



## How to Give Your Customers What They Want With Self-Service

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# Meet Your Speakers



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# Agenda

- Self-service stats and benefits
- Four components of self-service
  - Knowledge base
  - Customer hub/Support hub
  - Live Chat
  - Community Forums
- How to get started





# Is Self-Service Viable?

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- More than half of cases are closed at first contact
- As much as 40% of live service volume could be resolved through self-help channels Gartner
- Only 25% of cases were deflected by self-help resources in 2022



# What do customers say?

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- 75% of customers say it is important for businesses to offer self-service options to answer their questions Emplifi
- 60% prefer look for self-service first, instead of contacting a live agent Microsoft
- Digital channels that are better suited for self-service are growing in usage TeamSupport



# Increasing Efficiency & Customer Satisfaction

- Self-service provides two valuable support benefits:
  1. Increases efficiency:
    - a. providing answers faster
    - b. reducing agent involvement
    - c. allows your team to focus on urgent, high-value, and complex issues
  2. Boosts customer satisfaction
    - a. Customers prefer it
    - b. They can seek help in ways that work for them
    - c. It empowers them

# 4 Important Components

## Self-Service

### Knowledge Base

A searchable collection of resources

### Customer Hub

A centralized place for product and support information

### Live Chat

A platform for connecting with customers at any time

### Community Forum

A place for customers to communicate with each other

These are the 4 most prominent, accessible, and useful self-service tools.

How many are you offering?



# Knowledge Base

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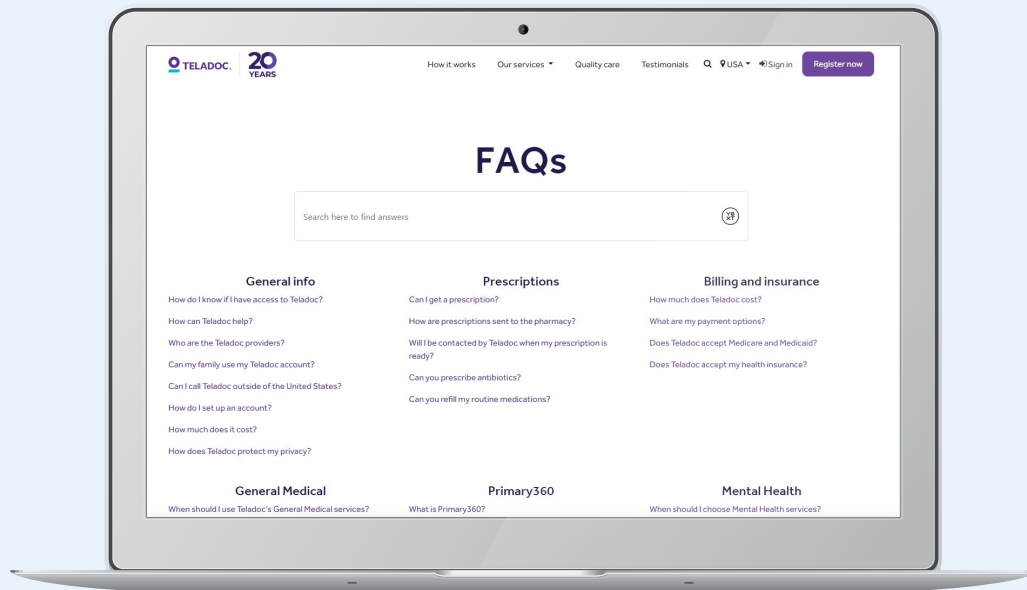




# What is a knowledge base?

A searchable collection of resources including:

- FAQs
- User guides
- How-to tutorials
- Blogs



Can be in any format: text, video, or images.

# Top 3 Knowledge Base Must-Haves

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1. Search bar
2. Categorized
3. Linking between articles



