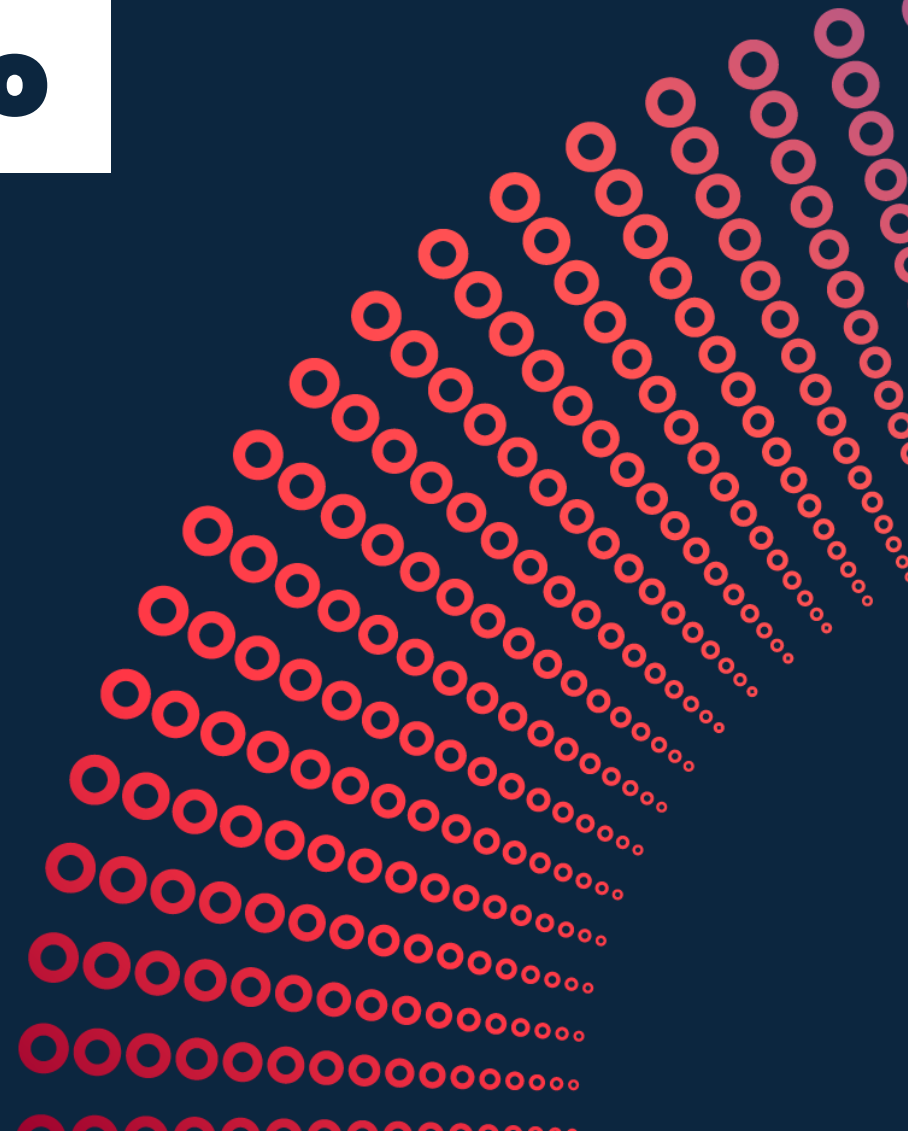


**The Essential Guide to**

**Automating**

**Customer Journeys**



## Self-Service Automation is core to accelerating Digital Transformation

Digital organisations thrive on the benefits of agility. They are quick to innovate, quick to bring products to market, quick to fail and quick to succeed. Service Management needs to support this business agility whilst providing the framework to reduce the risk of failures.

The idea is that the more services are available via self-service, the higher the channel adoption and overall customer satisfaction. However, self-service adoption will remain low and customer experience will be impacted heavily should the fulfilment processes supporting self-service channels continue to rely on manual activities.

Based on our 25 years' of Service Management experience, we have identified 5 critical capabilities for organisations to achieve true Self-Service Automation:

1. Understand your customer's requirements by taking a data-led approach
2. Understand your customer's preferred channels of consumption
3. Adopt a platform approach
4. Create an automation culture through citizen developers
5. Benchmark, measure, react



# 1 Understand your customers' requirements by taking a data-led approach

User expectations are set outside the corporate world by consumer style experiences and social apps. For the younger generations who have been brought up in the online world, self-service is the norm whilst for others it is convenient, and the user experience is constantly improving.

However, customer journeys aren't simple and linear but a series of handoffs between traditional and digital channels that can vary significantly by customer type, an effective strategy requires an in-depth understanding of what customers truly want.



## The challenge

To excel at the customer experience, start by providing high quality self-service with supporting knowledge your customers need. But where do you begin?



