The customer support portal plays a central role in digital customer support delivery. Customer support leaders responsible for delivering digital experiences via their portal should implement these 11 foundational capabilities to improve the customer experience and deliver self-service success.

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Overview

Key Findings

- The majority of digital self-service support experiences result in dead ends, requiring customers to create cases or escalate their requests to assisted support resources which cause an increased cost per resolution.

- Many customer support portals lack the foundational capabilities required to facilitate customer self-service resolution, resulting in sub optimized customer experiences, low self-service success rates and high escalation rates to assisted service.

- Underinvestment in digital experience reporting and analytics capabilities results in an inability to fully understand the entire customer search to resolution journey, bottlenecks and opportunities for improvement.

Recommendations

To improve the effectiveness of their customer support portal, customer support leaders should:

- Evaluate their current customer support portal capabilities to identify gaps and areas of improvement.

- Implement the 11 foundational portal capabilities to enable an improved customer search to resolution process.

- Expand the current reporting and analytics methodology to include the entire customer journey from search to resolution to gain a full picture of the customer experience, identify potential roadblocks and understand opportunities for improvement.

Introduction

The customer support portal has taken a central role as support organizations transform themselves digitally and the customers they serve prefer access to easy, self-service answers 24 hours a day.

Once thought of as simply a place to house FAQs and documentation or provide "contact us" options, today's customer support portal provides a centralized hub for customers. There, customers can get answers to questions, educate themselves, interact with other customers, create and manage support cases, complete specific tasks and engage live customer support resources should they need additional help.

Yet, despite the central role the customer support portal plays in the delivery of the digital customer support experience, few organizations and their customers realize the full set of intended benefits. To optimize ROI and increase support portal effectiveness, customer support leaders must implement 11 capabilities that serve as the foundation for every support portal experience.

Analysis

Evaluate Your Existing Customer Support Portal Capabilities

A critical step in building an effective customer support portal is to complete a current state assessment of your existing portal capabilities. The current state assessment identifies the critical portal capability gaps and guides the prioritization of projects to close those gaps based on what business outcomes the customer support organization wants to achieve.

To ensure organizations are on the right path to building their customer support portal, Gartner has developed a self-evaluation tool to guide customer support leaders through this process (see Tool: Customer Self-Service Portal Assessment).

The extent to which these capabilities are used and deployed will depend largely on your industry, current situation, strategic objectives and appetite for investment and change.

## Build Your Customer Support Portal Foundation

To meet the support organization's goals and objectives, the customer support portal must include 11 foundational capabilities. Each of the 11 capabilities taken individually improves aspects of the customer experience and elements of the search to resolution process.

Taken collectively, the impact of the 11 capabilities drives significantly more business value, creates effortless customer experiences and improves overall portal adoption and self-service success (see Figure 1).

Figure 1. Customer Support Portal Foundational Capabilities

Each of the 11 portal capabilities are detailed in the following section. These 11 portal capabilities serve as the foundation for any customer support portal.
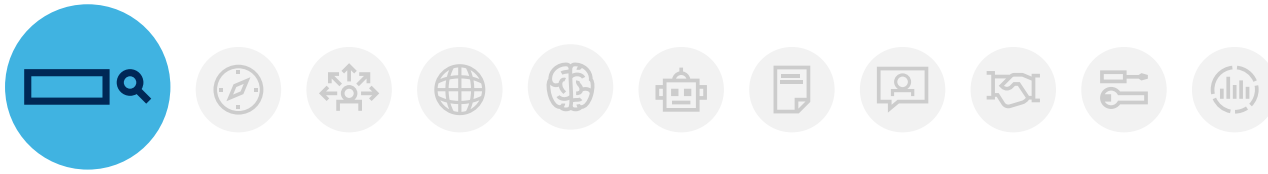
Capability 1

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External and Site Search

The capability for both external and internal search has moved past keyword inclusion and must provide content context, relevance and value. There is a need to understand your customer's questions using common everyday language.

- Support pages and content must be optimized for external search engines. Investment in search engine optimization (SEO) tools and processes must be part of the customer support budget, and customer support content must be created with SEO in mind.

- Site search must include a unified index searching multiple repositories simultaneously and ranking results accordingly.

- Site search must also include the capability for machine learning and AI to provide personalization, continuously improve results and provide comprehensive reporting to identify content gaps and tuning opportunities.

