5 steps towards building frictionless self-service and onboarding digital products

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The last thing your customer wants is to actually talk to you.

People are smart and they want to be able to do things for themselves. They want to manage their money online, track their fitness and wellbeing on the latest app or troubleshoot why they are unable to complete a task – the last thing they want to do is pick up the phone and talk to a human being.

And since lockdown began, the need for customers to self-serve has become ever-more prevalent. Whether it's accessing health advice, getting help to vulnerable family members, reassuring friends that you're ok, or staying connected at work, the demand for digital products has never been greater. Given that the Government has spoken of the country taking 'baby steps' to enable us to safely return to 'normal', this need for independence within a digital world looks set to only get stronger.

Previously we explored how smart companies are delivering strong digital products by creating a friction-free customer journey. By putting themselves in their customers' shoes, they gain the insights required to know where to rethink processes and workflows and continuously improve the experience by reducing friction – the main barrier that prevents customers achieving their goals.

"All I wanted to do…"
It all starts with just 5 little words, which give a company that's prepared to listen so much insight:

"All I wanted to do was move money between my accounts but it's asking me for some authentication code I don't have."

"All I wanted to do was track what impact a daily run has on my weight loss."

"All I wanted to do was understand why I'm unable to share the latest version with my colleague."

When we listen to those first 5 words, we're given a clear definition of the customer's success criteria – because there's no point having the fastest, flexible, most reliable system if your

customer isn't able to do what they want to. It's a harsh reality, but customers don't care about what you want to offer, they only care about what they want, which means you need to deliver a customer centric platform that is self-service by default.

So how do you build digital products that enable your customers to better self-serve?

Simple. Take 5 little steps…

1. Be where your customers are

Think about your website. It's rare that a visitor will enter on your homepage, read their way through your navigation bar like a book, page-by-page before they hit the contact form. No. They can enter absolutely anywhere and take any action.

Your customer journey is the same. Able to start anywhere, you should be wary about locking a journey into a specific channel, because with the slightest hint of friction, your customers won't be happy and you risk losing out. Therefore, your products need to be planned and systems built to enable your customers to start their journey in one channel, continue on another and complete somewhere else.

2. Map your customer journeys

To smooth the customer journey, you first need to understand where their potential areas of friction lie.

Write out the journey from start to finish and highlight where you know your customers most frequently ask for help, or identify where the path might get bumpy, such as needing to await feedback, providing information or changing their authentication level.

By mapping out the way you operate it:

- Provides an understanding of the context for where your self-servicing journeys could begin.
- Forces you to consider ways your customers could get to a successful outcome on their own.
- Helps to plan self-service improvements based on areas that don't support customer success.
- Eliminates routes to failure due to unnecessary friction.

3. Design your products for context

Every moment your customer spends waiting for a resolution to their issue is a moment they are questioning your brand. And be under no illusion, if they're not happy with you, they're more than happy to shout about it to anyone who will listen. Digital Marketing Magazine reported that 36% of consumers would use social media to complain about a product or service compared to just 14% who would call the company.[1]

One way to overcome the extent of the friction felt is by starting the conversation with their context. Think about how you can build a journey that gives your customers a clear understanding of:

- Where they are in the process.
- Where they've been.
- What they need to do next.
- And if possible, giving them access to their own self-service history in case they have the same issue again so they can fix it themselves.

4. Automate like the world is watching

By enabling your customers to help themselves it reduces the need for your customer to pick up the phone, which as well as keeping them happy, can lead to more scalable services.

Automation in self-service journeys can range from simple chat bots and IVRs, which search based on customer inputs to the same type of clients based on deep learning and neural networks. But whatever system you choose, unfortunately it's not a 'one and done' scenario – these tools need to be fine-tuned with your product offerings, and then monitored so you can continuously improve.

One way to achieve this is by considering how you can set up your systems to reduce friction by adding value. For example:

"Have you tried searching our knowledgebase or our live chat?"

"Your potential wait time is 15 minutes. Can we call you back at time that suits you?"

"Did you know you can now ask the community simply by Tweeting #ABChelp?"

5. Ensure you always have helpful humans handy

While it's important to seek to automate and allow customers to self-serve wherever possible, it's always helpful to have humans ready and available to offer person-to-person support.

Every person is an individual, and even the best automated systems can't predict the many ways customers want to use your services, which means there will be times when you need the creative, lateral thinking that can only be delivered by a well-trained and engaged service agent.

The experience your customer has when seeking personal support should be easy and reassuring – remember, they may already be in a state of anxiety and just want the problem

to go away fast, so making them jump through 101 different options on an automated phone menu will only exasperate the friction felt. When it first launched, First Direct quickly earned a reputation for its customer service because it eliminated this friction with a simple promise – a person who can help will answer your call within 3 rings.

It's unlikely that we'll ever reach a time where we eliminate the need for human support. However, you should be aiming to reduce your reliance on it if you're to successfully deliver digital products at scale. Therefore, understanding why your customers need human help, and where it's needed within the customer journey is important to identifying areas for improvement, and areas to optimise automation.

Customer self-service should become part of your product design culture

When building digital products, your team should always start with self-service in mind – and in particular, how to reduce the friction felt during that customer journey, because if you can do this, everything else becomes simpler.

By modelling value-driven customer journeys, not only do you simplify them to reduce friction and make your customers happy, which reduces customer churn, you're always adding value to the experience, which will delight them and make them your advocate to increase your brand awareness.

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