

INGENIUX



Six Steps to a Unified Customer Support Portal

There is a new customer mandate. More than ever you must provide a seamless and engaging customer support and service experience. Customers are savvy and used to accessing information online. They expect you to deliver all of their services in one location, to have easy customer self-service options, and to interact with your organization on any device or from any location.

You've invested time and money into your CRM, ticketing and other applications. But these are only parts of your overall customer support experience. Your customer experience may include training, product information and licensing, customer marketing and retention programs, professional service requests, and other services. Unfortunately, every service you provide often means a different application and customer touchpoint.

How can you bring it altogether to provide a 360-degree customer support? Leading organizations use a modern customer experience portal to unify support, knowledge, and service. When delivered effectively, a customer support portal or "hub" can increase loyalty and retention, lowers costs, and open new channels for customer marketing, sales, and insights.

Follow these 6 best practices to elevate your customer experience.



1 Create a Unified Customer Portal

It's frustrating for customers to have multiple ways to contact you depending on what they need. One contact point for service requests, one for product support, another for sales, and so on. To make it even more frustrating each department doesn't seem to know what's happening with the customer in the other department. This is far from the seamless customer experience demanded today and is a primary reason customers leave.

Seamlessly connect all your service and support applications into a unified customer portal. With a unified customer support portal there is no need to change your back office applications, like your CRM, ticketing or other business processes; every application can be connected on the backend and the relevant data and information fed into the portal experience.

A unified portal encourages self-service. It gives your customers a single place to get all their service and support by providing the information and tools needed to get issues resolved quickly and easily. The customer portal also ensures your employees have access to all the customer information necessary to build and support a strong customer relationship.

The screenshot displays the IGX unified customer portal. At the top, the logo 'IGX YOUR WORLD, CONNECTED.' is visible alongside 'Submit Case' and 'My Profile' buttons. A navigation bar includes 'IGX Support', 'Training', 'Products', 'Knowledge Base', and 'Support Cases'. The main content area features a 'Welcome Back' message and four dashboard cards: 'Support Cases' (5 OPEN SUPPORT CASES), 'Products' (105 PRODUCTS), 'Knowledge Base' (27 SAVED ARTICLES), and 'Training' (3 CERTIFICATES). A notification bar shows 'You have 6 notifications' and a search bar. Below this is the 'Open Support Cases' section, which lists current support cases in a table. The 'My Products' section highlights a 'Cartella' product with details like 'Product Model #: TT-3000-A' and 'Purchase Date: 11/7/2016'. The 'Knowledge Base' section at the bottom shows 'All Articles' and 'My Library' with a '27 SAVED' indicator.

Reference	Title	Date Opened	Submitted by	Status
0034897	Testing with type, product, and urgency	11/8/2016	Thomas Jeffery	New
0034896	Support blog down	9/6/2016	Anita Wallace	Research
0034895	Search on mobile	9/6/2016	Thomas Jeffery	New
0034893	Downloads not working on blog	9/6/2016	Michael Dash	New
0034892	Initialization error in version 9	8/29/2016	Brett Lindon	Escalated to 360 Support

2 Align All Customer Support & Service Technology

Think about the costs associated with managing a range of support and service technologies. Many customer support applications require expensive customer subscription fees, and other associated costs.

Unifying content and applications under a single support experience removes the need for individual application subscription fees. It moves the customer experience to the front-end portal where you pay volume user fees without expensive growth and vendor lock-in. If you decide to switch a back office support application or use a new one, it's easier to change connections to the portal without disrupting the customer experience or needing to train the customer on a new support application.

3 Use a Hub and Spoke Model Where the Customer is the Hub

Far too often we plan our customer services around a product or an organizational structure. To provide a great customer experience you need to put the customer at the center and build the experience around their specific needs.

Think of the customer as the Hub and your support and services as Spokes. Align your messaging, account information, access to customer data and security around the customer and how they want to interact with you.