- A singular search experience should be present on the portal. However, if multiple search experiences are necessary, they must operate and provide the same results and overall experience.
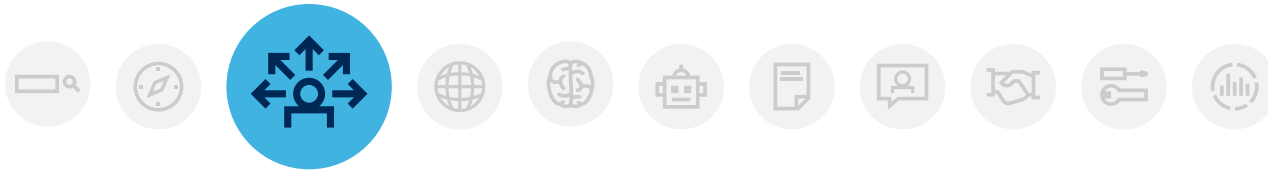
Capability 2

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Usability, Design and Navigation

The overall look and feel of the support portal is a critical capability in its overall effectiveness. Users have an expectation of consistency, and pages on the portal must be similar in layout and design.

- The portal must also have a similar look and feel to other corporate properties and consistent with the overall brand.

- The page layout and design must be purpose-built for the audience it is designed to serve, which is different from a corporate website.

- Predictable navigational menu choices, page layouts that provide low-effort ease of use for users moving around the portal, mobile responsiveness and accessibility are also essential.

- The use of unconventional menu names or having different design experiences page by page causes confusion, increases user frustration and wastes the user's time on the site.

- The site where applicable should enable SSO so that customers can log in once and have access to different applications.
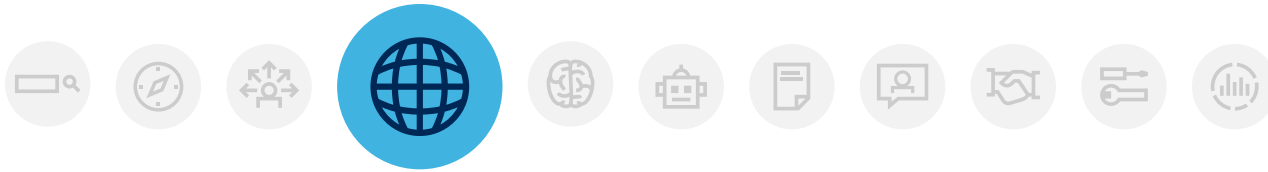
Capability 3

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Personalization

The capability of personalization enables customers to create a profile that identifies them as users on the portal and provides administration functionality to manage preferences and demographic information. Advanced capabilities takes personalization a step further and collects customer usage data using both real-time and historical data to create dynamic experiences for the user.

- Users should be able to set their communication preferences, understand their past purchases and/or entitlements, and update addresses or other demographic data.

- Customer profiles should enable unique and tailored experiences in delivering content, specific calls-to-action, promotions to customers based on history, real-time behavior, journey(s) and/or segmentation data.

- Advanced personalization capabilities can dynamically restructure page layouts and designs, and automatically rearrange menu items and categories to deliver customized layouts according to each visitor's preferences.
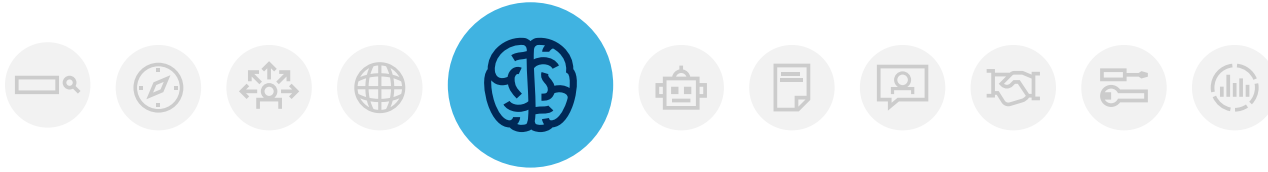
Capability 4

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Globalization

The capability of globalization supports translation and localization of the portal menus, search and content to the user's language and locale based on the geographical location of the customer.

- Provide translated and localized menus, page layouts, content and search experiences

- If your products or services are offered to customers in regions outside of your base location, there will be an expectation from customers to engage in their language of choice.

