



eBook

Self-Service in B2B Customer Support



TEAMSUPPORT.COM

Why Self-Service is Great Customer Service

Providing customers with a choice is almost always the right call. The age of personalization is in motion, and customers want their experiences to be tailored to their specifications.

An ideal self-service tool provides options for customers to solve all tasks (that all for it). The more freedom allowed customers to solve problems their own way, the better.

- **75% of customers believe it's important for brands to offer a full self-service option.**
- **60% of customers choose self-service as their first action in seeking help.**

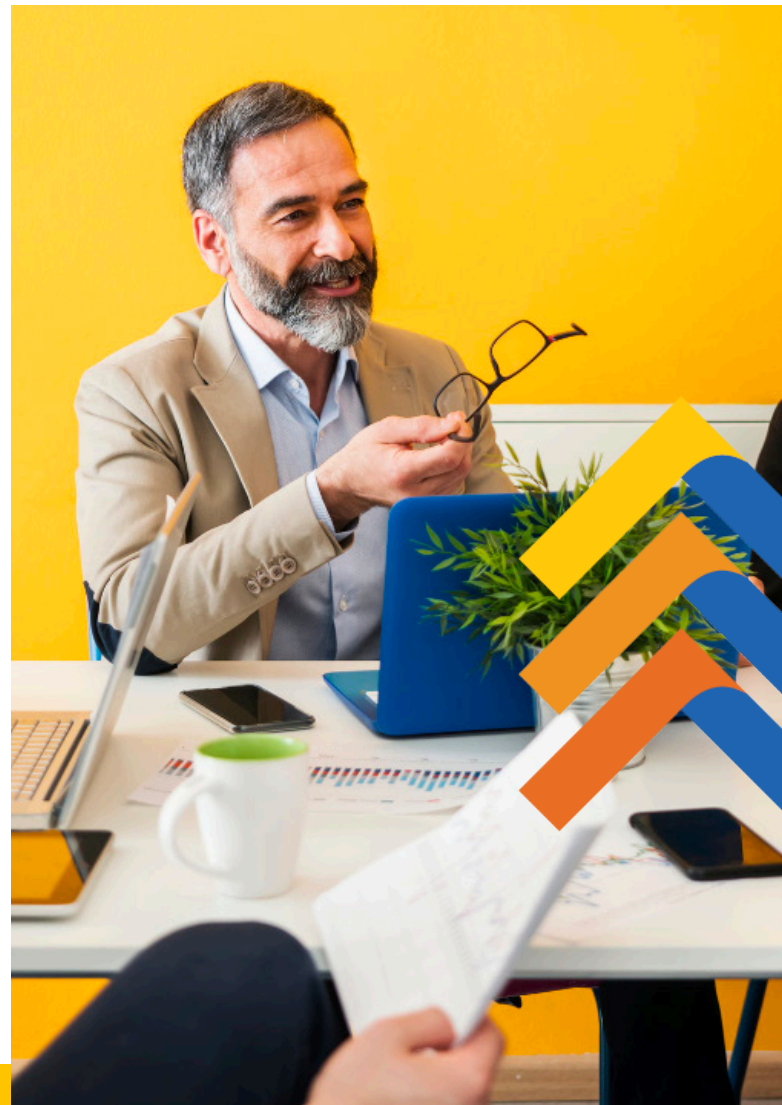
A great customer support solution meets the demand for good experiences and ideal service. According to a Coleman Parkes survey and research from Nuance:

- **91% of respondents said they would use a knowledge base if it were available to them.**
- **75% said online support is preferable as long as it is reliable.**
- **66% of customers would rather help themselves.**

It is particularly important to precisely organize information and product wisdom into well-cataloged libraries for a knowledge base – self-service needs to be designed to the customers' needs. In other words, self-service needs to be customer-first.

Provide customer control with automation

One of the more important facets of self-service, and what makes it so popular, is that it's fast. Don't feel like you have time to go through the customer support ringer, wait, and then be routed somewhere else? That potential customer service experience happens all too often, and even if your business prides itself on behaving otherwise, it is still a very real sentiment shared by many.



According to TeamSupport's State of Support report for 2022, self-service accounts for a higher percentage of all support interactions. Additionally:

- **Overall support demand continues to grow at a rate of 11%.**
- **43% of cases are resolved through self-service channels.**
- **53% of these cases are resolved at first contact.**

The self-service experience is fast, it's easy, and customers can do it all by themselves – without having to wait or rely on anyone to help them.

Control over a customer support experience is especially important if the customer has a smaller issue, such as one that can be easily solved through a chatbot or a knowledge base help article. Where this gets tricky is when the problem isn't that simple.

In these cases, a live chat chatbot becomes particularly useful – a customer can chat in, follow prompts, and then be routed to a customer support agent that can already see what this customer needs through the chatbot interactions.

This bypasses the typical issues associated with calling upon a human professional, and yet they are still included for the actual problem-solving process. All in all self-service literally puts control into the customer's hands.

In fact, according to our State of Support report for 2022, chatbots are only becoming more integral to the entire self-service ethos, with 59% of companies currently using chatbots, and 68% planning to use them within the next year.

