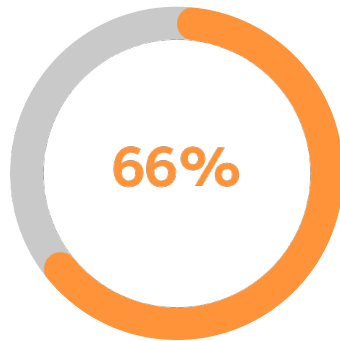salesforce

# Your Customer Self-Service Experience Scorecard

Today's customers expect seamless self-service options. See how well your company meets these expectations in the scorecard below. These ratings highlight areas where your self-service website experience excels and areas that may need improvement.

Your Overall Score

66%

Needs improvement

Your Score Breakdown

Homepage	Search Results	Article Detail	Contact Us	Chat	Chatbot
66%	80%	0%	61%	0%	0%
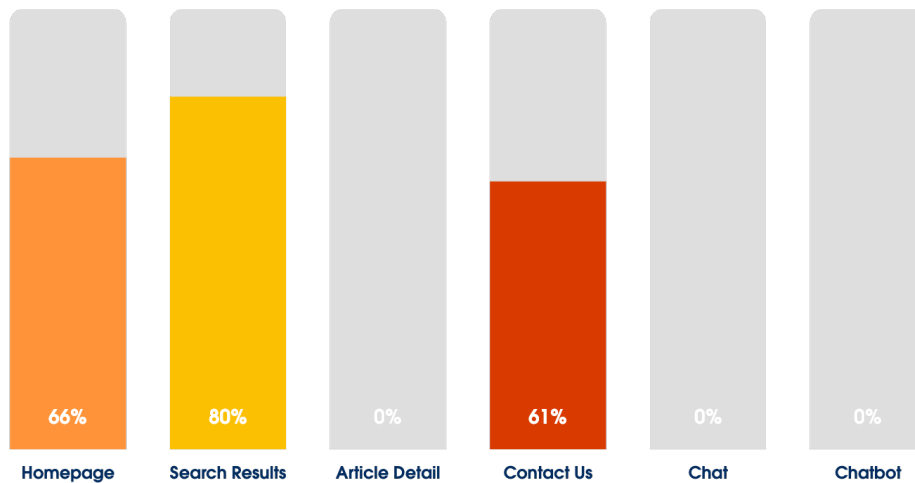
Your top recommendations

Your Support homepage Score

66%

Needs improvement
Support page enhancements required

Your Top 3 Support homepage Best Practice Recommendations

1 Language Selection
Update the language selector to include a comprehensive list of countries and language combinations.

2 Experience and Design
Consider incorporating imagery/iconography to help users navigate the site and complete their actions.

3 Article Categories
Use common contact drivers to create logical and well-organized categories, so visitors can easily find information.

Your Contact Us Score

61%
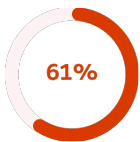
Fail
Incomplete or no self-serve options

Your Top 3 Contact Us Best Practice Recommendations

1 User Experience
The contact us page should include options for customers to resolve issues on their own (via knowledge, articles, or links).

2 View Incidents
If there is an incident related to the customer, there should be a notification displayed for the incident that is surfaced on the Contact Us, homepage, or both.

3 Resolution
Add an automated process (a link or flow) to help users resolve their issue.

Your Search Results Score

80%
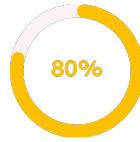
Doing well
Accurate, reliable search results

Your Top 3 Search Results Best Practice Recommendations

1 Experience Search Reliability
No recommendation

2 Search Results Sorting
No recommendation

3 The Results List
Article search results should include an option to "filter" results so users can more easily find the article they need.

Your Chat Score

0%
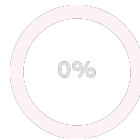
Fail
Unhelpful chat support experience

Your Top 3 Chat Best Practice Recommendations

1 Display Wait Time/Queue
No recommendation

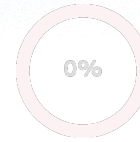### DID YOU KNOW

66% of service professionals say self-service channels reduce case volume.

