6 Techniques for

Customer
Self-Service
Success

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Introduction

In today's digital-first economy, customers form their first impression of a company based on digital interactions. Every digital interaction including the ease of search, the ease of finding information, the ease of self-education, and the ease of self-servicing, shape that impression.

Providing options for online self-service offers two benefits:

1. Serves as passive case deflection to help reduce case volume submitted to the contact center

2. Helps customers and prospects to be successful on their own. Customers and prospects want to find answers themselves before having to reach out to any company contacts, including and especially the contact center.

A lack of self-service capabilities should never be the reason for churning a customer. Building intelligent self-service into your digital properties will help you predict what customers need and take them on a digital education journey, leaving a lasting positive impression.

This ebook covers 6 techniques to help customers achieve self-service success.

6 Techniques for Intelligent Self-Service

1. Identify self-service content by understanding the customer journey and support issues

2. Make self-service content easy to find across all digital channels through unified data

3. Ensure the self-service unified search box is prominent on your site and case submission form

4. Proactively offer contextually relevant information

5. Use machine learning to continuously improve the customer experience

6. Leverage analytics to measure case deflection and self-service success

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1 Identify self-service content by understanding the customer journey and support issues

When identifying what content to include in your self-service site, remember that more does not always equal better. Remember the 80/20 rule — 20 percent of your content will likely solve 80 percent of your issues. So how do you know what content should be offered via self-service?

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Start by reviewing support issues. Issues that appear repeatedly or those that are simple, such as a password change, signal a need for self-service content. If you create self-service content for the most common issues first, those cases are deflected and your agents will then be free to spend time on more complex or new issues. Additionally, when you take the time to review your most common support issues, you will also get a sense of the language and terms your customers use, which you can then tie back into your content.

Next, understand what your customers are searching for on your digital properties. Use search analytics to uncover what your customers are searching for the most, and ensure you have content to answer their questions. Investigate the search queries with zero results to see what you may be missing altogether and determine if additional content needs to be created.

Ultimately, by understanding your customers — their issues, what they are searching for, and how they use your site — you will be able to determine how to prioritize content creation and management so that your customers are always getting the most valuable information through self-service.

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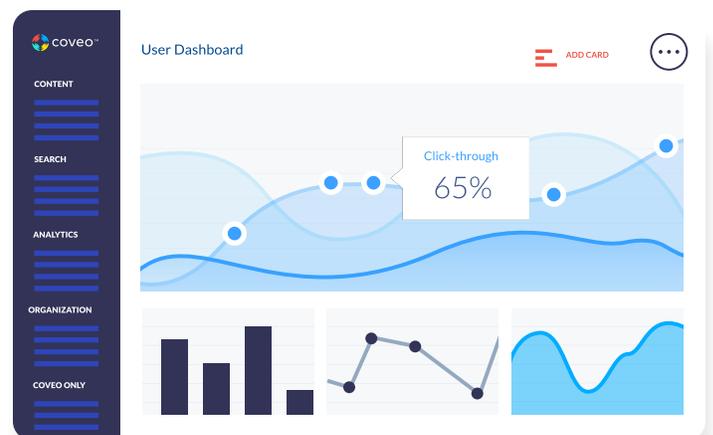
2 Make self-service content easy to find across all digital channels through unified data

Now that you have the right content, you need to make it available.

The information people need to self-serve rarely resides in a single repository or knowledge base. Instead, it is created, shared, and stored across a variety of platforms, databases, and apps, both on-premise and in the cloud. But your customers shouldn't have to worry about the best way to interact with you to get the information they need. Instead, you should be bringing the information to them, in the channels that they prefer.

You can do this by unifying the data across your internal silos. With your self-service content unified, you are able to deliver a consistent content experience across all channels.

To ensure your customers are able to find what they need, regardless of where it lives or how they access it, make sure search is optimized for every device as well. It is important to offer an intuitive, people-friendly search experience not only on desktops, but on tablets and mobile devices too.

Content Sources

- 01 Knowledge Base
- 02 Support Sites & Communities
- 03 In-Product Help
- 04 Chatbots & Virtual Assistants
- 05 Live Agent Chat & Contact Centers
- 06 Cloud Storage
- 07 Product Documentation
- 08 Intranet

Digital Channels

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3 Ensure the self-service unified search box is prominent on your site and case submission form

Self-service only works if your customers can actually find what they need.

