



# The Path to Intelligent Self-Service

Follow the best practices that innovative brands like Adobe, Salesforce and Logitech use to help their customers do more on their own with less effort.



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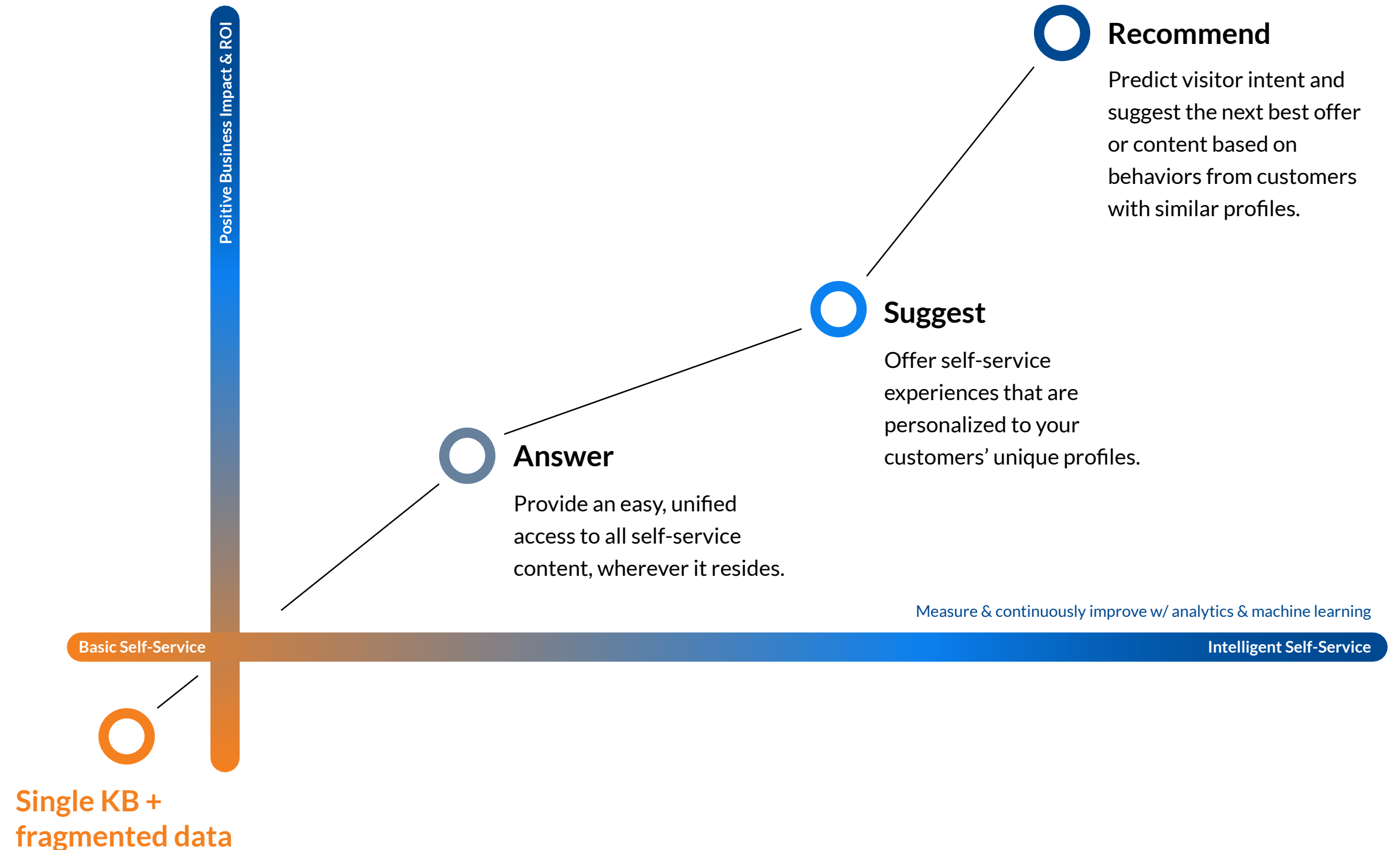
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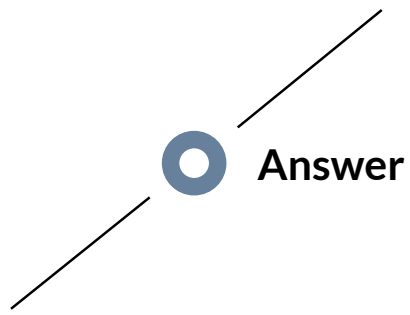
# The Intelligent Self-Service Maturity Model

Intelligent self-service is about empowering customers, partners and employees to find the answers they need on their own, when they need them. It is also about adapting the experiences to the evolving expectations of those who interact with your products, and use the knowledge you have about them to make these interactions more relevant. To do so, you need to leverage, unify and learn from the intelligence of your employees, content and customers.

The path to intelligent self-service can be broken down into 3 key capabilities, which deliver increasing positive business impacts.

**This guide gathers best practices from Coveo customers powering their self-service strategy with intelligent, self-tuning search. It showcases how these trendsetters are making self-service responsive, proactive and predictive to drive engaging and intuitive experiences. In it, you'll learn the fundamentals of delivering great self-service, all the way through the best of breed capabilities to maximize success.**

