

Measuring Self-Service Success

Amy Dotson, Smarsh
Christina Roosen, Akamai
Arnfinn Austefjord, Consortium

September 21, 2023



CONSORTIUM
for Service Innovation™





CONSORTIUM
for Service Innovation™

Reimagining the way we work together

Non-profit alliance of companies

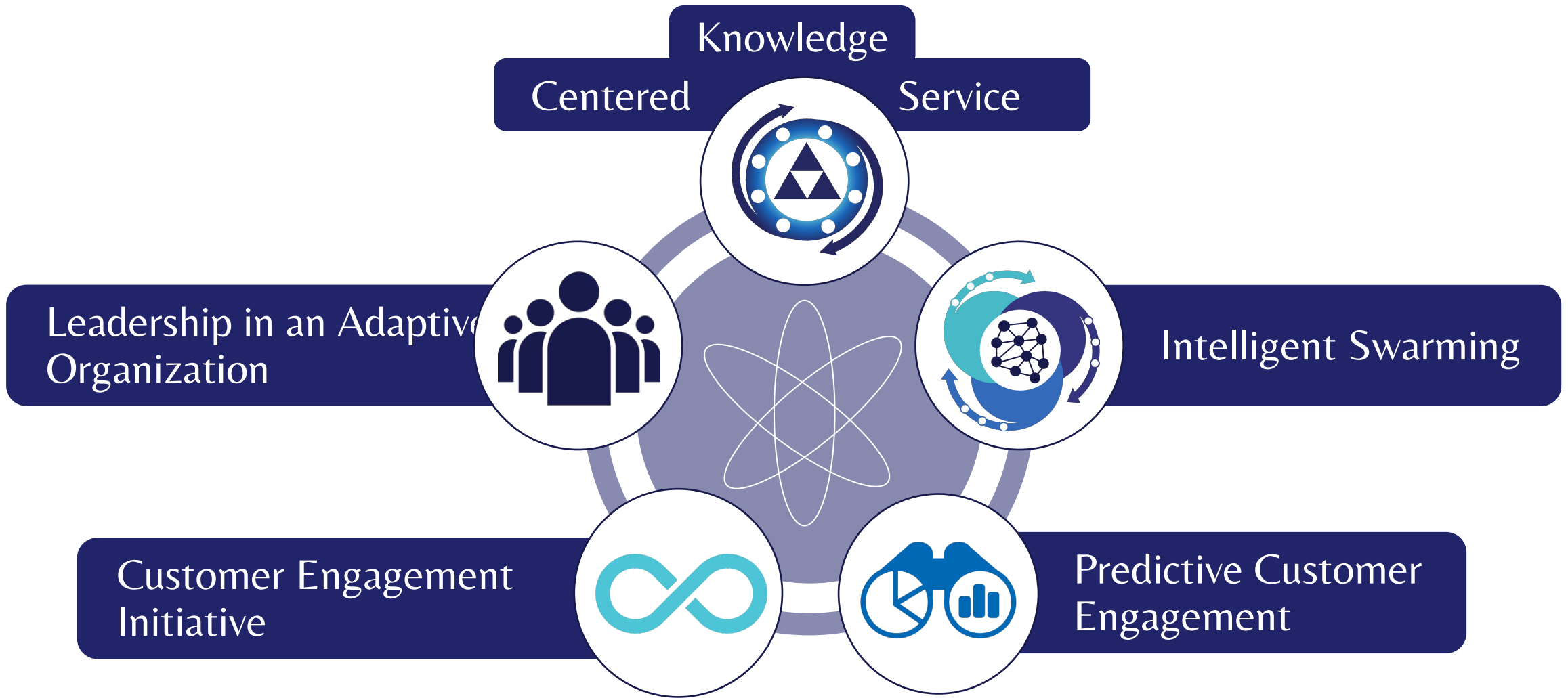
A strategic think tank pursuing innovative ways
to improve engagement

