

Customer Service Portals: Help Your Users Help Themselves

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In a world where there's often little differentiation between products, good customer service is a crucial factor in steering a buyer to your company.

As technology advances, people are demanding customer service in different ways than they used to. Instead of going into a store or picking up the phone, many customers want to help themselves, so they go to a company's customer service portal.

If that portal contains the information they are looking for, the user feels the company takes care of its customers. The opposite can also be true. A bad self-service portal can leave a customer with negative feelings about a company or product.

In this article, you'll learn the basics about customer portals and what customers are looking for. See how a good portal can benefit your business, and learn the important points to consider when creating or revising portals.

What Is a Customer Portal?

Simply put, a customer portal is an online destination where users can find information about and support for a company or product. There are two main kinds of portals — customer and self-service — but as technology advances, the terms are mostly

interchangeable. Both allow the customer to get information without any interaction involving a company representative.

Basic portals may have only general information about a company or product support. These portals do not require a customer login, so the information is available to anyone who visits the web page. Customers may encounter and converse with a virtual assistant powered by artificial intelligence on these sites. More advanced portals are more secure and require logins and passwords to access.

Both types of portals are valuable to customers in different ways. For example, if a mobile phone customer needs an owner's manual for a phone, they can search online and find many readily available from a variety of customer portals. If that same customer wants specific information about their phone plan, minutes, and data, that capability requires the customer to use a company's secure self-service portal.

What Are the Most Common Elements of a Customer Service Portal?

The main goal of a customer service portal is to give each and every customer the right online experience, which means providing a sufficient level of access, customer service, and convenience.

Customer service portals, sometimes called business or corporate portals, are a place to centralize the information and tools a customer could need. Behind a secure login, a customer might be able to see the following:

- Account details (including account numbers and contact information)
- Past history
- Invoices
- Billing information
- Credits
- Credit limits
- Price quotes
- Other personalized information specific to each customer

The portals act as a hub for information about a customer and products. It's a place where a customer can go for support or information when they need it. Often, there is a knowledge base with frequently asked questions, service notices, and product updates. Sometimes, there is a place where a customer can submit and track a issue ticket or escalate a concern.

Community forums are becoming increasingly popular, allowing customers to help each other with issues and to share information. It's part of today's larger sharing culture and can lead to instant problem resolution.

Some savvy businesses use enterprise resource planning (ERP) to link customer portals to other technology systems within the company. Linking day-to-day software, such as accounting, procurement, project management, and manufacturing, with the self-service portal can often help customers get more robust information more quickly. Knowledge management software can help organize a company's online and offline information.

What Today's Customers Demand in a Customer Portal

Modern customers want service, and they want it when they say so.

“Customers want convenience, to put it very simply,” says Brian Manusama, a Research Director for Gartner, a worldwide research and technology firm. Manusama is an expert in customer strategies and the author of a 2015 study called “Why You Need to Rethink Your Customer Self-Service Strategy.”

“If I am engaging with a company, I want to have the best experience that I can,” Manusama says, adding that companies are no longer competing simply in terms of products. “They are competing on service and experience. The only way a company can differentiate from another company is service. What we see as the next competitive battlefield is the customer experience,” he continues.



Every year, Gartner does a worldwide customer service survey. In Manusama's 2015 paper, he said customer self-service was a top five service trend and recommended that leaders get on board. The trend has not slowed down.

“By 2022, we expect that two-thirds of all customer service engagement will go through self-service,” Manusama says.

Some of that prediction has to do with the increased power of millennials, young people who have never known a world without cell phones. But they aren't alone — customers of all ages are taking care of themselves, whether they're booking plane tickets or paying bills. Long gone are the days when only travel agents made travel arrangements and financial transactions were performed only at a bank. Business has moved online, as technology has empowered people to find solutions for themselves.

Despite these changes, it isn't enough for a company to simply have a portal. It must be useful, with quick response times for queries.

“A lot of companies have a portal that is just out there. It isn’t responsive,” Manusama notes. “A good portal provides you with personalized value. You move away from channels that don’t bring value.”

With customers helping themselves through portals, they are in control of the information they receive. They can track their activities, submit trouble tickets and support requests (and hopefully get a quick reply from the company), check the status of their queries, look in the knowledge base and community chats for information, track content they are following in the community areas, and learn from others.

Many customers still want an option to reach out to a human being, either by phone, by email, or in person. “If I’m not happy doing it myself, I can escalate it to another channel. That’s what you see more and more nowadays,” Manusama emphasizes.

