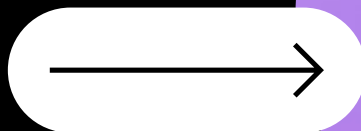


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THE CASE FOR (INTUITIVE) SELF-SERVICE

Why self-service is essential to your company's success



Introduction

New technologies, emerging trends, and evolving customer preferences are constantly changing how organizations execute on their customer service initiatives.

Today, more and more companies recognize the need to prioritize customer self-service in order to provide the best possible experience for their customers. By not putting self-service at the forefront of customer experience, companies will likely risk customer churn to competitors who do.

The concept of customer self-service is constantly evolving. From a benchmark of customer experience strategies, to support teams' best practices, it evolved as a must-have practice for many enterprises.

Yet, even more than a professional standard of customer service, self-service represents a comprehensive outlook of enterprises' internal and external outreach, organizing and delivering knowledge, and engaging customers and users.

Self-service has many advantages to customers; the reduction of churn and improved customer satisfaction show this to be true. But rarely do enterprises delve into a comprehensive outlook on its advantages across all the enterprises' customer facing teams.

This eBook gives an overview of what intuitive self-service looks like and delivers its advantages for customer experience leaders, enterprises and, of course, your customers.

An effective self-service culture offers customers and employees easy access to clear answers for a large variety of queries. It empowers customers to solve their own issues without waiting in a long customer support queue, decreases time-to-value, and simultaneously saves precious time for your customer service teams with ticket deflection. It's helpful for internal matters too, as employees can independently manage their onboarding process, HR queries, employee training and more. It is a win-win for everyone.

Customers today demand near-instant solutions and expect a flawless customer experience. Let's see why you should answer their expectations.



The advantages of customer self-service

Providing self-service alongside synchronous (real-time) as well as asynchronous support channels lets customers decide how they want to solve their problems.

Self service helps your customers:

1 Fulfilling customers' expectations: Customers want to self-serve

In today's fast-paced world, customers want answers as quickly as possible. Overdue or delayed support from live support reps can be frustrating, so providing customers with the tools to self-serve gives them direct access to the information they want - and fast.

Customers expect enterprises to offer the option to independently find the answers they are looking for, because self-service customer support is often more convenient, faster, and more flexible with respect to customers' unique time, energy, and resource availability.

A recent [Frost & Sullivan report](#) about the State of Self-Service confirmed what has been a growing trend for a number of years: customers WANT to self-serve. No matter how good the live support offering is, customers are showing an overwhelming preference for self-led resolution, with 81% of the research's B2B technical content users saying they would like to resolve technical issues by themselves. In fact, only 3% of users stated that they contact customer support immediately when confronted with a product problem.

According to a study from [Acquity Group](#), 94% of B2B buyers regularly research products and services online before they decide to buy them. Not only do they do their own research, most would prefer not to talk to a sales rep at all. Even the [Harvard Business Review](#) found that customers prefer to solve problems independently instead of reaching out to customer support across industries, demonstrating that 81% of all customers attempt to solve their problems by themselves before reaching out to a support specialist.

2 Customer self-service improves customer experience

A great self-service customer experience is based on two assumptions, a positive and a negative one.

On the one hand, a positive view of an effective self-service experience highlights the importance of putting the information customers need at their fingertips; thus, making the knowledge accessible for them whenever and wherever they need it. On the other hand, trying to avoid negative experiences is no less important for self-service culture. When customers need to spend time and energy on finding the answers to their questions, they are more likely to drop the search and find their answers elsewhere, thus experiencing a poor customer experience with your product. Given that customers' expectations around self-service are high, it is important to lower the effort for your customers to find the answers they are looking for.

When self-service is done inconsistently across channels and throughout the user journey - companies end up providing an inconsistent experience for their customers instead. Letting users self-serve will only provide a seamless experience when an entire culture of self-service is integrated throughout multiple teams and touchpoints for the customer and throughout the customer journey, from pre-sales to adoption.

3

Self-service portals proactively solve problems for customers

A self-service portal is a platform that allows businesses to provide customer support at scale by empowering customers to find answers to their own problems instead of relying on interactions with a customer support agent directly. A self-service portal can expedite common service requests while saving time and money, and free up support representatives to take on more complicated issues, and build your customer community.

Typically, a self-service portal is a website that provides information to help customers resolve issues and find answers to their questions.

The portal allows the customer to have the convenience of approaching support whenever they are looking for answers. It also expands customers' knowledge and skills and offers the tools to utilize their knowledge, and independently solve more complex problems in the future.

This sense of control, capability and empowerment correspond with the way your customers' want to feel when using your product, and towards your brand in general.

A customer self-service portal is a website or platform containing the necessary resources for customers to help themselves. Customer self-service statistics illustrate the importance of allowing customers to serve themselves. With 86% of [users preferring to self-serve](#), it may be more important than ever to create a digital-first support culture that allows customers to readily find the answers they need in a quick, efficient manner.

