

by Callie Evans

Prioritising Which Customer-Facing Services to Digitise

A Three-Step Approach

Presentation



By definition, customer expectations are any set of behaviours or actions that individuals anticipate when interacting with a company. Historically, customers have expected basics like quality service and fair pricing – but modern customers have much higher expectations, such as proactive service, personalised interactions, and connected experiences across digital channels.¹

¹ ['What Are Customer Expectations, and How Have They Changed?'](#), Salesforce.com, 2023

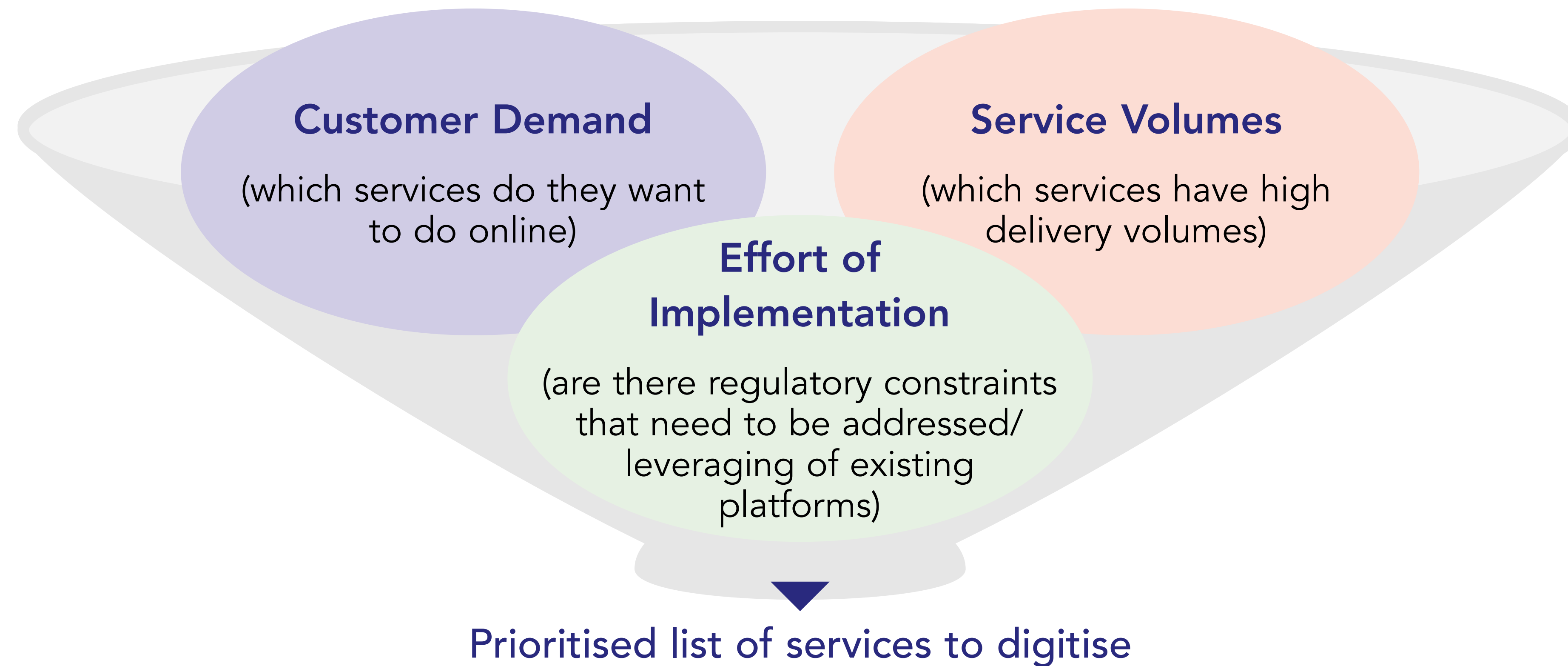
Offering services online and simplifying forms (while providing guidance on how to complete them) can provide a significant boost to user satisfaction. Moreover, implementing these changes is relatively speedy and inexpensive. Automation of the back end, on the other hand, requires more time and resources and is thus better suited to a long-term plan.²

Many Australian organisations are well on their digital transformation or digitisation journeys, however numerous companies still struggle to identify and prioritise which customer facing services they should digitise, and in which order. This pack provides a simple, three-step approach for organisations to use to identify, then prioritise which of their customer facing services to digitise, based on customer demand, cost to serve and ease of implementation.

