The Online Self-Service Portal Journey

As the notion of Web-enabled self-service matures, organizations must be sensitive to customer expectations for relevant information and problem resolution across channels in order to optimize costs and deliver a consistent user experience.

Executive Summary

The advent of a global social community has shrunk the world into a global village. This powerful new channel makes the quick exchange of information easy, as well as impactful, even changing the image of an organization overnight. As a result, all organizations need to provide outstanding customer service to more effectively acquire and retain customers. Customer expectations are high for an excellent experience, and meeting or surpassing these expectations isn’t easy.

Meanwhile, customer touchpoints continue to proliferate, making it difficult for organizations to maintain consistency and interconnection across channels. Many organizations strive to synchronize, automate or offer an effective set of self-service tools to minimize human support, but this can only be accomplished when customers can access all the necessary information and options at the right time and in the right form to resolve issues on their own before calling for help.

This white paper assesses recent advances in online self-service and identifies best practices for building a world-class self-service portal that not only optimizes customer support costs but also adds a differentiating factor to attract and retain customers by delivering a true omnichannel customer support experience.

Mobile, Channel Proliferation and Analytics

If the 1990s was an era of Internet-enabled commerce, the millennium era has ushered in desktop- and laptop-like computing functionality to handheld devices. Mobile devices now rule the world to such an extent that they have beaten all expectations from both a personal- and professional-life perspective.

It is interesting to note that mobile subscriptions reached about 6.7 billion by the end of Q4 2013, introducing a whole new spectrum of customer issues. The mobile channel is not just another device that customers use to seek support; it signifies something much broader, as it combines digital intelligence with a physical context (such as location via GPS) to deliver service directly to customers’ hands.

According to a Forrester blog, 67% of consumers use Web self-service to find the answers to their issues or questions. However, IT-built or Web-enabled self-service portals can help reduce the time to resolution only for specific problem types,
such as password reset. Some issues still require a call to the service desk or even in-person resolution by a support technician. When channel-to-channel handoffs are done effectively, they can help reduce the time it takes to resolve problems and make customers feel that all channels of engagement are well-connected and integrated across the spectrum, including customer-facing Web sites, Facebook or Twitter pages, chat, e-mail, call support, in-person interaction, etc. However, the current state of customer support does not reflect this, as a majority of companies in our experience have nonintegrated communication across various support channels.

Enabling effective cross-channel customer support is a journey that a majority of companies undergo, with continuous improvements all along the way; in our experience, one-time revamps are typically ineffective. Further, measuring online channel effectiveness in isolation will not provide the true status of basic metrics, such as customer satisfaction and cost effectiveness.

Organizations need to assess customer service as a whole, across all channels. Analyzing when customers interact with which channel, for instance, can help organizations design self-service systems that can detect the exact issue at hand. Based on this knowledge, organizations can present customers with pinpoint solutions for a specific problem, resulting in enhanced customer satisfaction with the products, services and brand.

For example, if 30% of a mobile service provider’s requests are for a plan change, the organization can recommend the best data plan for them, based on past usage, user profile and history, and enable them to complete the entire process on their own. A different service request might require additional verification, such as changing from a pre-paid to a post-paid subscription. In this case, which might account for another 10% of total requests, the self-service portal can facilitate a Web request and then be processed later by customer support or a third-party partner via an offline mechanism. Full automation through the online self-care system may not offer sufficient return on investment, while having completely disconnected systems may lead to the loss of a customer.

A Self-service Portal Maturity Framework

How can organizations elevate their self-service channels to a transformational maturity level? It starts with measuring the existing level of customer support effectiveness. Figure 1 depicts a maturity framework that can help organizations understand their current state, as well as the features or characteristics required to reach the next levels of customer support excellence.

