



An Oracle Best Practice Guide
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Best Practices for Web Self-Service User Interfaces

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Introduction

This white paper presents a series of customer-centric recommendations to help you deliver a world-class customer experience by ensuring that your Web self-service experience is performing to its highest potential.

Oracle products come with a history of more than 1,700 customer implementations of Web self-service. Through this extensive experience, several patterns for effective implementations have been observed across numerous implementations; the first purpose of this paper is to highlight those patterns. A second purpose of this paper is to help you avoid common Web self-service mistakes—ideas that might seem like good ones at first but that address issues that are more complicated than they first appear. It will help you identify the mistakes to avoid.

It may be helpful to think about Web self-service in terms of a long-term sustainable commitment to your customers achieved through continuous refinement and improvement. Although difficult to implement (long-term commitments typically are), this approach will enable you to reap the largest overall reward, because it will serve as a competitive differentiator for years to come. Successful customer experiences are multifaceted, and it often takes organizations years to fully mature to the point where they can reliably deliver amazing results.

With that said, significant short-term and immediate benefits can be reaped from following the best practices outlined in this paper and empowering your customers with self-service.

Ten Best Practices for Web Self-Service User Interfaces

The following 10 best practices represent the top ways your organization can improve the usability and effectiveness of your Web self-service offerings.

1. Make It Easy to Find

It may seem obvious, but if customers cannot locate a self-service area, then functionally it doesn't exist! This lack of *findability* will not only frustrate customers but will also increase the use of assisted channels such as the phone, which are more expensive for the organization.

There are those stories of disgruntled customers using services such as GetHuman (gethuman.com) to bypass bad support sites entirely or, worse yet, causing brand devaluation by tweeting or blogging about their bad experiences for the whole world to see. One customer even reports that he got so frustrated with a certain electronics company that he once faxed his service issue directly to the corporate office fax number for investor inquiries. Apparently the executives at the corporate office were much more willing to help than the agents in the contact center.

To maximize the possibility that customers will find your Web self-service features, try the following:

- Integrate Web self-service into the information architecture of your Website, by placing a link or a **Support/Contact Us** button that appears prominently on most or all pages of your general Website. You will likely need buy-in from your marketing and/or IS department to do so.
- Design Web self-service so that it matches your larger corporate presence and feels like a continuation of the larger Web experience.
- Invest resources in search engine optimization (SEO) for major Web search engines (such as Google, Bing, and Yahoo!). This is critical. One study found that 65 percent of Web searches start at Google¹, bypassing large elements of your site's navigation or search.
- Make sure support pages are indexed and ranked in your overall site search, so that support content shows up in these search results.
- Use caution in obscuring phone numbers and other contact information. Ideally, offer multichannel choice and a consistent experience across these channels. See best practice 5 for more information.

¹ Andrew Lipsman, comScore, "comScore Releases November 2009 U.S. Search Engine Rankings," comscore.com/Press_Events/Press_Releases/2009/12/comScore_Releases_November_2009_U.S._Search_Engine_Rankings

- Ensure that knowledge in your Web self-service knowledgebase is properly optimized for easy information retrieval. Check out the RightNow Community or ask Oracle Professional Services for more information on this topic.

For more information on how to make Web self-service easy to find, refer to the knowledgebase optimization document online.²

Once customers have found Web self-service, they will need to interact with it to achieve issue resolution; this leads to the next recommendation.

2. Make It Easy to Use

Companies with the highest Web self-service success rates and greatest ROI are ones that are able to make consumers feel self-confident, assured, and empowered through self-service. The usability of Web self-service is thus critical to its success.

Displaying a large amount of information to customers will just overwhelm them and make them feel helpless. When in this psychological state, a customer is more likely to try to get help by seeking an assisted support channel that is more expensive for the company.

To help improve the usability of Web self-service, follow these recommendations:

- Focus on design simplicity.
- Keep in mind that, in general, customers' use of Web self-service is infrequent. Customers don't want to learn how to use your site—they just need to use it to resolve the issue at hand and get on with the more important things in their lives.
- An 80/20 rule often applies to Web self-service: 80 percent of the visitors are seeking only about 20 percent of the content. Place this 20 percent of content prominently, and you'll get a big bang for your screen real estate buck.
- Design for "probabilities, not possibilities." Instead of trying to offer every possible choice to a customer, focus on the probable actions that are most likely to help.
- Help customers select their preferred support category by offering a series of product images or icons (where product-specific support content is appropriate) as the starting point of the service experience. This is particularly important when you offer tangible and recognizable products or services a user will quickly recognize.