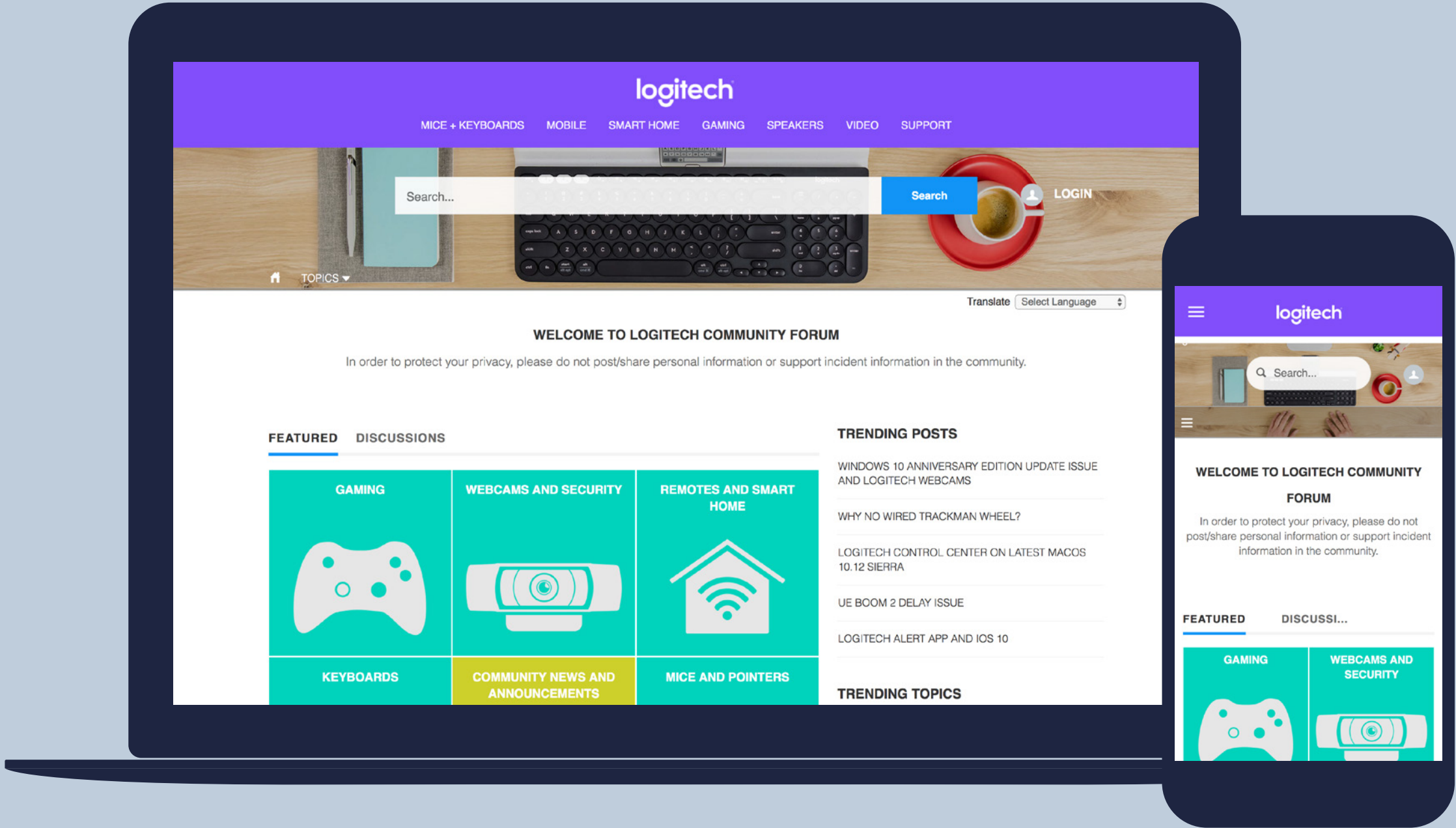




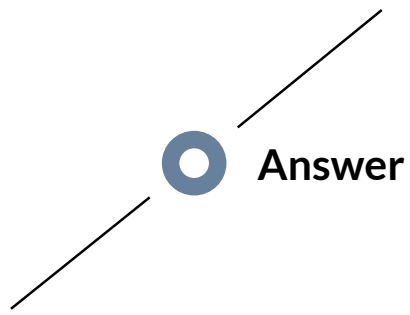
# Best Practice #1

CREATE A SINGLE SELF-SERVICE HUB,  
ACCESSIBLE FROM ANYWHERE

Do your customers know where to go for help? Providing a single, unified self-service hub is the first step to an effortless and intuitive experience. Then, make sure that they can have swift and easy access to your site from any device, and with a single login.



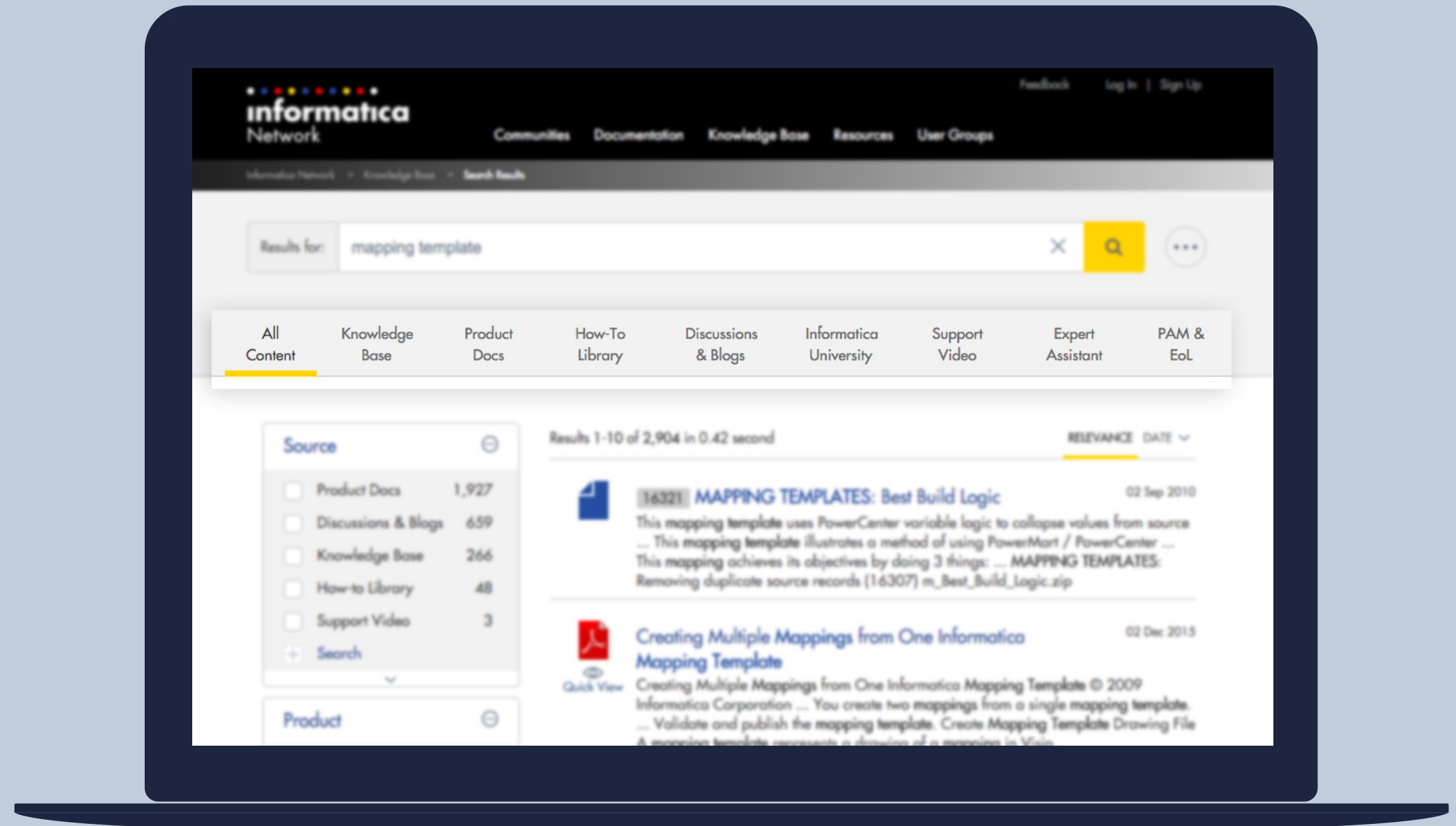
Logitech's support community is the hub where its customers can go for answers, knowledge and discussion. All of their self-service resources are accessible through that single site, which is responsive and optimized for mobile devices so their users can access it from anywhere.



