Customer Self Service Portal

Presented by IVG

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Microsoft Dynamics

What is a Customer Self-service Portal?

- A customer self-service portal provides one-to-many customer support resources for customers who are searching for instant answers to their problems. It removes the need to contact your customer support team and allows customers to help themselves.

- Customer satisfaction rises when you offer them self-service support. A customer self-service portal is an important part of the user experience of your product, allowing customers to find easy solutions and avoid bothering your company with repetitive questions.

- A self-service portal means your customers are uninterrupted when using your product. They don't have to wait for a lengthy answer for your support team when they encounter common issues.

Why Should You Use a Customer Self-service Portal?

- **24/7 self-service access**

  When customers use a self-service portal, they have 24/7 access to the support that your company can provide. There are no times when agents are unavailable and they can take advantage of instant answers to their problems. Your company can offer truly global support which is unaffected by the times when your agents are available to work.

- **Reduce customer service costs**

  A customer self-service portal means that fewer requests are sent to your customer support team. You can employ fewer agents to handle the same volume of customers, which is good news for your budget. A self-service interaction costs pennies when compared to the same interaction with a human agent, which costs dollars. You can expand your customer support team with less resources and save money in the long-run.

- **Improve Agent Productivity**

  When agents are dealing with fewer repetitive queries, they are much more productive overall. They have more time to devote to the more complex cases and have more time to devote to non-customer facing tasks. It's easier for your customer service agents to be good at their jobs when they aren't dealing with the same questions over and over again.

Why Should You Use a Customer Self-service Portal?

- **Boost Site Traffic**

  Your site's SEO is boosted when you have customers visiting your knowledge base. When knowledge base content is indexed by search engines, you have more traffic coming to your site's domain. This improves your ranking in the Search Engine Results Page (SERPs). The more visitors you have coming to your site, the more visitors you attract in the future, meaning you expand your site's visibility to new customers.

- **Reduced customer frustration**

  When customers have their small issues solved, they are less frustrated with your product as a whole. If a customer just wants to find out how to change their password, they shouldn't have to fire off an email to your support team. Having access to instant answers improves the customer experience and increases the chance they will stay with your brand for the long-term.

- **Consistent service across the globe**

  No matter where your customers are based, a customer self-service portal means your customers will have equal access to support. This reduces the pressure on your support team to provide service out of hours and means you can offer 24/7 support with minimal effort, independently of the location of your customers.

Why Should You Use a Customer Self-service Portal?

- **Competitive edge for your business**

  You can be assured that your competitors will be providing a customer self-service portal. In order to keep pace, your business should do the same or your customers will start looking elsewhere. A self-service portal has become part of what your customers expect from your business and they will be disappointed if your business doesn't offer it.

- **Enhance customer satisfaction**

  When you provide a customer self-service portal, customer satisfaction is enhanced. Customers are easily able to find answers to their most pressing questions and they don't have to wait for a reply from your support team. When customers can rate your response as instant, they have a much higher approval rating for your business.

Key Features of a Service Portal

Accessing services, product settings and subscriptions

- Requesting, cancelling, re-activating services.
- Placing orders.
- Tracking order statuses.
- Notifications on status updates.
- Scheduling services.
- Viewing and editing subscription details.
- Remote product (device) management (viewing device information, password reset, managing settings, performing remote actions).

Paying for products/services

- Checking payment information.
- Managing subscriptions.
- Paying bills.
- Viewing a billing history.
- Filing claims.
- Viewing, tracking and downloading invoices.
- Viewing and filtering transactions by status.

Self-support for customers, employees, citizens and business organizations, etc.

- A knowledge base (user manuals, supporting documentation, educational materials).
- Forums, communities.

