

3 Tactics to Improve Discoverability and Search in Customer Portals

Introduction

Imagine trying to navigate through a company's customer portal to find information on the service you've recently purchased. Scrolling through numerous pages, trying to use the search bar, and still not finding what you need would be frustrating and exhausting. However, this is the reality for many customers.

50% and more say that the main reason they can't resolve an issue on their own is because they **are unable to search and find the answer they need online.**¹

63% say that they **are annoyed with the search field in most portals** because they are unable to provide the results they are looking for.²

What is meant to be a helpful tool for customers ends up getting wasted because customers can't find what they need.

Your customer portal needs to be set up to help users find information that is relevant, official, and up-to-date in order to be a tool that customers want to use.

By making it easier for customers to find the resources they need, you help them save time, reduce effort, and increase overall satisfaction. Additionally, your service teams will no longer have to help with these issues, giving them more time and resources to handle more strategic initiatives.

3 Tactics to Improve Discoverability and Search for Customer Portals

In order to empower customers to search for content more easily, ensure that your customer portal:

1. Is Designed to Be User-Friendly

To start, the entire customer portal experience must be easy-to-navigate. Customers need to be able to easily locate the tools and resources they need. Build a user-friendly experience with:

Intuitive Design

The overall design and layout of the customer portal should be modern and user-friendly to help minimize any user friction.

This begins by creating a single point of entry that makes it easy for users to access your portal. You can then use Single Sign-On tools like Okta to ensure that users are properly authenticated and have immediate access to the right resources.

Once users are on your site, your navigation should help them quickly get to the content they need. This can be done with *simple flat navigation* or *multi-level navigation* that allows your users to drill down into the information they need faster with minimal clicks.

But you don't need to guess your way to the right design; be iterative in your design with automated A/B testing that can help you test different elements of your navigation, such as the number of navigation levels, fonts, and link colors, to determine which design performs the best. It can also help you test other elements of your site, such as buttons, graphics, and different headlines, so that your site design gets optimized for your users.

Another option you can deploy on your site is *dynamic navigation* that changes depending on your audience. This can be useful if you have unique product categories or services you offer to different customers. For example, you can tailor your navigation to only show the product categories that are applicable to the customer logged into your portal. This simplifies the navigation for your customers so that it's easier for them to locate what they need.

And because users can access your portal on any device, it's important that your design is responsive and easy to use on tablets, mobile phones, and other connected devices. A portal can simplify content creation and management by providing a publishing environment that allows your teams to create content in one place and automatically generate pages that display correctly on any device.

Relevant Content and Resources

It's important to organize the content that your customers need to use your products and services in ways that they can easily access. You can automate this organization and personalize it for each customer. For example, by tracking user behavior, you can personalize what users see on their pages by what they access most often. And because a portal can store customer preferences and purchase information, it can automatically generate a dashboard that shows your customers all the relevant content related to their purchases in one place. This makes it much easier for them to find resources such as:

- FAQs
- Demo videos
- Documentation and manuals
- Trainings/e-learning
- Announcements

Assistance When Needed

If customers still cannot find what they are looking for, there must be other ways for them to find what they need. Within the customer portal, make sure there are:

- **Chatbots** for more immediate help that can direct customers to the relevant information or escalate to a customer service rep if they still aren't able to find what they need.
- **Community forums** where customers can search for past questions and topics or ask their own questions to a group of customers.

Having these different features will minimize user friction and match up to customer expectations.

Everything Customers Need in One Place

Global technology leader, Broadcom Inc., wanted a better solution to bring product and account resources together so that customers could more easily access the information they needed.

With their new customer portal, Broadcom now provides dashboards and product pages with specific education, documentation, licensing, and software downloads.

Customers can also easily search through their knowledge base for existing answers, converse with other customers on their community page and blogs, and reach customer support through virtual and live agents to find the information they need.

By enabling customers to more easily find the information they need, Broadcom has seen a reduction in customer support tickets. Read more about Broadcom's success [here](#).

2. Provides Intuitive Search Tools

Of course, the best way to ensure that customers can find the answers they are looking for is to make sure they can access powerful search functionality.

Make search even easier with tools that can:

Aggregate Content and Information from Many Different Sources

With so many different systems, applications, and repositories, it can be hard for customers to find what they need, especially when these systems are disconnected from each other.

However, tools such as *federated search* can empower users to search through several different data sources at once and then see the results in a simple interface.

Additionally, options such as *filtered search* can help users refine the list of results so that they can hone in on what they're interested in the most.

Improve Tagging, Categorization, and Filtering of Content

With tools like auto-tagging and auto-indexing, users do not have to manually organize content and search results but can use AI to automatically categorize them based on a variety of topics and filters. Not only will these tools increase internal efficiency, but they will also help to surface the right information for customers.

With tags in your content, visitors can easily search and identify the information most relevant to their needs. For example, a kitchenware store might have different tags describing the store items, like glass, clay, or dishwasher-safe.

