

Prepare Your Digital Support Organization with Intelligent Self-Service

Self-Service Health Check

Use this checklist to understand how to improve your self-service capabilities.



Connectivity & Relevance

- Does your support portal access all enterprise content sources like Salesforce Knowledge, Sharepoint, Jive, Oracle Knowledge, Lithium, Dropbox, Box and other repositories?
- Does your self-service portal unify content created across all customer channels like Communities, Knowledge Bases, discussion forums, ideas exchanges, user groups and documentation?
- Is the most relevant result, from across all sources, surfaced to the top when a customer performs a search?

User Experience

- Does your support portal display a prominent search bar and intuitive search experience on all devices?
- Does your self-service experience deliver proactive content recommendations to help users succeed throughout their online service journey?
- Does your self-service site use customer data to deliver a personalized and predictive experience?

Processes

- Do you have a process in place for creating and leveraging organizational knowledge in the context of support, such as Knowledge-Centered Service (KCS)?
- Do you feel like your support organization has a unified vision of the customer support experience, beyond self-service?
- Do you have clear definitions of what constitutes self-service success and case deflection on your self-service site?

Analytics & Measurements

- Are you able to easily identify and address content gaps as they emerge?
- Do you have usage analytics to track customer behavior and key KPIs such as site visits and cases deflected?
- Can you easily determine how your content is performing and where the content ranks when customers look for solutions?

If you left 3 or more of the elements unchecked, your self-service delivery is likely falling short of your customers' expectations, and not maximizing your case deflection.

Deliver intelligent and effortless self-service with our latest ebook,
The Guide to Delivering Intelligent Self-Service.

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