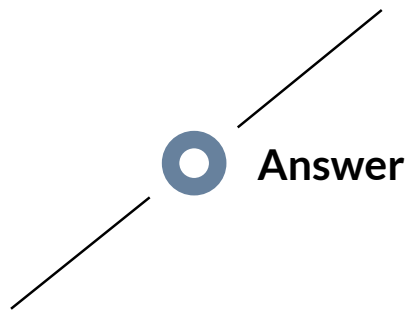
## Best Practice #2

PROVIDE UNIFIED SEARCH ACROSS ALL SELF-SERVICE CONTENT

In most cases, self-service content resides in multiple, disparate sources and systems. Don't make your customers go to different places to find it. Instead, deliver a unified search experience from your support site that allows them to find the best, most relevant answer, wherever it resides.



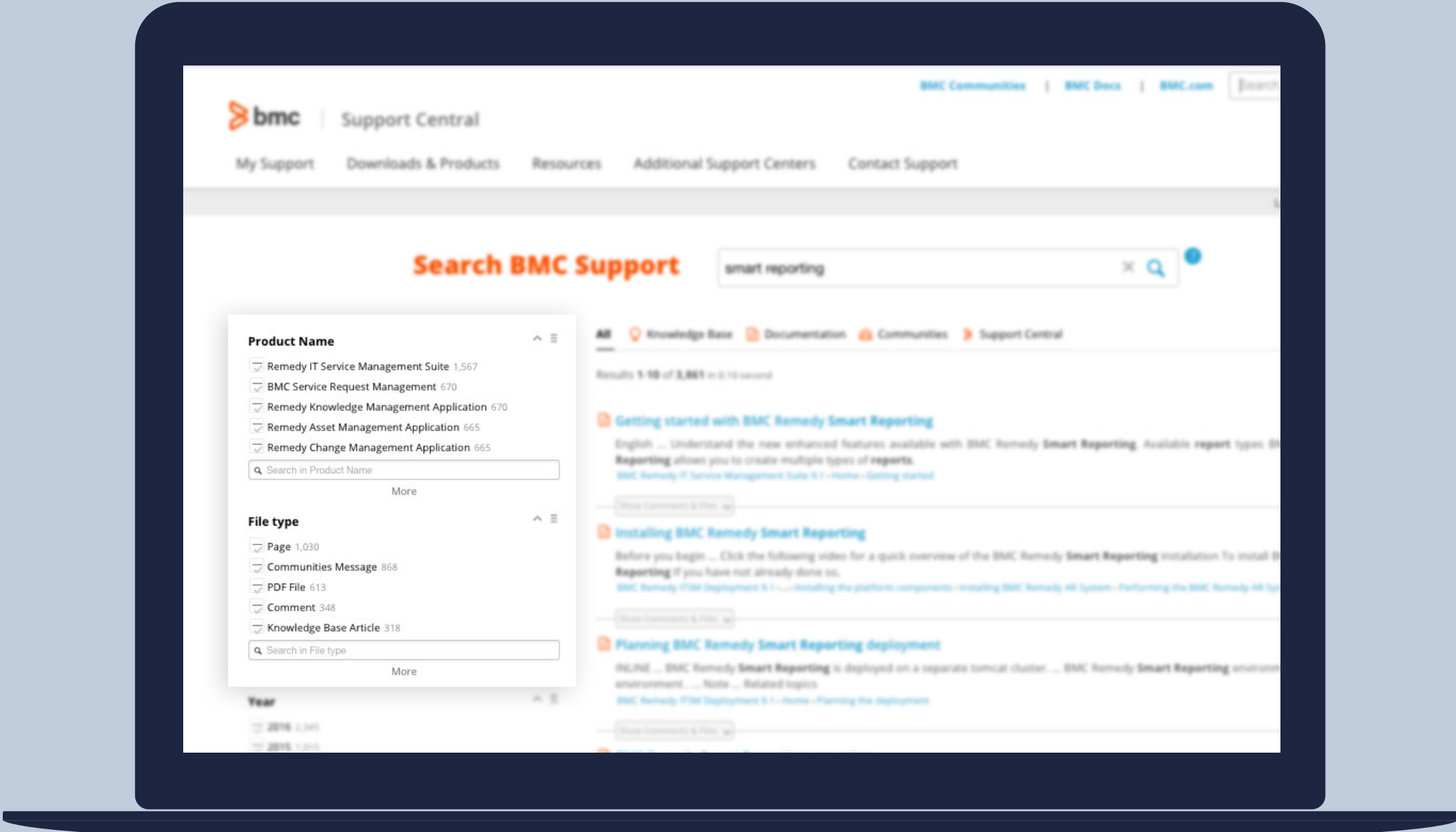
Informatica uses unified search to provide a single hub for their customers to securely access self-service content from their knowledge base, product documentation, videos, community threads, and other sources where their content resides.



# Best Practice #3

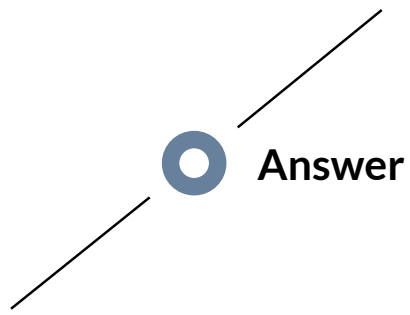
ALLOW CUSTOMERS TO EASILY FILTER DOWN SEARCH RESULTS

Chances are there is probably a lot of content on your self-service site, and perhaps in multiple languages. You don't want your customers to have to browse through results to find what they really want. Make sure users can filter down search results with facets and filters so they can easily get to the result that is most likely to help them succeed.



BMC offers dynamics filters to help users narrow down results by products, content type, languages, or date. This is helping their customers get to the exact content they are looking for, faster.

