



# Self-Help Matters: Increasing Self-Service Adoption, User Satisfaction, and Knowledge Success



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## INTRODUCTION

Support centers keep hearing that “customers would rather help themselves than contact you.” Yet, when user-facing knowledge (unassisted support or Level 0) is provided, it’s often ignored or underutilized. “How can we convince our end users/customers to take advantage of their ability to help themselves?” is a frequently asked question in the support community.

On the other hand, those organizations that are able to leverage user self-help find it very helpful. Most support organizations see their ticket volume go up year after year, but according to the [2018 HDI Practices & Salary Report: Ticket Management & Metrics Edition](#), 37% of the organizations that saw ticket volumes decrease attributed that decrease directly to user self-help—the highest percentage of any of the factors named.

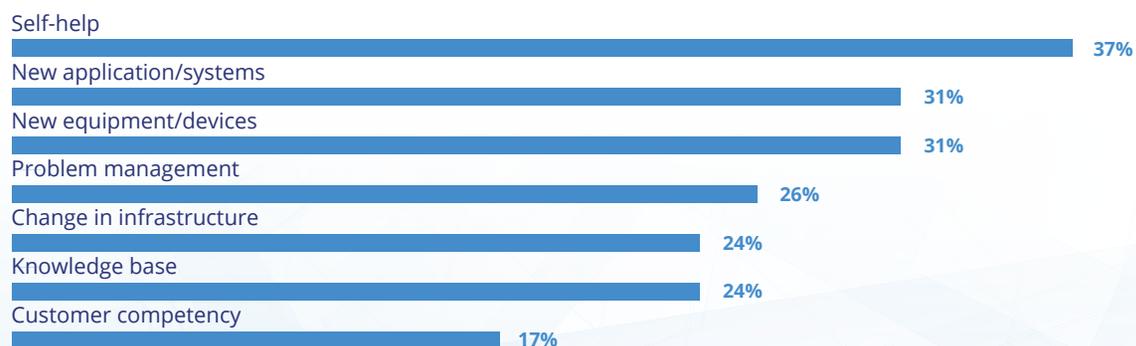
### Self-Help vs. the Traditional Knowledge Base

In the broadest sense, self-help consists of user-facing articles specifically intended to provide answers and guidance so that users can resolve issues without having to contact support. Modern self-help may include guidance powered by artificial intelligence or bots to assist in finding the best resolution quickly and easily.

A knowledge base is simply a collection of articles or documents published for/to whichever audiences the organization decides to grant access. The whole or parts may be used solely by support staff, or portions may be user-facing.

### 14% of support organizations saw a decrease in ticket volume over the past year.

They attribute this decrease to the following factors:



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## TRADITIONAL KNOWLEDGE

Traditional knowledge initiatives often don't consider the user experience. The knowledge base is built and populated, there's a tepid marketing campaign around it, and then end users/customers don't take advantage of it more than once. Why? Because the support organization needs to create guidance that end users/customers want to use.

This report will examine some of the reasons why traditional user-facing knowledge fails to deliver the expected results and how to be successful with self-help. We've also included a self-help self-check to provide specific guidance for identifying and making improvements to your self-help offering.

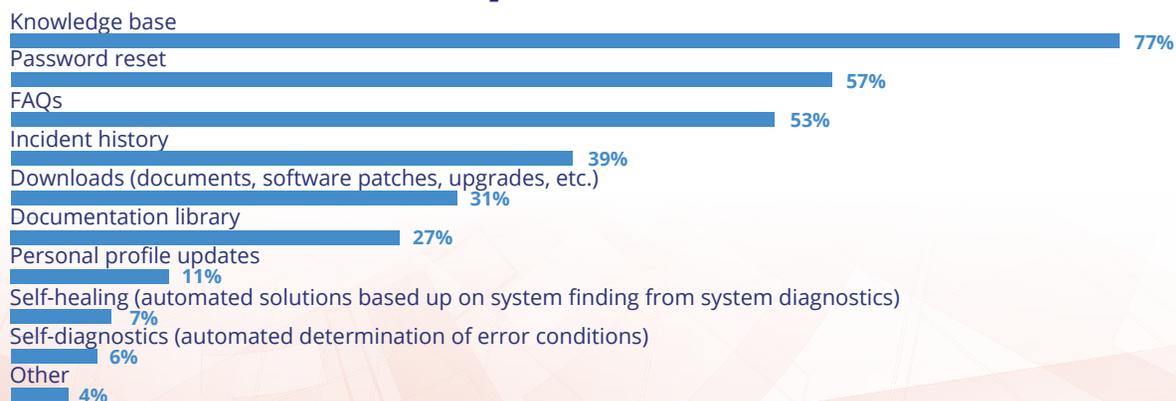
### Why Users Aren't Utilizing Your Traditional Knowledge Base