Consortium Members

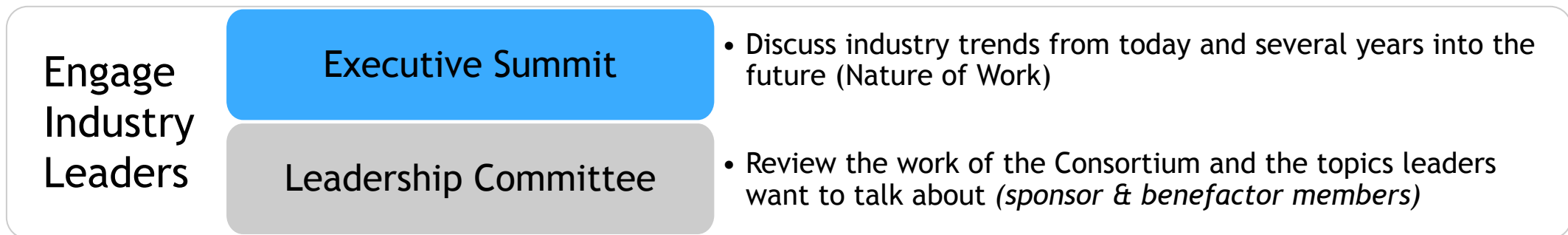


Sponsor & Benefactor Members

Organizing the Work



Member Engagement



Upcoming Events



Public Event | Virtual



Oct 19th | 8-10 AM Pacific



KCS in Action

KCS Roundtables

Small Group Discussions



CONSORTIUM
for Service Innovation™



Public Event | Virtual



Dec 12 | 8-9 AM Pacific



2023 Year in Review



CONSORTIUM
for Service Innovation™



Public Event | Virtual



Nov 9th | 8-10 AM Pacific



KCS in Action

GenAI for KCS:
Proven Use Cases



CONSORTIUM
for Service Innovation™

Explore the intersection of
empathy & AI-assisted
knowledge sharing



CONSORTIUM
for Service Innovation™

2024 MEMBER SUMMIT

April 9-11
Fort Worth, Texas

Measuring Self-Service Success

Amy Dotson, Smarsh

Christina Roosen, Akamai

Arnfinn Austefjord, Consortium

September 21, 2023



CONSORTIUM
for Service Innovation™



A team formed to define the Self-Service Measurements

Representing many Member companies



coveo™

ptc

Hewlett Packard
Enterprise



DELL
Technologies

servicenow™

ORACLE®

sage

BILZARD®
ENTERTAINMENT



smarsh



Akamai

AARP®

ciena®

mindtouch

dbkay
+associates

A team formed to define the Self-Service Measurements

Thank you to all of the participants



Kimaya Agarwal
Kris Anderson
Richard Bekolay
Monique Cadena
Justin Calhoun
Peter Case
Bonnie Chase
Matt Chinn
JC Coynel
Janine Deegan
Keri Detrick
Amy Dotson
Ross Edgecombe

Jeff Elser
Sara Feldman
John Fronius
Rosalie Girard
Kristin Hunter
David Kay
Aditya Kulkarni
Jennifer MacIntosh
Theresa Manzo
Patrick McBride
Sabrina Meditz
Sarup Paul

Laurel Poertner
Bit Rambusch
Christina Roosen
Brad Smith
Steve Springer
Devra Struzenberg
Dave Thorp
Heidi Wagstaff
Jacob Watts
Arnfinn Austefjord
Kelly Murray
Matt Seaman
Greg Oxtan

Customer Issues - A Definition



Usability

Interoperability

Defects

Installation

Configuration

New Functionality

How To...

A large, stylized purple cloud shape with a gradient from light purple at the top to dark purple at the bottom, serving as a background for the definition text.

***Anything that inhibits
or prevents the user from getting their
work done.***

Customer Demand Model

Volume of Activity Per Month



An example based on industry data....

- If our case volume per month in assisted = 10,000 ... then
- Our communities and social volume = 300,000
- Our Self-service = 100,000
- For a total of 410,000/month
- Which means.... ***Less than 3% of the total customer demand ever becomes a case!***

Service Engagement Measures Template



Measure	Self-Service Engagements	Agent Assist Engagements	Totals	Good, Better, Best
Number of engagements	90,000	10,000	100,000	
% of total engagement demand (volume)	90%	10%	100%	
% channel success	50%	90%		
Number of successful engagements	45000	9000	54000	
% of total successful engagements	83%	17%	100%	
Avg length of successful engagement (minutes)	5	380	68	
Cost per successful engagement (\$)	\$0.50	\$75	\$12.92	
Customer Satisfaction	4	4		
Customer Effort	4	4		
Customer Loyalty	-	-		

Number of Engagements



Service Engagement Measures Phase I: Example template in second tab				
Enter data in yellow cells				
	Measure	Self-Service Engagements	Agent Assist Engagements	Totals
				How are you measuring self-service? (good/better/best or add notes)
	Total number of attempted engagements	1,432,000	1,183,214	2,615,214
	% of total engagement demand (volume)	55%	45%	100%
Traffic & Success	% channel success	31%	89%	Better
	Number of successful engagements	443920	1053060.46	1496980.46
	% of total successful engagements	30%	70%	100%

Good

Better

Best

Number of session or views per month.

