



How to Design an Effective Customer Self-Service Portal

Learn the right way to build, implement and optimize a self-service option for customers — as well as some of the ways it can go wrong.

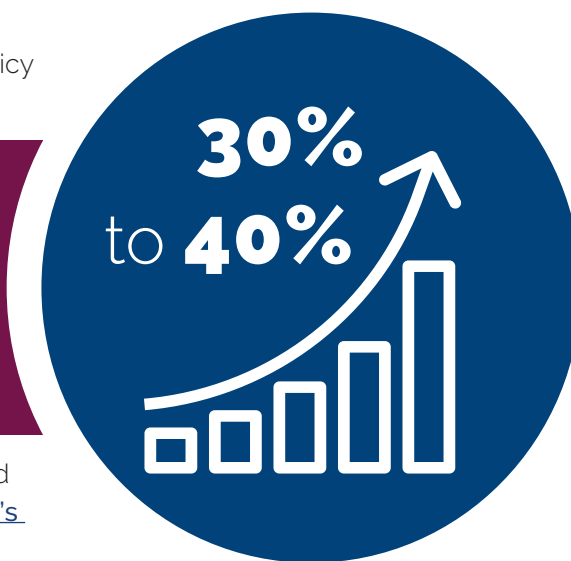
As the old saying goes, if you give a man a fish, you feed him for a day. If you teach him how to fish, you feed him for a lifetime. The idea is that helping people to help themselves can often be much more effective and productive than simply handing them a one-time solution — for both this fisherman and his friend.

This same mentality is behind the concept of a brand's online self-service portal. A self-service portal allows a brand's customers to gain answers to their questions or resolve issues without always having to interact with human customer service agents. It generally resolves inquiries faster and empowers customers to be their own advocates on their own time. For a brand, it's a more strategic, far less expensive approach to great customer service.

Creating an effective customer self-service portal has long been a priority for many companies — but recent events have made it infinitely more imperative. We're talking, of course, about the COVID-19 public health crisis.

The pandemic and the resulting economic fallout have affected every consumer in some way, creating a host of reasons customers might be driven to contact a brand. Perhaps they need to suspend automatic payments, or pause a service, or cancel a reservation. Maybe they have questions about the health precautions a brand is taking within its physical storefronts, or about how recent policy changes might affect their shopping experience.

These and other urgent customer needs have translated into a staggering spike in the volume of customer service requests — an estimated **30% to 40% more requests**, or higher, in some cases — for brands in every industry. Most companies are not equipped to deal with such an increase on short notice.



A Wall Street Journal article cited situations like that of United Airlines in the wake of the initial coronavirus infection. [United's call volumes doubled](#) as customers rushed to cancel flights, and the airline had to enlist employees across the organization to take calls, even senior executives. The news outlet reported other brands, including British Airways and Charmin, simply stopped answering the phone.

On top of this increased volume of requests, many brands continue to experience staff shortages. Agents can become unavailable because of illness or lack of childcare. Some contact centers have closed, allowing agents to work remotely if they have adequate internet — not always a given. Other contact centers have to remain open if they serve companies in industries like banking or healthcare, which are governed by strict regulations, but may have drastically reduced staff to support social distancing recommendations. Additionally, cost-cutting measures at a time of economic uncertainty has led to reduced contact center staff at some companies.

With so many brands overwhelmed by what the Washington Post termed "[a perfect storm of customer service issues](#)," the pandemic has been a revelation for many: There are better ways to handle many customer requests than a contact center staffed by human agents.

Yet not every organization has taken steps toward implementing a self-service option. Even those with existing self-service have struggled to design a fully effective solution — because there is a right way to do it, and there's also a wrong way.

What Does a Customer Self-Service Portal Look Like — and What Can Go Wrong?

Let's start with the basics.

A digital self-service portal is a dynamic help center that presents the best channel for resolution to customers based on the questions being asked. It may be part of a brand's own website (for example, some technology brands dedicate most of their site to self-service product set-up, troubleshooting support, etc.), or a separate support website or landing page.

A digital customer help center can employ a variety of channels to help customers find answers on their own, including:

- » An FAQ page (either static or designed to guide customers along a path depending on their question)
- » A search bar that populates articles and other content based on what customers type
- » How-to videos
- » Tip guides, blogs or other content
- » A virtual assistant or chatbot
- » A customer community hub where existing customers help others with similar questions or issues, with or without brand agents participating in the conversations
- » An automated/intelligent email system that recognizes keywords as a customer types and dynamically routes them to a self-service solution instead



While any of these channels are perfectly acceptable starting points upon which a brand can build, the customer experience when navigating a self-service portal can vary dramatically depending on how well they are designed.

