

SIR 2025 Annual Conference

CHICAGO, IL
Fairmont Hotel in Chicago

May 4-6, 2025



SIR | SOCIETY OF
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RESEARCH

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Drive Culture Shifts to Improve Self-Service Adoption and More Empathetic Customer Interactions

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The Official Agenda

- **Why do customers call vs. use Self-Service Technologies (SST's)**
 - *The Basics*
- **Barriers to self-service adoption through targeted education**
 - *Co-Creation vs. Co-Destruction of VALUE*
- **Customer Research to inform AI and CX strategies**
 - *Service Climate*
- **Build organizational buy-in for data-driven insights**
 - *Cycle of Success*
- **Leverage dynamic personas**
 - *Developing a single source of truth with Bloomfire*



The Actual Agenda



think differently...



But first, here are the standard reasons why people call rather than use SST's...



Complexity of issues

Customers prefer speaking to a human agent who can provide more nuanced assistance.

Human interaction

Customers value the personal touch and empathy that human agents can provide

First-time resolution

Customers may believe that speaking directly with an agent increases their chances of resolving their issue in a single interaction.

Immediate response

Calling in may be perceived as a faster way to get an immediate response.

Lack of Awareness

Customers may not know that the SST exists

Verification and reassurance

Customers thinking about making a purchase often call to get verified answers to their final questions, which helps them make informed decisions.

Complex product inquiries

Customers may call to ask detailed questions about specific products, shipping, warranties, or return policies that may not be adequately addressed through self-service channels.



What is your favorite way to travel?

What is your least favorite way to travel?

What would it take to get you to move from your favorite way to your least favorite way?



I don't know why **YOUR** customers
choose not to use
self-service technology (SST)
...but, I have some ideas.





How would we define value
from a customers perspective?