- Digital experience strategy design should include globalization elements and requires organizations to develop a team responsible for ongoing maintenance, managing content, designing user experiences, and managing encodings and localization elements for multilingual display.
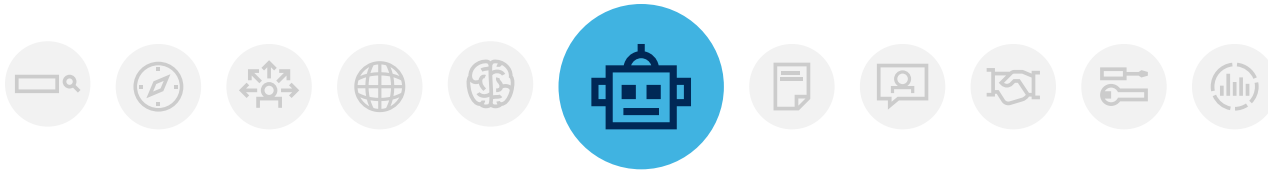
Capability 5

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Content, Knowledge and Education

Access to high-quality content, knowledge and education is the most important capability of any customer support portal. The customer's ability to self-serve is directly linked to the effectiveness, timeliness and instruction provided in the content.

- Content should be authored using the customer's words, terms and phrases. It should leverage structured templates for different content types to deliver consistent experiences.

- Content should be simple to follow and provide direct answers to specific questions.

- Content should make use of rich media, visual aids, embedded tools or videos where appropriate.

- Provide integrated access to product documentation, implementation guides and user manuals as applicable.

- Provide opportunities for customers to learn by offering educational online courses (free or fee).

- Develop internal knowledge management processes to author, review, edit, archive and manage content.

- Encourage customer feedback on content by including a ratings system at the end of the content piece.

- Leverage feedback and usage analytics to identify content gaps and high- or low-performing content.

Capability 6

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Virtual Customer Assistants (VCAs) and Bots

The capability of providing bots and virtual customer assistants to customers via a business application that simulates a voice or text conversation in order to deliver information, take action on behalf of the customer or perform transactions.

- A VCA uses a natural language interface and can be deployed via live chat, SMS, consumer messaging apps, native mobile apps, peer-to-peer communities, kiosks and other web-based or mobile interfaces.

- A chatbot is similar to a VCA but narrower in scope, and typically uses text based, menu-driven engagement.

- VCAs and bots can either be reactively or proactively deployed.

- Reactive deployment requires customer initiation, when a customer clicks on a bot icon that is provided at key points in the customer journey or is persistent on a page to assist customers.

- Proactive deployment would include the use of business rules and logic that triggers a bot conversation, in which the bot icon would physically pop up on the customer's screen. These rules can include time on page or information gathered through clickstream analytics.

- VCAs and bots are increasingly becoming a more important part of the customer support digital strategy. Leading edge support organizations are reimagining the digital experience by using VCAs and bots as digital front doors, and are extending this front door capability across all support properties.
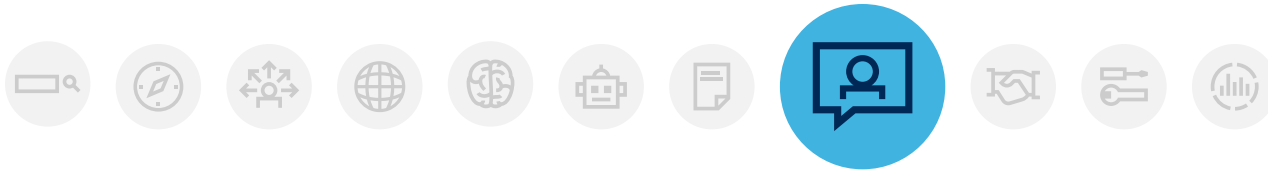
Capability 7

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Case Management

Case Management is the capability to submit the details of a customer's interaction or inquiry to assisted support via the support portal which is integrated with the CRM or Case Management solution. Case management processes and associated workflows are foundational to the assisted service customer support organization. Case management capabilities required via the portal to include:

- Provide the ability to open, edit, update, escalate, add attachments, link to knowledge articles and close the case/service request.

- Provide users the ability to take necessary action to view and search case history and set the case status as open, in-progress or closed.