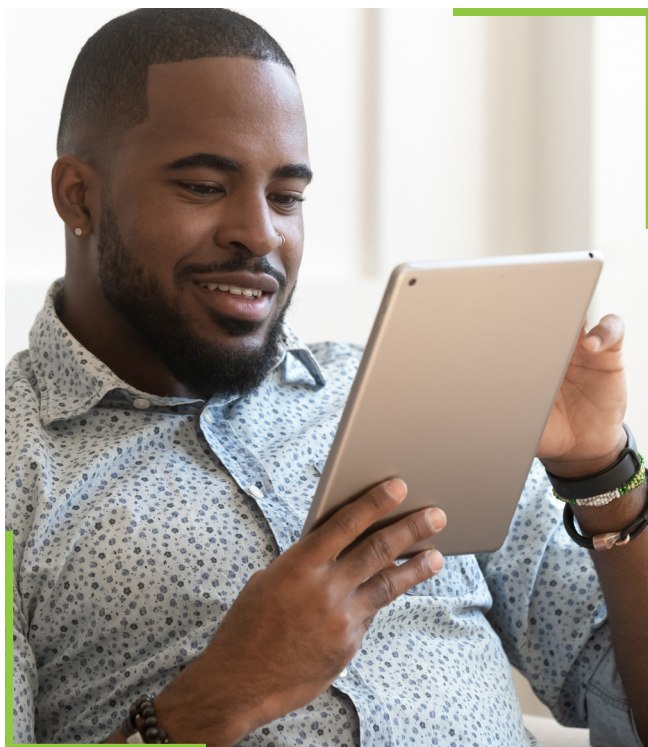
In fact, the experience can sometimes be quite negative. Consider:

- » A search bar that yields hundreds of results versus a handful of targeted answers
- » An FAQ page that lists too many questions and isn't organized, meaning users must scroll endlessly to find an answer
- » A self-service portal that is not optimized for mobile traffic, making it difficult for mobile users to navigate menus and find and click the right buttons

These are just a few examples of the wrong way to build a self-service portal. There are many, because there is so much involved: strategy and messaging, coding and user interface/user experience (UI/UX) design, brand voice and style, helpful visual and written content, technologies like automation and artificial intelligence (AI), and more — and everything must be user-friendly, seamlessly integrated and fully functional.

With so much involved, you might be wondering whether it's even possible to successfully design and implement an effective self-service option.

But it is possible. Here's one company that got it right.



5 key questions to consider

If your brand has an existing self-service option and you're not sure if it's up to par, ask yourself these questions:

Was your customer service leaders involved in the strategy, design and content population of the brand's current self-service experience?

- » If not, have you ever gone through a UI/UX analysis and determined how many steps/clicks it takes to resolve issues, or how much scrolling customers must do?
 - Have you also done this analysis on a mobile device?

Do you measure issue resolution through self-service? If not, how do you know that customers are getting their issues resolved?

- » Do you survey your agents to learn how and why a customer ended up placing a call versus using your self-service option?
 - If customers say they tried to find the info or resolve their issue online, but couldn't, have you measured how many times, and for what reasons, a customer has said that?

Do you know the key contact drivers that lead customers to contact your brand?

- » Have you designed your self-help portal around these contact drivers?

Do you have an FAQ page or how-to content that is static and infrequently updated?

Do customers who use your virtual assistant or chatbots constantly request human agent assistance?

If your answers have left you feeling unsure about your solution, it might be time for a change.

A Self-Service Success Story: Spotlight on a Large Consumer Electronics Company

A large consumer electronics company that produces products for well-known brands like Toshiba, Dell, Kodak and others, planned to move from an in-house call center to a more efficient outsourced option. With a mission to improve the customer experience while reducing operating costs, the company engaged [HGS](#) to create a multichannel customer engagement strategy, including a customer self-service portal.

HGS designed, built and now manages a device-agnostic consumer self-service portal, branded under the client. Designed with the mobile-ready customer in mind, the portal deflects call volume by guiding customers toward a self-service solution. It includes channels like FAQs, downloads, videos, chatbots and live chat, and email, all integrated with each other and architected using knowledge management, data analytics and insights, and natural language processing for search.