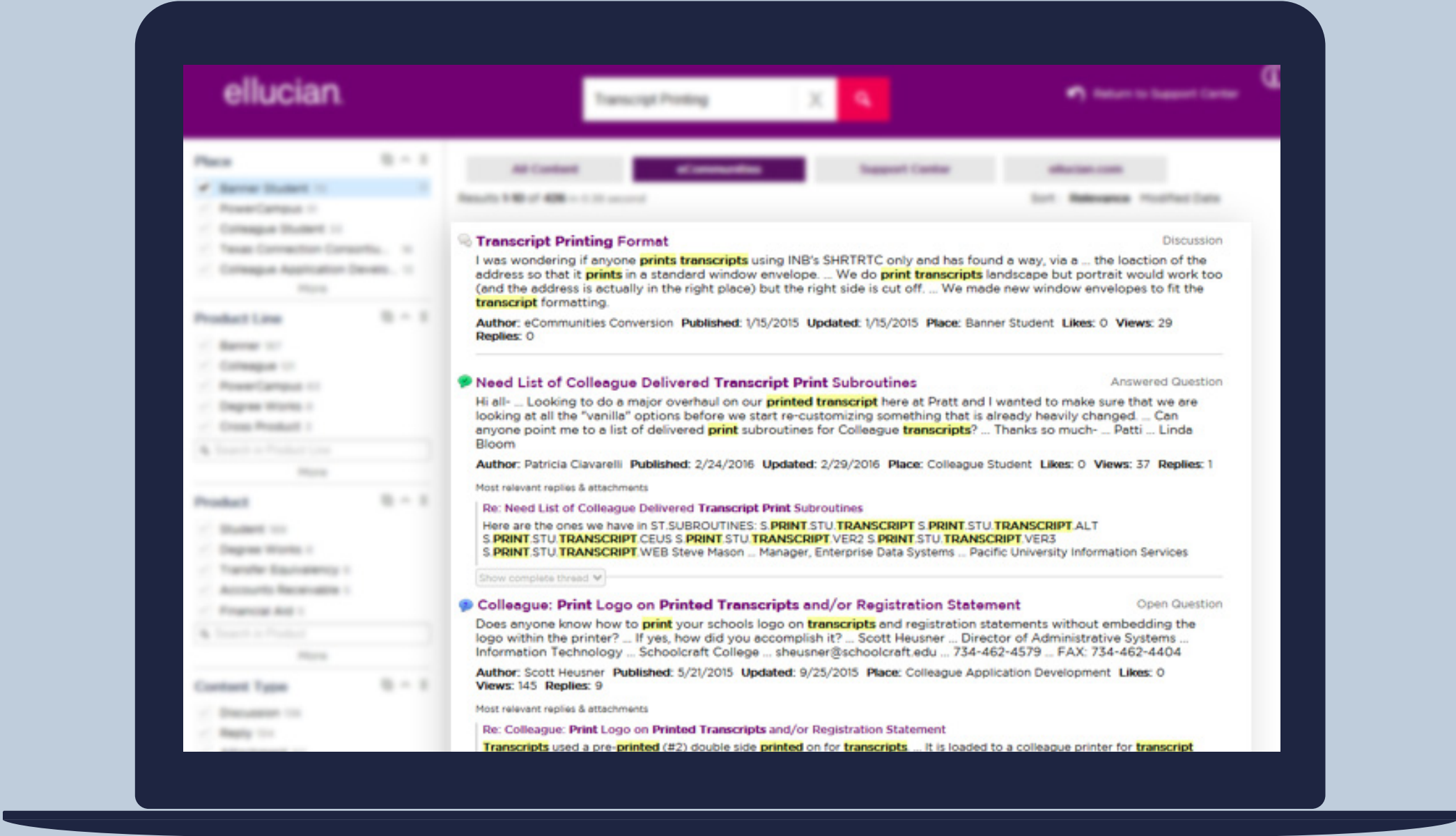




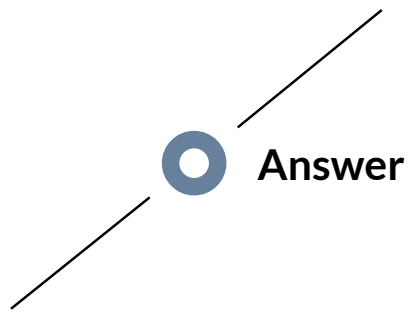
# Best Practice #4

GIVE CONTEXT TO SEARCH RESULTS TO ENSURE RELEVANCE

Don't have your customers click on multiple results before finding the right one. To help them understand which result is best for them, provide a sample of the document while highlighting the search terms used for the queries to help understand in which context they are being used. This allows customers to quickly preview content before clicking on results.



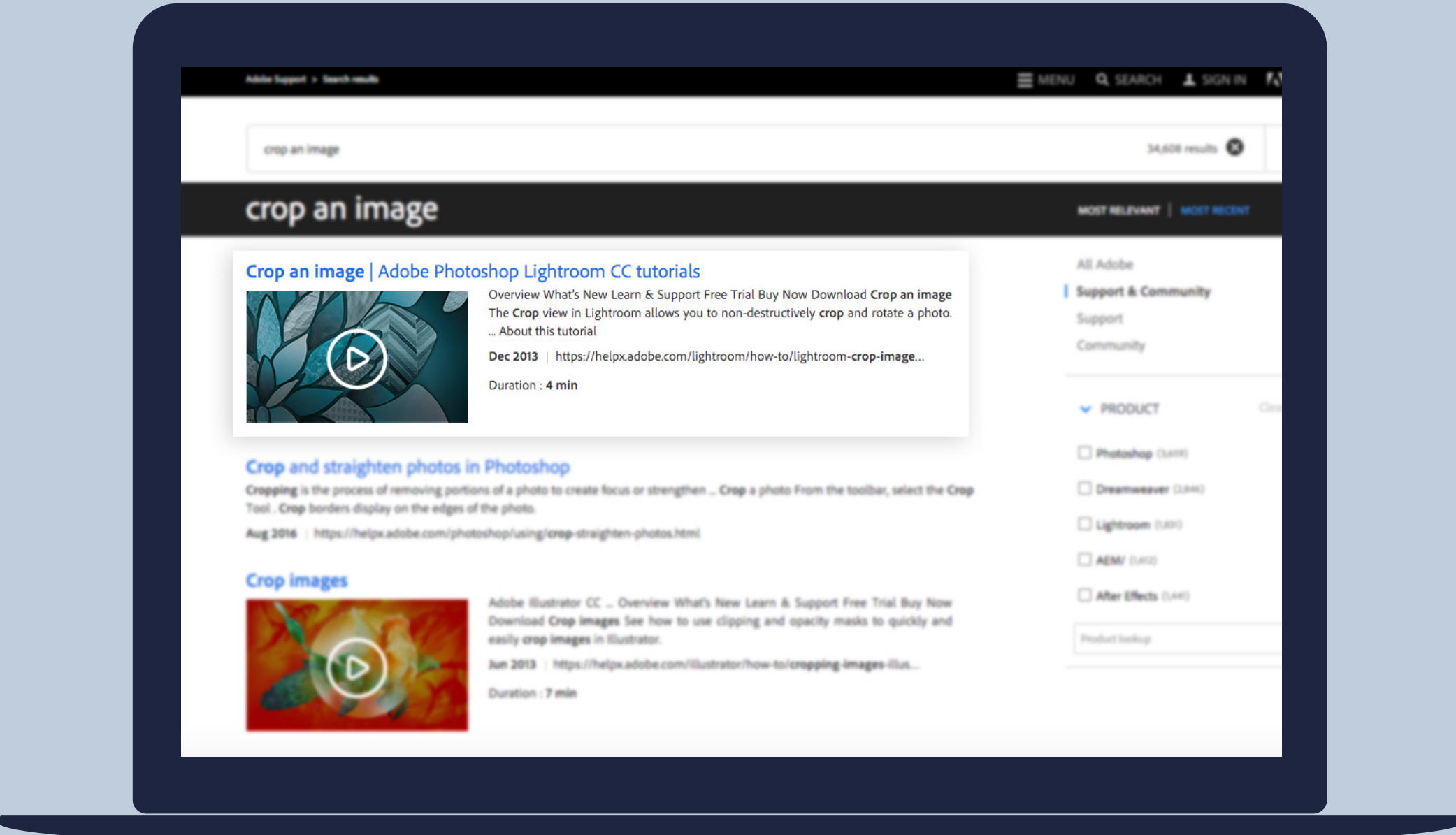
Ellucian highlights the terms that were searched for by the customer in the result overview to help put these keywords in the context of the document, and help users select the best resource for them.



