

SELF-SERVICE

in the Online Space

Online presence isn't meant to take away the human experience, but rather to enhance it. Learn how to structure your online customer interactions while creating a balance between self-service and customer interaction.

Self-Service Mindset

Be in the mindset that self-service will continue to be a preferred choice by your customers.

Assign responsibility for promoting and evangelizing your CustomerConnect site.
Spread awareness and drive traffic to the online portal.

Determine structure for ongoing maintenance.
Update marketing messaging to reflect your latest initiatives and incentives.

Have a process to check for online questions and inquiries from your customers.
Check email notifications daily and run frequent reports.

Create Balance

Create balance by putting the customer experience first. Which approach is best will depend on the customer and situation, so select the options that lead to the best customer experience.

- Modern Approach
- High Efficiency
- 24/7 Availability
- Strong Visibility



- Body Language and Tone
- Practice Empathy
- Escalations
- Capture Feedback

Depending on the situation, self-service might not always be the answer; customers may need interaction from your company to resolve an issue. By offering self-service to customers for certain tasks that are ideal for the online space, you will have newfound time to focus on interactions that call for more direct interaction from your team.