We often hear from organizations after investing in a user-facing knowledge base and seeing some initial traffic, adoption stalls and users stop using it. There are several reasons why this happens:

#### All the Information Is from IT's Perspective

By providing self-help, IT and/or technical support is really trying to assist end users and/or customers. Too often, however, we're driven by "the curse of knowledge": we know something, and so we assume everyone else knows it as well. IT departments often suffer from this affliction.

### Tools Made Available to Help End Users/Customers Help Themselves



**If you're going to have an FAQ page, make sure you're adding actual frequently asked questions to the page.**

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In many instances, support staff is so familiar with the terminology and basic procedures that, when drafting knowledge articles, they assume end users/customers also share the same familiarity.

This is one of the most common issues with frequently asked questions (FAQ) pages, which 53% of organizations make available as a self-service/self-help tool, according to the [2018 HDI Practices & Salary Report: Technology & Operations Edition](#). Too often, the questions are composed by IT or technical staff and don't reflect the kinds of questions users actually have.

### **It's Searchable, but It's Not "Findable"**

Searchable is to "findable" as backup is to restore: if you can't restore, your backup is useless; if you can't find, your search is useless. We've all had the experience of trying to sift through search engine results, trying different words until we either find the answer we seek or give up. Self-service/self-help must get to the answer fast, or people will give up and won't come back.

People will use their own words to search for relevant help. The terms they search need to be added to your system, so that their plain-language queries get to the information they need. Don't expect end users/customers to learn your language; make your knowledge base learn theirs by capturing the way they ask when they search, as well as when they call or email.

*If users can't find the information, they can't use the information.*

### **It's Not Relevant**

You've just rolled out a new email system, but your knowledge base has a mix of the old information and the updated information. Maybe you have 56 articles on applications that are no longer in use and are clogging up search results. Your knowledge needs management and maintenance to keep up. Move old articles to an archive where they're still accessible but don't appear in basic searches.

*Knowledge management isn't a project, it's an ongoing part of the work you do.*

### **It's Not Useful**

Sure, you've tested the procedure described in the knowledge base, but you forgot that most of your end users/customers aren't administrators on their computers and your solution requires administrative rights. Your solution doesn't work for them, so they will most likely not try any more of the solutions you've provided.

*If it isn't useful to the end user/customer, it shouldn't be included as user-facing knowledge.*

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## DELIVERING SELF-HELP: INCREASING ADOPTION AND KNOWLEDGE SUCCESS

### Consider the User Experience

#### Intuitive Interface

One of the first things many end users/customers do when they encounter an issue is head for their favorite search engine, like Google or Bing. They're familiar with the interface. They know what to expect. The search engines are intuitive and easy to use. Like it or not, these big, commercial search engines are what your end users/customers are used to, and they're what they compare you to.

#### Beyond the Article

Keep in mind that knowledge articles don't have to be text. Consider the fact that YouTube is the second most frequently used search engine, and it's especially useful for "how-to" videos. Why tell people how to do something when you can show them? Creating interactive bite-size pieces of knowledge based on user context will help predict the right answer for a particular user, providing a more intuitive, engaging experience. And the user journey doesn't have to stop if the answer isn't found. To facilitate user interactions, you can also implement automatic actions and processes, such as sending a ticket if the problem isn't resolved.

### Intelligent Technologies

What if you don't even need a separate portal to provide assistance? By using available tools powered by natural language processing (NLP), artificial intelligence (AI), and machine learning (ML), assistance becomes available within the context of the tools end users/customers are already using, greatly improving their experience and saving time.

Just as the big, commercial search engines use predictive text in searches, the tools in use within your organization can be backed by advanced technologies that:

- Understand what the end user or customer is searching for
- Predict the most likely solutions based on previous searches and resolutions
- Assist the end user or customer in finding and applying the appropriate resolution through the use of chatbots or contextual assistance
- Direct end users or customers to further sources of knowledge
- Bring assistance to the end user or customer by pulling an analyst into the conversation if necessary, or—for the analyst—bring in a higher level specialist to assist

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## Market Well

Many support organizations feel that they have to do everything themselves. This isn't the case. If your company or institution has a marketing department, they'll very likely be able to provide help for your user-facing knowledge efforts, or at least provide some advice and guidance. If your organization has tried user-facing knowledge before and failed, you need to make sure that you project confidence that the new initiative will be better for everyone. Marketing can be helpful in:

- Adding a memorable brand name to your knowledge initiative
- Recommending colors, fonts, and graphics that carry the organization's overall look and feel
- Producing posters, table tents, flyers, and other materials that can help you publicize your efforts

In the following section, we've put together a self-help self-check to provide guidance for "testing the waters" before you launch your user-facing self-help program.