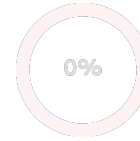Learn more >

Your Article Detail Score

0%

Fail
Article detail needs expanding

Your Top 3 Article Detail Best Practice Recommendations

1 Article Feedback
No recommendation

2 Related Articles
No recommendation

Your Chatbot Score

0%

Fail
Chatbot ready for experience overhaul

Your Top 3 Chatbot Best Practice Recommendations

1 UX and Scrolling
No recommendation

2 Label and Position
No recommendation

3 Menu Design
No recommendation

DID YOU KNOW

72% of customers won't reuse a company's chatbot after just one negative experience.

Learn more >

22 best practices to creating a self-service site customers love

Make your self-service site easy to use with these must-have features.

Support Homepage

Your customer help homepage is the introduction to your service experience. It should:

☐ **1. Experience and Design**
Your support home page should be engaging to users while staying consistent with the branding of your company's website. It should be simple and easy to navigate for both mobile and desktop users.

☐ **2. Trending Articles**
Your support site should feature "trending articles" on its home page. This will help users identify the most recent and relevant Articles.

☐ **3. Help Site Online Search**
When searching online for "<Company> Customer Support", the results should provide a clear path to the Help Site "Home" landing page. If your company's contact information isn't listed in the search results, your customer will not have a reason to navigate to the Help Site for self-service.

☐ **4. Language Selection**
There should be a language and country selector that includes all languages appropriate for the locations of your business.

☐ **5. Article Categories**
The support home page should include clear and well-organized categories for articles.

Search Results

When testing out search features, include search terms appropriate to your customer's industry and searches with special characters. Your search should:

☐ **6. Experience Search Reliability**
When a user is searching on your help site, results should load reliably and contain relevant results, even with variations of the same search term.

☐ **7. Search Results Sorting**
The search results on your site should offer a variety of sorting options – for example, by relevance, publish date, or last updated.

☐ **8. The Results List**
When a customer searches for an article, the results should be accurate, easy-to-read, and visually appealing. Additionally there should be meaningful metadata (data about the article) listed under each result.

Article Detail

Be sure to check multiple articles across topics or product lines.

☐ **9. Article Feedback**
There should be a feedback component at the bottom of each article.

☐ **10. Related Articles**
Each article page should include a way to explore other related articles.

Contact Us

Every help site should include a contact us page. This is your company's last chance to deflect and resolve and issue before it escalates with an agent. The page should include a category selector or sub-selections, a deflection component, and a channel menu. It works to:

☐ **11. User Experience**
Your Contact Us page shouldn't just include a list of phone numbers and emails. It should also guide customers to resolve their issue.

☐ **12. View incidents:**
If there are incidents relevant to a customer's business, a notification should be displayed on the Contact Us page, home page, or both.

☐ **13. Category Selections**
Articles should be organized into categories on the Contact Us page. There should be lists and filters available for customers to find the right category and related article.

☐ **14. Resolution**
When a customer selects a category of issue on the Contact Us page, there should be suggested articles, links, or automation that help them resolve their issues themselves before contacting an agent or bot.

Chat

These components are key to setting your chat function up for success. Make sure to:

☐ **15. Display Wait Time/Queue**
When a customer launches a chat session, their queue number or wait time is displayed in the window.

Chatbot

Many companies are still in the early stages of chatbots. Your bots are successful when they:

☐ **16. UX and Scrolling**
Your chatbot should interact in a way that is consistent with the brand. The chat screen should be appropriately sized. Your chat window features auto-scroll so a customer can easily navigate a conversation.

☐ **17. Label and Position**
It should be clear that the chatbot is different from chatting with an agent. The option to chat with a bot is available on the Articles page or the Contact Us page.

☐ **18. Menu Design**
Your bot should use menus and buttons to facilitate a conversation.

☐ **19. NLP**
Your bot should use natural language processing (NLP) or generative conversational design. Your bot should be responsive and accurate for your top contact drivers.

☐ **20. Automation**
A customer should be able to resolve an issue directly with help from a bot.

☐ **21. Survey**
At the end of the chat or bot session, there should be an immediate post-chat survey for feedback.

☐ **22. Agent Transfer**
Your bot should transfer to an agent when a customer requests escalation either from a menu or through text.

Ready to scale your customer support with AI-driven self-service?

[Learn more →]