When a customer needs to contact a company for support or assistance, the most common communication channels have for many years been assisted channels, such as phone or e-mail. With the arrival of internet, support organizations today offer a number of advanced technology-enabled channels to efficiently respond to customers’ questions. Today, FAQs, public knowledge bases and customer communities are among the fastest growing resources for customer service, and companies have strong incentives to guide customers towards using self-service channels, as these channels cost the firm less than assisted channels while they can still respond to an increasing number of customer issues.

Companies migrate customers from assisted channels to self-service with the hope that, except from lowering costs, customers will benefit from quick, effective and usable contact channels, without picking up the phone. But is it as simple as this? It has been speculated that self-service, while potentially being a revenue-saving opportunity, could also erode customer satisfaction and loyalty. Does companies know enough about customer experiences to enable them to build successful self-service channels? What does success even mean in this circumstance?

The author of the Master Thesis *The Migration Measurement Model* have developed a theoretical framework that aims to give an answer to what determines a company’s success of migrating customers to a new channel and how can this be measured. The model is built from iterative research between theory and case study, and by being based on company objectives, it can be used by any company that needs to measure the process of migrating customers. The Migration Measurement Model is composed of four major sections: the Company, Financial, Customer and Operational measurements, see figure 1.
The Company
The first part of the Migration Measurement Model is related to the company and is performed to get an overall picture of the company and understand which part (or parts) of the model to focus on. Before choosing objectives with a migration and deciding what to measure, a company must take into account their own capabilities and characteristics. As soon as a company is clear about its own capabilities, it is important to realize that any measurement used in a support organization should be in line with the company objectives and goals. By understanding the company objectives it will be easier for a support organization to create available, understandable and meaningful metrics.

Financial Measurements
There is a great opportunity to decrease support costs by implementing self-service. If a company decides to migrate their customers because of this reason, it becomes important to measure the benefit of savings in time and cost, and which return they give on the investment. The second part of the Migration Measurement Model describes ROI as a suggested metric to determine the financial success of a migration.

Customer Measurements
Even though a company’s profitability often is tied to a financial success, it is hard to succeed without satisfied customers. This part of the model presents channel distribution and customer satisfaction as two important factors to measure and improve. Connected to these are two factors that are not measurable but very important to understand in order to interpret results and fulfill a successful migration; reputation and customer behavior and expectations.

Operational Measurements
Behavior and expectations are not the only factors influencing the customer’s choice and use of channel, but also the quality and performance of each channel. The last part of
the Migration Measurement Model describes agent performance and self-service quality as two factors that should be measured on an operational level. Two related factors, agent motivation and technology leverage, cannot be measured in numbers, but they can explain why the results showed what they did and how to improve the metrics.

Conclusion
By analyzing each part of the model, a company should have a clear picture of its activities and results, and eventually new objectives with the migration could be developed. Choosing objectives within customer support that aligns the business goals can be hard and just considering financial performance is not enough. A company has to look at the factors that make employees smarter and happier, or products better, or the self-service more satisfying for customers to use.

For each objective selected; financial, customer or operational, metrics need to be chosen and adjusted to evaluate the progress on the objective. A pre-measure should take place before the migration is initiated, which will provide a baseline to measure the value of subsequent improvements. The hardest and most time consuming part of the model might be to evaluate and choose metrics, since it depends on what data is available and what results the management wants to see. The best way to measure the success with a migration is to follow the project for at least 1.5 years since many results will not be positive until the self-service is fully adopted and matured.

In order to obtain the best possible result when applying the model, employees from different departments and levels in the company must be involved with the project and contribute with knowledge and opinions. A migration is more likely to be successful if the whole company is committed to the project. Internal and external communication is of greatest important, motivating employees and customers to use the self-service.

The distinction between financial, customer and operational measurements is not the main objective with the Migration Measurement Model. The point is to give a broad picture of different factors that determines the success of a migration, and to limit the number of metrics to 2-3 per category. If the same metric is used several times, it should be used for different purposes and have a bearing on the outcome and eventual following actions taken. Therefore, all links (arrows) in the model are not unique, but they show the major connections. For example, satisfied customers could be linked to financial results (such as increased loyalty and profitability), but increased customer satisfaction is here seen as an objective separate from others, why it is directly linked to company objectives.

To sum up, the Migration Measurement Model covers many different factors when analyzing the activities and processes in a support organization. After applying the model, a company should have a clear picture of how successful they are in fulfilling the objective with a migration and what they need to improve.