Search is one of the most popular ways customers look for answers. Display the search box prominently on every site, page, and community where you offer self-service. This lets customers know that your organization's search tool can connect them with the answers they need when they need it.

In situations where customers decide to submit a ticket, make sure you are also presenting search results on the ticket submission form. This will give your customers one last opportunity to find the information themselves, and deflect the case from getting submitted.

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72% of customers prefer to use a company's website to get answers to their questions rather than use phone or email.

47% of US online adults say that they are very likely to abandon their online purchase if they can't find a quick answer to their question."

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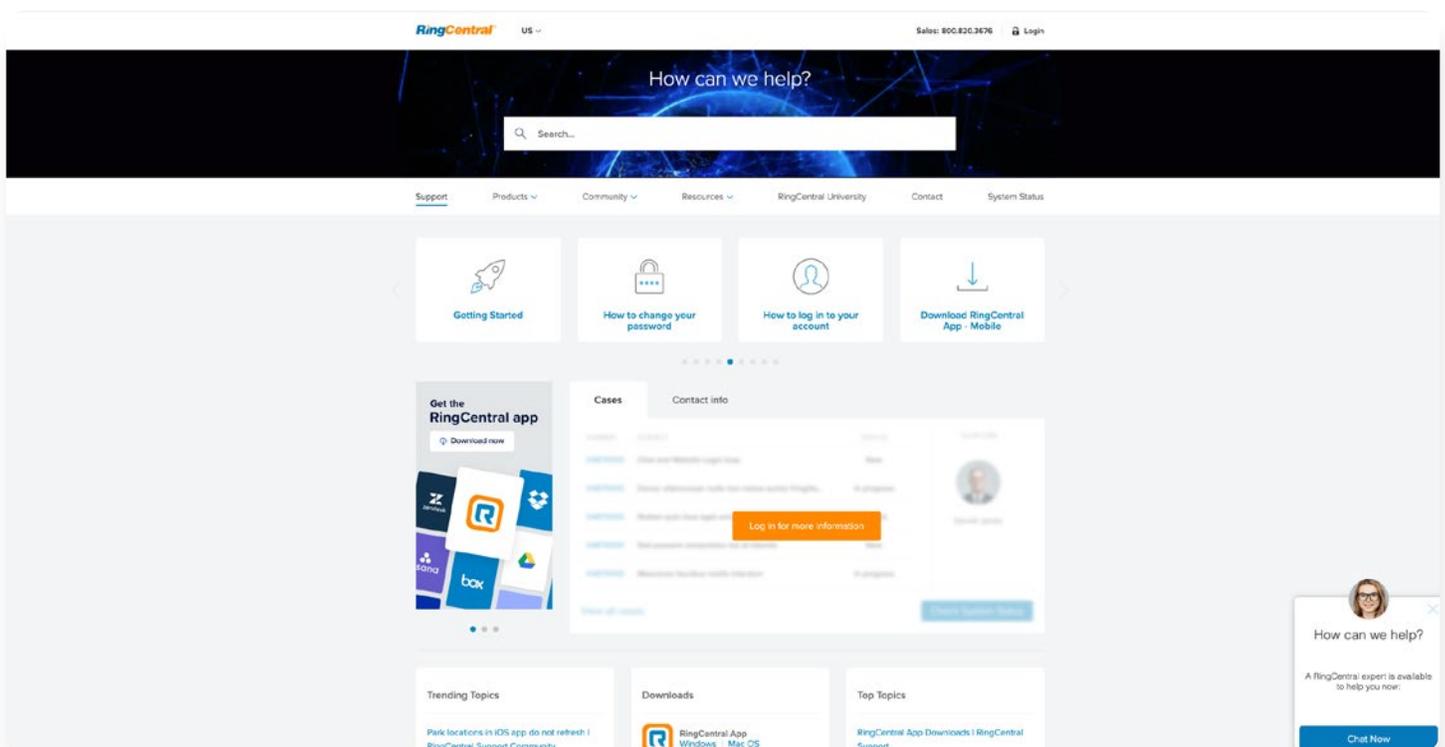
4 Proactively offer contextually relevant information

Use your customer's context to proactively recommend personalized and relevant content that might help with their task at hand.