4

Self-service minimizes customers' wait times

Quality and speed of service, as every support leader knows, are among the most important factors that affect customer satisfaction.

Time is an essential resource when it comes to showing customers the right amount of attention and gaining their trust.

Enterprises should use it actively to help their customers to self-serve, respecting their valuable time.

Support teams are measured by the time it takes to respond to customer questions, so any opportunity to speed the process of solving customers questions will make your support outreach more efficient.

The process itself signals how much your support service is approachable, receptive, customer-focused and agile. It can determine how much the customer will feel comfortable using your product and engage in a long-term relationship with it.

For instance, the recent Frost & Sullivan research about the State of Self-service reveals that it takes, on average, 6.7 minutes for users to find the answer they need to a product related question. To put that in perspective, try Googling an answer to a simple question and see how long it takes to receive results. For customers looking for information about how to use a product, these 6.7 minutes can stretch into an eternity. In today's digital world, where users are accustomed to finding any answer in the universe in milliseconds, 6.7 minutes of search could feel like a throwback to ancient history. In a world of milliseconds, minutes are a measurement of the past.

When customers need to invest time in searching for product answers, they become frustrated. Their frustration may cause them to leave your website, and look for other options, from interacting with other, less reliable knowledge resources, to developing fatigue with your product or peeking at your competitors who might cater to their needs quicker.

Self-service-first culture allows customers to find instant gratification when searching for product answers. When the answers are provided in a coherent, easy to understand and personalized way, customers can find their answers quickly.



Self-service helps your enterprise:

Providing a well executed self-service approach is critical to reduce support costs, because self-service allows you to help a large number of customers at a much lower cost. Customers can ask questions and receive answers at the same time, boosting your existing product knowledge to fulfill its potential, and reach its maximum audience exponentially.

1 Self-service increases cost efficiency, lowers support costs and improves efficiency

Customer self-service reduces the volume of support tickets your business receives, thus reducing the number of support representatives you need to solve customer problems.

When you can deflect simple customer queries to an automated self-service portal, you free up your reps to focus on the more complex queries and tasks that only they can and should perform. It's easy to see why it costs far less to solve customers' problems using self-service tools than when they contact corporate support: once you've created self-service resources, the additional cost to maintain it is minimal, yet its outreach can grow exponentially. Customer self-service channels can drive significant savings in support training and customer service costs.

Self-service contributes to more efficient use of human resources. It encourages support teams' flexibility, creativity and availability, as it reduces the number of repetitive questions in their queue, which makes support work more engaging and frees up reps to handle more complex requests. When customers can self-serve, your support team has less stress managing their incoming request queues, which clears up more

time for reps to solve complex or unique customer problems, or repair relationships with customers.

2 Reduces support tickets

When customers solve basic informational research and queries on their own, thanks to self-service, it reduces the number of issues that support reps need to solve. In the absence of such repetitive queries, reps can focus their time and effort on selected, complex queries. Customer self-service channels decrease the number of simple inquiries submitted, hence substantially reducing individual service tickets load and increasing support team's availability.

3 Self-service improves traffic to your website

A customized knowledge base on your self-service portal can boost your website traffic. When product portals and websites provide all the answers and tools necessary for customers to self-serve, a customer will naturally head there first for any questions they might have. This means driving more quality traffic to your domain.

Consequently, the more quality content your website and customer portal include, there is a much better chance of improving your SEO ranking. Quality content on your self-service portal will attract more and more customers and unique visitors, which will not only visit your website but can also share your self-service content and increase your visibility and your website traffic and performance.

Self-service throughout the customer lifecycle

A comprehensive self-service experience can guide your customer through the full customer lifecycle - from initial research to first use, to activating new features, to managing their account to upgrading and/or cancellation - all without ever needing to interact with another person. This process can develop trust, loyalty and a favorable brand perception as your customer grows to use your product.

In order to build a self-service culture throughout the customer lifecycle, you need to enable customers to move through every touchpoint possible via self-service, from the very initial pre-sales stage, all the way to the retention and renewals stage.

1 Self-service is critical for the presale process

Often when we look at a customer journey map, it begins with the purchase of a product or service. But viewing conversion as the starting point of a customer's journey does not give you a holistic picture of a true customer journey.

In reality, the customer journey really begins far earlier; when the customer first realizes a need for a product or service.

