TeamSupport

How to Build an Engaging Self-Service Support Site

Introduction

Customer support efforts have increased exponentially in the past couple of years. With that, comes increased customer demands and expectations for how quickly their questions or concerns will be addressed, how easy it is to get the help they need, and so on.

In 2022, 88% of customers stated that they expect businesses to offer a self-service portal. It's clear that now, more than ever, customers want to help themselves and prefer to seek guidance only when the manner is more complex.

So, how can businesses create self-service options that encourage customers to seek solutions on their own? The answer is simple: answer the right questions, make sure it's easy to understand, and promote it so that it is accessible.

In this whitepaper, we will explore ways to not only create a customer self-service site, but also discuss ways to ensure it's engaging and effectively fulfilling customer needs.

Part 1: Setting Up Your Platform

When you're choosing a platform for self-service options, you don't have to look much further than your customer support software. In reality, this process began when you first started searching for a support system that allowed you to manage customer inquiries. Most help desks or ticketing management systems come with self-service tools: so it is a good idea to either explore what options your provider offers or, if you're currently searching for a customer support system, then you'll need to pick one that offers self-service tools.

In addition to ensuring your customer support platform offers self-service options, you'll need to keep the following things in mind when setting up your tools:

Make sure it is cross-browser friendly (Chrome, Safari, Firefox, etc.)

Brand your support site to match your company image

Include cross-site search so customers can easily find what they need

Provide a customer portal where users can view, edit, and submit tickets

Include a variety of options such as a knowledge base, Wiki, or forum

Offer live chat so customers can reach out if needed

Provide a general orientation that offers instructions on how to use the site and where to find information

Include tutorials with supporting videos, images, and/or screenshots

Part 2: Answer The Right Questions

Support organizations and departments must make sure their self-service tools answer the questions that customers seek. With that, there are certain topics that should be addressed to avoid creating confusion for your customers. These include "getting started" articles, basic operation how-to's, and records of software or service updates.

For inspiration on other topics to discuss, here are some tips for ensuring you're answering the right questions:

Survey prior phone calls and emails for frequently asked questions

Ask for feedback in the form of surveys, comments, and a suggestions form

Explore ticket trends to identify complex or troubling areas

Be proactive: reach out directly to customers and ask about their success with the product or service

Part 3: Make Sure Answers Are Easy To Understand

Your self-service options won't be of much help if they don't offer solutions in basic, easily understood ways.

Beyond using simple, well-constructed sentences; there are a number of things you can do to guarantee customers easily grasp the content and can move forward with ease:

Avoid jargon

Supplement technical terms with brief explanations or links to more information

Provide step-by-step instructions (even when it seems redundant)

Include captions for every picture should the image fail to load

Use structural hierarchy to allow customers to capture information at a glance (this means bolded headers, number sequencing, etc.)

Incorporate lists to avoid being too wordy

Utilize a small amount of various fonts or text colors to highlight important information

Include hyperlinks to any related topic

Part 4: Promote Your Self-Service Options

Customers can't use what they don't know exists. If they aren't able to quickly find online help options, they're likely to call or email the help desk directly. Therefore, it is essential to make sure your self-service options are easy to find and navigate to.

Here are a few ways to promote your tools:

Make sure your portal isn't hidden on your website

Be certain to discuss it during onboarding experiences

Include a link to your portal in email signatures

Reference the tools in any trainings you offer

Remind customers about it during phone calls, voicemails, or even holding times

Refer to the link in all customer newsletters

Implement ticket deflection when customers are creating new tickets that involve simple, do-it-yourself solutions

Moving Forward

Designing helpful web support isn't a one-time event. The content in your self-service options should be consistently updated, especially as new software and updates are released. It's a good idea to list the dates of revision so they know the answers they find still apply to their particular issue.

Ultimately, offering self-service isn't just about making information readily available for customers; it's also about empowering them to feel confident in their success with your products or services. When done effectively, you'll notice that not only do your customers engage with your offerings more, but their happiness increases too.

TeamSupport

TeamSupport is a B2B-specific customer support software platform that makes it easy to adopt more customer-centric practices. With customer happiness at the center of our software, we offer a variety of self-service tools to empower them to find answers when and how it's convenient for them.

Are you ready to see what TeamSupport's self-service tools can do for you? **Let's chat today!**

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