Number of session per month that include at least one content view

Same as better and includes failed attempts to view content

% Channel Success



Service Engagement Measures Phase I: Example template in second tab				
		Enter data in yellow cells		
	Measure	Self-Service Engagements	Agent Assist Engagements	Totals
	Total number of attempted engagements	1,432,000	1,183,214	2,615,214
	% of total engagement demand (volume)	55%	45%	100%
Traffic & Success	% channel success	31%	89%	
	Number of successful engagements	443920	1053060.46	1496980.46
	% of total successful engagements	30%	70%	100%

How are you measuring self-service?
(good/better/best or add notes)
Did "Good" Metric first and it was a 68/32 ratio – didn't represent sage. Used "Better" metric

Better

Good

Better

Best

% of sessions/visit without request for assistance OR number of views divided by an assumed avg number of views/issue.

Survey "were you successful?" percent "yes", apply confidence interval and correlate with "good".

Survey plus sophisticated clickstream analysis (percent of patterns that represent success or failure).

Survey



Help improve your online experience

After your visit today, would you like to take
3 minutes and tell us about your experience?

Yes >

No thanks

Did you find what you needed today?



Yes, I was successful

☐

No, I was not successful

☐

What Sage product do you own?

☐ Sage One

Why did you come to the knowledgebase?

- ☐ Solve a problem
- ☐ Download my product
- ☐ Learn how to use a product or feature
- ☐ Find information about installation
- ☐ View product manuals
- ☐ Download my forms
- ☐ Other (please specify)

Calculating Your Confidence Interval



<http://www.surveysystem.com/sscalc.htm>



Creative Research Systems
Your Complete Survey Software Solution Since 1982

Call Today for Your FREE Consultations (70

HomeAboutProductsServicesDownloadsResearch AidsContact UsFree QuoteBlog



THE SURVEY SYSTEM

Customize Your Surveys with Our Packages

Request Your Free Quote



Research Aids

Research Aids

- Sample Size Calculator
- Sample Size Formula
- Significance
- Survey Design
- Correlation

"Best Survey Software"



TopTenReviews selected The Survey System as the Best Survey Software.

"The Survey System gains our highest marks for survey creation, analysis and administration methods, making it the best survey software in our ranking... This is the only product in our lineup that offers all features and tools we considered. For these reasons, The Survey System earns our TopTenREVIEWS Gold Award." [Read More](#)

Sample Size Calculator

This Sample Size Calculator is presented as a public service of Creative Research System [software](#). You can use it to determine how many people you need to interview in order to that reflect the target population as precisely as needed. You can also find the level of precision have in an existing sample.

Before using the sample size calculator, there are two terms that you need to know. These **confidence interval** and **confidence level**. If you are not familiar with these terms, [click](#) learn more about the factors that affect the size of confidence intervals, [click here](#).

Enter your choices in a calculator below to find the sample size you need or the confidence you have. Leave the Population box blank, if the population is very large or unknown.

Determine Sample Size

Confidence Level: ☒ 95% ☐ 99%

Confidence Interval:

Population:

Sample size needed:

Determining a Sample Size



Determine Sample Size

Confidence Level: ☒ 95% ☐ 99%

Confidence Interval:

Population:

Sample size needed:

Find Confidence Interval

Confidence Level: ☒ 95% ☐ 99%

Sample Size:

Population:

Percentage:

Confidence Interval:

- Confidence interval = margin of error.
- Population = Sessions
- A sample size of 2,397 completed surveys needed to have a 95% confidence level +/- 2%.

Finding Your Confidence Interval



Determine Sample Size

Confidence Level: ☒ 95% ☐ 99%

Confidence Interval:

Population:

Sample size needed:

- Sample Size - # of times the survey was completed
- Population is the # of sessions
- Percent is success rate
- I'm 95% confident that my success rate is 31% +/- 1.67%

Find Confidence Interval

Confidence Level: ☒ 95% ☐ 99%

Sample Size:

Population:

Percentage:

Confidence Interval:

Average Length and Cost per Success



Measure	Self-Service Engagements	Agent Assist Engagements	Totals
Number of engagements	#	#	=
% of total engagement demand (volume)	=	=	=
% channel success	%	%	
Number of successful engagements	=	=	=
% of total successful engagements	=	=	=
Avg length of successful engagement (minutes)	time	time	=
Cost per successful engagement (\$)	\$	\$	=

- Good Use data collected by other similar organizations, or perform 'test runs' to get an idea of average length
- Better Web Analytics data i.e. Avg. Time on Page x Pages per Session for Knowledge + optionally add time on landing and search pages
- Best Tools that can analyze the complete customer journey through the site, identify success paths and measure length

What Do I Know?



What do I know about my data?

Data source: Google Analytics 4 (GA4)

New data model as of July means re-evaluation of my existing metric and some change management!

What do I know about my self-service environment?