² [*'Digital public services: How to achieve fast transformation at scale'*](#), McKinsey, 2020.

This simple, three-step process is designed to guide organisations to identify, select, and prioritise which customer facing services should be digitised and in which order.

This three-step process involves capturing, analysing, and applying insights across customer demand, service volumes and effort of implementation.



Step 1: Selecting Which Services to Digitise – Understanding Customer Demand

1.0 Customer Demand

What services do customers want to be able to do online themselves?

The first step involves capturing insights, directly from customers, via offline service delivery channels (phone) and existing online channels about which services they expect to be able to access digitally. This provides the first data point – customer demand.

1.0 Customer Demand


**Company
Call
Centre**



For a 1 month period, call centre staff ask callers the following questions and record the name of the service needed/reason for call and the answers to these questions:

- Before calling today, did you try to do this online? (Yes/No)
 - If Yes, – why did you end up calling today? (Couldn't find it/didn't understand/not available online)


**Existing
Company
Website**



Utilise a web based pop up feedback plug in (e.g. Hotjar) on the company's website, that asks website visitors:

- What type of information or service are you looking for today? (open text)
- What are you trying to do today? (find information/apply, or register for a service/pay for a service/lodge documents)

Data Collected:

- Which services are customers seeking online and the volume of the demand.

Data Analysis:

- Combine the data collected via phone channel with the data collected online by service, then analyse the level of customer demand.

Output:

- This will provide a customer-led prioritised list of candidate services for digitisation, based on their expectations and current demand.

Step 2: Selecting Which Services to Digitise – Understanding Current Service Volumes

2.0 Service Volumes

Which services have high delivery volumes?

The second step involves gathering and analysing service volume data, against the services identified in step one. This includes obtaining annual or six-monthly service delivery data for each of the services, i.e. how many times the service has been accessed by or delivered to customers.

This provides the second data point – service volumes.

2.0 Service Volumes

Data Collected and Analysed From Step 1:

- Which services are customers seeking online and the volume of the demand.
- Customer-led, prioritised list of candidate services for digitisation.

Data Analysis:

- Combined data from phone channel and data collected online by service, then ranked by level of customer demand.

Output:

- Customer-led, prioritised list of candidate services for digitisation.



Analyse customer-led, prioritised list of services against the volumes of those services delivered annually.

Once annual service delivery volumes have been assigned to each of the customer-led prioritised services, filter these by volumes – to identify which services are high in customer demand for on-line service delivery and have high service delivery volumes.



List of Services Where:

- The demand from customers for digitisation of the service is high.
- The service delivery volumes via offline channels (phone/counter) are high.

Co-prioritised list of candidate services for digitisation based on customer demand and service delivery volumes.

Step 2: Selecting Which Services to Digitise – Understanding Effort of Implementation

3.0 Ease of Implementation

Are there regulatory constraints that need to be addressed/to what degree can you use existing technology platforms, can implementation be iterative?

3.0 Ease of Implementation

Data Collected and Analysed From Step 2:

List of Services Where:

- The demand from customers for digitisation of the service is high.
- The service delivery volumes via offline channels (phone/counter) are high.



Output:

- Co-prioritised list of candidate services for digitisation.

Review each candidate service, and consider and rate the following:

- Are there any requirements for changes to policy in order to digitise this?
- Does the customer need to verify who they are?
- Is a signature or authorisation required?
- What would be the digital service's end point (e.g. online form that is sent via an API to a database) and how easily could this be developed (i.e. leveraging existing platforms or with ease of developing additional functionality).
- Can the delivery be broken into meaningful incremental chunks?