² "Knowledge Base Optimization,"
communities.rightnow.com/files/14e9681120/KnowledgeBaseOptimizationSteps1.pdf

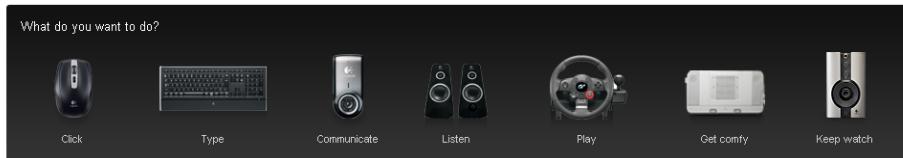


Figure 1. Include a visual product selector that enables customers to restrict knowledge by product or category.

- Users are likely to remember an e-mail address more easily than a username when returning to a site after a period of absence. Keep this in mind if you require a login.
- Leverage the wisdom of crowds to direct customers to the best content. One approach is to dynamically generate a list of frequently asked questions (FAQs). A second way is to automatically link to an Answers Others Found Useful section at the bottom of individual answer pages.

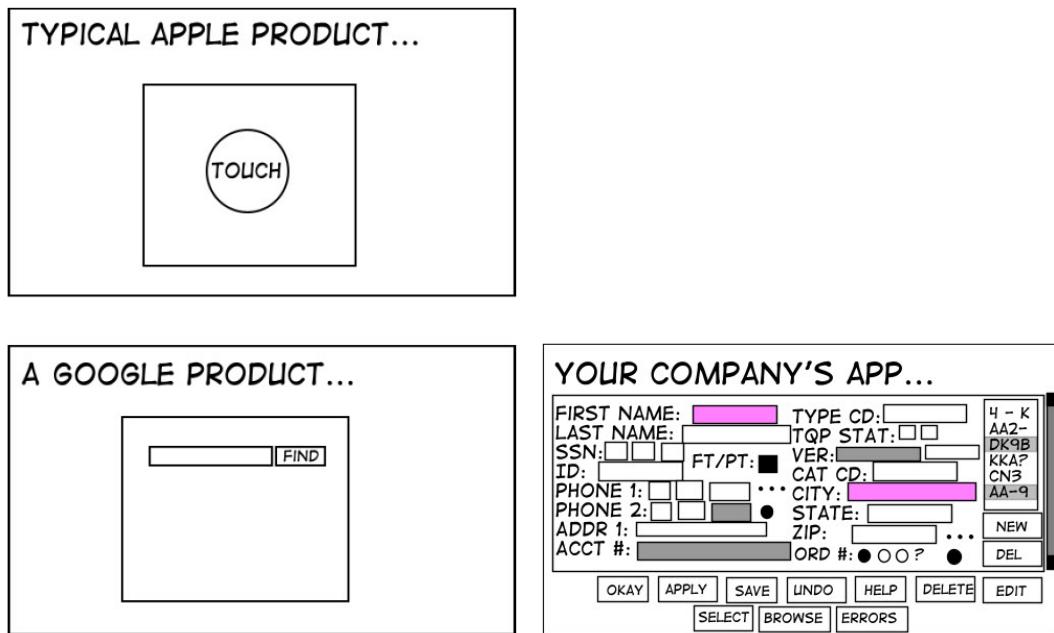


Figure 2. Focus your design on simplicity!

Usability goes well beyond the design of your site—if that design doesn’t offer functionality that truly helps the customer, it will go unused. To avoid the mistake of design without function, you will first need an accurate understanding of the tasks you offer with Web self-service. This leads to the next best practice.

3. Understand Your Customers’ Issues

Resolution rates for Web self-service are determined largely by an organization’s understanding of the problems the organization’s customers frequently need to solve. Organizations that have an in-depth understanding of these issues are able to structure their Web self-service experiences to help customers resolve these issues by reaching their goals for the interaction.

Extensive user and market research reveals much about the goals of customers using Web self-service. In addition to any customer goals you identify that are specific to your business (see also best practice 6), most customer goals for Web self-service can ultimately be distilled down to two objectives:

- **Find information.** The customer is looking for self-service and wants to locate some information or perform a function.
- **Get help.** The customer feels that the problem can't be resolved with self-service and is seeking a knowledgeable human being for assistance.