Assisted support

- Live chat with a service agent, HR specialist, etc.
- Submitting support requests for customers or employees.
- Getting notifications on support ticket status.
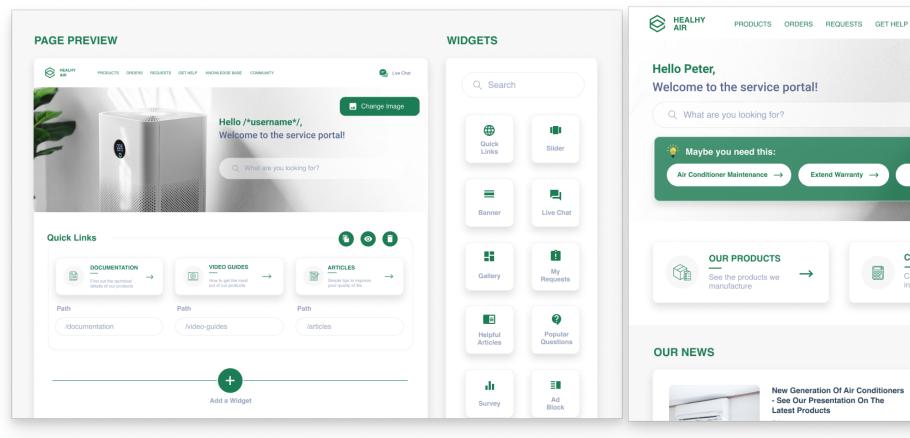- Viewing support and account history.
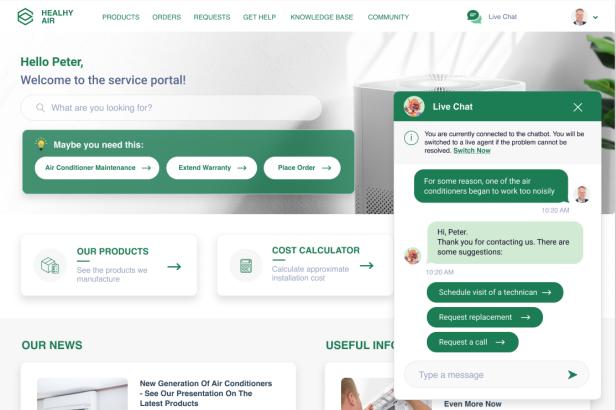
Portal administration

- Configuring widgets displayed in the portal.
- Setting up location-based portal content and ads.
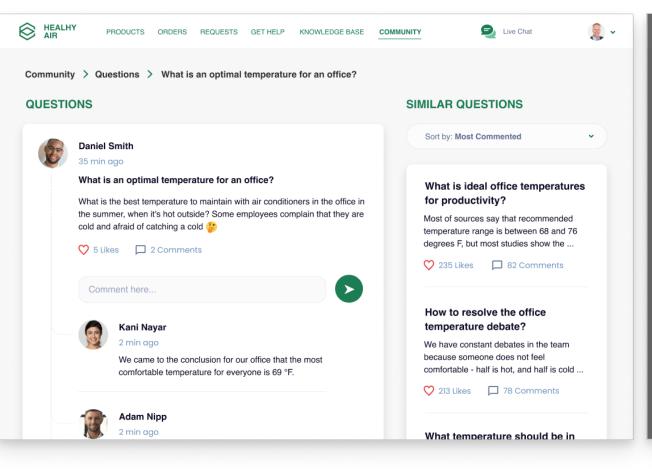
Advanced capabilities