## SELF-HELP: A QUICK START GUIDE

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### Providing User-Facing Guidance: The Strategy

Delays in response, telephone and email queues, escalations: We can all name reasons why end users and customers wind up going to Google for answers before they contact support. They don't see support as truly helpful. They don't want to wait. They'd rather be able to handle it on their own.

Meanwhile, one of the commonly cited reasons for beginning a user-facing knowledge initiative is to save money. While controlling costs is important, spending money and resources in the hope that you can drive costs lower is not a good reason. Saving money by better managing the delivery of support is an outcome, but it shouldn't be the primary motivation for the journey.

Likewise, call deflection is a problematic motivation and term, at best. Rather than thinking about deflection or avoidance, we should be talking about contact management, and we should have an ongoing dialogue with end users and customers about how they want to receive support and why.

Start by asking the people you support how they feel about using self-help. It is important to gain an understanding of why they don't use it or how they would like to use it. Find out how your organization feels about using self-service by:

- Conducting focus groups
- Launching a formal survey of the user base
- Asking your end users/customers
- Educating people on the process for self-help

**Try having your analysts end calls by asking, "If you could find this solution for yourself without contacting us, would you?" Provide an easy way for analysts to make a note of the yes and no answers.**



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If a substantial portion of your user base—it doesn't even have to be a majority—would at least be willing to try it, you're already on the road to success. You can achieve the desired cost savings by using good practices in constructing the portal and marketing the program well. Remember that the organizations that saw a decrease in the number of tickets during the last year cited self-help as the primary factor.

Your mission as a support organization is to keep the workforce working, and—if they're interrupted—get them back to work as rapidly as possible. If you can provide ways for people to find the assistance they need without exerting extra effort and waiting for answers, you are furthering your mission.

## Using the Right Tools

Many self-help products and tools on the market may focus on one aspect of self-help, but it's important to consider tools that provide a combination of functions, such as a knowledge base, AI, and automation in order to deliver a seamless experience.

Modern tools for knowledge management should:

- Include intelligent assistance for end-users seeking solutions and/or answers
- Offer guidance for knowledge creators to:
  - Make the knowledge accessible to end users
  - Discover other areas across the enterprise where the knowledge can be used

- Ensure that the knowledge provided is accessible across channels such as web pages, chatbots, and mobile devices—including inside mobile applications (“in-app”) as well as through self-service/self-help portals

Users and customers are no longer bound to one or two ways to access support; in fact, HDI currently tracks 13 channels through which support offers assistance, including chat, mobile app, social media, text messaging, and video chat.

A new generation of tools is coming to the market, more sophisticated and easier to use, guiding knowledge creators and enabling them to provide the right information in the right format in the right channel.

If your goal is to invest in your organization's future, you should be taking advantage of these advances in knowledge management technology.

## Maintaining and Improving User-Facing Guidance

As mentioned in the first section, contextual awareness is key to delivering knowledge that is both useful and engaging. Your end users should want to come back to your self-help, even as their needs evolve, their work changes, and their information needs grow. Your organization isn't static; your knowledge shouldn't be either.

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Improving the knowledge base you have is a good place to start. Not only will you be able to confidently point your customers and users to it, you'll also improve the skills of the staff in composing knowledge and seeing things from the end user/customer's point of view. For example, below is an actual user-facing knowledge article about a video driver update:



**ISSUE:**  
Several users report having monitor screen flicker after upgrading to Windows 10.



**ENVIRONMENT:**  
Windows 10 Version 1709



**WORKAROUND:**  
Update video driver. If problem persists, contact IT Service Desk for more information.

That's the complete entry. With no links to other knowledge or further information, an end user/customer won't find this article useful unless:

- They know what version of Windows 10 they're running
- They know how to update the video driver
- They have privileges on the computer to perform the update

It should also be noted that this article is static. There's no easy method provided to search for related articles, such as other reasons a monitor might be flickering.