He explains that some people still prefer talking on the phone or meeting in person when they first seek help, mostly because they are not tech savvy. “Not all engagement channels are appropriate for different customers,” he says.

If customers are not able to get the answers they need, they can turn to social media to express their displeasure. By the same token, if the portal is good, customers can also use their social media to tell others about their great experience.

Benefits for Businesses Using Customer Portals

The biggest benefit to businesses that help customers help themselves is saving money.

“Customer service has always been a cost center instead of a profit center,” Mansuama says. “[Companies] see a possibility to be more efficient with how they help a customer.”

Because customers can find the answers to many of their own questions, companies can use their customer support team members to assist with more difficult problems. This redirection of resources can help decrease the response time for many questions, leading to more satisfied customers.

In customer forums, people using similar products can often help each other, reducing the need to call the company for support. Having customers do their own searches first can also minimize the number of queries for the same issue, saving time and money.

Since people who file trouble tickets online often have to fill out and submit a form, customer service representatives can sometimes get a head start researching an issue and possible solutions before responding to the customer. This process saves time for both parties involved.

Using ERP to integrate with departments outside of customer service can reduce costs and the need for escalation. For example, allowing a customer to look up an invoice or a payment history saves a call to accounting, and checking on a shipment saves a call to shipping and receiving. Other departments can benefit as well.

If there is no ERP, a company could end up with multiple databases that do not communicate with each other, possibly leading to slower performance and response times. For more on planning an ERP, check out this article: “Enterprise Resource Planning: Definitions, Best Practices, and Examples.”

Businesses can drive customers to self-service by rewarding or penalizing behaviors. Manusama cites the example of charging per minute for a phone call to drive customers to self-help areas. Reducing fees for using an ATM instead of a bank teller is another example. “You’re playing with ingredients to persuade a customer to go to your preferred channel of communication, but at the same time, a customer has his own type of behavior,” Manusama says. It’s a way to reduce the need for some service methods without getting rid of them completely.

A good customer service portal can generate data that companies can use to proactively solve customer problems, market to new customers, or put new or updated products in front of existing customers. Taking the time to see what customers are searching for could spark the creation of a service document to solve multiple problems. Pushing that new document to customers could save them the time and frustration of looking for it on their own.

“You can use the analytics to see the behavior of that customer in a service portal and engage with that customer proactively,” Manusama says. He offers the example of a customer who is repeatedly searching for information about installation problems with a new television. A representative from the company could proactively reach out and offer assistance to that customer.

Happy customers tend to stick with a product and often tell their friends.

What to Think about When Creating a Portal

Self-service portals are useless if customers can’t find the information they are looking for. People want portals that are reliable, accurate, and up to date.

“One of the hurdles I often see is creating the content first. It’s frequently difficult for businesses to take the time to go out and build great content,” says Jason Maynard, General Manager of Guides and Data Products for Zendesk, a company that builds software (including many customer portals) to help create better consumer interactions for companies. “We encourage customers to start small and build out the content of their self-service over time,” he adds.

If the goal is to help customers help themselves, portals need to be simple and easy to navigate with a search function that scans the site, not the entire internet. Making sure documents and guides on the portal have the appropriate tags can help with searches. Use clear language, not technical terms, when creating navigation for the portal.

“Oftentimes, a content writer will be disconnected and have a style guide that isn’t using terms customers use,” Maynard says. “Use the customer voice instead of the brand voice. It makes it easier for customers to understand,” he emphasizes.



Maynard recommends keeping content short. It’s easier to handle for customers, artificial intelligence, and bots, like virtual assistants. “Customers get their answers quickly and don’t get as frustrated. They don’t have to parse through a long document to find what they need,” he says.

Branding is important. Even if another organization designs and runs your customer portal, make sure it looks like your company’s website, so customers don’t get confused. If it looks like another site, customers might not trust it. It’s even possible to use your company’s domain for the site, so the brand experience stays consistent for customers.

“Branding is right up there with content quality,” Maynard says. Customers want their experience on a self-service site to be seamless. When customers see a notice pop up that they’re leaving one website to go to another, they see it as a red flag and might opt for another business instead of yours. “They want the look and feel to be the same,” he says.

Maynard thinks that the company Evernote has a great customer portal, where everything is in one place and is easy to find for users.

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Get More Help

Also, forums connect customers so they can help each other, freeing staff to handle more complex customer concerns.

