

HOW TO DRIVE CUSTOMERS TO ONLINE SELF-SERVICE SOLUTIONS



WHAT YOU'LL LEARN

We will provide specific details related to why companies should utilize self-service technology, how to build a self-service solution the right way for all customers to understand, and most importantly describe tactics for driving customers to self-service solutions.

WHY SELF-SERVICE?

Many businesses are determined to cling to phone-based customer support despite the prevalence of web and email options. Unfortunately, such calls are expensive, and other channels can solve the issues discussed at little to no cost. Businesses should encourage their customers to use email and web support for quick fixes and save phone support for more complex problems. But how exactly can they encourage users to seek solutions on their own? The answer is simple: Supply the right information, make it easy to understand, and promote online customer service tools through every channel and device.

Answer the right questions

Support organizations must make sure online help desk solutions provide the answers their customers seek. Self-service does nothing if it does not actually address the issues customers have. A survey of prior phone calls will identify simple, frequently asked questions that can be answered on a support web page.

There are certain topics every service page should discuss regardless of how many questions the help desk receives. These include basic operations and records of software updates. There is no reason for customers to have to call to obtain this information, but if they can't find or understand it easily they have no option but to pick up the phone. Many customer support inquiries are actually related to training needs, such as how to set up a certain feature, or where to find xyz. Creating how-to's and tutorials are a great way to help train customers on using your product. Start with the basics and use images and video as much as possible to relay technical or complicated descriptions.

PROMOTE ONLINE SELF-SERVICE SUPPORT

Customers won't use what they don't know exists. If they can't quickly find online help options, they're likely to call the help desk directly. That's why links to self-service tools need to be displayed prominently on websites. It is also important to make sure these options are easily viewable on a number of devices. Responsive design helps a website look good on both desktop and mobile. It allows the page to adjust its layout depending on the size of the screen or monitor on which it's viewed. Best practices for web design state that text on smartphones should be large enough to read without zooming. Similarly, users shouldn't have to scroll horizontally to view everything on a page.

Using a customer support software that includes ticket deflection can also help steer your customers to online self-service options. Ticket deflection utilizes your existing knowledge base to offer suggested articles or solutions to customers as they are creating a new ticket in the support portal. For example, if a customer types in "I need to reset my password" ticket deflection would suggest an article on how to reset your password. The customer gets the answer they need quickly and effortlessly, and your agents are freed to work on more complicated issues.

Self-service support options can also be promoted through offline channels. Automated recordings can remind customers of online help opportunities at the start of each phone call, or while they wait for an agent. Customer support reps can do the same once a ticket is complete, gently reminding customers they can also check online if they have additional issues.

A more drastic option is to gate your direct support options so that when a customer clicks on "support" or "help" on your site or in your application, they are taken to a self-help portal or knowledgebase to search for a solution. Once the results appear, you can then offer phone or chat support. This can be done professionally and without looking as though you do not want to talk to your customers – for example, the message could be something like "Not what you're looking for? Contact us directly and one of our amazing team members will be happy to help you!" followed of course by your phone number and/or a chat link.

DISPLAY TOPICS IN AN UNDERSTANDABLE WAY

First and foremost, online help options must be written in a manner that all customers (even brand new ones) understand. This means short, well-constructed sentences that aren't too jargon-heavy. Of course, some technical language is necessary from time to time, but it's best to supplement these terms with a brief explanation or link to more information.

Providing step-by-step instructions that include images or even video makes actionable tasks easier to follow, especially when dealing with software. Each picture should have important information such as cursor position, buttons and text input areas highlighted in a noticeable color.

For instance, a red circle around a button labeled “Next” tells users to click that area to proceed. Every image should also have a caption in case the picture itself fails to load.

Well-written copy and clear images should be organized according to a distinct hierarchy. Appropriate structure allows users to capture information at a glance and quickly determine if it’s what they’re looking for. They can easily grasp the most important ideas and can read on for a deeper understanding of the topic. Hierarchy also helps customers keep their place as they follow directions.

Using headers and lists helps organize content for maximum readability. A best practice is to use the largest header only once per page. Anything else should be a subhead. A single main header clearly defines the primary topic, and subheads organize it into easily digestible pieces.

Lists keep information structured and prevent brief ideas from becoming too wordy. They emphasize notable points in the text and make it easier to scan through content. Similarly, colors and text styles highlight important information - users can quickly scan a page to find keywords in bold and hyperlinks that are a separate color than the main text. The key with using color and style to improve readability is not to overdo it – too many different text styles can be confusing and you don’t want a page that looks like a rainbow.

Finally, each supporting page on a website should link to other relevant topics, similar to how you would format an email response. The only difference is that links in email support are more targeted to the customer’s specific issue, while links in a self-help document should be generic enough to apply to all customers.

NEVER IGNORE SELF-SERVICE

Designing helpful web support isn’t a one-time event, just as customer emails aren’t something that can sit on the back burner. The content in FAQs and wikis should be continuously updated, especially as new software and updates are released. It’s a good idea to list the date of the latest revision on each page so customers know the answers they find still apply to their particular issues.

Ultimately, encouraging self-service is about making information readily available to customers. They should be able to find solutions effortlessly and understand them clearly. The easier it is to access self-service portals, the more likely your customers are to use them. Of course your customers should also have the option to call customer support directly, in case they aren’t satisfied by the answers they find through web and email.

Self-service support is not a replacement for in-person support, but when implemented properly it is a great enhancement.



ABOUT TEAMSUPPORT

TeamSupport is a powerful yet easy-to-use, web-based enterprise software that helps businesses provide seamless, effective customer support by focusing on the customer and enhancing internal collaboration. TeamSupport customer service software is designed for companies with external-facing customer support.

CONTACT US TODAY TO LEARN MORE ABOUT OUR COLLABORATIVE CUSTOMER SUPPORT SOFTWARE

TRY IT FREE TODAY!