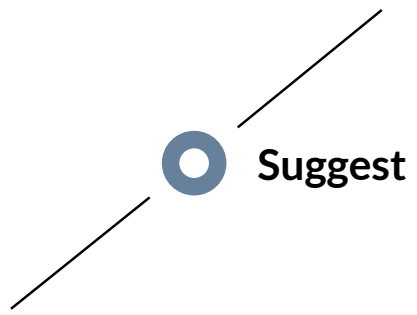
# Best Practice #5

CREATE ENGAGING SELF-SERVICE EXPERIENCES WITH RICH SEARCH RESULTS

A visually appealing experience will increase customer engagement. To design rich self-service journeys and to optimize the display of information, tailor search results to the different types of content, and use thumbnails and overviews to help users understand the value of each resource.



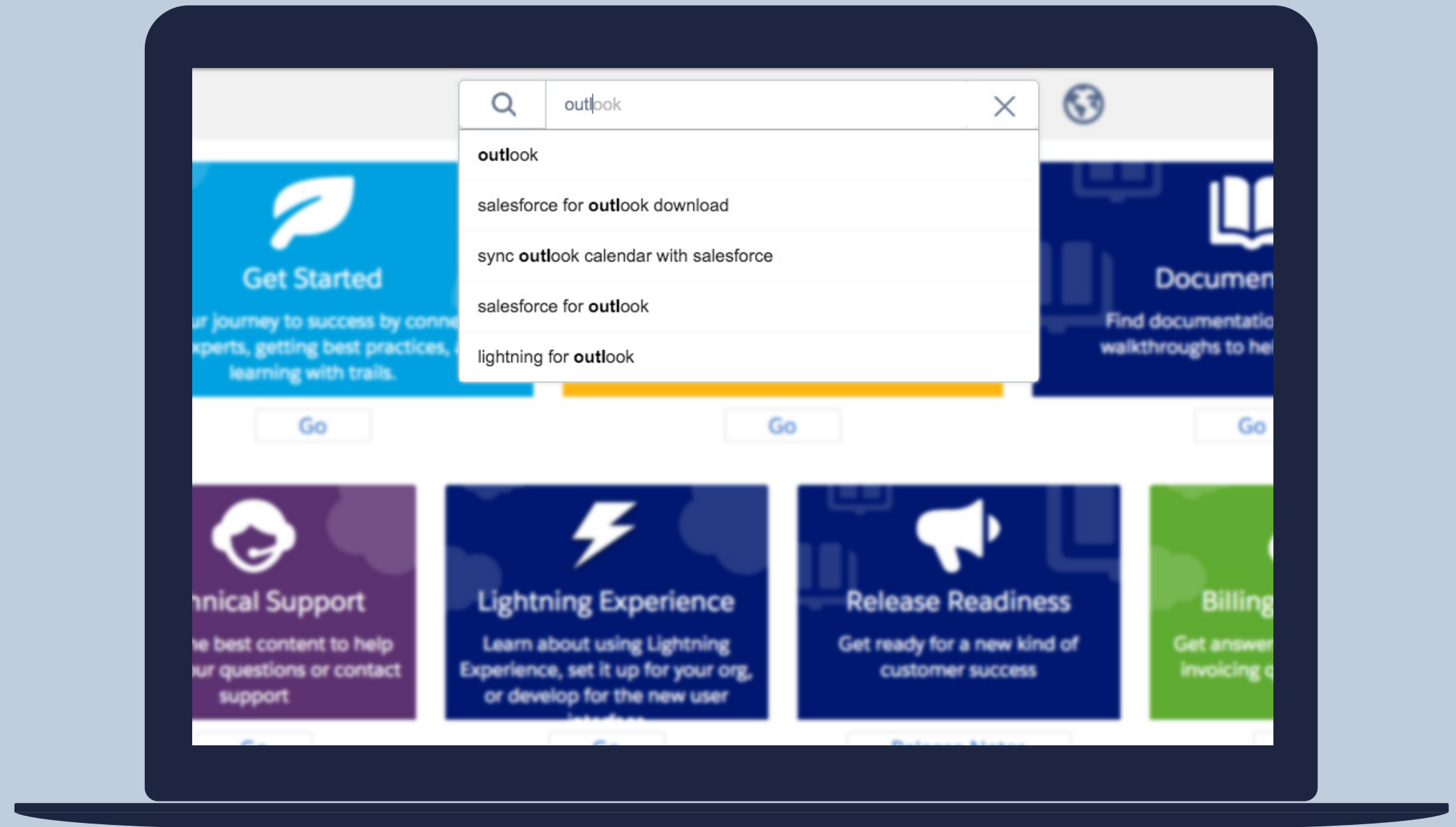
Adobe displays appealing search results with rich-media thumbnails of content, and quick views that allow customers to access the content without leaving the site.



## Best Practice #6

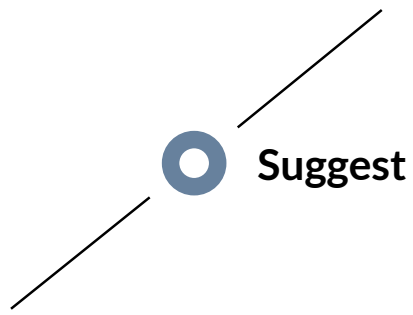
### DELIVER PROACTIVE SEARCH EXPERIENCES

Customers expect the same engaging experiences from you as they are getting from their day to day applications, so make sure the self-service on your site is proactive and smart. When your customers perform a search, help them shape their queries based on what others like them have been searching for, and what search terms lead to successful outcomes.



Salesforce is helping its customers on its support site form their search query by auto-completing their sentences, and proactively suggesting the best queries that have helped users in the past.





