

# 6 Best Practices for IT Leaders to Enable Effective Self-Service

# Introduction

Gartner predicts that by 2022:



Source: Gartner<sup>1</sup>

Despite these figures, many businesses lack an intentional approach and vision for truly effective customer self-service, resulting in disjointed experiences and poor self-service capabilities.

This guide draws from over a decade of experience empowering IT leaders around the world to build customized self-service experiences. Here is the resulting collection of best practices and a deep-dive into one company's success story.

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<sup>1</sup> Delivering Relevant Content and Knowledge to Customers Is Key to Great Customer Service

# Is Self-Service Worth the Investment?

The short answer is yes. It's not only worthwhile for businesses but is also becoming necessary to implement.



**Digital self-service is key to decreasing cost-to-serve for the company.** In order to run a cost-efficient customer service program, IT leaders need to help their customer service teams deliver self-service that empowers customers to resolve their own issues.

**Self-service interactions cost a fraction of what live interactions cost.** By moving more customer interactions to a digital self-service site, companies can quickly reduce costs of their customer service program.

This approach also enables companies to scale their customer service strategy more efficiently. Instead of relying solely on live channels, IT leaders can choose to leverage digital self-service for increasing customer requests or reducing the number or length of calls into customer support. Additionally, since self-service can be implemented within several channels, businesses will be able to deliver consistent communication throughout these touchpoints, providing better customer experiences that increase customer satisfaction.

# Best Practices to Support Self-Service

Drawing from over a decade of experience delivering excellent self-service experiences, here are six best practices our team recommends IT leaders following:

## 1. Understand What Customer Service Teams Need

IT teams need to have alignment with customer-facing and business teams to successfully execute a self-service strategy. There is no one-size-fits-all self-service strategy, so IT leaders must examine their own organization and determine how self-service can help their business counterparts accomplish their goals.

**Take the time to understand what the customer service team is trying to accomplish. Ask questions such as:**

- What are customer experience success metrics?
- What is the customer experience like now?
- What questions and tasks do customer service representatives spend most of their time handling?
- What does the ideal customer experience look like for our customers?

Discuss these goals and manage expectations alongside the team that will be relying on self-service to facilitate better customer experiences. Using this knowledge, IT can then build a comprehensive technology strategy that will help satisfy business needs.

## 2. Align with Customer Experience Strategy

IT teams must remember that any technology implemented must work to serve the greater customer experience strategy.

**Self-service is not an isolated tactic, but rather must be approached as a crucial channel to streamline and guide the customer's experience.**

If the initiative for self-service is siloed, then it will fail. According to Gartner, the reason why most customer self-service initiatives are not successful is because many businesses approach self-service as a response to immediate or urgent requests from customers or other business units rather than placing self-service into the context of a larger customer experience strategy.<sup>2</sup>

Evaluating where self-service can assist customers during vital touchpoints in their journey is foundational to a successful execution. If the focus of self-service is centered on the technology being used, then it will not be useful for customers. The decision to adopt self-service in existing portals needs to be driven by customer needs and preferences.

The most powerful and innovative technologies will be ineffective if they are not implemented with a comprehensive understanding of customer behavior and a commitment to enhance customer experiences.

**Effective self-service experiences start with an understanding of customer behavior, communication preferences, and buyer journeys.**

Prioritize what self-service options will best serve customers and deliver an intuitive experience. This will help determine which features are most critical to deliver first and help plan accordingly for future developmental phases.

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<sup>2</sup> Does Your Digital Customer Service Strategy Deliver?

As these get executed, measure the effectiveness of self-service with ROI goals. Again, because self-service is not an isolated tactic, it should be managed and evaluated upon continuously.

Success metrics of the self-service portal may include:

- Incidents rate
- Complaint resolution rate
- Customer effort score
- Service satisfaction score

Compare these metrics to overall customer experience KPIs to assess how to improve and raise the ROI of self-service.

### 3. Focus on Integration

Self-service, in particular, requires robust integration capabilities; whenever customers use a self-service feature, some business activity must be done behind the scenes in order to produce the results they are expecting. For example, if a customer is searching for documentation, a content management system needs to be integrated with a customer-facing interface and search application in order to surface what the customer is looking for. No matter what self-service is accomplishing, all will require integration between systems to be effective.

However, integration proves to be challenging for many businesses as the number of existing applications, third-party systems, and emerging technologies used increases. Customer service technology stacks continue to contain disparate, overlapping systems, leading to disjointed customer experiences and slow processes.

Consider what technologies will help combat this risk and facilitate the integration of existing services into a single platform to allow for not only seamless activity between systems, but also to deliver a connected customer experience.

## 4. Adding Robust Knowledge Management

Take an integrated approach when it comes to managing knowledge assets, which can include best practices, FAQs, critical business processes, and more. This information must be available across multiple channels and devices through self-service.

Tagging and metadata will also be extremely important as customers begin to search for the content they need or for chatbots trying to surface the correct information.

## 5. Enhancing Performance Management

Businesses need to have a solution that is able to serve customers around the globe in different time zones. Use a cloud solution that has 24/7 availability, which will not only minimize downtime, but also ensure business continuity, so customers can still have access to self-service options in a timely manner.

Eliminate the challenges of maintaining on-premises infrastructure to deliver value to customers faster and reduce maintenance costs. Customers will be able to access the portal without being hindered by constant downtimes and slow performance. Additionally, look for a vendor that provides auto-scaling in order to shape computing capacity according to changes in volume and circumstances.

## 6. Using a Digital Experience Platform

Bringing together all these considerations, an open source digital experience platform (DXP) is the most cost-effective way to launch self-service.

Businesses may choose to decrease maintenance and management costs by leveraging a DXP to integrate existing systems and knowledge into a unified platform. Using a DXP also accelerates time-to-market with out-of-the-box functionalities, such as knowledge management, search, and workflows, needed to drive self-service. This allows businesses to unify common customer service processes and narrow their focus on customizing and maintaining what is important to the business.

**To start evaluating different DXP vendors,  
see Gartner's assessment in the most recent  
Magic Quadrant report for Digital Experience Platforms >**

# No Service like Self-Service: Panamax Success Story

Panamax Inc, a global leader in retail and wholesale telecommunication services, needed a scalable solution to accommodate a growing customer base. This required more sophisticated technologies than the homegrown systems the business had originally been running on. The team decided to leverage a DXP to develop a self-service customer portal that was scalable and reliable.

By facilitating back-end processes with APIs, Panamax was able to:

- Reduce customer account set-up time to just a few minutes
- Accelerate and improve the onboarding workflow
- Improve user experience with an intuitive interface
- Provide immediate access to timely content and transaction details

By delivering a self-service portal for their customers, Panamax was able to experience, just within one year:



4x increase in  
website traffic



5x increase in number of  
monthly sign-ups



7x increase in  
monthly revenue

This self-service portal has now become the de facto hub for customers to interconnect more efficiently, helping to acquire new customers, engage existing ones, and steadily increase revenue.

Read more about how Panamax was able to build an [effective self-service portal for its customers](#).

# Conclusion

The benefits of self-service cannot be realized without an intentional strategy and customer-focused goals. Even though every business's self-service strategy will vary according to different goals and customer preferences, consider these general best practices to guide a successful self-service strategy.

# Moving Forward

See a [full list of features and integration capabilities](#) available for building effective self-service portals with Liferay.



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