

# 10 Top Tips

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for getting your customers  
to use and keep using  
Self-Service





## 1 Choose a diverse sample of customers to test the portal

It is important to include some you know will be enthusiastic to use the portal, but also choose some that you feel may be harder to convert. This approach will allow you to get some constructive feedback across a wide variety of customers.

## 2 Build suspense and promote the portal through visual aids

Communicate the launch of Self-Service through a series of channels such as posters and emails to build excitement and interest and encourage engagement moving forward.

## 3 Highlight the advantages

Highlighting the advantages to your customers about what they will get from using Self-Service such as faster response time and knowledge articles is the perfect way to get buy-in.

## 4 Change the priorities

Make calls logged via Self-Service top priority, this will change perception that phoning or visiting the Service Desk will result in a quicker incident resolution.

## 5 Publish your successes

Publishing quotes from successful customer experiences onto your email and poster campaigns is an excellent way of encouraging other unconvinced customers to use the portal as people trust word of mouth above anything else.

## 6 Monthly customer reviews

Once a month look to see which of your customers are not using the portal, try to understand why and take the opportunity to help them with how to use it.

When they call in, encourage them to try the portal first.

## 7 Voluntary training

Offer your customers training on Self-Service through voluntary sessions held either at your offices or theirs to help a wider audience on how to use the portal – and don't forget refresher courses when new functionality is released.

## 8 Look for opportunities

It is not just about incidents, look for opportunities to extend Self-Service to other support requests such as facilities requests, training requirements and supplier work orders.

## 9 Keep it up to date

Make sure that you continue to update your Knowledgebase with relevant videos and articles, the more content there is, the more useful your customers will find it and the more they will use it.

## 10 Don't forget about new functionality

Don't forget to tell people about new functionality via posters, email and training, you and your customers can only reap the benefits if they know what is available to them.

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