as a cost centre. But then, so was field service. That's all changed. In a service-driven world, field service and customer service are the elite. Field service organisations are realising how profitable they can be, particularly with a powerful field service management system at their fingertips. Now the focus is on customer service—specifically, a new kind of customer service. The kind where, instead of solving your customer's problems quickly, you're giving them the tools to do it themselves.

Asolvi has partnered with Zendesk in order to bring you a best-of-breed product to help your customers self-serve, and if they can't, get help quickly from your support teams on any channel. To learn more about expanding your self-service capabilities and taking your customer engagement to the next level, please contact sales@asolvi.com.