If users don't have all the information they need to update the video drivers, they'll email the service desk and ask for assistance. Chances are they'll be at least somewhat annoyed when they do. Not only did they spend time looking for the answer, now they have to spend time waiting for support to assist them. Odds are high that they won't be back to use self-help again. For them, it was time wasted.

There are several simple improvements that could be made to the example article:

- Link to a screenshot or video showing where to look for the Windows version number
- Link to instructions on how to update the video driver or have your tool automatically access your asset manager
- Link to submit a ticket, assuming this feature is in place
- Link to a more immediate way than email to get assistance (text, phone, etc.)

Always include the end user/customer's vocabulary in your knowledge base to increase the likelihood of finding a relevant article. If your knowledge base refers to "Lawson" or "Oracle" but end users/customers refer to "the HR system," make sure "the HR system" is included in the search terms or keywords. Remember, if they can't find it, they can't use it.

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## Measures That Help Ensure Self-Help Success

There is a way to measure the readiness for success of your user-facing knowledge: [level zero solvable \(LZS\)](#).

“LZS is a metric—level zero solvable—that measures the percent of incidents resolved by the support center that could have been resolved by the customer using self-service. It requires that the customer could have found the answer using self-service. One common mistake organizations make when implementing a knowledge base is rushing to implement self-service before they are truly ready. Use the LZS metric to predict your success rate before you grant customers access to your knowledge base.”

Measuring self-help is more difficult than measuring assisted support. In addition to LZS, there are [other metrics](#) to consider that can guide you to success.

“In self-service, customers may or may not log in to access the knowledge base. They most likely are accessing through a browser, and closing a browser is not an indication of success or failure. Research has shown that a very small percentage of customers will complete a survey after reading a knowledge article. If they find knowledge that’s helpful, they close the browser or navigate away from the page. Given this type of environment, what metrics can help evaluate the success of self-service?”

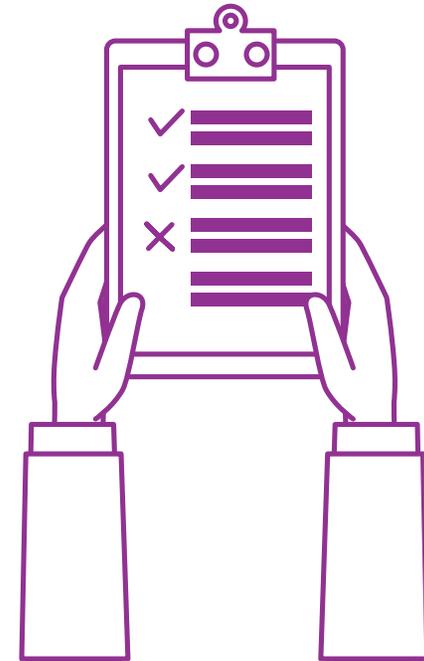
- **Unique sessions.** The number of visits to your knowledge base. A trend of this metric can indicate the change in use of your self-service portal, positive or negative.
- **Self-service success rate.** Since you can’t determine this directly, some organizations have turned to asking the customer during a periodic customer survey. If you’ve used the self-service knowledge base, what percent of visits resulted in you finding helpful knowledge? Average the answers to calculate a self-service success rate. The customers are guessing, so accuracy is questionable, but having this metric is very valuable.
- **Ticket deflection** (or self-service tickets). This is the number of tickets not created through assisted service due to self-service success. Total tickets deflected equals the unique sessions times the self-service success rate. In addition to the tickets managed by the support organization, you need to take credit for the ticket deflection as knowledge was delivered to satisfy a customer need.”

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## CONCLUSION CHECKLIST

- ✓ Understand the needs of your users for self-help
- ✓ Use the right tools to enable knowledge creation and maintenance
- ✓ Make sure your knowledge is:
  - Searchable
  - Findable
  - Useful
  - Relevant
- ✓ Be wary of the “curse of knowledge” and provide all the information needed
- ✓ Consider the power that AI, natural language processing, and chatbots can have on providing a better self-help experience
- ✓ Remember that savings are an outcome of providing good user-facing knowledge
- ✓ Use the right measures to ensure good results
- ✓ Set yourself up for success



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## TAKE THE NEXT STEP

It is critical for organizations to understand the users' needs and expectations when it comes to delivering knowledge. The right self-help tool can help you provide access to knowledge that is relevant, easy to digest, and that engages all users across your organization.



Ready to take one step further to improve your self-service capabilities?

[SIGN UP FOR YOUR DEMO](#)

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