



As Michael Treacy and other business thinkers have noted, expectations set in one industry carry over to another. Your members can transfer funds online, pay their bills with a few keystrokes, and find out how many minutes are left on their cell phones — all by themselves, without ever having to go through a third party. Associations also must strive to offer this kind of convenience to their members. BY SHERRY BUDZIAK

# Help Yourself

Self-service has become our expectation. With technologies such as HBO On Demand, Tivo, satellite radio, and the Internet, consumers today have information at their fingertips — information that can be accessed without the assistance of a third party.

Consumers also have come to expect a high level of service, and many organizations have turned to Web self-service applications to improve relationships with customers, enhance service, and reduce overall operating costs. Web self-service enables registered users to access information and perform their own tasks at their leisure, shifting the processing burden from already overtaxed call centers and customer care departments. Such tasks range from simply updating an address to placing an order, checking flight status, or verifying a shipment.

## What is Web Self-Service?

Web self-service, Web site personalization, personal customer experiences — these buzzwords have edged into our vocabularies. But what do they really mean?

Web self-service is the concept of making information readily available to customers via the Web in efforts to reduce inbound support inquiries while offering greater convenience to customers. Web self-service enables your members to quickly and efficiently find answers to their questions without having to pick up the phone and call a support line. Today's Web-savvy consumers prefer this freedom. Members and customers who can quickly and efficiently find their own answers are more satisfied than those

Using Web self-service as an approach to automating customer care takes the lessons learned in e-commerce and applies them to online customer service. Specifically, it taps the power of personalization and dynamic data to identify and customize the online experience of each visitor based on the visitor's previous buying activities and overall interaction with the company.

## Gaining Momentum

Recently, there has been an increasing amount of interest in and concentration on Web self-service. According to Allen Bonde Group, Inc., a management consulting and strategic advisory firm based in Wellesley Hills, Massachusetts, several chief information officers made self-service projects a priority in the second half of 2004.

Corporate spending on self-service research and knowledge management applications is expected to double over

the next few years, potentially reaching \$2.8 billion in 2007. Clearly, many organizations are investing time and money in creating self-service offerings to meet and exceed consumers' demands.

## Web Self-Service and Associations

Members' expectations have continued to increase over the years as a result of the shift in consumer expectations. Research conducted by the American Society of Association Executives (ASAE) identified several important trends that will affect the future of associations. Four of those trends in particular stand out:

### High tech will mean high touch.

Technology is enabling associations to build member satisfaction by providing members with a personalized experience via the Web. Personalized portals are providing members control over their Web experience. For example, members are able to select topics on which they'd like to receive information, collaborate with other members to obtain answers quickly, and participate in committees and special interest groups without having to attend meetings in person.

**Value — return on investment.** Self-service offers a high return on investment. Members can now see and experience the benefits of their membership as soon as they sign up. Through interactive Web solutions such as e-mail listservers, real-time chat, discussion boards, dynamic information delivery, and a personalized experience, members can immediately put to use products purchased through dues membership. Happy members translate to loyal members.

**Responsiveness.** Web self-service enables your organization to be more responsive to your members by providing answers to questions before they are asked and by making information readily accessible.

Dynamic delivery of Web content ensures that your members can take advantage of organizational benefits when it's most convenient. Organizations can use simple services, such as automated e-mail responses upon execution of activities (such as conference registration) on the Web site. Members can now be active with the organization outside of normal business hours. The Web self-service model is more conducive to their schedule.

**Technology use.** Associations rely on technology every day to meet the changing needs of their members. Today associations are leveraging the Web to enhance member services, reach new target audiences, and boost their bottom

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who must wait to receive information.

Our earliest and most widespread self-service model came in the form of an automatic teller machine, more commonly known as an ATM. In 1968, while waiting in line at a bank, Don Wetzel conceived the notion of an ATM. At the time, the majority of baby boomers were the target market — and as research has shown, this segment increasingly had less time, had families with dual incomes, and had a profound need for this type of service.

Initially, consumers used the ATM simply to withdraw funds from their bank accounts. Now consumers can use the ATM as the means to perform all interactions with the bank. This convenience has allowed us to conduct our banking transactions at any time while almost never entering the bank's doors.