- Track all assisted support actions and activities required to resolve the customer's service request through the case management functionality on the portal.
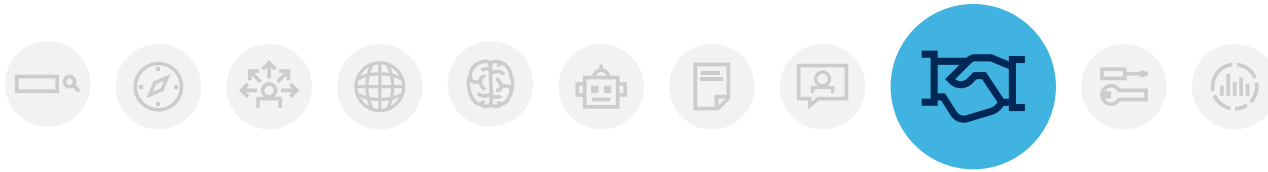
Capability 8

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Assisted Support

The capability of providing human-based, agent-assisted, customer support options when resolution through the self-service portal has failed, or when it has been determined that the customer's intent is best handled through assisted support versus self-service.

- Seamless escalation from self-service to assisted support includes the ability for self-service to pass context (customer information, knowledge articles viewed, self-service path) to assisted support options when escalation occurs.

- Assisted support can be provided reactively when it is initiated by the customer.

- Assisted support can be provided proactively when it is triggered using business rules specific to the customer's real-time digital experience.

- Delivery of assisted support may include the use of multiple communication modes and channels including:
  - Live chat
  - Co-browsing
  - Click to call, call me now, or schedule a call
  - Community forum responses to customer posed community questions

Capability 9

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Community Engagement

The capability of providing a dedicated, online space where customers, company associates, partners, and experts can interact with each other to share information and ideas, and where users can go to find knowledge.

- Ideally, the community should include functionality to enable customers to provide feedback on products and/or request features and changes to the product and/or service.

- Leverage feedback and usage analytics to identify content gaps and high- or low-performing posts that make strong candidates for knowledge base articles or educational content.

- Encourage customers to self-help and provide answers to other customer questions.
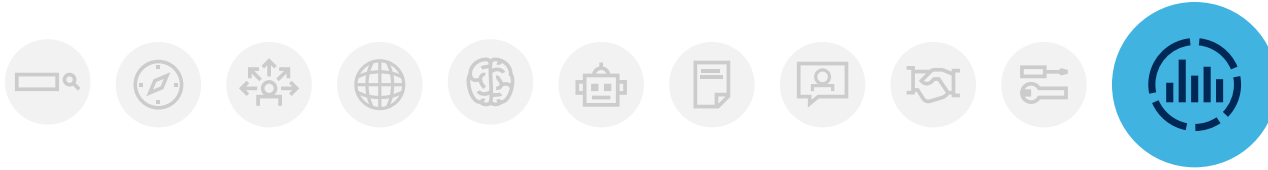
Capability 10

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Tools

The capability to enable customers to carry out specific functions or tasks through self-service. The nature of the tools required varies from business to business and can be both company- and industry-specific. Examples of tools that customer support organizations use include, but are not limited to:

- Order or upgrade software, solutions, support packages

- Schedule customer support, technical account management or customer success 1:1 consultation

- Check order status

- Check shipping/tracking status

- Download a software patch or update

- Complete a diagnostic or troubleshooting exercise

- Upload reports, system logs

- Predictive capabilities

- End of life (EOL) look-up

- Welcome to the portal — overview of support capabilities

Capability 11

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Reporting and Analytics

The capability of developing a regular cadence for collecting, measuring and analyzing portal usage data and feedback. There may be overlap in some of the analytics capabilities of the below tools. However, each category does provide additional information, and best-in-class portals are analyzing all data.

- Measuring the online experience through customer interactions is often collected through surveys that ask customers for feedback on content, knowledge base articles and their experience with the portal.

- Search engine optimization (SEO) — how content results are returned from an external search engine.

- Website analytics — how many sessions, visits or visitors, how often, how long do they stay, what browsers and devices are they using.

- Clickstream analytics — how users are engaging with the site, content usage and mouse moves. This can also be used to A/B test page designs, layouts and vocabulary.

- Portal/CRM analytics — the number of cases logged and reopened. This can also be used for analyzing knowledge base articles usage, feedback and portal search reports.