Make self-service as complete as possible

The key to providing customer self-service options is to make them as complete as possible. So what does “complete” mean in this context? If customer support only solves a portion of a problem, then it's not a complete service. Self-service needs to be the same way, and it should never be looked at as though it is informal or only as a method of deflecting tickets.

Overall support demand continues to grow at a rate of 11%.



Self-service needs to be complete service and actually have the capability of letting customers solve problems, at least those that can be solved without assistance from the experienced human element.

- **71% of support demand is initially serviced through self-service**
- **Only 22% of self-service initiated requests are resolved by self-service tools**

A key benefit of providing FAQs, knowledge bases, and instructional videos is that it significantly diminishes the burden of repeating, frequent tasks for support agents.

If customers can find the answers they need for simple problems without contacting the support team, then the overarching focus can shift to solving bigger issues and improving overall service.

It's ultimately more effective to let customers choose when they need to speak with a support agent. Here are some situations better suited to self-service:

Quick questions

Quick questions are essentially those which can be answered in 1-2 interactions with support staff. When a customer has a quick question, submitting a full-on ticket or calling in can seem like too much work. With a knowledge base or self-service chatbot function, you'll be giving them a way to access an answer as quickly as possible.

Clarifications

Sometimes a customer's question is more of a double-check. Calling in or submitting a ticket for these inquiries can seem excessive. Offering self-service channels saves time and empowers customers.

Adding humanity to your self-service support options

When your business creates FAQs and knowledge base articles, it's integral that they are written to be customer-first. Especially when it comes to how-to's or problem-solving articles, DO NOT write them as though the reader knows what you are talking about. Always create these pieces as though you are explaining it to someone who has never heard of your company or product.

Avoid using jargon, keep information simple and pointed, don't use acronyms, don't abbreviate. Essentially don't self-sabotage.

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There are a handful of key elements to adhere to when crafting customer-first self-service articles:

Use buyer personas

Chances are that your business utilizes buyer personas for the Marketing and Sales teams. These fleshed-out personas are massively helpful in determining who your typical and ideal customers are. Using these as a springboard, your writers can launch into self-service articles with confidence and create pieces that are fine-tuned to your customers.

Keep it simple and clear

It cannot be stated enough – self-service articles need to be easy to read and understand. Directions need to be written plainly with acute attention to exactly what a customer should do. For example, if an article states to “change parameters in the settings,” where are the settings located? Change parameters how? What does it say exactly? These articles need to be written precisely.

Tell a story

It doesn't need to be superfluous, but storytelling is a key aspect of humans committing information to memory.

Get to the point. Be sure to use examples, fictitious or factual, to color your articles. There doesn't need to be a great epic in every help article, but for the most important and visited pages, be sure to paint a picture so customers can more easily commit it to memory.

Include visual media

Painting a vivid, informational picture is much easier if there is an actual picture. It's the digital age and no one can get away with not using images and videos.

Use images to show where things are and what to click on. Use short and pointed recordings to show how to perform certain processes. People learn and retain information 55% better if there's an image included.



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Self-service improves performance

Track your success. With your offered self-service tools, you should monitor and evaluate your channels regularly. Your knowledge base should be actively maintained with updates and additions, and while an FAQ page likely won't change as often, it's important to track page visits to understand if it is being used and how often.

Need a hand getting started? Here are some of the most popular metrics used to measure performance:

Surveys and user ratings

Be customer-first, focus on customer satisfaction, and find out their opinions straight from the source. Either follow up a self-service event with a survey, or include ratings on your articles to gather feedback directly.

Return visits to the support page

Measure the number of visitors returning to a support page, within a set time frame, to determine the general effectiveness of the page. For example, if the issue is solved on the first visit, the customer won't need to return to that page.

Page views and average time spent

It can be a rather effective measurement of channel growth to track the number of page views and time spent on your self-service pages. That said, these measurements can't communicate if the page is actually meeting customer needs.

Ticket deflection

If your customer support software can do it, be sure to implement ticket deflection tools and keep a close eye on the metrics.

As far as tangible evidence that self-service improves performance and reduces costs, according to Software Advice:

- **Over 75% of respondents confirmed that First Level Resolution, First Contact Resolution, Cost Per Contact, and Cost Per Incident improved with self-service tools in place.**
- **Speed to answer improved by 80% of the respondents, and 65% reported reduced abandonment rates.**

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Properly promote self-service options

Despite the popularity of self-service tools, many businesses still rely on phone and email. Interestingly, in many cases in which a business DOES have self-service tools implemented, their customers aren't using them, or the business is not making it readily apparent that these tools are available.

Just because you build it doesn't mean they will come. You have to let your customers know about available self-service options, and promote them at every opportunity.

About Us

TeamSupport has been a leader in driving the customer-first space in customer service software for over a decade. Our variety of products are built to protect your most valuable asset - your customers - with an all-in-one, post-sale customer service platform that truly brings your customers to the center of your business.

From our customer support technology, live chat software, and analytics and success tools, our products provide omnichannel support, robust customer self-service options, increased customer satisfaction (CSAT, NPS, etc.), and rescue churn and increase retention.

TeamSupport ensures that your customer support network is never a cost-center, but a driver of business growth and success.



Looking for a self-service solution that enables your business to always be customer-first?

Schedule a demo today.