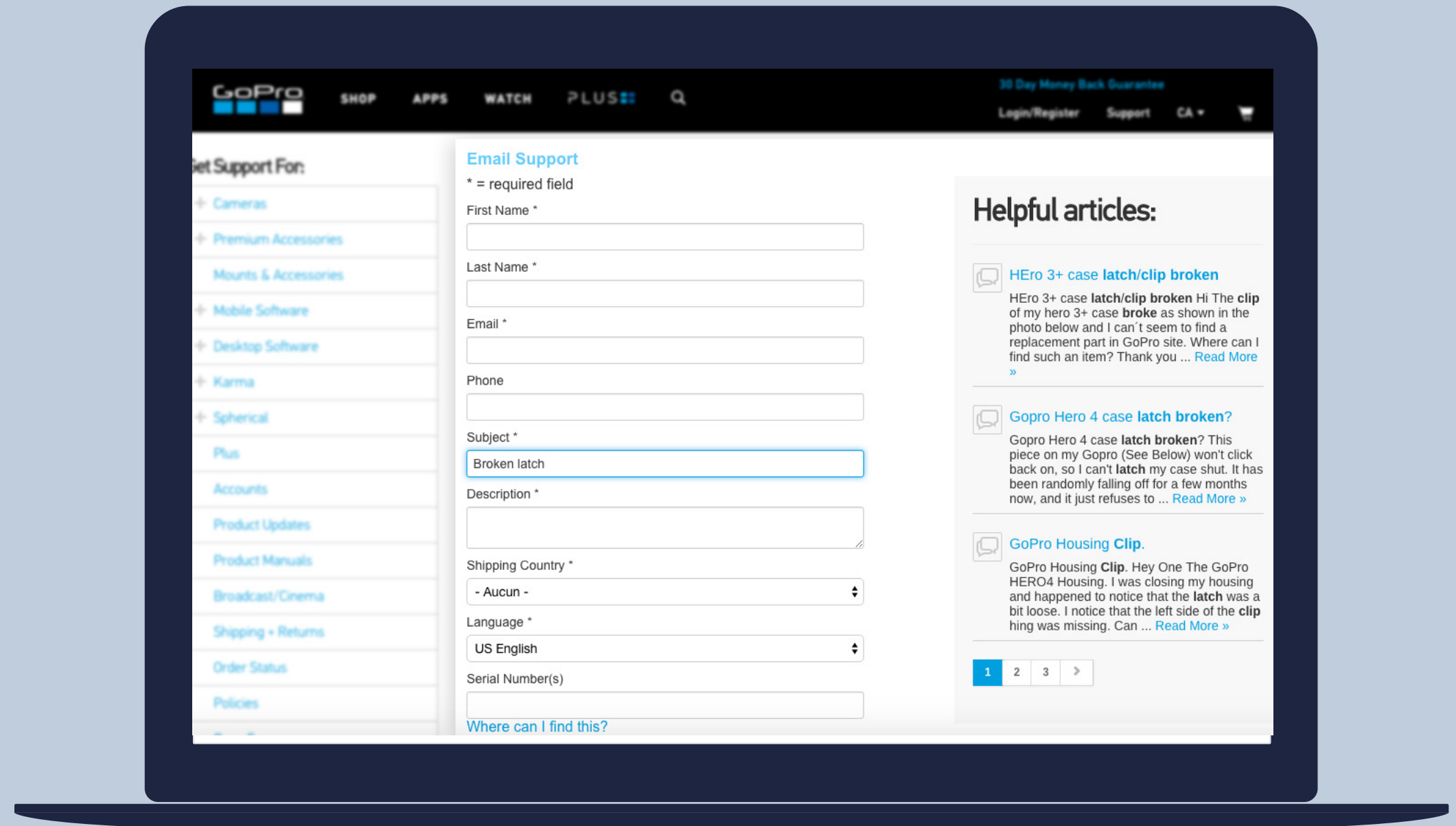
## Best Practice #7

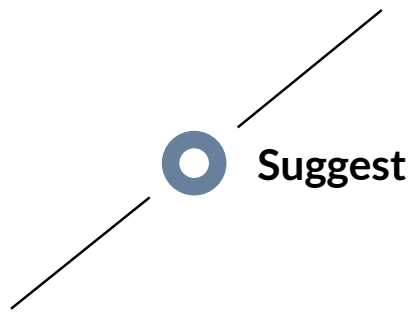
MAXIMIZE CASE DEFLECTION WITHIN THE CASE CREATION PROCESS

Case deflection occurs when a customer that would have logged a case on your support site manages to find the answer by himself and ends up not having to contact you. The best self-service sites leverage the insights from all customer interactions to help them find relevant and contextual answers that will solve their issue and increase chances of success. This practice of proactively suggesting content during the case creation process is proven to significantly boost case deflection rates.



GoPro leverages all the information entered by the customer in the case deflection workflow to suggest relevant information that can help them solve their issue before submitting their case. This practice has proven to boost case deflection for many Coveo customers.

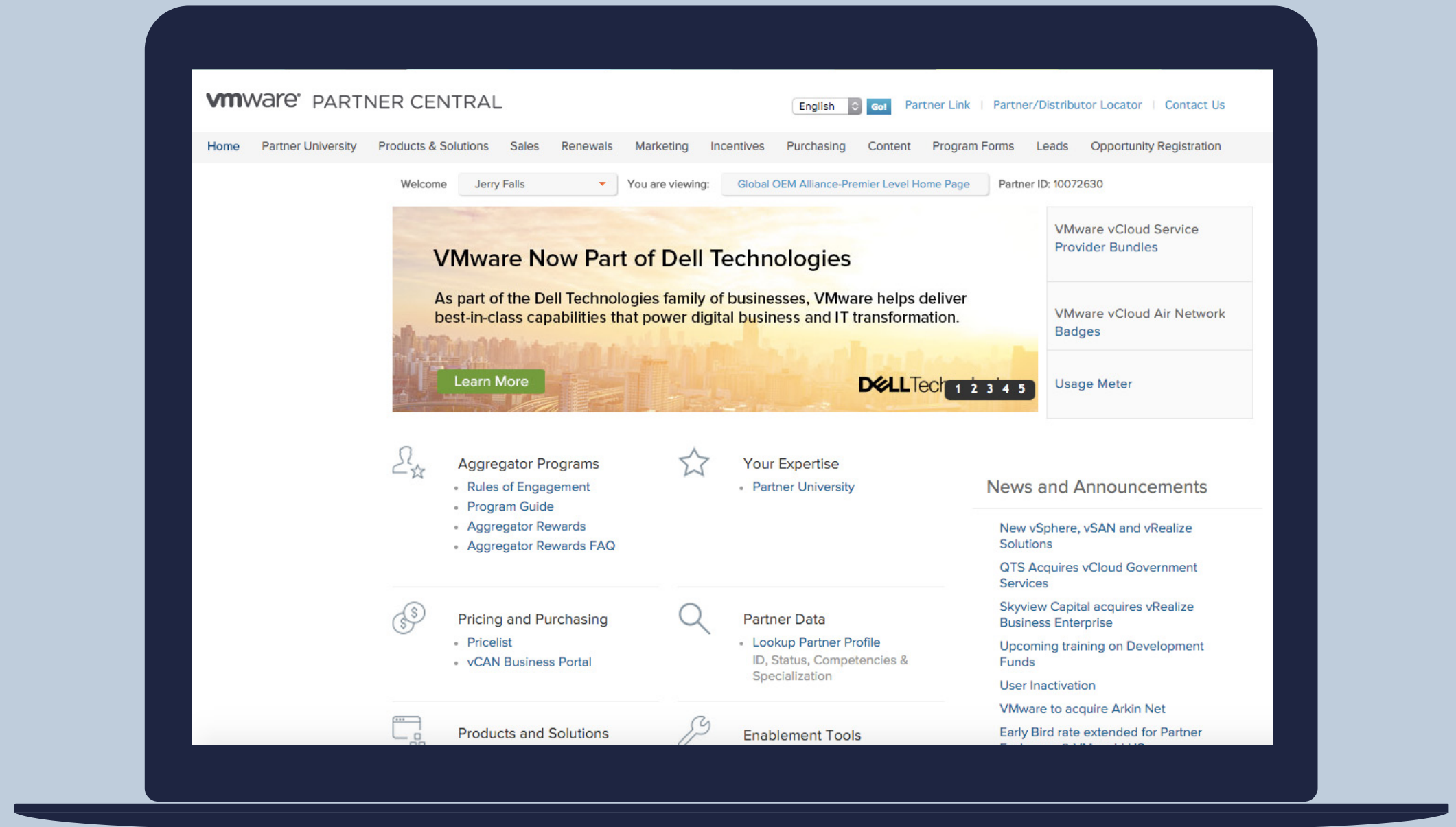




## Best Practice #8

### DELIVER PERSONALIZED EXPERIENCES

Your customers, partners and employees expect you to leverage everything you know about them to be as relevant as you can be. Deliver personalized experiences based on your visitor's profile, past purchases and their behavior on your site. Use the information they are giving you through search and online interactions to adapt the answers, recommendations and offers you are giving them.