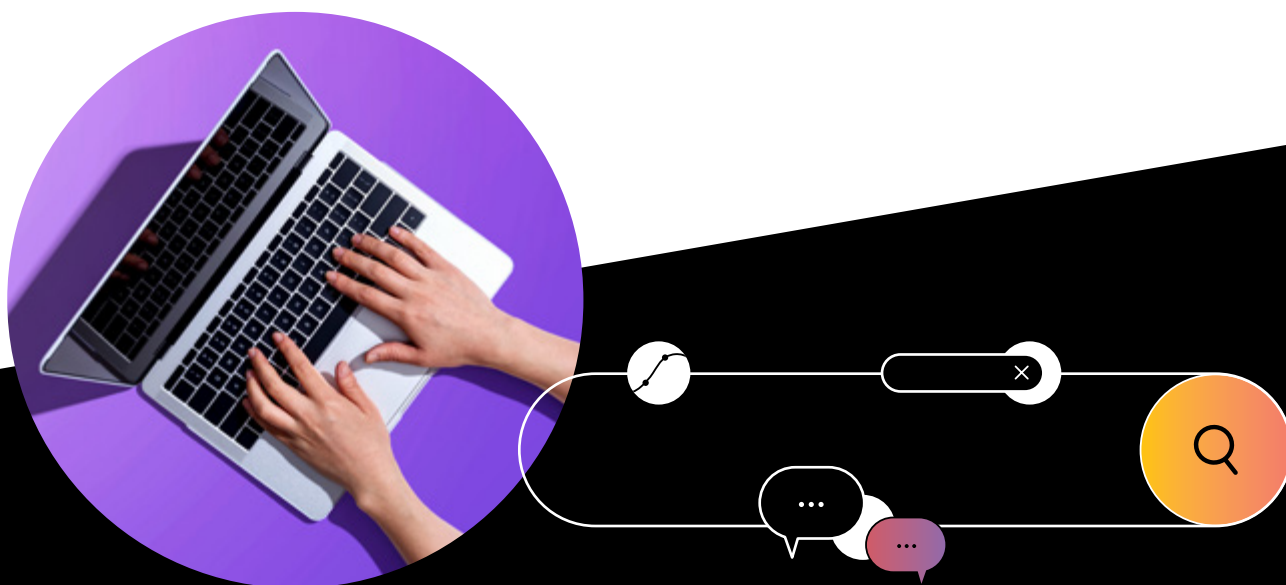
When there is a need for a service or product, most prospects will research the market thoroughly to make sure that they have the best, most functional product for the best price before purchasing. If your information is readily available, then your product will be on their list of potential options. If you don't have readily available information that potential customers can access independently, then your product will most likely not be considered.

“The ready availability of quality information through digital channels has made it far easier for buyers to gather information independently”, states a [Gartner research](#) report. The report found that only 17% of a B2B buyers’ time is spent in direct contact with suppliers, meaning vendors aren't seeing 83% of the buying process. This means that

long before they reach out to you, they’re already gathering insights and being influenced, be it positively or negatively, by the product information they’re coming across.

In the consideration stage, providing users with accessible and relevant information is key to gaining their trust.

It may be tempting to gate a lot of your marketing material in order to capture data on your leads. If a product overview is the best way for a prospect to understand your product, don’t wait for them to request a demo from your sales development team - allow access to pre-recorded teasers or overview demos. Laying all the information out up front makes for a smoother sales process. And a smooth and effortless pre-sales process signals to your customers that they can expect an equally smooth product adoption experience.



2

Implementation & onboarding stage: Finding best practices and sifting through information

Learning how to adopt and implement a software remotely can be very challenging. Without the right guidance, adopting a new product into your system can be a tedious and dragged out process. Many companies create learning centers to enable users to self-train throughout the onboarding process. HubSpot, for example, is a market leader in creating great learning material. [HubSpot Academy](#) certifications provide well-produced course videos, high-quality content, and easy to navigate programmes. These types of courses encourage users to enhance knowledge of the products and creates a competitive space to see who can make the most use out of these products.

3

Self-service accelerates product adoption and conversion

Providing customers with the ability to self-serve allows them to accelerate product adoption at their own pace without the need for a representative, while increasing time to value. Rather than having a customer success manager or onboarding specialist schedule sessions to give walk-throughs and tips on the product, self-service onboarding and product adoption gives customers everything they need to succeed right at their fingertips.

The more information customers can find on their own, the more likely they'll continue to use your product.

The end result is an improved customer experience that keeps customers on an uninterrupted purchase journey with your brand or business longer.

Conclusion

The notion that companies can develop a service that meets the needs of their customers at the right time and offer them personalized solutions, that can serve ample customers simultaneously, gather information about their usage and decrease support costs is - surprisingly- often overlooked.

Self-service is an all-encompassing organizational culture and world-view, that puts the emphasis on creating a stellar customer experience, that empowers customers as well as customers' facing teams.

Contrary to the common idea that self-service must be a fully automated process, it harbors its promise in many aspects, for different parts of the company. Either for customer facing or internal teams, self-service can bring change in workflows and transform companies' relationships with their customers.

Done right, self-service can provide the best possible experience for your customers and employees and grant them easy access to clear answers for a large variety of queries. Providing a self-serve, content-led approach enables customers to self-adopt and learn how to master their products in their own time, on their own terms. It empowers customers to solve their own issues without waiting in a long customer support queue, decreases time-to-value, and simultaneously saves precious time for your customer service teams with ticket deflection. It is a win-win for everyone.