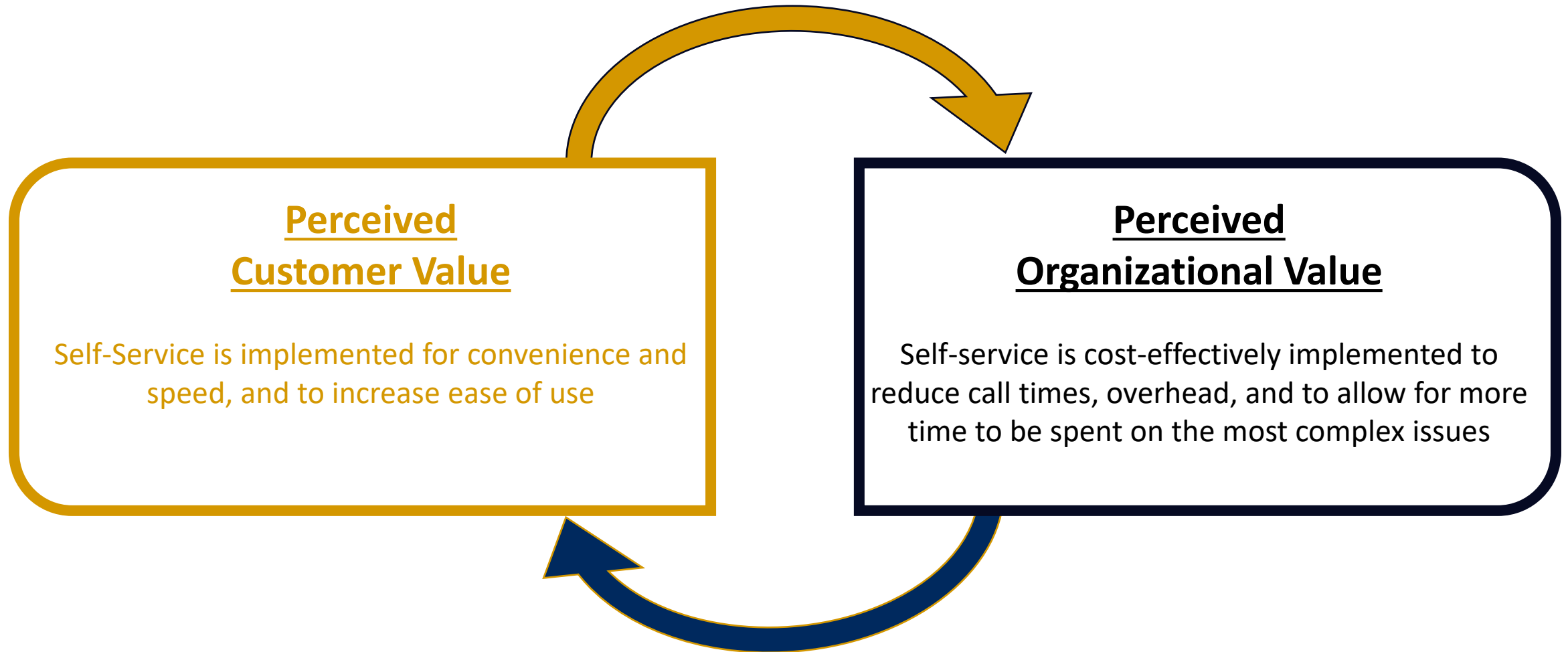
Benefits – Costs = Value

What are the benefits and costs of Self-Service?

Are there benefits for the company and the customer?



Value in Self-Service is Co-Created



Co-Creation of Value

Customers and organizations interact and integrate their resources for each others mutual well-being.



Co-Destruction of Value

Customer and organization interactions reduce well-being for one or both, through intentional or unintentional misuse of tools and resources.



Co-Destruction of Value



Customers

- Misuse of technology
- Lack of engagement or avoidance (ex. FTP)
- Trust and privacy concerns
- Absence of skills and resources to take advantage
- Preserve the “Status Quo”
- The “HOW” is bigger than the “WHY”

Employees/Organization

- Negative perception of SST
- Provide inadequate support to customers
- Internal process, policy, and procedure failures
- Resistance to change
- Inconsistent information



Co-Destruction of Value



Customers



Employees/Organization

- “I don’t have my account number or password handy in order to login or create an online account”
- “I’m trying to explain my problem to your chat bot but it’s not returning helpful information”
- “The amount of time it takes to figure out the SST tools is not worth it to me”
- “I don’t have access to the technology needed”

- “We can’t give you that information unless we can verify its you”
- “We can only answer the question that’s asked, we’re not mind readers”
- “Amount of effort it would take to create an exceptional experience with our SST is not worth it”
- “Our online experience is better than our mobile, text, or IVR”



Co-Destruction of Value



Before Service Encounter

Lack of Resources

If a customer lacks pre-possessed resources, such as time, skills, technology, proper information, or trust in the organization the process can fail.

Expectations

Failure to achieve expected outcomes during the service encounter may drive intentional misbehavior

During Service Encounter

Conflictive Resources

Customers fail to integrate or apply the available resources in the expected manner.

Negative Perceptions

Customers view the service provider as misusing resources, rather than in situations in which they are willing to share responsibility for misconduct

After Service Encounter

Restore Resources

Disappointed customers may try to recover their resources in a way that is incongruent with the service provider's expectations.

Contradictory Perceptions

Outcomes perceived as positive by one customer and negative by another



AI and CX Strategies

Can technology be empathetic and create a climate of service?



Make your employees lives easier – they have to believe in it

If they believe, then they can tell your customers about it

Make current channel experience easy and convenient

If the phone call was hard, how much easier can the self-service be?

Make sure you're paying attention to your service climate

What is your employees shared sense of service quality?



Service Climate

The overall sense or meaning people construe from the patterns of their individual experiences and behaviors they observe in social settings constitutes the climate of the setting.

Service Climate is the shared sense people who work for an organization have, where policies and procedures, and the expected/rewarded employee behaviors, emphasize service excellence.