# Tips From Our Experience



## Rely on support personnel

They're the best source for the content you should develop

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## Use a variety of media

People learn in different ways; utilize text, videos, and images

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## Offer escalation options

If customers need extra help, provide ways to reach an agent

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## Customer/Support Hub

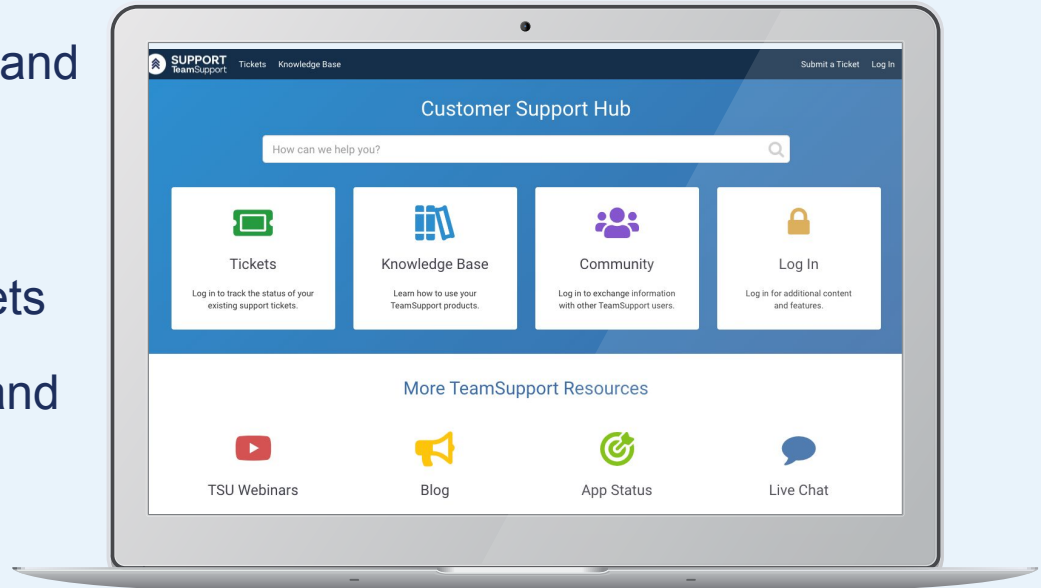
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# What is a customer hub or support portal?

A centralized place that provides access to support tools, services and applications, as well as related resources. It often includes:

- A way to submit or review tickets
- Connections to other content and support channels
- Application status





# Customer Hub Offerings

- Things to consider:
  - Complete ticket visibility
  - Opportunities to provide feedback
  - Connection to the Knowledge Base and Wiki
  - Engagement in the Community Forum
  - All product information (release notes, etc.)
  - Easy ways to connect with Support Representatives

# Tips From Our Experience



## Promote it to your customers

Make sure your customers know  
it exists and it is easy to access

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## Customize it

Highlight frequently-used  
resources

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## Include Application Status

Make it easy to see any outages  
or service impacts

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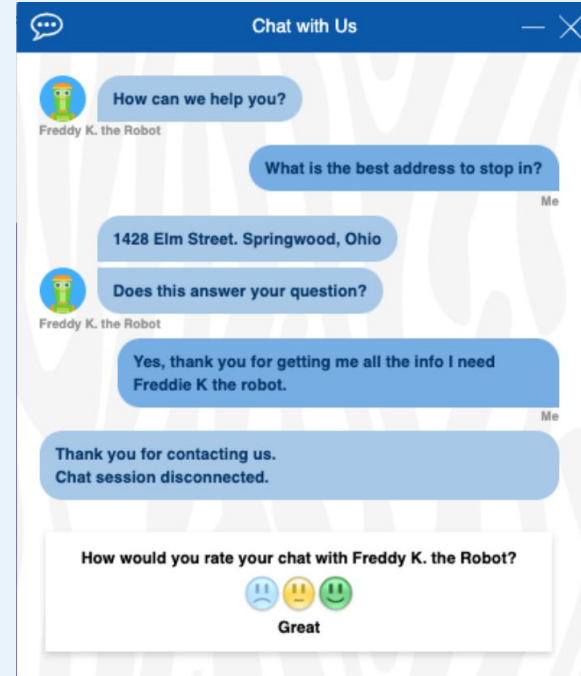
Live Chat

