



How Product Documentation
Improves Customer Self-Service &
Elevates the Customer Experience

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In the recent past, self-service was viewed by customers as an option that enhanced their post-sale experience, and was perceived by companies as a competitive advantage to promote in their marketing and advertising. However, in today's business landscapes, a growing number of customers are no longer merely appreciating self-service: they're insisting on it. For example:

- > A survey by digital marketer Steven Van Belleghem reported in Fast Company that **56%** of customers prefer self-service options when conducting pre-sales research, and **48%** of customers want self-service options when addressing post-sales issues.
- > The Aspect Consumer Experience Index found that 65 percent of customers feel good about a company and themselves when they can answer a question or solve a problem on their own. Indeed, regardless of the industry or sector, it's clear that offering some degree of self-service is essential. Research by Zendesk [PDF.] found that **50%** of customers think it's important to solve product or service issues themselves.

In fact, the demand among customers for self-service is so strong, that Gartner [PDF.] predicts **by the year 2020, customers will manage 85% of the pre and post-sales relationship without interacting directly with the company.** As noted by workforce optimization company VPI:

"Self-service is growing by the minute. Your customers' preferences are rapidly changing. They expect and demand immediate service and satisfaction. These days, regardless of age, gender or occupation, customers expect almost instant gratification when it comes to customer service - they have tools at their fingertips that provide constant and immediate communication. They don't want to have to wait on hold and they don't want to have to repeat their information. Can you live up to their expectations? It's crucial to adapt to your customer's self-service needs or you may be left behind."

The Importance of Self-Support

However, the other side of this increasing demand for self-support, is that customers are holding companies responsible if their experience is disappointing or expectations aren't met. For example:



> According to Forrester [PDF] **will abandon an online transaction if their questions or concerns aren't addressed quickly.**



> According to Frost & Sullivan's Visionary Research Group, **consider a company website to be fundamentally flawed if they can't easily find what they want.**



> According to research by American Express, **have bailed on a transaction, or not made an intended transaction, because of a poor service experience.**



> According to Salesforce, **are likely to leave a website and head to a competitor if they can't quickly find answers to their questions.**

Add it all up, and affirms Belleghem's dire warning: "a company that doesn't offer a self-service solution has to suffer the consequences."



When Self-Support Comes Up Short

Unfortunately however, whether delivered through knowledge portals, apps, web resource/help sections, customer communities, product documentation or other channels, self-support isn't always a runaway success.

In fact, some attempts are part of the problem, because they fail to easily and quickly provide customers with the information they need, when they need it. As a result, customers are obligated to contact an agent to resolve their issues – which is an action that 59% of them find frustrating (source: Nuance Web Self-Service survey).

And it's not just customers who are getting angry and losing patience. Support agents are struggling to cope. According to Forrester Research Senior Analyst Ian Jacobs: *"because customers have already tried to self-serve and failed, they are already somewhat frustrated when they reach an agent. The agent starts two steps back at the word hello."*

And along the same lines, HDI & ICMI's Group Community Director Justin Roberts notes:

"the typical customer journey is taking [customers] across multiple channels, and all too frequently captures information in multiple disparate systems. When these customers finally make their way to a phone rep, it's often a fragmented, complicated mess."

What's more, the above phenomenon – however unpleasant for all parties – only comes into play when customers pick up the phone. Many won't even give companies the opportunity to make things right. Research by customer strategy consulting organization thinkJar found that failure to resolve customer issues at the first engagement is responsible for a staggering 67 percent of customer churn.



Why Improving Customer Self-Support is a #1 Priority

Obviously, for the sake of their profits – not to mention the wellness of their overworked and besieged agents and reps – companies need to ensure that customers are consistently getting the information they need early and easily; especially since, according to Forrester [PDF], 45% of customers will abandon an online transaction if their questions or concerns aren't addressed quickly.

Yet to improve customer self-support, some companies may need to take a step back and re-think their approach and strategy. As Business Insider's Ed Shepherdson observes:

"Many companies have not taken the time to make adjustments for new customer expectations in self-service environments. They continue to put single dimensional information into single dimensional storage mechanisms we call knowledge bases, and expect to deliver complex solutions."

On the other hand, companies that have made this adjustment are reaping significant rewards, right alongside their impressed and in many cases delighted customers. For example:

- A survey of executives by Information Today found that **45%** of companies with effective web or mobile self-service options reported a **54%** increase in web traffic, a **45%** reduction in phone inquiries, and a **37%** drop in email traffic.
- As noted by Harvard Business Review, by improving its website help section Travelocity doubled the use of its "top searches" and decreased calls by **5%**.
- Research by Salesforce noted that "when self-support is done right, it can lower costs, and lead to a more personalized and profitable customer experience."
- According to Frost & Sullivan's Visionary Research Group, **76%** of B2B buyers listed Enhanced Search as one of their top three features.

6 Best Practices for Effective Self-Service & Elevated Customer Experience

While self-support options will vary from company to company – and even within a company as it targets different customer groups – the following 6 best practices should be part of the effort and investment:

1

Make Self-Service Options Easy to Find

As noted by Oracle's Best Practices for Web Self-Service User Interfaces [PDF]: "It may seem obvious, but if customers cannot locate a self-service area, then functionally it doesn't exist! This lack of findability will not only frustrate customers but will also increase the use of assisted channels such as the phone, which are more expensive for the organization."

2

Make Self-Service Options Truly Supportive

It may sound strange, but there are some instances of self-service options that look professional, but are actually missing a key piece of the puzzle: they're not truly supportive! That is, they're confusing or difficult to use – which is why customers don't use them. As noted by Harvard Business Review: "True customer-centricity requires that answers can be quickly found and easily implemented with a minimum of muss and fuss... Doing self-support should be as easy—or easier—than not doing self-support."

3

Deliver an Omnichannel Experience

Companies should borrow from the retail CX playbook by creating an omnichannel experience that ensures, no matter which touch point customers access and engage with, that the self-service content they come across is accurate, updated, complete and easy to digest. As noted in the aforementioned Oracle report [PDF]: "A unified experience across multiple channels is not only important to the customer experience but can also have an impact on your bottom line." self-support should be as easy—or easier—than not doing self-support."

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4

Measure Analytics and Usage

Anecdotal feedback is one thing; hard data is another. Companies need to use relevant impact metrics to measure and track the engagement level of their product documentation. This valuable intelligence helps them understand reach and perception, as well as identify ways to more costeffectively publish content through various touchpoints

5

Don't Forget Existing Customers

While new customers increasingly demand self-service options, it's vital for companies to pay attention to their existing customers, too – not just because it's good manners, but because it's highly profitable! As noted by Adobe research [PDF], while existing customers represent only 8% of all website visitors, they generate 40% of revenue. Indeed, companies would be wise to heed the advice of help desk software vendor Groove: "So many companies focus all of our efforts on getting new customers, when an even bigger opportunity often lies untouched in front of us: making our existing customers happy and selling more to them."

6

Deliver an Omnichannel Experience

Companies must also keep in mind that customers don't want – and frankly, won't tolerate – self-service being their only method of answering questions or solving problems. Regardless of how often they use selfsupport or how much they like it, they still want the ability to pick up the phone or launch a live chat and connect with a warm, friendly, empathetic, and above all informed support agent.

The Bottom Line

Ultimately, customers demand a positive customer self-service experience – which means they want accurate answers and useful advice quickly and conveniently. Companies must meet this growing demand by re-inventing their approach product documentation, and ensuring that it improves customer self-service, elevates customer experience – and ultimately drives more sales and success across the organization.

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