VMware relies on its ecosystem of more than 75,000 partners to grow its business. Their partner self-service portal, called Partner Central, makes it easy for partners to self-serve and access on-boarding and sales enablement content. Depending on the type of partner they are, the site will deliver different content and functionalities.

 Recommend

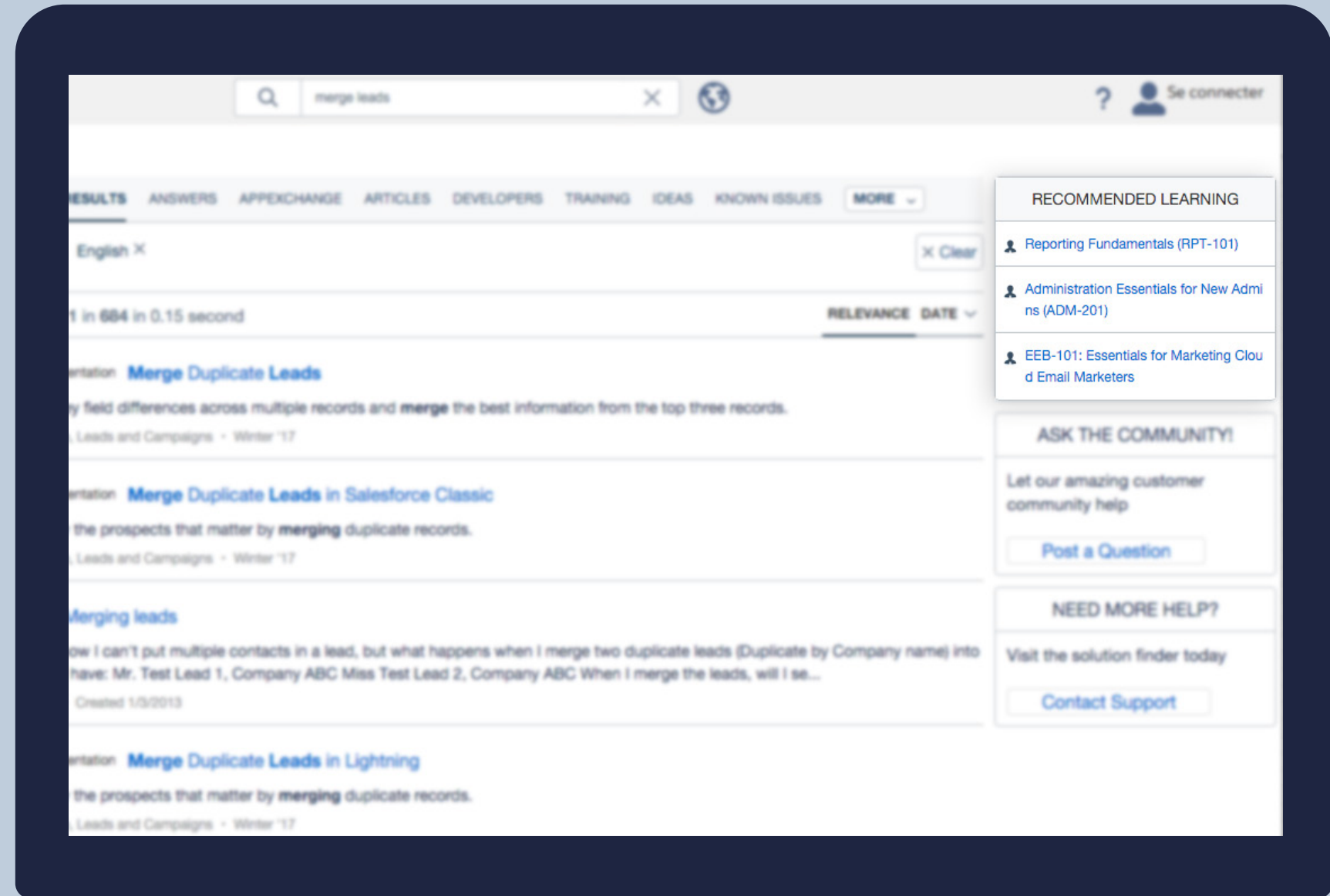
## Best Practice #9

RECOMMEND THE NEXT BEST OFFER,  
TRAINING OR CONTENT

As customers are interacting with your website, they are giving you insights about who they are, what they are interested in, and what they need. Use machine learning to leverage that knowledge and proactively suggest content, training or resources they might be interested in. Recommending the right offers helps drive revenue through upsells and fuels community engagement.

 salesforce

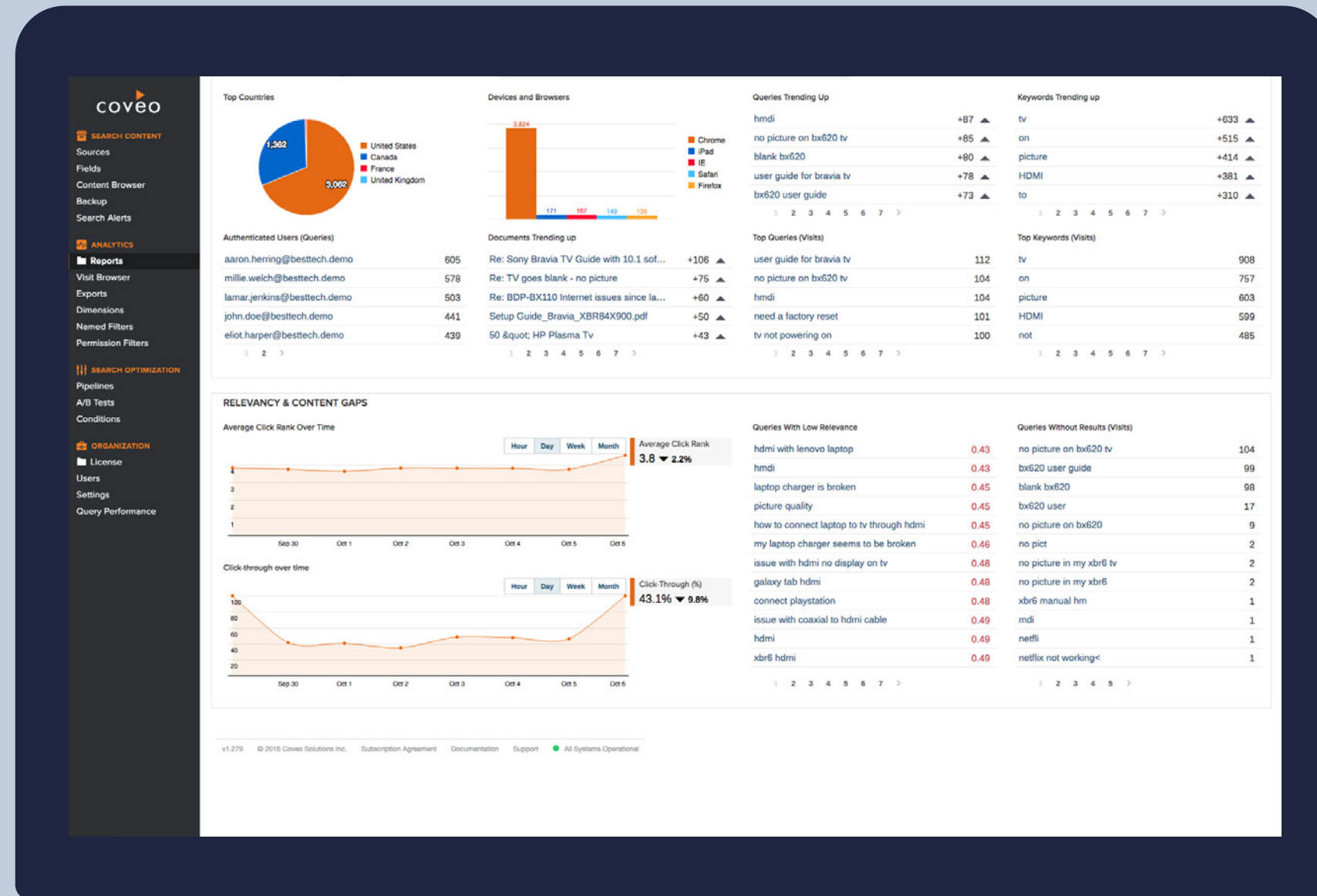
Salesforce uses intelligent search on their support site to proactively recommend related training classes and resources based on what customers are searching for. By leveraging self-learning search capabilities, they are able to automatically deliver relevant suggestions based on what customer with similar profiles have previously clicked on.