(Schneider, White, and Paul 1998).



Managing Service Climate

Employee Dimensions

Team Service

- How would you rate the following:
 - Job knowledge and skills of employees in your business to deliver superior quality work and service?
 - Efforts to measure and track the quality of the work and service in your business?
 - Overall quality of service provided by your business?
 - Leadership shown by management in your business in supporting the service quality effort?
 - Tools, technology, and other resources provided to employees to support the delivery of superior quality work and service?

Work Facilitation

- We have the manuals and resource materials we need for the systems we work with.
- People in my business are adequately trained to handle the introduction of new products and services.

Organizational Dimensions

Other Departments

- How would you rate the job knowledge of the staff in the area?
- How would you rate the overall quality of service provided to you by this area?

Managerial Practices

- My manager is very committed to improving the quality of our area's work and service.
- My manager recognizes and appreciates high quality work and service.

Customer Orientation

- My business does a good job keeping customers informed of changes which affect them.
- Top management in my business has a plan to improve the quality of our work and service.

Customer Feedback

- My business asks our external customers to evaluate the quality of work and service.
- We are informed about external customer evaluations of the quality of service delivered by my business

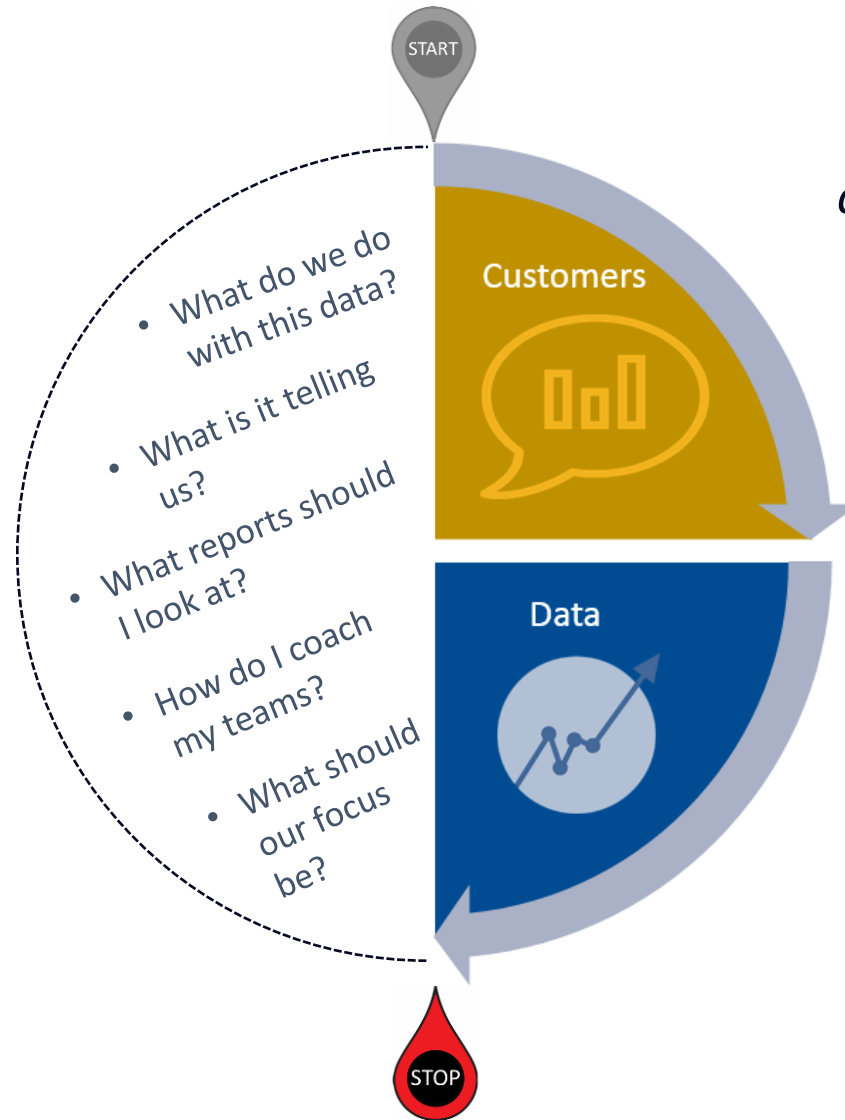
Think of this in the context of AI. If you need all of these things to have a best in class service climate, which parts can AI take over, which parts need to be managed to help facilitate the successful integration of AI, and which ones should remain AI free?