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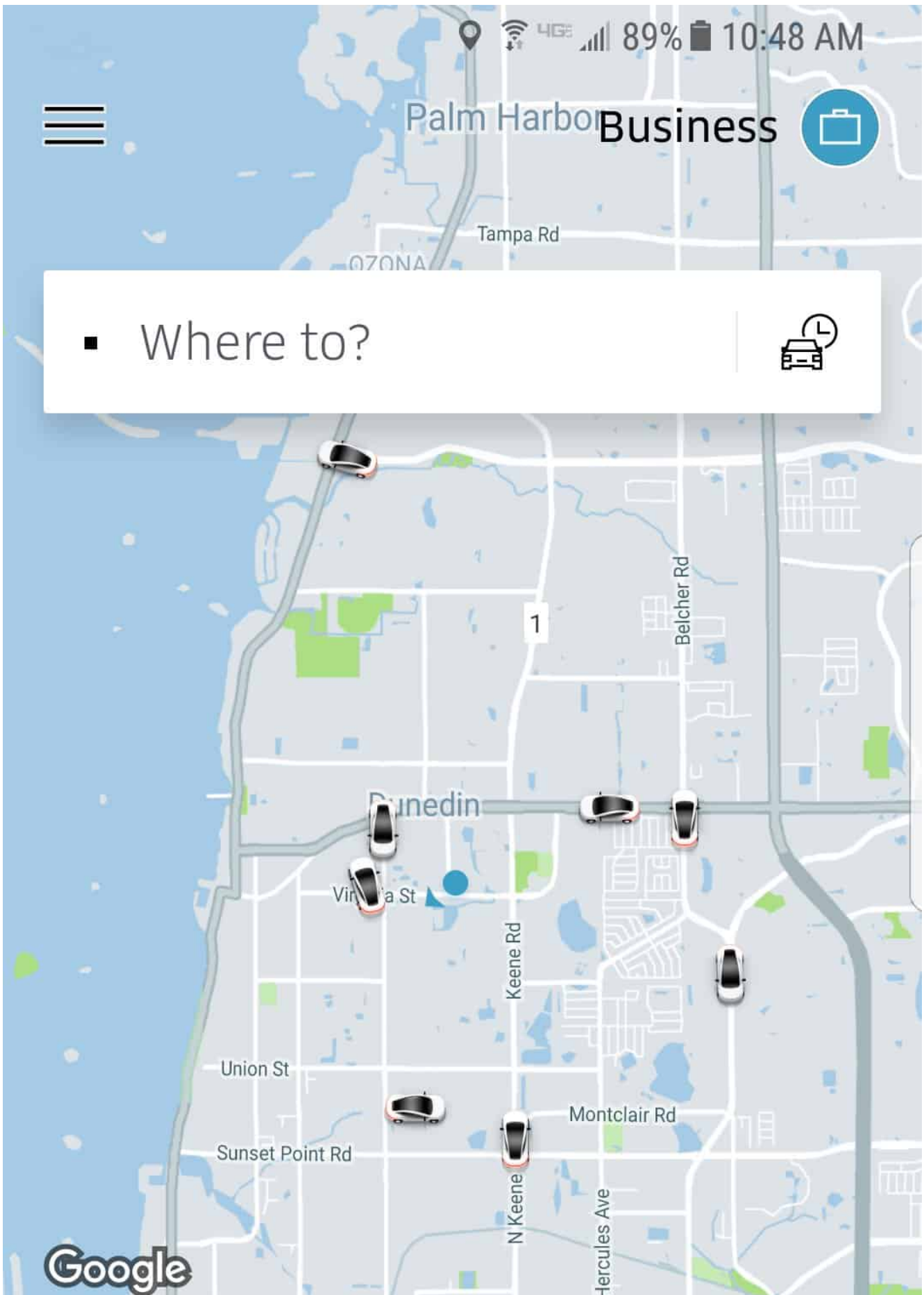
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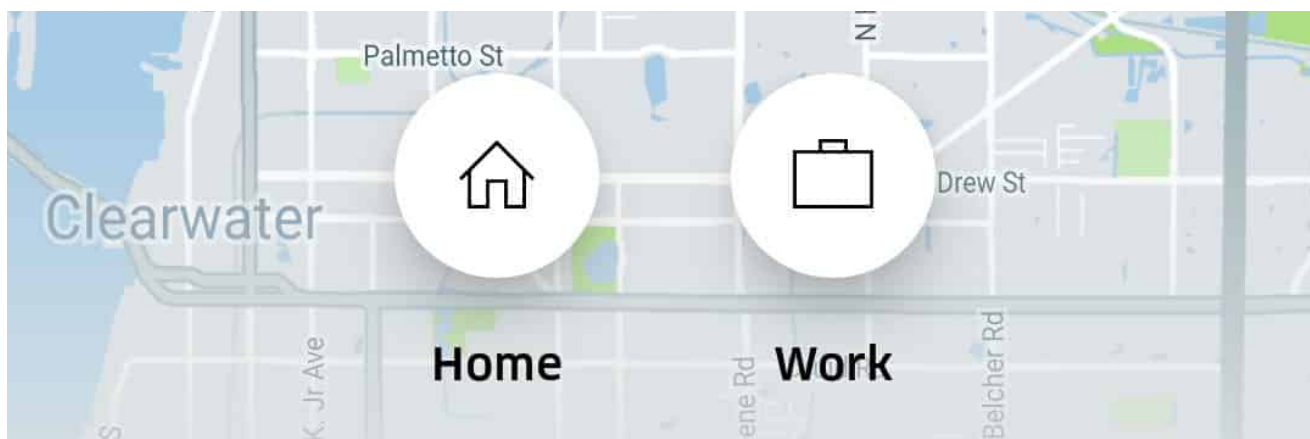
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Manusama says Uber is a good example of a customer portal because of the connections it makes between systems and what it allows customers to do for themselves. The mobile site and website are linked. Users can track available and arriving drivers, pay them, and rate them all in one place.