# Best Practice #10

CONTINUALLY IMPROVE THE EXPERIENCE BASED ON TRENDS & BEHAVIORS

In order to measure self-service success and continuously improve the experiences you deliver, you need to have a clear understanding of what content is helping your users, and where they struggle to find answers. This can only be achieved by having a complete line of site into user search journeys.



In-depth search analytics allow you to identify and address content gaps, understand user behavior and patterns, create reports to track progress and quantify self-service success.



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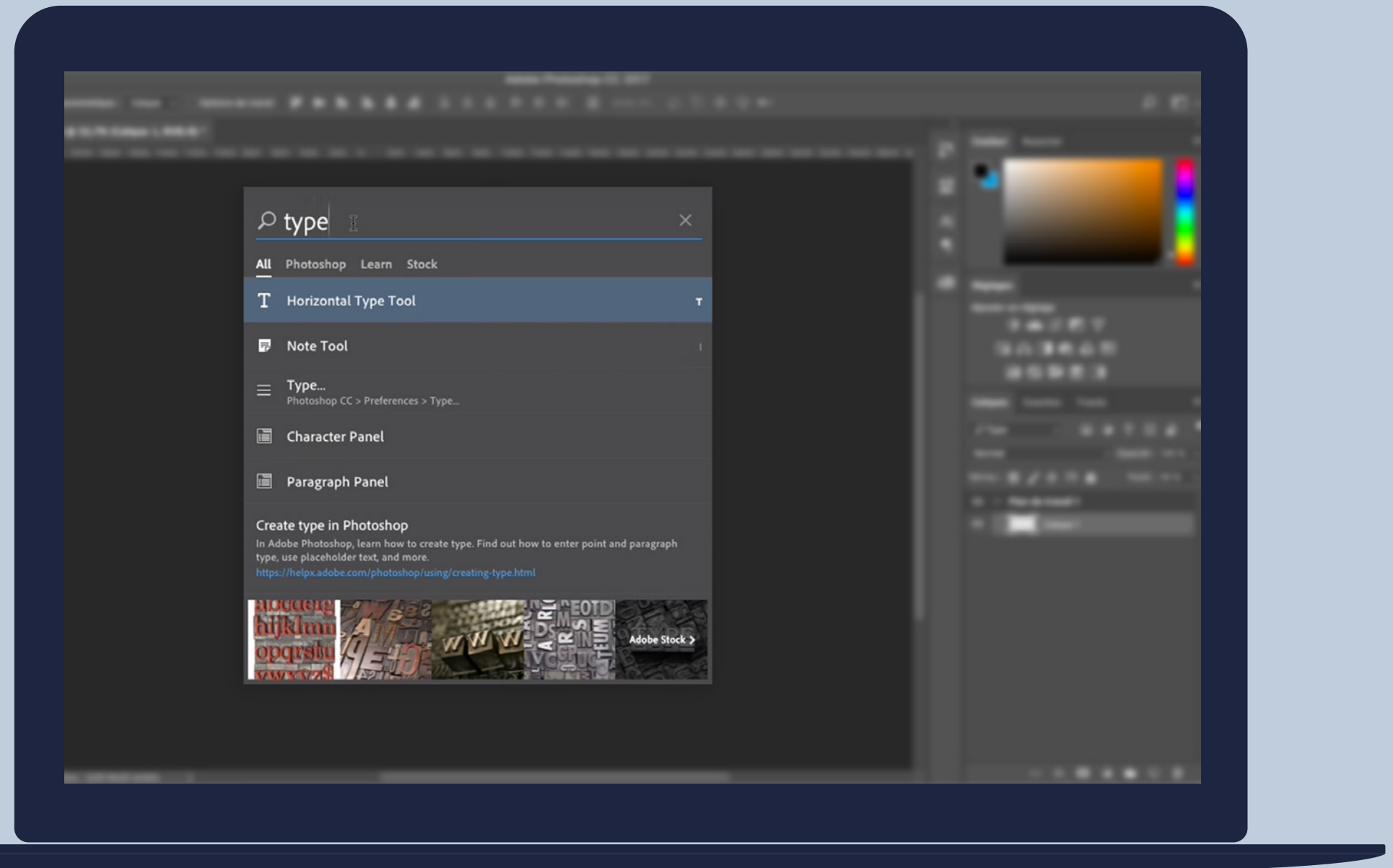
## Best Practice #11

DELIVER IN-PRODUCT HELP TO  
PREDICT AND PREVENT ISSUES

Search is the main way your customers, partners and employees interact with you whenever they have a question, run into an issue, or want to get new information. Make sure you display a prominent search bar, that's accessible from anywhere on the site, or wherever your users need it the most. Trendsetters even started to introduce in-product search, offering an intelligent self-service experience directly within the tool the customer is using.



Adobe Photoshop features a powerful in-app search functionality that lets you search across UI elements, documents, help & learning content, inspiring Stock assets, and much more—all from within the product itself.



# What's Next?

To get additional best practices from innovative companies and learn about the results they are getting from their self-service strategies, consult these resources and case studies.



ellucian™

Get best practices from their journey, including how they use technology and processes to measure and improve self-service success and case deflection.



Find out how Salesforce uses intelligent search and usage analytics on its Success Community and increased its case deflection rate by 40%.



Adobe®

Learn how Adobe is taking intelligent search inside Photoshop to help customers find their answers without having to leave the product.



BROCADE®

Learn how Brocade created effortless self-service experiences for their customers and is on track to increase case deflection by more than 30%.

[Request a demo of Intelligent Self-Service](#)