- Our knowledge is available on two separate sites; data comes from both
- One site accounts for <2% of total knowledge views
- The primary site has a mix of public and authenticated content, with nearly half of its traffic from organic search
- We recently started exposing more content to public view
- It's common practice to share links to individual articles in support interactions and embed direct links in emails

GA4 and User Engagement



New with GA4 User Engagement

- Engaged session is longer than 10 sec, at least 2 pageviews, or a conversion event. Replaces Bounce
- Engagement time is when the site page is in focus in a user's browser

More accurate than time on page, but also can be shorter

First user default channel group +		Engaged sessions per user	Average engagement time
		2.97	2m 57s
		Avg 0%	Avg 0%
1	Direct	0.28	1m 25s
2	Organic Search	8.66	6m 12s
3	Referral	0.74	1m 44s

Hey, what's going on here?

GA4 and User Engagement



Our self-service environment influences the time to solution metric we use

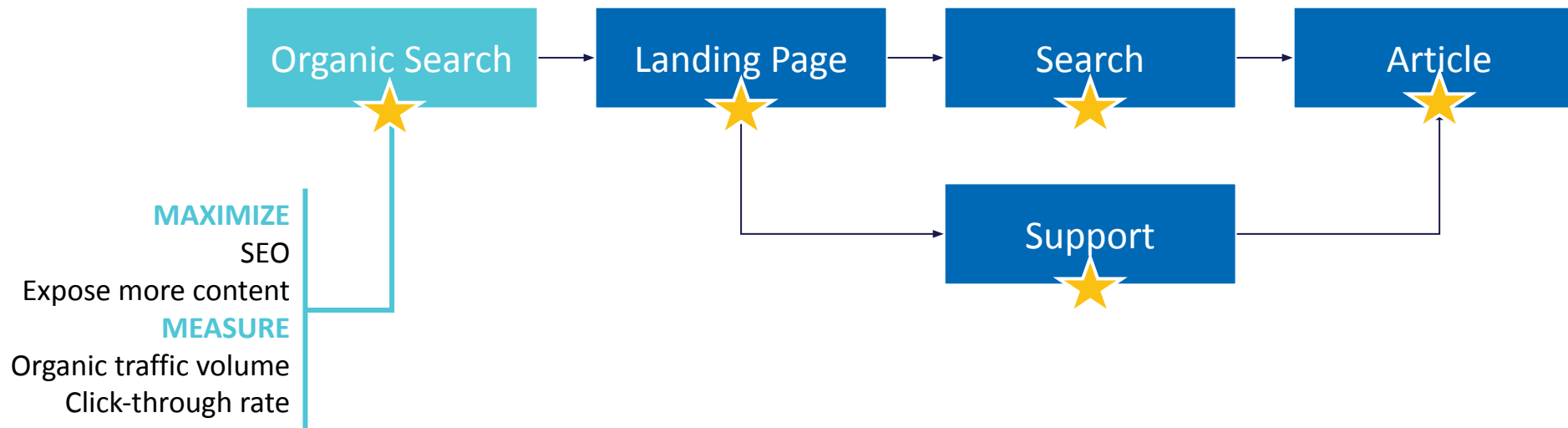
Traffic from Organic Search and Referral best represent the self-service journey we're trying to measure and improve

First user default channel group ▾ +		Engaged sessions per user	Average engagement time
		7.16	5m 21s
		Avg 0%	Avg 0%
1	Organic Search	8.66	6m 12s
2	Referral	0.74	1m 44s

Improving Time to Solution



Where and how can I **offer** self-service opportunity?
How can I **maximize** the chance that a user will choose self-service?
How can I **measure** the success of each opportunity point?





Total Cost of Self-Service Program / Total Successes

Best practice - use the same factors you use for cost per agent assist.
These often include:

- Staffing - specific to self-service
- Platform costs
- Licensing costs

Do not include KCS Program costs.

You are benefitting from KCS with or without self-service!



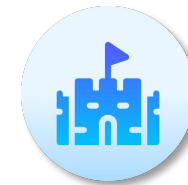
Digestible

Easy to understand



Durable

Able to evolve with the project and the business



Defensible

Backed up by supporting measures and solid logic

Traditional Support Metrics



- Case Focused

- Time to Resolution
- Average Cost Per Case
- Cases per Engineer



Impact of driving Issues to Self-Service



- Issue Focused

- Time to Resolution 
- Average Cost Per Issue 
- Issues per Engineer 

Impact of driving Issues to Self-Service

Phase 3 Self-Service Measurements

Customer Experience: *A measurement area still forming*



•Customer Satisfaction

- Surveys



•Customer Level of Effort

- Surveys
- Clickstream Analysis



•Customer Loyalty

- NPS Survey by channel
- Churn Analysis



Questions