Security is important both to a company and to customers. Will the portal be open to the public, all customers, or a subset of customers? Who will determine access privileges? The question of access is critical from both an external and an internal company perspective. Which company employees will have access to the portal and the data it generates? How can they use the data?

Here are other points to consider:

- How will customers sign in?
- Will there be a username and password? If so, will the customer or company create them?
- Could there be a single login, so customers need to log in to the site only once, whether they are trying to reach sales, support, or another department?
- What information do you want to collect from customers, and how do you want to use that data?
- Will the site be in English only, or should there be other languages?
- Do you want the site to be searchable only from within your website or on the internet as well? Knowledge management software might be necessary to keep information organized, track the content, and help with search engine optimization.

Omnichannel support is also important, meaning a customer can email a question and receive a follow-up phone call or confirmation text without having to repeat information to customer service agents several times.

“[Customers] want it to be consistent. You need to act as one organization and make it a seamless experience for customers,” Gartner’s Manusama says. Customers have many options to purchase products, good customer service can sway their loyalty.

Many companies make the mistake of simply trying to put the same in-person or phone product into an online format, without adding value for the customer. “They are sort of just copying the service they have in one engagement channel and bringing it to another engagement channel,” Manusama suggests.

He cites the example of getting a loan to buy a car. In the past, people had to go to a bank, meet with a banker to show identification and present evidence of income, and then have the banker perform a risk assessment to decide whether or not to approve the loan. Companies can't easily do this over the phone since bankers can't confirm identities or sign paperwork. Follow-up paperwork is necessary, often by mail, creating a hybrid system. Not everything can translate to an entirely online process.

Customers demand the same level of quality no matter what service channel they choose for contact and interaction with your company.

What Elements Should Be Included in a Customer Portal?

The key to any self-service portal is making your customers want to use it. That means having the elements they need in a format they understand.

The ability to search for answers is a major element of any portal. If a customer can't easily look up an issue, they will probably get frustrated and escalate their problem to another customer service channel. The search function should query multiple areas within the company, including forums, service notes, knowledge bases, etc., not just one area.

