To state the obvious, today’s customers are digital. What is less obvious is that they want to remain digital even when interacting with businesses, whether it is for self-service or human assistance. In other words, they’d rather be “contained” in digital channels.

Savvy businesses get this—they know that digital containment is a win-win for the customer and the business. After all, providing assistance through traditional channels such as phone, storefront, and branch office touchpoints, is far more expensive. However, digital containment needs to be done well in order to avoid digital disasters.

Here are six ways to get it right, based on the lessons we have learned in the trenches for over 15 years.

1. **Answer with knowledge**

One of the biggest reasons customers pick up the phone for service is that they cannot find answers or resolve problems on company websites. In fact, CEB found that 58% of callers in a survey of nearly 18,000 consumers had unsuccessfully tried self-service on company websites when they reached out to the contact center. eGain’s own survey of 10,000 consumers found that the inability of companies to answer customer questions on their websites is one of the top pain points in customer service.

Make sure you deploy a robust knowledge management system that not only helps customers find answers with search methods that go beyond keyword search to include natural language search, faceted navigation, guided search, etc., but also solve problems through guided self-service that simulates an interaction with a human expert. Artificial Intelligence (AI) technologies like Case-Based Reasoning (CBR) excel at driving such conversations.

2. **Think digital**

When you design customer service processes, think digital. Don’t be constrained by the limitations of legacy systems or point products for digital engagement that break down when the interaction calls for rich capabilities or the process involves more than one digital touchpoint in the same interaction.

A best-in-class solution would support advanced capabilities such as chatbots, AI-guided digital self-service, video chat, cobrowse-aided phone engagement, cobrowse-aided website navigation and form-
filling, proactive digital offers, and proactive digital notifications, and deliver a connected experience across those touchpoints through a customer engagement hub. For instance, channel-integrated, knowledge-enabled chatbots can answer queries, take customers on a website tour, push relevant web pages, and escalate with context to a live agent, when needed; secure, cobrowse-aided form-filling can help avoid an expensive customer interaction in a branch office of a bank; and video chat might help avert a field visit by an insurance claims expert or a shopper’s trip to a retail store, which create high effort for the customer and cost for the business. Keep this in mind when you look for next-gen capabilities to serve the new digital customer.

3. Analyze for derailment
Analytics are critical to identifying points of switching from digital to traditional channels along the customer journey. For example, knowledge analytics and customer journey analytics can help assess digital self-service success. Likewise, if a chat session results in a customer request to call back, analytics will help to identify what is causing it—is it the chat wait time, inquiry topic, skill level of agent, etc.

4. Deflect for delight
Offer customers a chance to resolve issues with online self-service when they are about to escalate to an agent. Our clients have been able to deflect up to 70% of the requests for agent-assisted service with this approach. However, it is important to retain context across self-service and agents if and when the interaction does get escalated so that the service interaction can go forward instead of starting all over again, a big pain point for customers. With the advent of the smartphone, customers on hold in IVR systems can be sent an SMS link to answers, based on caller information and IVR context, providing them an option to check out the answers without losing their place in the queue. This is something that eGain Knowledge is able to do through seamless integration with leading IVR systems.

5. Coach for future
Digital collaboration technologies such as cobrowsing, with simultaneous phone conversation, can be used by agents to coach customers on how to get things done digitally—whether it is finding information, or completing a transaction such as form-filling or a purchase. This is similar to providing training wheels on kids’ bikes.

Savvy organizations also make sure to promote digital service options through traditional channels by simply getting the message out and offering incentives like faster response time on digital channels and priority place in the assisted queue for customers that started with digital self-service first.

6. Press the gas pedal
Digital containment and transformation does not have to be a “big iron” project. Look for solution providers that put skin (and body!) in the game. Are they offering you risk-free, expert-guided
production trials in the cloud free of charge, and have they a proven method for continuous agile value delivery? In the new two-speed operation of business systems (and business!), as defined by McKinsey and Gartner, digital engagement systems can be your fast-mode systems for innovation and differentiation that leverage slower-changing systems of record such as CRM, ECM, ERP, call center infrastructure, and transactional systems that “keep the lights on.”

About eGain

eGain customer engagement solutions power digital transformation for leading brands. Our top-rated cloud applications for social, mobile, web, and contact centers help clients deliver connected customer journeys in an omnichannel world. To find out more about eGain, visit http://www.egain.com/.