Customer Experience Building Block #3: Connecting on the Customer's Terms

Liferay®

In many ways, the concept of self-service is all about letting customers decide what's best for their interactions with your organization. When users are "calling the shots," it's much easier to cater experiences to their behaviors, needs, and expectations.

However, as user expectations continue to rise and new technology paves the way for novel experiences, you may be left wondering which self-service opportunities to focus on, when to provide them, and how to build them into your offerings. It all comes down to the third customer experience building block: **connecting on the customer's terms.**

Why Do Customers Appreciate Self-Service?

To understand the role self-service plays in a world where customers want experiences catered to their exact specifications, it's important to take a step back and appreciate why users appreciate self-service in the first place.

Here are just a few reasons an overwhelming majority of worldwide consumers expect self-service options:

Convenience and Simplicity

Self-service options allow users to do business when and where it works for them. This is beneficial for both business-to-consumer (B2C) and business-to-business (B2B) customers, as each type of user has unique requirements for when and how they can interact with your organization.

In many cases, a customer may feel it's easier to handle a task themselves than to involve service representatives. While that might not always be the truth, especially when employees have easy access to customer information and account details, the fact remains that users often prefer handling their own responsibilities.

For example, when customers use self-service features, they expect their account to remember any preferences and needs. They also want agents to have access to this data so there's no need to provide basic details at the beginning of every interaction. The result is a continuous, personalized, and convenient conversation across all channels, including chatbots, live chat, social, email, or voice. These omnichannel experiences mean customers will never have to explain a problem over and over as they switch between interactions.

Speed

Sometimes, a certain task or request just can't wait while a customer sits in an automated phone queue. That's when anytime, anywhere self-service tasks come in especially handy: Users don't have to wait for anyone to help them and can instead interact with your services on their own terms.

Imagine a returning B2B customer is shopping with a heavy machinery manufacturer. They've recently made a purchase, and now they need to know which parts are compatible with their new equipment. They shouldn't have to wait for a representative or look through thousands of listings.

Instead, self-service is the perfect solution for this user. By presenting content or products based on the customer's previous purchase, the manufacturer can solve problems, answer questions, and possibly even sell more products to this same user — all without the need for a customer service call.

Security

Phishing — the process of tricking an unsuspecting user into giving up sensitive information by pretending to be a trusted entity — was the top infection vector in 2021. Customers are understandably hesitant to provide personal details in any way that might lead to a security breach — so, to circumvent the problem, many prefer to use secure self-service platforms. When a user manages or updates their own information, they may feel safer than when they're asked to give these details over the phone or in any other customer service capacity.

Self-Service Account Management

Self-service takes many forms depending on the industry, platform, interaction, and even the individual customer. However, one of the most effective ways to utilize these offerings is in account management.

Think of user accounts as digital versions of your customers, full of vital information that allows them to engage with your platform's features, find answers to their biggest questions, complete tasks for themselves, and more. Just as importantly, your company can use this data to better understand user behavior and needs, which, in turn, allows you to better tailor your offerings.

Many account management tasks are quick and simple, which means customers might be frustrated if your system requires them to reach out to a representative. Instead, self-service gives users the ability to complete account maintenance tasks on their own. While your system may provide automated reminders — for example, a pop-up prompting customers to update their email address if they haven't changed it in some time — the majority of the responsibility can rest with users.

Consider a B2C customer who has just moved into a new home. They'll have a new address and phone number to add to their account, and schedule a service appointment — but with all the pressures of moving, the last thing they want to do is wait for an agent to make these updates. Luckily, self-service allows this customer to log into their account and perform maintenance tasks whenever is most convenient for them.

Simply put, account management is the perfect landscape for self-service because it has a big impact but requires only a few basic tasks. Here are a few examples:

- **Adding users.**
- **Placing orders.**
- **Reviewing order status.**
- **Viewing quotes, invoices and balances.**
- **Checking product or inventory availability.**
- **Paying bills.**
- **Setting roles/responsibilities.**
- **Scheduling appointments.**
- **Placing warranty claims.**

Allowing customers to manage these tasks for themselves is an excellent way to give them control over their own experiences. Instead of reaching out to a representative every time they need to complete a routine errand, users interact on their own terms. The ultimate goal is to understand the customer's needs and provide them with the tools to do as much as possible via self-service, thereby simplifying their experience and eliminating frustration.

Say a customer wants to open a new account with a banking company. They're tech-savvy and comfortable addressing their own needs, so most or all of this process can be automated to maximize simplicity and efficiency. Online prompts tell the customer what information they'll need and which steps to take — and once their account setup is complete, they can immediately begin interacting with your products or services.

It's important to note that, while self-service is a valuable option, it shouldn't be the only interaction customers can have with your organization. Remember to provide the opportunity to reach out to you when necessary.

Learn More About the 5 Customer Experience Building Blocks

When designing a self-service system for your customers, it's important to consider every interaction from their perspective. In this way, you can appreciate the building blocks of a good customer experience — one that creates satisfaction and loyalty among users while reducing costs for your company.

There are five building blocks total:

- **Providing the right content for users.**
- **Making content easy to find.**
- **Letting customers connect with you when and where it works for them.**
- **Ensuring your tools are useful.**
- **Providing consistent updates to ensure the best experience.**

Although it's an undeniably important element, making content easy to find is only one part of developing a good self-service experience. To learn more about the other four elements, make sure to download our Customer Experience Building Block whitepapers.

Once you've mastered these concepts, it's time to start putting them all together — and that's where a Digital Experience Platform (DXP) comes in. With Liferay's DXP, you can build self-service customer experiences that utilize all five building blocks to truly delight your users.

Ready to get started? Schedule a live demo to see how Liferay's DXP can bring your self-service offerings to life.

Liferay ®

220127