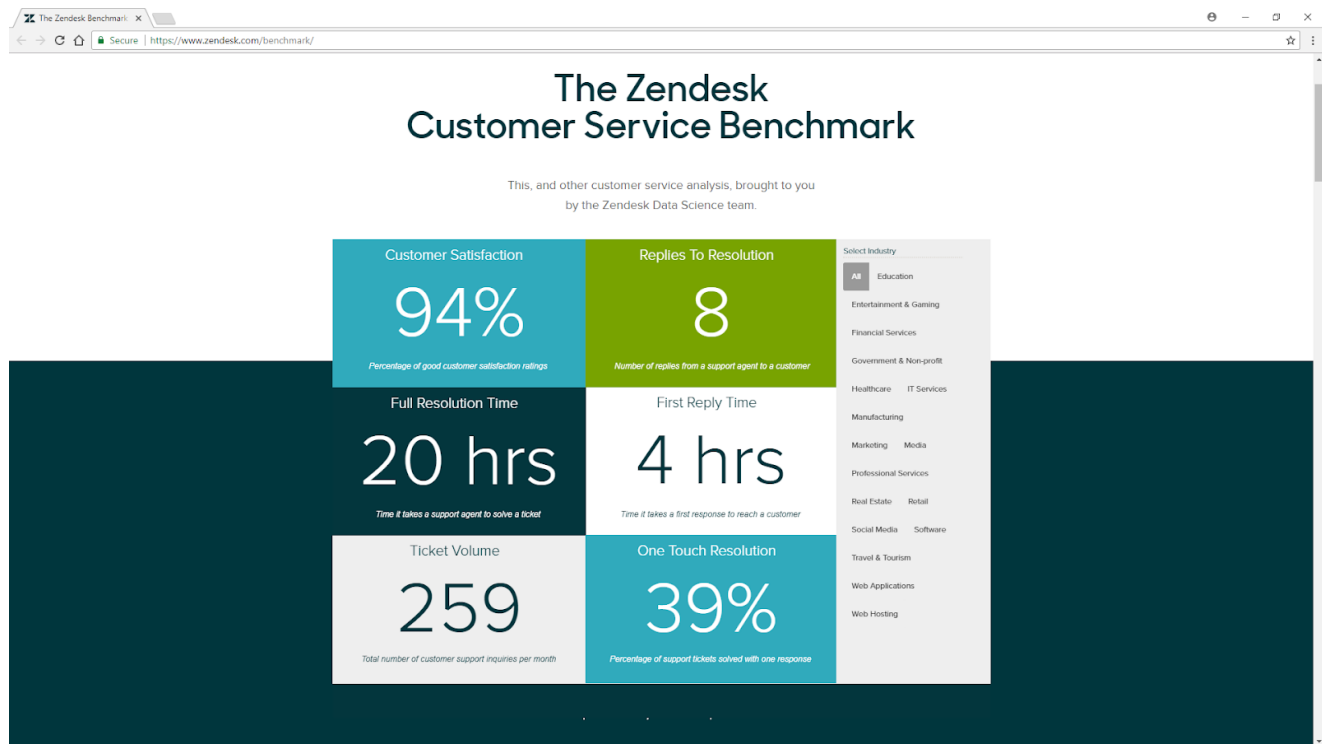
Portals should also provide a way for customers to interact with and help solve problems for one another. This peer-to-peer interaction can save companies money by allowing customers to assist each other and not involve employees. However, it is important to designate someone within the company to read and respond to items in these customer forums. This way, customers see the company as responsive.

A section for frequently asked questions can be extremely helpful to a customer. This is the place to include articles, user guides, and manuals to inform customers. When answering questions, consider using screenshots or videos to show people where to click and what to do. These visual components can be more helpful than using words alone.

There should also be a way for a customer to ask for more information or help if they do not find what they are looking for, and this function should be available 24/7. It could be an option to easily send an email or a text or to post a question. The key is letting people know that the company received their question and when they can expect a response. Clicking send and not receiving any kind of confirmation does not give customers confidence that their query will be answered.

“Customer satisfaction drops as response time increases,” Maynard says. According to the Zendesk benchmark report, it usually takes about four hours for a first response to reach a customer and about 20 hours until a full resolution. Thirty-nine percent of support tickets

were solved with only one response from a company. People from any company can use the benchmark page to test their response times and other performance metrics against those in their industry or against those in all types of business.



A key is keeping the customer in the flow of what they were doing. For example, if a person is making a purchase, a company could offer a widget that comes up and explains the item in more detail or states the return policy. This keeps the customer from having to go elsewhere to find the information.

“If they stay within that purchasing flow, they are more likely to buy. If [customers] can find that information easily, the less likely they are to reach out to the business,” Maynard says. “The trend is moving away from a monolithic knowledge base and toward embedded content.”