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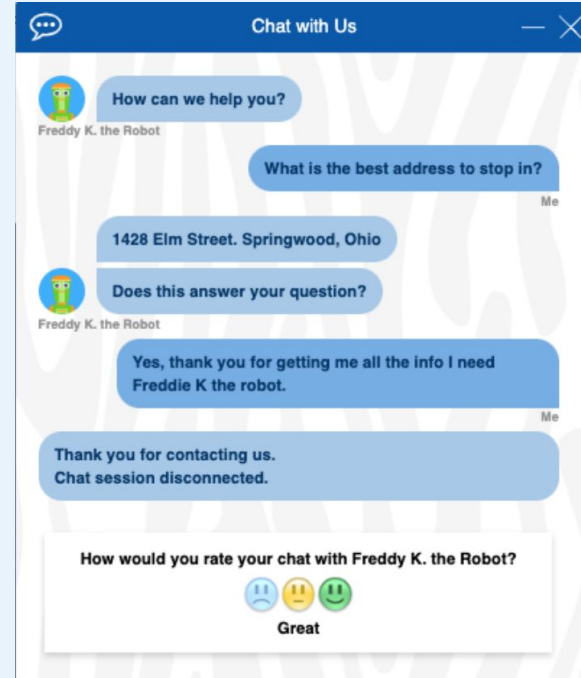
# Conversational Support

- People prefer self-service to mimic a live interaction, and AI and chatbots are the best way to do that (Gartner)



# How can chat help self-service?

- Automate responses for FAQs
- Redirect to other resources such as knowledge base and Wiki
- Use custom chat forms to gather necessary information before speaking to an agent
- Leverage AI to allow certain chats to automatically create tickets





# Tips From Our Experience



## **Tell your customers they are talking to a bot**

People interact with humans and bots differently, and have different expectations for bots



## **Prepare and Update**

Bots should be set up for the ways you expect your customers to interact with them and updated regularly



## **Keep the human element**

Make sure that a real person is accessible and isn't too many clicks away



# Community Forum

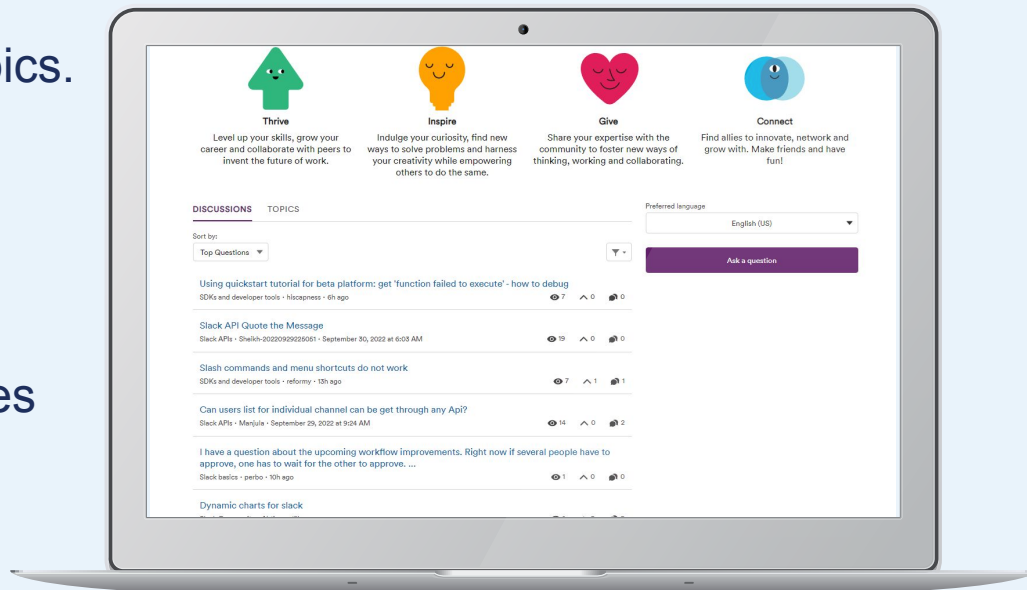
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# What is a community forum?

A place for users to exchange thoughts, ideas, and views on topics. Customers often use it for:

- Asking each other questions about the products
- Advice on system best practices
- Tips for support efforts



# Tips From Our Experience



## Trust

Having a forum allows customers to gain more trust in the platform by hearing from other customers



## Crowdsource

Active customer bases can enable fast response times due to crowdsourcing answers to questions



## Moderate

Always ensure agents and product experts are looking through the forum to eliminate misinformation



# Getting Started ASAP

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# Self-service Cautions

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- Poor self-service can be worse than no self-service
- Customers abandon self-service channels when information is hard to find
- It requires up-front work
- Self-service is a product
- Self-service requires a specific skillset
- Self-service requires upkeep



Step 1

Step 2

Step 3

Step 4

Own it

Audit your  
resources

Consolidate  
and fill

Make it  
simple

# Get in Touch



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Click **HERE** to schedule a demo

# Thank You

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# Any Questions?

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## Let's Chat!



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