

How to Get Buy-In for a Customer Self-Service Web Portal

Making Your Case to IT Decision Makers

Introduction

While customer experience leaders are seeing the benefit and the need to provide excellent self-service for their customers, IT leaders might be hesitant to jump on board. But alignment with IT is critical for the success of a self-service strategy.

Here are some tips to approach the topic with IT buyers and present a compelling case for customer self-service.

Making the Case for Self-Service

Customer experiences leaders are recognizing that the **first step needed for excellent digital customer experiences is self-service**. Empowering customers to find the content and information they need themselves is not only how customers prefer to interact with businesses, but also brings immediate benefits such as cost-savings and productivity gains by reducing the amount of calls into the customer support center.

By 2022, Gartner predicts that 85% of all customer service interactions will start with self-service.¹

This will be the future of customer service: a majority of customers being guided through self-service offerings for their requests, and a team of highly skilled service representatives being able to focus on valuable interactions and difficult questions.

However, despite the rising interest and pressing need for customer self-service, IT teams may still be resistant to moving or changing the support systems and applications they manage when live customer service has worked in the past and seems to suffice for specialized business needs. These concerns cannot be brushed over; take the time to unpack and address IT's reservations together in order to develop the partnership needed to execute self-service.

¹ Gartner Predicts a Virtual World of Exponential Change

Involving IT Early

Without IT buy-in, it will be impossible to go to market effectively. Customer experience leaders may have high expectations and envision an amazing self-service experience, but if it's not technically possible or too resource-intensive, then it's back to square one.

Alignment with IT is foundational to a successful self-service strategy. Discuss goals and manage expectations alongside the team that will actually be in charge of the implementation to establish a self-service strategy and vision. Nearly anything is possible with modern technology, given enough time and money, but not everything will be practical or even useful for the business.

Communicating with IT

For any new strategy, IT needs to evaluate which technologies will best accommodate business needs and work well with the existing technology stack. So use the following points to present a compelling business case for the need and value of customer self-service.

Triggering Change

Get IT teams to start exploring self-service options by asking the following questions:

- ☐ How much time and money is spent maintaining current customer service systems?
- ☐ How many different customer service tools and applications are currently in place? Are they integrated together?
- ☐ How can these processes be streamlined to improve productivity?

Use these questions to determine areas of need and begin building your case for adopting a self-service strategy.

Why Use Self-Service?

Digital self-service is key to decreasing cost-to-serve for the company.

It is not just a marketing hype that is going to die down in a few years. Here are predictions from a few notable sources:

81% of customers across industries attempt to take care of matters themselves before reaching out to a live representative.

Source: Harvard Business Review²

By 2030, the use of customer-directed automation technologies, like self-service, will be needed to serve Gen Z buyers, who will represent the largest customer base at that time, as they obtain support and value from the organizations they choose to interact with.

Source: Gartner³

In order to run a cost-efficient customer service program, companies need to implement digital self-service options that empower customers to resolve their own issues. Self-service interactions cost a fraction of what live interactions cost and by moving more customer interactions onto a digital self-service site, companies can quickly reduce costs in their customer service program.



Source: Gartner⁴

² Kick Ass Customer Service

³ Gartner Says the Future of Self-Service is Customer-Led Automation

⁴ Delivering on the Digital Promise

This approach also enables companies to **scale their customer service strategy more efficiently**. Instead of relying solely on live channels, IT can leverage digital self-service to handle a larger volume of customer requests as the business begins to accommodate a growing customer base. Additionally, since self-service can be implemented in several channels, businesses will be able to deliver consistent communication throughout these touchpoints, providing better customer experiences that increase customer satisfaction.

Getting Buy-In for a Unified Customer Experience Platform

The next question to ask is, “how will the organization be able to effectively manage and implement self-service technologies?”

IT leaders might be concerned about adding another system—so they may want to consider using a digital experience platform (DXP). A DXP is an integrated and cohesive piece of technology that provides the architecture needed for companies to digitize business operations and deliver connected customer experiences.⁵

A DXP is able to facilitate the creation of excellent self-service experiences. The organization will be able to benefit from a platform that:

1. Delivers a More Cost-Efficient Solution

A powerful DXP should come with a broad range of functionality to deliver a solution that has what most companies need out-of-the-box, allowing businesses to deliver a more cost-efficient solution than a homegrown solution. This not only allows IT teams to customize and maintain only what matters most, but even to replace any existing applications or systems that have been custom built. For example, if a business needs to use a forms application, instead of building from scratch, they can save time and resources by leveraging built-in forms functionality that many DXPs will provide.

⁵ Gartner Magic Quadrant for Digital Experience Platforms

2. Empowers Business Units

DXPs facilitate the integration of existing services into a user-friendly platform so that Marketing and Communication teams can manage the day-to-day tasks of the self-service site, freeing IT teams to spend their time handling more business-critical tasks.

3. Integrates Easily

Self-service, in particular, requires robust integration capabilities; whenever customers use a self-service feature, some business activity must be done behind the scenes in order to produce the result the customer is expecting, whether that is pulling information from a database or making changes to account information, all will require integration between systems to be effective.

This is made even more challenging as the number of existing applications, third-party systems, and emerging technologies used increases. Customer service technology stacks will start to contain disparate, overlapping systems, leading to disjointed customer experiences.

To combat this risk, resolve disparate systems with a DXP that can facilitate the integration of existing services into a business-user friendly platform to not only allow for seamless activity between systems, but also deliver a unified customer experience.

4. Remains Flexible for Future Needs

Because DXPs are built to be flexible and extensible, the platform is able to unite new systems, incorporate emerging technologies as they arise, and be extended for other future needs.

For example, a robust DXP can build multiple customer-facing solutions, all on the same platform. Having different touchpoints live on multiple sites will only result in disjointed customer experiences and additional managing disparate systems. Instead, businesses should be able to build self-service customer portals, communication hubs, status update websites, and other solutions that can connect to third-party applications and legacy systems, all on through one DXP.

This allows IT teams to save resources by not only needing to manage fewer systems, but also reusing existing elements to build new sites and touchpoints much faster while also maintaining brand consistency, rather than having to start from scratch across a range of point solutions.

**To start evaluating different DXP vendors,
see Gartner's assessment in the most recent
Magic Quadrant report for Digital Experience Platforms >**

Conclusion

Self-service will only be effective if both CX and IT teams are aligned and committed to working together in order to support and implement these tactics. Even though it's critical to convey the cost-savings and business efficiencies that can be gained from self-service, ultimately these tactics should support the customer and help streamline their experience.

Moving Forward

Learn how to begin implementing self-service with these best practices. [Grab the guide here.](#)

Did you know that Liferay has been named a Leader in Gartner's Magic Quadrant for Digital Experience Platforms Report for the tenth year? Learn more by getting a [complimentary copy of the report here.](#)



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