



Self-Service Best Practices

By Chandra Callicutt, Product Manager, TechExcel, Inc.

A Step by Step Guide to Self-Service

TechExcel stands at the forefront of the rapidly changing market for web-based tools intended for self-service. The Help Desk Institute estimates that each first level incident will cost about \$25. Therefore, if support centers are able to deflect just ten calls per day to a Self-Service Portal, the company will stand to save around \$60,000 per year! This guide highlights some of the key best practices that we have used in the field during implementations. We hope you will be able to develop your own successful strategy for self-service using this step-by-step approach.

Step 1: Focus on Marketing

When it comes to building enthusiasm for a self-service portal, marketing is critical. You can never plan enough for a new initiative. Here are a few ideas to get you going:



Record a message on your phone system telling people that you have a new service available.



Place a signature line in all support analysts email messages announcing portal availability and include a direct link to the portal.



Make the browser home page of your users' PC's default to your portal site.



If you are using web conversation, tell callers that web conversations get responded to first.



Stress they are helping the company. Many users care about how much money a company spends in operations. Letting your users know that by using the portal they are saving the company money may be one way to spark their interest.



Record a "how to" video. Inserting a browser compatible video on the home page can help train your users and customers on how to use the self-service portal.

Step 2: Get Everyone Involved

When designing a portal, ask your customers or users what they would like to see. The best way to know what to include is to go directly to the source. Adoption rates tend to be higher when users or customers are involved in the process. After creating a beta version of your portal ask your users to test it and apply the feedback you receive from them to make it even better!

Step 3: Extra! Extra! Spread the News!

Put a quote from a happy customer right on the home page of the portal. As the percentage of incidents created through the portal begins to rise, create an announcement on the portal letting everyone know the success. Sometimes knowing that other users are embracing the new portal is enough to make otherwise hesitant users give it a try. Update the signature files of the support analysts to include success stories as they become available. In other words, help spread the good news!

"I love the new web site support has created. I was able to quickly find out how to update my email client without even having to place one call! Thank You!"
~Cheryl, Human Resources



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Step 4: Build Knowledge for the Rule not the Exception

Do not try to author every solution to which you have responded. Your users will just be confused when they complete a search and far too many records are returned. Instead, focus on the most common problems. Create a team consisting of a manager and several experienced support analysts. Together research the incidents that have been reported and note the most common problems. Create FAQs to address the most common issues and post them directly within the knowledge search area. Also, add three to five most commonly asked questions to the home page and rotate them monthly. This will keep your users or customers coming back to see the new information as it is posted. Populate your knowledge base with usable and easy to understand content.



Step 5: Knowledge is a Two Way Street

When you deploy your knowledgebase instruct your analysts to always check the knowledgebase for the answer when speaking with a user /customer on the line. If knowledge is returned instruct the analyst to send a link to the customer after the call has ended or walk the customer through the steps for finding the answer during the call. This will greatly improve user/customer belief in the system. Many times users are skeptical of automated help systems. However, if your analysts can easily find the solution and produce it for the customer, it will help to increase user adoption and confidence over time.

Step 6: Make the Home Page Count

The home page of a self-service portal is like the cover of a book. If you want someone to use the portal they must be presented with something clear and usable and it should include information that would entice the user to want to know more. Include things such as warnings and outages, news and events, and support tips and tricks. You can even create a user of the month section that highlights a user that has fully embraced the portal. Sometimes a little notoriety is enough to get people interested in trying something new. Make certain that the portal design is clear and that information stored on the home page is pertinent to the users or customers that will be visiting.



Step 7: The Portal Should be a One-Stop Shop

When designing a great portal, make certain that users can not only search for knowledge but they can easily get status updates and view historical incidents that have been closed. Teaching your users or customers that the portal is in many ways like a journal that can be used as a reference tool will go a long way. Using web conversations as part of the portal experience will keep your users or customers coming back, each time gaining more confidence in the portal.



Step 8: Bring in the Reinforcements

Constantly remind your users or customers that the portal exists. If you are accustomed to sending an email response containing updates, try updating the incident and then sending a link to the incident through the portal. During a call with a customer, your analysts should remind the caller that they can check the reported incident for any updates simply by logging into the portal. Finally, when a user or customer calls to report an incident make certain that even though a ticket was created by a support analyst, the customer still receives an email with a link to the ticket on their behalf. Reinforcing the system that is in place is paramount to a successful self-service operation.

Step 9: There is Always Room for Improvement

Use online surveys and feedback forms to consistently improve the portal experience. If you just take some time to listen and read what your users or customers are requesting, you will be surprised at how easy it is to give them exactly what they need. When you initially implement your portal you must be ready to make changes and try new things. A portal is never perfect on day one. It takes time and refinement to develop a portal that your users will appreciate.

