

Self-service and the 'R' in CRM

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Self-service is generally considered a good thing, especially in CRM, where there has been significant investment in empowering people to take on more responsibility for provisioning service or making purchases. But it's not all great and there is some interesting blowback that is causing vendors to reconsider how their offerings work.



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In sales, self-service has resulted in truncated sales cycles and fewer invitations to the dance -- you know this problem. Customers do their own research and engage a company and its representatives later, when they are looking for pricing for their final decisions. In the past, vendors could control the information flow and customers would need to engage just to get a basic fact, that's not true today.

We all know this happened as an inevitable consequence of the Internet, and now vendors are struggling to find ways to engage customers earlier in their processes so that they aren't locked out of deals before they can even find out about them. Also, nobody wants to be engaged at the last minute when all they can do is price, propose, and pray. We're definitely dealing with unforeseen consequences.

Interestingly, and perhaps ironically, self-service has an equal and opposite effect in customer service. Customers are very happy not to wait in phone queues to ask simple questions. As a result, social media, FAQs, knowledge bases, and communities are supplying solutions for many of the issues that once consumed service reps' time - another benefit of the Internet. This also means fewer touches, with fewer chances to make an impression or try for the additional sale.

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