Build organizational buy-in for data-driven insights

Create a “Cycle of Success”



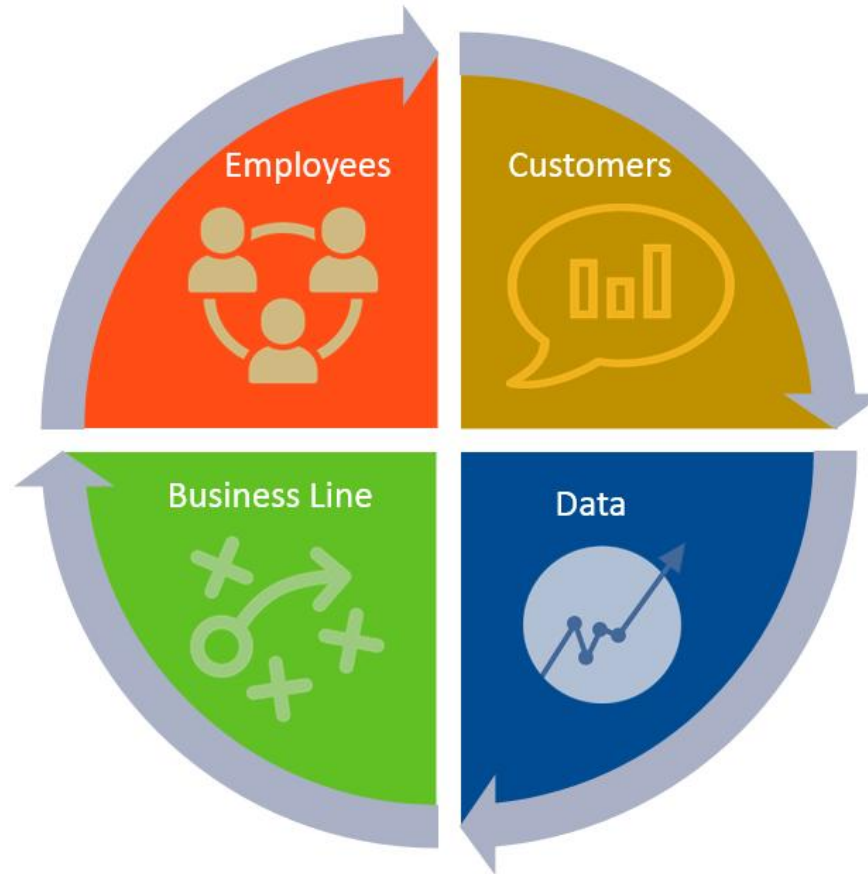


Below Average organizations create a beginning and an end to CX measurement.



“Cycle of Success”

*The **BEST** of **THE BEST** know CX measurement is a continuous process, a cycle of experiences.*



Continually enhance all connections throughout the “Cycle of Success” AND provide support and resources within each quadrant.



Leverage dynamic personas through developing a single source of truth

Utilizing AI and Knowledge
Management Software



Traditional Personas

Persona Template



Name

"A quotation that captures this user's personality."