- Optionally, some portals may have advanced search capabilities. Insight engines track what users are searching for, what they're finding, and if they're clicking on the results, what is the top performing content? Where are the content gaps?

- The most advanced form of portal analytics is customer journey analytics, which includes the process of tracking and analyzing the way customers and prospects use a combination of available channels to interact with an organization over time. Its goal is to help organizations deliver optimal customer experiences across touchpoints by providing cross-functional teams with the 360-degree insights needed to execute providing optimal customer experiences.

Measure and Analyze the Entire Customer Journey from Search to Resolution

Customer service and support leaders invest significantly in self-service capabilities but have little insight into the customer's search to resolution journey mainly due to underinvestment in digital analytics capabilities. In fact, Customer service and support leaders have historically relied on low cost, direct customer feedback in the form of a micro survey as a proxy to measure self-service success.

While surveys can prove effective, they do not account for the entirety of the customer's journey. A more comprehensive approach to measuring the entire customer journey from search to resolution is required. As each of the 11 foundational capabilities are implemented, customer service and support leaders must equally invest in digital analytics capabilities to ensure they are getting a full perspective of the customer's digital experience.

As customer service and support leaders implement the 11 foundational portal capabilities, they should:

- Expand their portal measurement and metrics methodology to include metrics that are representative of each step in the search to resolution process

- Document customer journeys, the path customer's take to achieving their goal, and determine the customer and business goals specific to each journey

- Implement analytical capabilities that collect customer journey data from the path customers take from external and internal search to resolution

- Aggregate and analyze data from analytical sources (Capability 11: Reporting and Analytics) to fully comprehend the value that the portal is delivering

- Implement a regular cadence to analyze customer portal data to identify bottlenecks and opportunities for improvement

- Close the loop by enlisting support from Marketing, digital, IT and other stakeholders to improve aspects of the search to resolution journey including optimizing support pages for external search engines

Evidence

This research is drawn from extensive inquiry with customer service and support leaders and other Gartner research.

Acronym Key and Glossary Terms

SEO	Search Engine Optimization		**FAQ**	Frequently Asked Questions
KB	Knowledge Base		**EOL**	End of Life
ML	Machine Learning		**Q&A**	Question and Answer
AI	Artificial Intelligence		**VCA**	Virtual Customer Assistant
Nav	Navigation		**PW**	Password
SSO	Single Sign-on		**ROI**	Return on Investment
WCAG	Web Content Accessibility Guidelines			
CTAs	Calls to Action			
LMS	Learning Management System			

How Gartner helps customer service leaders adapt and stay ahead

The customer support portal plays a central role in digital customer support delivery. Gartner can help customer support leaders responsible for delivering digital experiences via their portal, to improve the customer experience, deliver self-service success and more.

Diagnostics and benchmarks

Guides and toolkits

Expert inquiry

Expert research

Live events

Peer connections

Case studies and best practices

Webinars and online learning events

Document reviews

Example: How Gartner supports you as a client

Diagnose current state

Use the Customer Self-Service Portal Assessment to evaluate current self-service portal capabilities and understand where opportunities exist to improve the customer experience and drive self-service success.

Understand the 11 foundational capabilities that best-in-class service and support organizations are employing to fuel their self-service portals and digital customer journeys.

Develop your plan

Watch a virtual briefing on The Future of Customer Support Success Is Self-Service to hear how NetApp put self-service first and drove substantial financial benefits as a result.

Schedule an inquiry with a Gartner expert to discuss your current self-service portal capabilities and what best-in-class organizations are doing to drive self-service portal success.

Execute and drive change

Create alignment within your organization around the self-service portal by debunking commonly held myths about customer self-service success.

Accelerate and sustain success through use of a comprehensive set of metrics, analytical tools and methodologies outlined in our research: Self-Service Portal Success by Adopting a Self-Service Portal Management Methodology.

Actionable, objective insight

Explore these additional complimentary resources and tools for customer service and support leaders:

Infographic

Improve Digital and Self-Service Effectiveness

Tactics to lower operating costs without sacrificing customer experience.

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Guide

The Future of Customer Service

Develop your strategy for building a value-driven customer service function.

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Guide

Increase Digital Customer Service Adoption

10 key actions to optimize customers' search results and guide them toward digital customer service.

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Infographic

Top Customer Service Priorities

Discover what's top of mind for service and support leaders this year.

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