The option to categorize content is also a powerful tool to quickly group similar assets, such as customer stories or specific types of products and services, into a dedicated section on your portal that makes it easy for users to find what they need.

Once your content is tagged and categorized, it's easy to provide filtering options that allow your users to refine their search results even more.

Customize Search Results

Not all search results should be the same for all customers.

Help customers surface the content and results that are relevant and important to them through *boosted search*. This search feature works by allowing you to “boost” a predefined set of content to the top of your search results whenever a user searches for a specific set of keywords.

For example, let's say you're a dealer that sells automotive products to retailers. If you wanted to promote a deal on a special oil filter and lube kit to your retailers, you could use a boost list to ensure that content related to your deal displays at the top of the search list anytime your retailers search for anything related to oil filters and lube.

Another tactic to ensure customers see the right search results is by using *semantic search*, which will contextualize searches based on the user. For example, if a truck dealership were looking for specific parts through the portal of an auto parts manufacturer, semantic search would ensure that they would only see truck parts rather than parts for a motorcycle.

Modern tools like *Applied AI/ML* also make it easy to target search results and content based on the search behavior of customers who are in a similar role or group (segment). Let's say a user who is in the sales department goes to the search bar of their portal, the search would automatically populate results related to pricing because that's what other users in the same department searched for.

Finding What's Most Important

A behavioral health company wanted to revamp their existing offerings to provide a more personalized, guided, and connected experience for their members.

A key part of this initiative was to make searching for the right tools and services easier. The scope of behavioral services can be quite broad and deep. Therefore, the company used highly configurable search pages and widgets to deliver a rich search experience so members could easily filter and find what they are looking for. Similar assets were grouped together to help users find content through navigation and search.

3. Delivers Personalized Recommendations

Another way to exceed customer expectations is to serve up relevant assets and information before they even search for it.

Personalize search results with:

Advanced Segmentation

Help buyers cut through the noise by targeting the resources and information most relevant to their role and needs. Find a customer portal solution that will empower your organization to segment users based on role, demographics, needs, and other characteristics.

Then deliver content and product recommendations to each of these segments so that they can see information that is relevant to them without even needing to actively search for it.

Relevant Search Results

Applied AI, mentioned in the previous section, can also use analysis of previous search history to personalize search results. For instance, AI can identify what content was useful for users who searched for a specific term and then present this content to new users who search for the same term.

Additionally, semantic search can also contextualize search results based on your customers' segments and previous search histories so that customers only see what is relevant to them.

Recommendation Engines

A recommendation engine is a technology that uses artificial intelligence and machine learning to provide customers with recommendations that are based on their interests, past behaviors, what similar customers have viewed or purchased, and a wide range of other criteria.

Examples of the recommendations these engines can provide are:

- **Related products** to what a customer is viewing
- **Also-bought items**, which shows the customer other products bought by individuals who purchased the same product
- **Also-viewed products**, which shows the customer other products viewed by individuals who saw the same content
- **Products viewed by similar buyers** (based on user profile)

In addition to products, these engines can also recommend different types of content using similar criteria. For example, they can recommend relevant articles, services, events, and other resources.

A customer portal solution that includes a recommendation engine can help you ensure that your most relevant content is automatically displayed to customers who could benefit from it the most.

Receiving the Most Relevant Information

An organization that brings together large enterprises and talent providers through their leading independent workforce management platform wanted to improve the user experience of their platform so they could increase customer engagement and satisfaction.

One of the ways they did this was by providing users with relevant content depending on their role. For example, by designating the members of their site as either Buyers or Talent Providers, they can provide members with content that is only relevant to them. They can also give them access to different tools and pages so that the site experience on the new portal is tailored to their unique needs. A great example of this is when users conduct a search on the site and only see content results that are relevant to them.

Make It Easy for Customers to Find Answers through a Customer Portal

Your customer portal can be a powerful tool if customers are able to navigate through it to find the critical information they need.

But if you can't easily customize your current solution to meet your unique business needs, then consider leveraging a more powerful platform that is able to deliver both out-of-the-box features to accelerate time-to-market and flexibility to then customize those solutions for your audience: Liferay.

Liferay provides a single, unified platform that empowers you to tailor the solutions your customers need without sacrificing budget, time, or flexibility. With native analytics, content, commerce, and cloud capabilities, Liferay makes it easy to build and connect multiple solutions, like customer portals, intranets, websites, and more.

Liferay's extensions architecture and portal heritage also make it well-suited for sophisticated B2B and B2E use cases that require challenging integrations and custom development.

With Liferay, you can build a customer portal that includes all of the features mentioned earlier to make search easier, streamlining the customer experience and making internal operations more efficient.

See how you can begin using Liferay to build a customer portal that empowers you to do more [here](#).

Contact our team at liferay.com/contact-sales to learn more.



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