Online Self-service Portal Maturity Framework

![Online Self-service Portal Maturity Framework Diagram]

Figure 1
The following best practices can help organizations attain the highest maturity level possible when providing cross-channel, self-service customer support:

- **Content**: The old adage “content is king” is still true. Unless there is meaningful content on your Web self-service portal, users will resort to other channels to resolve their issues. Outdated content can also annoy or lead to customer dissatisfaction. Content published on the Web or used by the service desk and any other touchpoints must echo the same message, without ambiguity. Further, customers no longer want to read oversized manuals and user guides; instead, they expect to do a quick search for a solution to their problem. When applicable, static text should be supported by video-based content or images; hence, it is imperative to have a solid content management system (CMS) that helps businesses publish the right content.

To ensure cross-channel consistency, content should be connected to the same data source used by other channels when referring customers to tutorials. Help information also needs to be structured so that it is easy to find and use. Most frequently requested information should be given higher weightage for simple queries, and complex queries should be answered with rich, interactive media, with links to other channels when self-help cannot fully resolve the problem. When such a hand-off is necessary, all the details of the interaction should be meaningfully transferred from channel to channel. For example, if an error that occurred in a workflow cannot be recovered without manual intervention, all error logs need to be integrated with the customer support system. This will help ensure that customers do not have to repeat themselves when engaged with a customer support representative.

- **User experience**: Content that is not easily discoverable may as well not exist; clear navigation to relevant information is a must. This is possible when organizations focus on customer personas and the task journey on the Web site to build a fluid user experience with intuitive and meaningful interactions. Organizations must also follow corporate design standards to reflect the brand and maintain consistency with related portals. Having a clear understanding of what end users look for throughout the end-to-end journey – not just look and feel – can play a major role in effectively designing the navigation or interaction aspects of the user experience. It also helps to have a dedicated user experience design team manage all future enhancements rather than restricting their role to the initial launch of the Web site by sourcing design to a third-party vendor for a limited time.

- **Performance**: Highly responsive systems are essential to providing a strong customer experience. Sluggish self-service portals can result in users immediately abandoning the site, as they expect quick and smooth response in this era of on-demand services. Every step toward improving site performance goes a long way – be it on mobile, tablet or any other medium. Measuring performance at different periods (peak/lean season) and optimizing performance to address shortcomings across channels is critical. Cloud solutions can help to meet unexpected spikes without the high upfront capital infrastructure expenses typically associated with on-premises systems.

Because self-service performance also depends on the speed of other systems integrated with the support hub, organizations need to look at optimizing back-end systems, in addition to the front-end components used by customers. To detect bottlenecks, organizations need to examine all system interdependencies, ensure that the weakest link in the system is continuously improved and allocate sufficient IT budget to the infrastructure- or technology-related challenges. Otherwise, only market- or consumer-facing features will be considered on the roadmap, pushing key technology initiatives to the back seat.

- **Personalization**: “One size does not fit all” in self-service portals. Users expect information that is relevant to them to be upfront, and that solutions will be specifically geared to their issue rather than generic, out-of-the-box advice. Personalized self-care portals can put customers at ease and offer better engagement. To get there, the information needs to reflect the customer’s entire order history, ticket status and interactions on other channels. To reach a transformational level of self-service, the system will also offer exclusive promotions that suit customers’ specific needs, and take advantage of cross-sell and upsell opportunities.

- **Social and community building**: Many customers like to interact with others when
seeking solutions, or share their own insights and knowledge to help others resolve issues. As a result, organizations should form social communities, promote interactions among customers and provide necessary moderation. Through gamification elements, such as badges or other symbols that differentiate power users from newbies, users can understand which answers are coming from an expert vs. a novice user.

Companies need dedicated community managers to drive social adoption and make meaning from these conversations. They need to dig deep into what prospects are seeking, the issues they face and which solutions are being used in the market. They also need to make sure this knowledge is used by the marketing and sales teams to identify new opportunities for growth, as well as new product or service categories.

- **Omnichannel customer experience:** Getting the right channel mix can not only reduce total cost of support, but it can also improve customer satisfaction. Promoting the Web for frequent and less complex issues can help reduce call support traffic. Showing time to resolution for different channels can help users decide which channel to use. Incentivizing the Web channel merely to reduce support costs may not be effective in the long term; instead, organizations should focus on customer satisfaction and the availability of 24x7 help with no waiting time.