- A service chatbot.
- Auto-suggested AI-based service solutions based on customers' or employees' queries.
- Automated AI-based routing of users' support tickets to an agent or a bot for help.
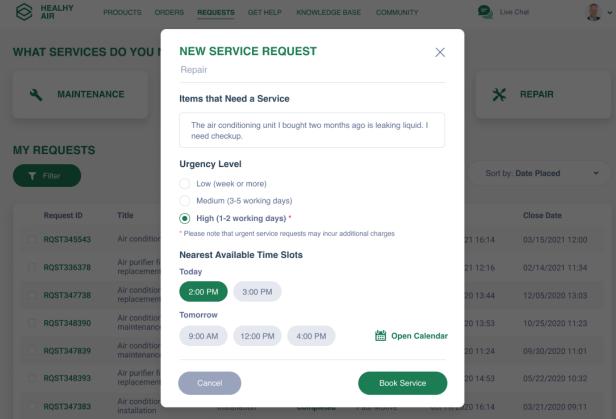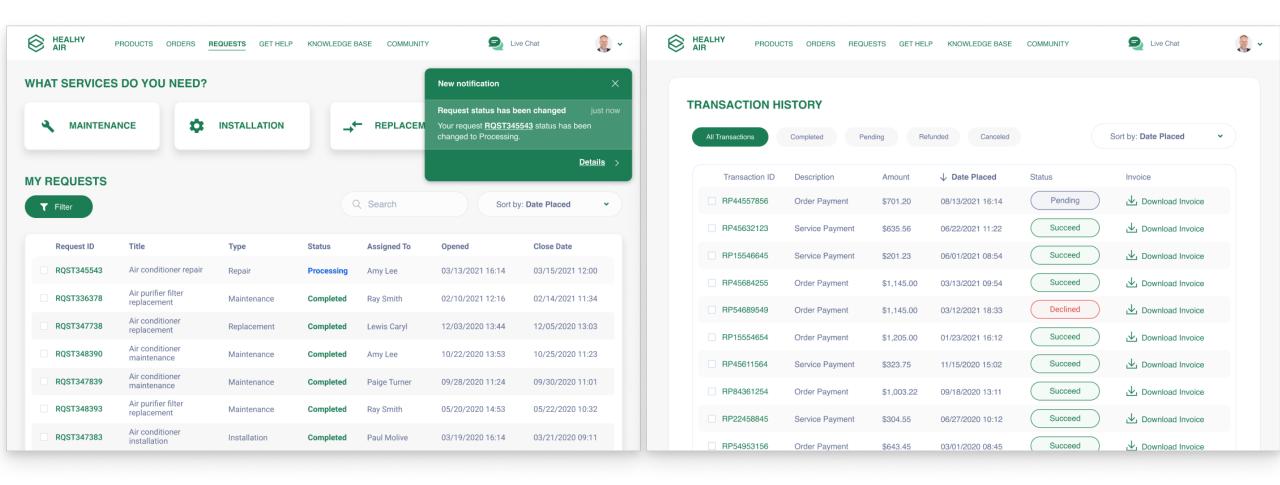
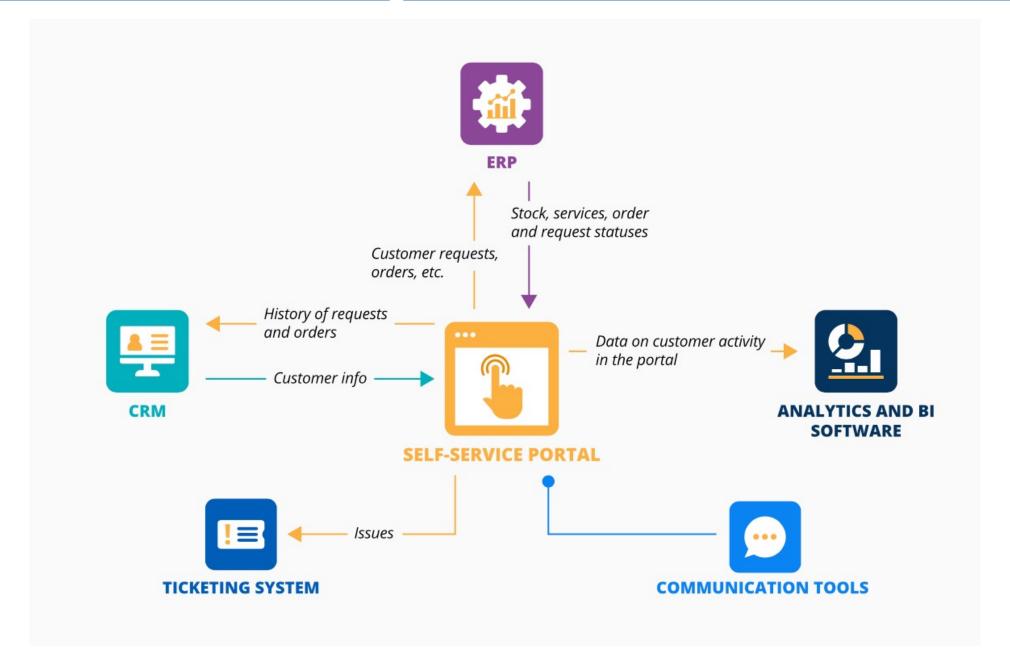# Self-Service Portal Interface Sample

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Key Service Portal Integrations

Service portal + CRM

– to get a 360-degree view of customer interactions with the business due to uploading the full history of requests and orders made via a portal to CRM, to personalize communication in the portal using customer info from CRM.

Service portal + ERP

– to keep stock, services, order and request statuses in the portal accurate, to send customer requests, orders and other input to ERP for verification and fulfillment.

Service portal + a ticketing system

– to automatically pull issues from the service portal to the support ticketing system.

Service portal + analytics and BI software

– to analyze user interactions with the portal and improve customer/employee experience.

Service portal + communication tools (online chat, social media, email)

– to allow for a prompt and convenient switch to assisted help.

Q&A

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