Delivering proactive recommendations makes the self-service experience more effortless and increases the likelihood that they will find the answer they need. There are several customer attributes, sourced from your CRM or Case Management system, that can be used to dynamically recommend contextually relevant help to each customerbefore (or while) they type, including:

- Product(s) owned
- Support plan entitlement(s)
- Geo-location
- Role (for employee self-service)
- In-bound search query

You can offer these proactive insights and recommendations at any point throughout the customer journey on your self-service sites. However, there are particular moments where it is absolutely essential for success, such as when a customer begins typing in the search box, and as a customer begins to create a new support case on the site.
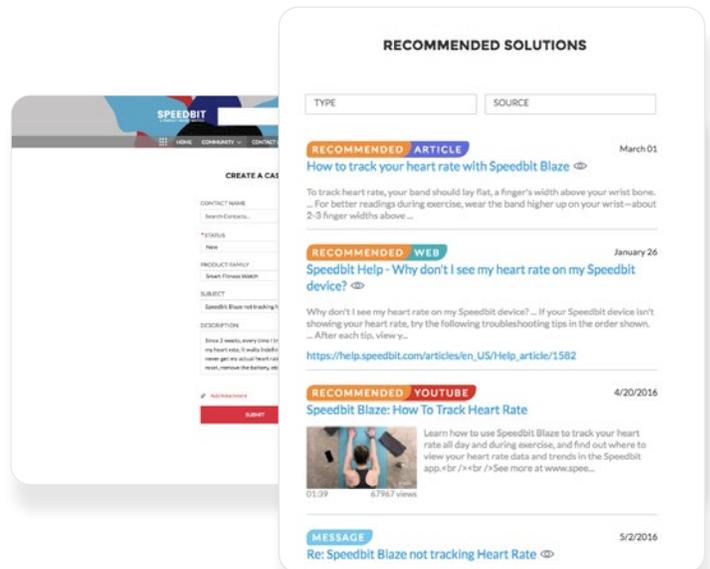
As the customer enters the details of their new case, helpful and personalized content is automatically displayed.

Gartner.

❝❝

Improved delivery of contextual knowledge reduces a provider's time to answer by 20% to 80%, raising competency and satisfaction."

↓ **8%** of support calls

↓ **40%** of inbound email

↓ **18%** support costs

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5 Use machine learning to continuously improve the customer experience

Machine learning model can track a single customer's end-to-end journey.

Customers learn from interactions across that journey to make the most relevant and contextually rich content recommendations. The best self-service solutions integrate machine learning capabilities for scalability and to analyze how user groups look for help, what they viewed, and whether or not they were able to successfully self-service, then:

- Auto-tune search results to deliver content that helped other similar users
- Proactively surface content that helped other similar users with the same need
- Recommend helpful query suggestions "as you type" that have proven to be effective for other similar web visitors

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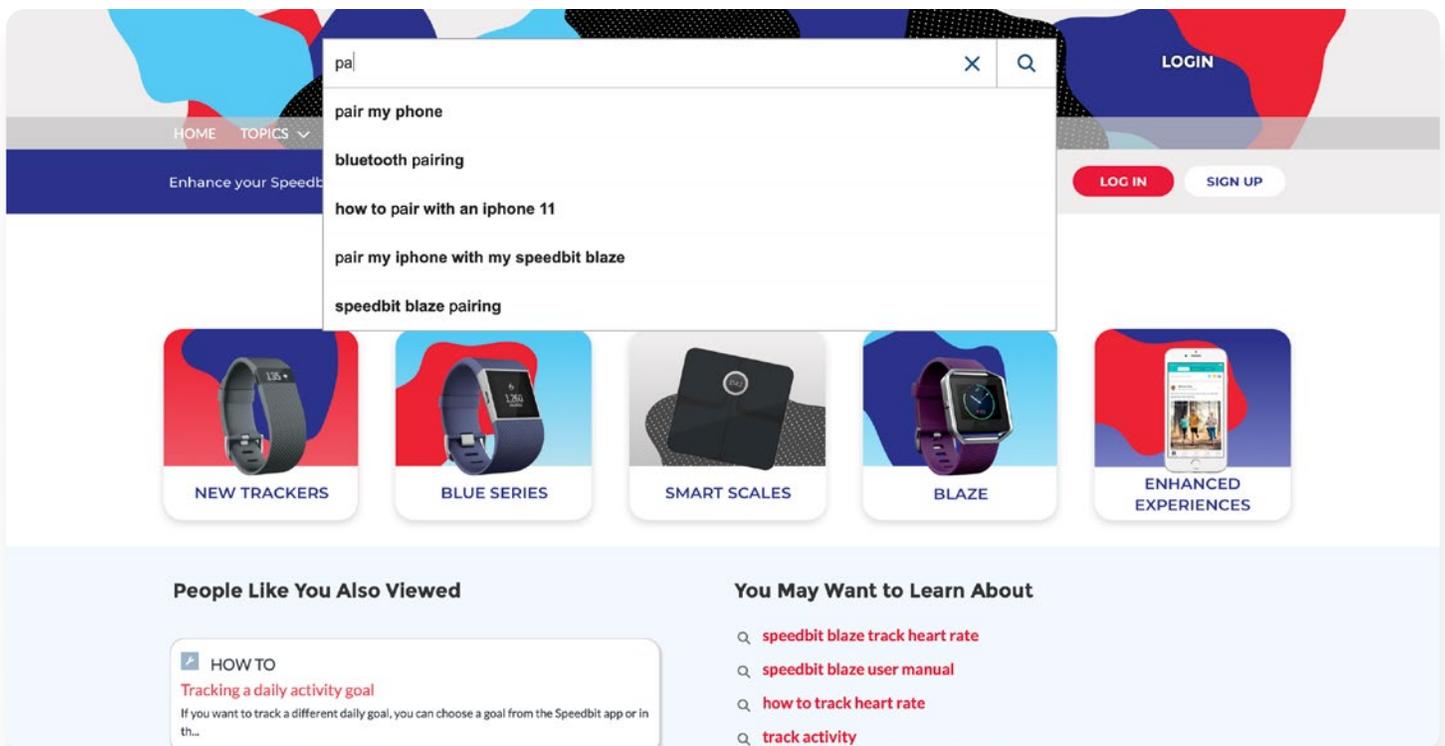
6 Leverage analytics to measure case deflection and self-service success