Moving from a maturity score of beginner to expert within each of these dimensions can enable the self-service channel to deliver a transformational impact to your business (see Figure 2).

**Key Role for IT**

Delivering to the highest maturity level across the board typically means more work for the IT organization, as well as tight collaboration with stakeholders in the technology and business organizations. Organizations need to look not only into customer service and support features and functionalities that need to be continuously added or managed, but they also need to understand the overall user experience in which these features will be delivered. Designers need to work closely with product owners and business users to identify the scenarios in which customers will use these systems and how solutions will be presented in the end-to-end user scenario or task flow.

Maintaining a static roadmap can be disastrous. Organizations will see higher rates of success when they continuously evolve based

---

**Best Practices for Self-service Portal**

![Content][2]

- Provide clear and readable content with little technical jargon, as customers may be less savvy than customer support.
- Focus on important and frequent customer issues rather than all issues.
- Optimize based on customer’s feedback.

![User Experience][3]

- Make it easy to find the right content, as well as the right solution.
- Focus on simplicity rather than overwhelming users with all content upfront.
- For issues that cannot be resolved using the self-service portal, make other options easily available. Optimize based on customer feedback.

![Performance][4]

- Measure site’s performance at different periods (peak/lean) and optimize site performance. If page load time is high, users will abandon the site and resort to other channels of customer support.
- Use image sprites for improved performance.
- Optimize Web services to minimize load time from the backend. It is not enough for the front end alone to be efficient.

![Personalization][5]

- Show specific details upfront, such as customer ID, order number and order status, that may be of prime importance with relevant reports.
- Show relevant offers for cross-sell and upsell instead of using a generic, one-size-fits all approach.
- Automatically populate data fields as appropriate.
- Provide special contact channels or custom knowledgebase articles.

![Social Community Building][6]

- Promote social communities and interactions among customers, along with necessary moderation.
- Attach a level of positive support, with badges or other symbols to differentiate power users vs. newbies. Let your users act as a channel of support.

![Omnichannel Customer Experience][7]

- Promote the Web channel for frequent and less complex issues.
- Show time-to-resolution for different channels, making it easy for customers to choose the right channel.
- Do not incentivize the Web for the sake of reducing costs. Focus on customer satisfaction.
- Reward good customer behavior.
- Use the same set of policies and solutions to bring uniformity across channels.

---

Figure 2
on learnings from every rollout and consider the impact (positive or negative) on both revenue and call volume. Any feature that results in more calls to the help desk needs to be thoroughly analyzed to unearth the root causes of customer challenges that might otherwise be ignored if not monitored actively. Such analysis may even help remove such a feature to avoid further customer dissatisfaction.

All customer queries require full attention and effort to understand whether online self-help can fulfill the request partially or fully. This a priori knowledge will help in building a feature list that can be rolled out as future enhancements. Continuous or periodic monitoring of calls or other support channels can prove to be a valuable source of input to decide what is added to or removed from the roadmap.

The IT team may also pursue a rigorous process of internal testing to closely monitor a solution’s likely success instead of moving to a full launch immediately after the internal QA (quality assurance) team signs off. This will help in assessing the impact across different browsers and for different user types and environments and arrest cases where self-service portal feature rollouts lead to a spike in call support volume.

Closing the Loop

A customer support representative (CSR) is a great entry and exit touchpoint for customers. CSRs are in an ideal position to mark calls or tickets as having a high potential for self-service resolution, thus improving the performance of the self-service system. If, for example, the CSR identifies a product feature that is automatically brought to the engineering team in real-time for fast-track development, then the self-service product will quickly ascend the customer service maturity curve. However, most organizations do not receive such feedback from their CSR teams. To overcome this process shortcoming, the engineering team needs to interact closely with the CSR team, analyze each call and measure its veracity, purely based on the tickets raised by the CSR.