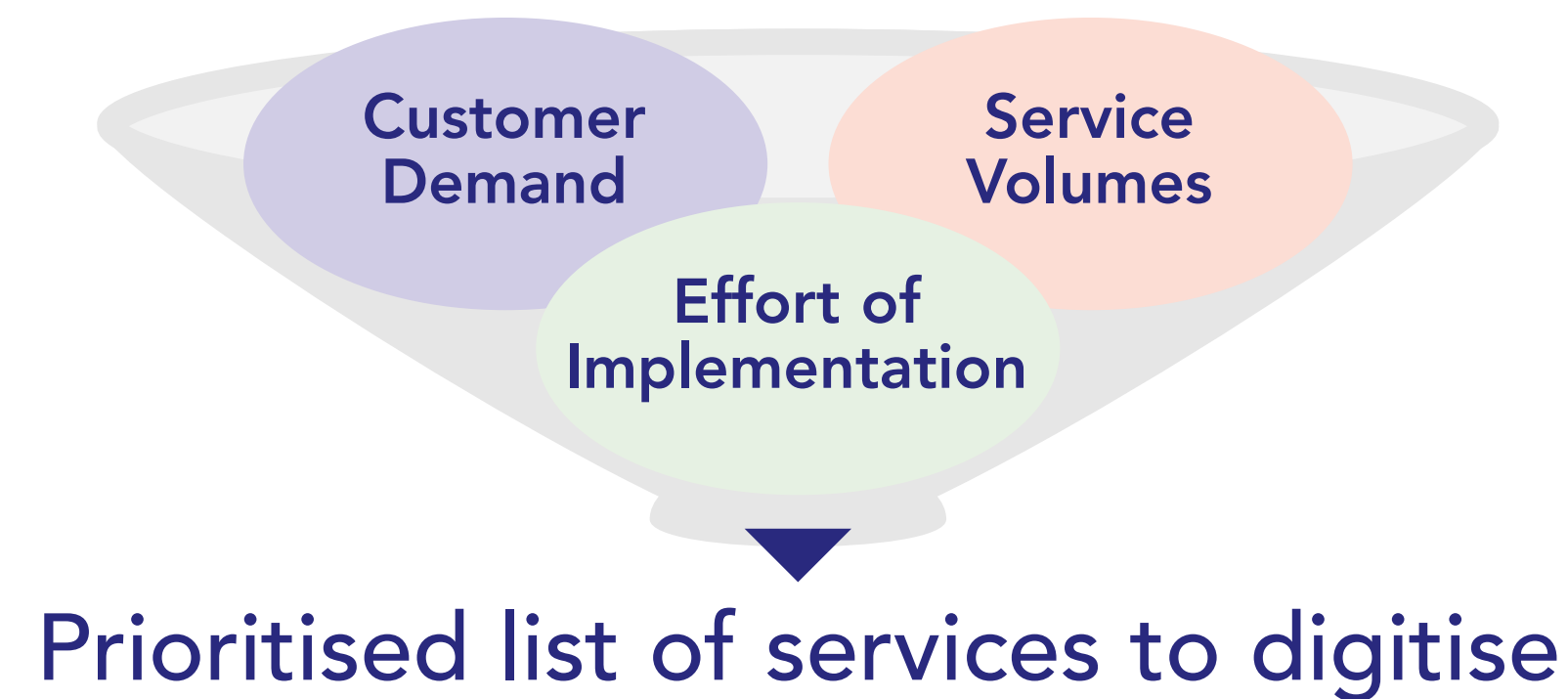


Prioritised list for the short and medium term delivery:

- The demand from customers for digitisation of the service is high.
- The service delivery volumes via offline channels (phone/counter) are high.
- The ease of implementation is minor – moderate.

Next steps:

- **Capture data about customer demand** to understand which services customers want to be able to do themselves online?
- **Collect and review service volume data**, alongside insights about customer demand.
- **Assess the ease of implementation**, which services have high customer demand, high service volumes, can be delivered in incremental ways, and can leverage existing platforms or systems?





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