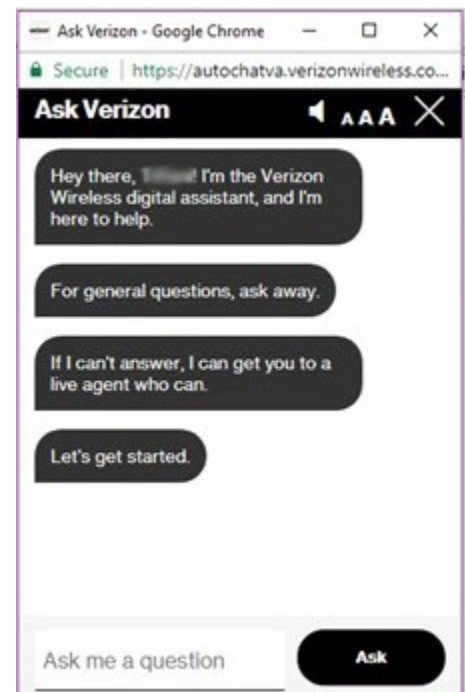
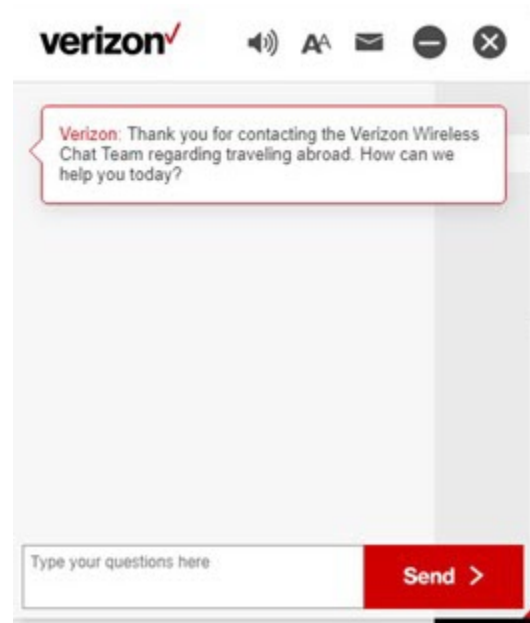
Live chats are another way to interact with customer service representatives. “[Chats are] increasing in importance,” Maynard says. Customers take the easiest path, and that is often having a live chat rather than looking up an answer in an FAQ or another place.

This preference has an unintended consequence. “Almost every company that deploys [live chat] experiences a large amount of chat volume coming in,” he notes. Adequate staffing is important, so response time can be kept within a reasonable timeframe.

To help decrease the volume, many companies use a virtual assistant or bot to help the customer with an initial inquiry. If this artificial intelligence software is unable to fulfill the customer’s needs, the user can connect to an actual person.

Not all customers need the same type of information. Segmenting customers so they see only information that is pertinent to their products is one way to limit information overload.

No matter where and how your company presents its content, it must be up to date. A customer portal is not just a static place where companies dump all kinds of information and forget it.



The Limitations of Customer Portals

A self-service portal is only one part of a company's customer service strategy. It cannot handle all issues a customer might have.

Companies need a way to escalate a concern to someone who can assist in a timely manner. That escalation could happen by email, phone, or another method.

It's also important to monitor what people are asking. Companies can be proactive by using data to see what customers are searching for. If many people are searching for the same item, the company can respond by updating the FAQs or creating a knowledge guide.

Also, consider the types of devices people might be using to access your portal. A customer using a phone to visit your site might not be able to search and view results as easily as a customer using a computer with a keyboard and monitor. Small type or graphics might not be helpful when viewed on a phone.

The information must also be useful and current. This means updating user guides, screenshots, and videos when the product changes.

Company Resistance to Customer Portals

Although the trend is for customers to attempt to solve problems themselves using self-service portals, not all companies are on board.

Some companies simply don't see the need for a customer portal, either thinking their existing customer service methods are fine or not viewing their business as one that has direct customer interaction.

Other companies consider self-service portals to be impersonal because they pride themselves on their direct relationships with clients. These companies often do not understand the changing business world and the changing customer.

Potential Issues Customers Have with Customer Portals

With so many options available, customers may not be loyal to one company anymore. The days of walking down to the corner store to buy a product have turned into pointing and clicking on a website, followed by the item showing up on the doorstep in a few days.

Customer service can help differentiate a company and create customer loyalty. Understanding potential customer problems and possible solutions can hopefully help a company prevent future issues:

- Make sure the self-service portal is easy to understand and navigate. If it takes too much time, a customer will give up.
- Have a robust search function to help customers easily find what they want.
- Respond quickly to inquiries.
- Have omnichannel support so that customers don't need to repeat themselves to multiple agents in many formats. If an inquiry begins on a portal and continues to a phone conversation, make sure notes from previous chats, searches, and conversations are available to the customer service representative.

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