Looking Ahead

If the journey of building state-of-the-art online self-service channels sounds daunting, it can be. However, with small steps taken in the right direction, organizations can show incremental positive impact on the overall support system. Such energy and positive momentum can drive larger initiatives to reach the transformational level. Remaining customer-centric and focusing on key cultural and geographical impediments can also enable organizations to quickly achieve their goals. This can be done in five steps:

1. **Assess the current maturity score of your online self-service channel by using the framework highlighted in Figure 1.** For example, if your self-service channel provides user-based login and dynamic functionalities but there are inconsistencies with other channels, then the current maturity score of Level 3 is insufficient to create a winning strategy.

2. **Define the long- and short-term goals for the self-service channel in line with the organization’s vision.** For example, improving support and the net promoter score (NPS) can be a long-term goal; improving online self-service adoption toward this goal can be a short-term objective.

3. **Identify the key pain points and classify them based on the frequency and effort required to alleviate these pain points.** For example, a poor user experience can be a bottleneck that undermines self-service channel adoption. Redesigning the experience by taking a persona-based approach that optimizes tasks based on user expectations and needs can be among the keys to solving this problem.

4. **Implement the low-hanging fruit and see the impact on online self-service adoption and overall support.** For example, implement a few navigational fixes first and see if that results in a better user experience; then, try re-designing the system in phases rather than in a big-bang redesign.

5. **Learn and continuously improve toward the long-term vision.** For example, simultaneously with the iterative approach for fixing the user experience, focus on building a social community and providing tighter integration with other channels to create a strong foundation that can advance maturity from Level 3 to Level 5.

To learn more about self-service portals, best practices and solutions to your organization’s specific customer service challenges, please contact us at: inquiries@cognizant.com.
Footnotes


About the Authors

Sitaraman Ananthakrishnan is a Director within Cognizant’s Communications and Technology Business Unit and has worked with dynamic online product companies for the last nine years. With over 18 years of experience in the IT industry, Sitaraman focuses on aligning the latest service and support technologies with ways to incent customers to use them. He has a master’s degree in computer science from the Indian Institute of Technology (IIT), Mumbai. He can be reached at Sitaraman.Ananthakrishnan@cognizant.com.

Savittha Ajitraj is a Senior Consultant with Cognizant Business Consulting Communications and Technology Practice and is focused on helping technology companies with online product management and customer support strategies. She works with the world’s leading e-commerce companies to launch and enhance online products and features, managing the entire lifecycle from inception to post-live support. She has completed her PGPM from Great Lakes Institute of Management, Chennai, and B.Tech (Information Technology) from College of Engineering, Guindy, Chennai. She can be reached at Savitha.Ajitraj@cognizant.com.

Nishad Phagre is a Consultant with Cognizant Business Consulting’s Communications and Technology Practice and has five years of experience in the field of customer relationship management and subscription billing. He can be reached at Nishad.Phagre@cognizant.com.

Acknowledgments

The authors would like to recognize the contributions of Stan Iyer, an Associate Vice-President with Cognizant’s Communications and Technology Business Unit, as well as Raghu Ramamurthy, Director, and Stephen Edward Pradeep, a Senior Manager with Cognizant Business Consulting’s Communications and Technology Practice.

About Cognizant

Cognizant (NASDAQ: CTSH) is a leading provider of information technology, consulting, and business process outsourcing services, dedicated to helping the world’s leading companies build stronger businesses. Headquartered in Teaneck, New Jersey (U.S.), Cognizant combines a passion for client satisfaction, technology innovation, deep industry and business process expertise, and a global, collaborative workforce that embodies the future of work. With over 75 development and delivery centers worldwide and approximately 178,600 employees as of March 31, 2014, Cognizant is a member of the NASDAQ-100, the S&P 500, the Forbes Global 2000, and the Fortune 500 and is ranked among the top performing and fastest growing companies in the world. Visit us online at www.cognizant.com or follow us on Twitter: Cognizant.