## The solution

Fusion's unique AI Talos delivers insights from hundreds of thousands of tickets and associated data from virtually any data source rapidly and accurately to help analyse customer engagements to:

- Support Omni-Channel Self-Service initiative by understanding customer service journeys
- Expand revenue opportunities with products available via self-service
- Improve quality of service through automated fulfilment
- Align to your customers' expectations, reducing customer turnover
- Offer customers an enriching, frictionless, enabling environment



## 2 Understand your customers' preferred channels of consumption

Interaction models have changed with chat becoming more widespread through social apps and more recently within enterprises through collaboration apps such as Slack, Hangouts, Teams etc.



### The challenge

Traditional channels are not well suited to digital transformation or automation as typically this requires human intervention. Face to face or telephone-based communication remains a viable 21st century method of service provision but does not support self-service effectively. Robotic Process Automation requires a defined process with no, or limited, manual input preferred. Even email provides significantly more challenges than a self-service portal. Customer adoption of self-service is often hampered by a limited scope of channels.



### The solution

Provide your customers with a self-service portal, or catalogue, via their preferred channels. If you are able to provide a critical mass of self-service items via the channels of choice, customers will naturally adopt a self-service first approach. Once the catalogue is defined, then fulfilment becomes highly automatable, as these processes can be defined in a way that minimises human decision making.

### 3 Adopt a platform approach

Automation appears in many formats. Critical automations are often delivered out of the box for key applications, but the challenges often arise when processes span across organisation and business siloes.



#### The challenge

The inter-operability of business applications is an all-encompassing problem. Many enterprise organisations have taken the approach to use monolithic ERP solutions (at huge cost) to minimise boundaries, but in most organisations the number of critical applications is in the hundreds. Where individual point-to-point integrations are built a technical debt is created. Where integrations are not built inefficiencies, lack of audit trail, errors and productivity losses arise.



#### The solution

Adopting a standardised cloud-native intelligent automation platform, like Automation Anywhere, across the enterprise ensures that a uniform, supportable, and expandable approach is created. In many organisations the line of business will address their own automation challenges without consulting IT, only to find that when there are issues IT is unable to provide timely or proactive support.

By following the platform approach organisations can ensure that they follow automation best practice and are able to build and maintain automated process flows across multiple lines of business, releasing the required benefits. This then allows automations crossing LoBs to be built into the fulfilment of a service request (for example take on-boarding a new temporary worker which is often manual and slow).

## 4 Create an automation culture through citizen developers

To achieve high levels of adoption, automation Centres of Excellence (CoE) are critical to developing and deploying an enterprise-wide automation strategy. When done well, businesses can realise large gains in efficiency, accuracy, and cost savings by automating repetitive tasks.



### The challenge

Customers engage with an organisation across many departments, often in a single interaction. We therefore have a two-fold challenge; automation of tasks within a single department, and automation of processes that span multiple business units. However, due to the technical nature of the CoE, it would be unrealistic to expect CoE to release benefits quickly when it is required to understand intra-departmental challenges.



### The solution

To scale and provide high adoption, the automation platform needs to encourage the concept of citizen automation developers operating within the boundaries of an automation platform. This achieves two objectives: 1). Innovation within departments is promoted while complying with the overall automation framework. 2). Benefits of automation are focused on addressing real business problems thereby increasing value and adoption. Modern automation platforms such as Automation Anywhere are designed to be accessible to the citizen developer, leveraging low-code / no-code approach to dramatically scale out automation across the enterprise.



## 5 Benchmark, measure, react

Businesses are dynamic, constantly adjusting to customer demands and competition. For digital service programmes to succeed, an accurate and up to date view of the customer sentiments is needed.



### The challenge

For self-service to remain relevant, IT organisations need to continuously assess customer engagements across all viable channels and to construct plans to advance the consumption of digital services.

This type of planning requires in-depth understanding of the customer journeys backed by detailed metrics covering areas such as:

- Self-service adoption rates
- Customer satisfaction metrics
- Most effective channels to direct consumers to (cost efficiency metrics)
- Levels of automation is required to provide exceptionally high quality of service while retaining close relationship with the consumers
- Actual mean-time-to-resolution metrics
- And many other KPIs



### The solution

Ability to benchmark and carry out quarterly self-service performance reviews using AI techniques across the entire dataset, provides the visibility into the effectiveness of self-service optimisation plan and effect of automation on customer experience and cost effectiveness. Additionally, as further automation is deployed, this type of continued assessment helps to identify new and more prominent bottlenecks in the fulfilment process and the business case for automation.



Automation is key to scaling your digital business. By understanding your customers' needs, embracing the right channels, and continuously measuring your customer and employee experiences, you can unlock the full potential of automation.

Fusion Global Business Solutions is your trusted partner to lead your digital transformation. Our 25 years of expertise and innovative AI capabilities empower businesses to make data-driven decisions, optimise customer interactions, and drive substantial ROI. Leverage our cutting-edge technology and best practices to achieve exceptional business outcomes.

**Don't just keep up with the digital age—lead it!**

Contact us today to start your automation journey



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