Create customer journey maps that outline how the customer interacts with your organization after they purchase your product. Think about all the ways they need to communicate with you and define the services and support required. For each service, outline the information and data required and think about how this content is shared across services.



With the customer as the hub and your services as the spokes, you can easily build a personalized customer support portal that only shows the information the customer needs.

4 Find Customer Success through Search

Search technology supports more than the brand website experience. It can make your knowledge and support information easier to find in your customer support portal. Using a native search architecture you can connect disparate content and application data located in your CRM, ticketing system, Web content management platform and more, using enterprise and federated search.

Federated search supports the connection of structured and unstructured content across a wide range of back-end applications and content repositories. It offers a single integrated approach to connect content and data in real-time so your customers always have the most up to date information about their service and support requests.

Enterprise search functions as a faceted and guide search, allowing you to quickly surface relevant information to your customers based on their specific requirements. You can also

personalize search using the customer profile and other customer data. This can include offering data that is specific to each customer in a secure way.

A native search-based architecture reduces the amount of development effort required when you need to integrate two or more separate back-office application technologies, and it speeds up the entire index and querying process ensuring the right information is delivered to the customer as quickly as possible.

5 Web-enable Technical Documentation to Support Customers

You spend a lot of time and effort creating technical documentation to support your products, such as product documentation, help documents and knowledge bases. But this information is typically stored on DVDs, in printed manuals or used only by support and development employees.

This information is highly useful to customers who want some degree of self-service. If they had access to your technical documentation and an easy way to find the exact information they need you could reduce support costs dramatically.

Web-enable your technical documentation and make it available in your Customer Support Portal. An XML authoring process enables you to structure your content and use in a variety of formats and functions through your support portal.

Customers can easily search all technical documents, regardless of type or format, and have the relevant results surfaced alongside the support tickets or the service requests they submit.

Don't keep your technical documentation hidden away, make it available for customers so they can find more detailed, relevant content to fix their problems and allow your teams to focus on the issues and requests documentation can't resolve.

6 Build a Brand Forward Customer Experience

You spend a lot of your budget building your brand and sharing your story in your marketing initiatives. But your brand goes much further than the marketing department.

Make your brand central to your customer support and service. By moving your customer support from the back office to the front, you can continue to promote your brand and brand promises through a modern, responsive and mobile friendly experience, one that matches your marketing experiences.

Customer support and service apps don't have to be boring and confusing. Create a support portal that matches your brand without sacrificing functionality. A customer support portal deserves the same attention to a seamless, user-friendly web experience as your public website.

Think about what you need to put in place to ensure a consistent seamless experience across all your customer-facing properties and ensure you pay attention to the complete customer lifecycle.



Wrap it Up

It has been said that it's easier to win a customer than it is to retain one. Customer experience expands far beyond bringing the customer in and making the sale, and while marketing is critical to your organization's success, so is customer service and support.

A unified customer portal that connects all the disparate content and back-office service and support applications to provide a seamless customer support experience improves customer loyalty, can lead to cross-sell and upsell opportunities and encourages retention.

Building a customer portal is not enough though. You need to put the customer at the center of the portal experience and build services around their needs and expectations. Think about how they want to interact with you and how much self-service support you can provide to help them resolve their issues quickly and easily.

About Ingeniux

Ingeniux is the leading provider of web content management and digital experience software. We enable organizations to orchestrate the entire customer experience from acquisition through to sales to support and service, across any device, application, or website.

We build content management software with an unparalleled focus on the content itself. The Ingeniux CMS is designed to manage and deliver modern websites, customer support portals, online communities, and other customer touchpoints.

We believe in intelligent “structured” content. We design our software to enable content reuse, enable true mobile and multi-channel content delivery, and insightful content discovery. Our unique content-as-a-service capabilities deliver content into web and mobile applications, and other key channels.

Ingeniux software is available as a fully managed software service or an on premise application. Ingeniux delivers unparalleled service and support to customers worldwide.

To learn more, visit us at <http://www.ingeniux.com>.

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