Age:
Work:
Family:
Location:
Charater:

Personality

Introvert Extrovert
Thinking Feeling
Sensing Intuition
Judging Perceiving

Goals

- _____
- _____
- _____
- _____
- _____
- _____

Motivation

Incentive

Fear

Growth

Power

Social

Frustrations

- _____
- _____
- _____

Brands

- ● ● ● ●
- ● ● ● ●

Bio

- _____
- _____
- _____
- _____
- _____
- _____

Channels

Traditional Ads

Online & Social Media

Referral

Guerrilla Efforts & PR



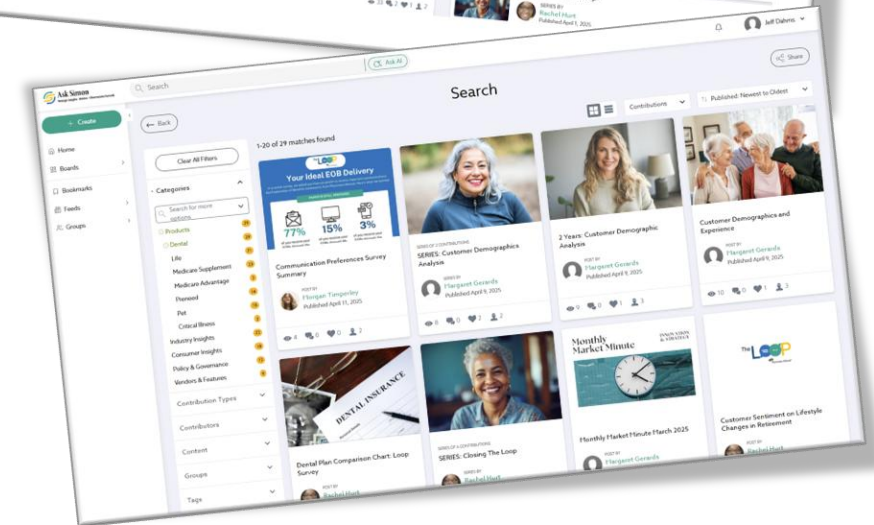
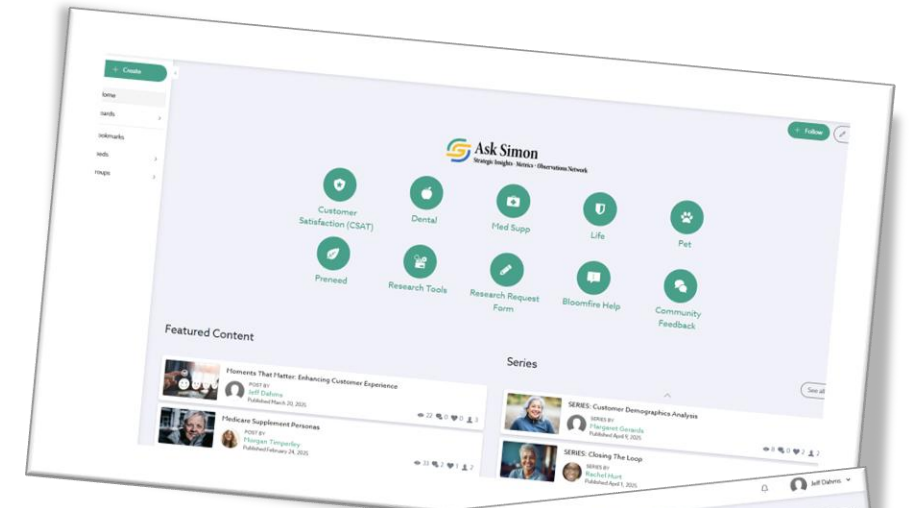
Dynamic Personas



SIMON says.....

The AI-Based Insights Engine that comprehensively explains our customer behaviors, needs, and preferences.

- Stores all market intelligence, research reports, and third-party data feeds
- Bolsters our personas with new research
- Ask AI questions about our research reports
- Reduces repeated questions to subject matter experts and researchers
- Summarizes long-form research into the most salient points
- Fosters insights-led decision making at all levels of the organization



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