The final technique is to leverage analytics to measure case deflection and self-service success.

Case deflection and self-service success are two specific metrics which can be used as indicators of your program's success. However, it is important that these metrics be looked at holistically with other business goals such as overall support case trend, total cost-to-serve and customer satisfaction.

Case deflection is measured as the percentage of customers who had the intention of contacting customer support but did not because they were able to resolve their issues online without human intervention.

Self-service success is measured by the traffic and click-through rates on your self-service pages which provides insight into how well customers could find and use information. Over time, these metrics should indicate a trend in your customer support experience.

By leveraging analytics, you will be able to measure success and continue to optimize the self-service experience for your customers.
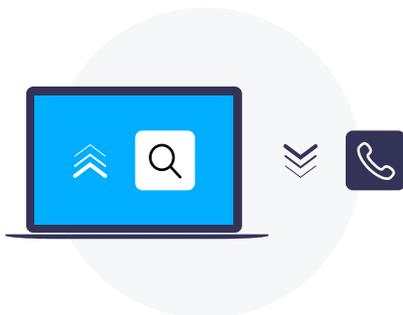
A decrease in case volume indicates customers are likely finding answers on their own, through self-service.

An increase in overall traffic and engagement on your self-service site or community indicates people are finding your content engaging and valuable enough to go there for answers.
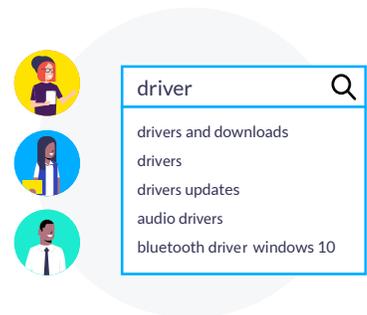
Positive customer ratings on knowledge articles or self-service content represent deflected cases.

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Conclusion

Every digital interaction is an opportunity to learn from and delight customers.

By leveraging the 6 techniques in this ebook, companies can build intelligent self-service capabilities that will help teams optimize a customer's digital journey while also equipping internal staff with rich customer insights.

Real-World Results

Leading support organizations around the globe have already discovered the powerful impact these capabilities can have on the overall success of their self-service programs, and — just as critical — on their ability to measure that success with confidence and accuracy.

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Business Intelligence Software

Over **$1M** per month in savings through self-service

Informatica

Data-management solutions

Skyrocketed case deflection by **120%**

Medallia

Global Customer Experience Management Platform

Agents handle **34%** more cases on their own without escalation

vmware

Cloud Infrastructure & Digital Workspace Technology

65% increase in click-through rate

Learn more about how you can use AI-powered search to drive higher conversions

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