This type of self-service has now extended to the Web and today surrounds us. Updating a personal account online, changing your address and personal information, paying bills online, tracking shipments, purchasing game tickets, subscribing to newsletter segments, and signing up for additional services all are examples of Web self-service.



lines. Self-service is not only an approach to put control into the member's hands, but it also is a way to streamline association processes, ensure accuracy of demographic data, and allow association staff to allocate time resources elsewhere.

These findings identified the need to create a self-service environment for members in order for associations to continue to thrive. As both consumers and members, we now expect to find many of the following features on an association Web site:

- FAQs (frequently asked questions);
- Comprehensive and accurate Web site search (according to Jupiter Research, 90 percent of consumers who have made an online purchase in the past six months claimed that they used a Web site search engine to access "self-service" content);
- Online shopping;
- Online dues payment;
- Online registration;
- Membership directory;
- Self-managed profile;
- Automated abstract submission;
- Virtual communities with discussion forums;
- Distance learning;
- Personalized user experiences.

## Associations are realizing the benefits associated with the self-service model and the idea of empowering members to help themselves.

As David Siegler, information technology manager of the American Association of Endodontists (AAE) remarks, "It has become increasingly important to engage our members via the Web through a self-service model. With today's technology we can easily allow our members to update profiles, register for meetings, purchase products, search for job opportunities, and more and have all transactions seamlessly processed and information stored into our back-office AMS [association management system]solution.

"Our members are now more engaged in the organization, as they've seen how simple it is to accomplish these tasks," Siegler adds. "We've tremendously improved our members' experience with the Web site and AAE as a whole, which will help us retain and engage new members."

Web self-service should provide your organization with efficiencies but not replace the call center completely. It should reduce the amount of service by the call center agents and improve the customer experience.

As members begin to expect instant access to information that is personalized to their requests, associations need to consider creating this experience for their members in order to retain them. As general consumers, your members will begin to demand a richer user experience that includes an interac-

tive Web site, intuitive navigation, and personalized information. Our expectations as consumers are the same expectations we have as professional members of an association. These expectations have increased with the rise of the “need-it-now” frame of mind.

Integration of the Web with association management software or customer relationship management (CRM) systems is making this type of personalized experience and online customer-support systems possible. By servicing your mem-

bers through the Web in a personalized, self-service environment, you will enhance the member experience and cultivate loyalty.

### Taking Web Self-Service a Step Further

Web self-service has evolved from a consumer-focused model to a business concept for deploying Web solutions. Vendors are now offering self-service Web applications that allow organizations to purchase, customize, and launch an

application online without salesperson intervention. This concept often is referred to as “software as a service” or “software on-demand.”

Software on-demand is designed with an intuitive interface, as it is intended to deploy successfully without extensive training or staff involvement to launch. Software on-demand services are offered on a subscription basis and enable associations to avoid purchasing software licenses. Rather than incurring large, upfront IT costs, organizations are paying a small setup fee and a monthly or annual subscription rate that is typically based on usage.

The subscription model allows companies to spread the cost of the technology over monthly or yearly payments rather than making a large, upfront investment. As companies look to simplify their information technology systems and budgets, software as a service is increasing in popularity.

Several major companies are driving this subscription model, including Microsoft, Symantec, Macrovision, and others. This shift toward Web self-service is not only about extenuating costs, but it also is about offering significant benefits to members, constituents, and the public through accessible information. Your members don't want to wait on the phone when they can achieve the same result with the click of a button. By offering members quick and easy access to information and services, self-service enables members to effectively help themselves.

Associations can now take advantage of this concept to meet their growing needs, and even the smallest association can take advantage of these subscription-based Web applications. Software on-demand services enable organizations to provide interactivity to members while gaining better visibility into their overall IT budget.

Benefits derived from software as a service to the association include

- Ability to respond to members and provide 24/7 customer service;
- Achieve rapid return on investment while minimizing total cost of ownership;

- Easily integrate self-service into existing branding;
- Improve member satisfaction and loyalty by giving members more control over their service experience;
- Reduce service costs without sacrificing quality;
- Increase online revenues;
- Automate and accelerate processes to improve accuracy and reduce costs.

It is clear that members today are demanding more control over their information and services. They desire the convenience of anytime-anywhere access to information. And associations are realizing the benefits associated with the self-service model and the idea of empowering members to help themselves. The self-service concept is no longer an added value; it is a level of service your members are coming to expect. **X**

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