With the right approach, any brand can achieve similar success.

HGS' custom-built self-service solution for the client manages **92%- 93%** of customer contact traffic and has a **97%** issue resolution rate for customer requests. The solution diverts **20,000** calls each month, reducing the company's costs by almost **70%**.



How to Build a Successful Self-Service Portal

To be clear, there is no one right way to do this. The way a self-service portal is built and optimized will always depend on your individual brand, your customer base, and their needs.

However, there are two considerations that should guide any design.



- 1. Don't forget: Most customers with a question, request or issue almost always start with the brand website,** and integrating a well-designed self-service solution can guide customers to the right answer without the need for human agent involvement. This means:
 - » UX is critical. A self-service portal must give customers the ability to find the right answer, fast. In addition, the portal must be designed for mobile device users as well as desktop/laptop users.
 - » Help center search channels should integrate natural language processing (NLP) to direct customers to targeted results.
 - A "Google-ized" search bar that uses NLP can recognize what question a customer might be typing and offer predictive suggestions, getting them to an answer or resolution faster.
 - To continuously improve the self-service options, organizations must track exactly what is being typed into the search bar and use data analytics to identify trends.
 - » Understanding exact resolution rates is essential. This will allow a brand to rework things as needed.
 - For example, if a brand can see that too many customers get to the end of the self-guided journey and click the button for, "No, this did not answer my question," or end up calling the 1-800 number anyway, it's clear something needs to be redesigned or updated.

2. You must identify your main contact drivers (for both web and phone call inquiries and issues).

It seems obvious, but it can be challenging to do well: Your brand's self-service portal needs to be designed around the reasons your customers contact your brand in the first place.

» The ideal way to do this is via data analytics to understand top contact drivers by customer location. This allows initial design of a portal, as well as a way to continuously optimize and update the portal in real time.

- Data analytics also allow a brand to marry contact drivers with the right channels. A smart channel guidance strategy gives customers a few channel options (e.g., virtual assistant, how-to video, dynamic FAQ page) based on their contact driver, empowering them to choose their preferred method for resolving their issue or inquiry.



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» For each contact driver, ask: Can this customer request be automated or done via self-service, or does a human need to be involved?

- Remember, in some complex cases, the best channel ultimately may be a phone call with a skilled human agent. If your customer needs help with a truly serious issue — one that could impact not just your brand's relationship with that individual, but your brand's reputation within the wider marketplace — automation is not the right answer. Understand at what point, and for what reasons, a human does or would need to be involved.

Does Your Brand Even Need a Self-Service Portal? Here's How to Find Out.

Building or optimizing a brand's self-service portal is a highly complex process. Most organizations — especially right now — need to focus on delivering high-quality products and services and sustaining their business. Creating this kind of offering in-house will take more time and staff resources than many companies can spare.

And not every brand may need a dedicated digital customer self-service portal, of course. But there's an easy way to figure out whether you do. It all comes down to how much volume you would be able to deflect from human agents.

Simply take the volume of the types of calls or interactions that could be deflected from human agents — generally 40% to 60% — and multiply that by the cost per interaction (estimated to be approximately \$5 per call/interaction). Once you have that number, you can see whether you need to invest in an effective self-service center.

Don't Go It Alone

If your brand is looking to provide a better digital customer service experience with fewer resources and at a lower cost, **HGS is here to help**. We've developed, built, optimized and deployed self-service strategies and offerings for dozens of brands in a variety of industries, and we know good UI/UX design and [customer journeys](#) inside and out. We use innovative tools like [automation](#), [AI](#) and [data analytics](#) to base our design and recommendations on data and customer insights, not gut instinct or educated guesses.

We're here to help with as much or as little as you need from us — from simply adding data analytics and metrics to the back end of your portal so you can quantify results, to consulting on a [multichannel self-service](#) solution that your internal team designs, to end-to-end assistance that includes workshopping, designing, developing and building your self-service portal from the ground up. We can even staff and manage it for you.

If you're ready to implement a more strategic, modern approach to good customer service, learn more about [why HGS](#) will get it done — the right way.



About HGS

A global leader in business process management (BPM) and optimizing the customer experience lifecycle, HGS is helping make its clients more competitive every day. HGS combines technology-powered services in automation, analytics and digital with domain expertise focusing on back office processing, contact centers and HRO solutions to deliver transformational impact to clients.

Visit www.teamhgs.com to learn how HGS can help make your business more competitive.