These two user goals must be acknowledged and ingrained within your Web support experience.

Information that satisfies the “find information” goal should be the primary content on the page, but information that satisfies the “get help” goal should also be visible. Burying it will only further irritate customers whose goal is “get help.”

The use of assisted support experiences frequently enables an organization to achieve greater revenue by increasing sales, including cross-sales and up-sales; first-contact resolution (FCR) rates; conversion rates; or customer lifetime value by offering multichannel options to high-value customers. Resolution, not deflection, has a positive impact on customer retention. You’ll find more about the options for and benefits of multichannel choice later in this document.

Eye-tracking studies on several Web self-service designs have found that the order in which contact channels are presented has a direct correlation with each channel’s frequency of use. To encourage use of a specific channel, place it at the top of a list, as shown in Figure 2 below:

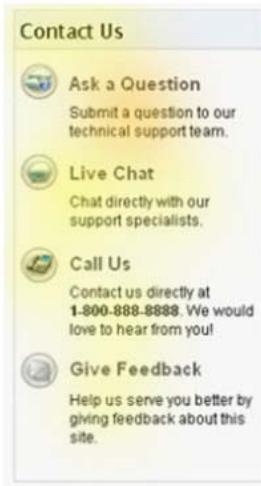


Figure 3. The communication channel at the top of this list is viewed with gazes of greater frequency and longer duration than those listed below it.

During one such eye-tracking study, the order in which customers looked at page elements was examined (see Figure 4). The Contact Us area is consistently the last one customers look at on the page. If customers whose goal is “find information” locate an element that may help them attain that goal, they may continue directly from that resource and not even see the Contact Us region.



Figure 4. This typical Web page shows the order in which customers typically view elements on the page—Contact Us being last.

Last, it can be tempting to build a self-service experience based on how internal departments or existing workflows are structured. If this delivery does not match the “mental model” of how customers think about your world, this will only confuse them. Customers simply don’t care about your company’s internal structure—they just want to resolve their issues as painlessly as possible.

Even if a customer locates Web self-service and it is usable and contains content that is applicable to the issue at hand, it *still* doesn’t mean that the customer will be able to successfully use self-service. This brings up the next best practice.

4. Provide Clear and Readable Content

Ensure that your content is easy to read (written in plain language, without jargon) and to the point. Web users are notorious for quickly scanning and flipping between pages, trying to quickly locate the “information scent” of the knowledge they are after. Enriching your content with graphics, diagrams, video thumbnails, bullet points, and inline bolded text sometimes has the effect of forcing the user to glance at these elements when scanning the page, and this will increase their engagement.

Content is often overlooked in terms of its importance—this is a big mistake, and good content is absolutely critical for a good experience. Unless you have a particularly technical or educated target audience of customers, make all your content readable at no more than an eighth-grade reading level, such that the average 13- or 14-year-old can make sense of the information. A variety of free online tools is available for checking reading scores for Web content. The Read-able tool, available at readable.com, is particularly helpful.

Following these content guidelines will not only increase the effectiveness of your content but will also make it easier to translate content if you are serving a multilingual customer base. The more complex the language is in your content, the more likely it is to be poorly translated or misinterpreted, particularly by automated translation tools. Also keep in mind that visual material and diagrams often do not need translation.

5. Offer Multichannel Choice

Offering a unified experience across multiple channels is not only important to the customer experience but can also have an impact on your bottom line. Consider the nature of each channel when determining how it can be used most effectively. Consider the following recommendations:

- **Web self-service.** Directing interactions that are low in complexity but high in volume to Web self-service will result in high self-service rates. Customers will be able to resolve their problems quickly and effectively, and the organization will be able to build the customer relationship while significantly lowering costs.
- **Community.** Leveraging the collective intelligence of customers enables the organization to provide a whole new dimension to supplement Web self-service. It may be surprising how willing customers are to help their peers and collaborate on problem-solving, especially because this is frequently done with minimal involvement from the supervising organization. Community functionality is also perfectly suited for high-volume, low-complexity issues.
- **Chat.** This channel provides a powerful way to either penetrate customers' thought process through a proactive notification or more passively provide a helpful channel for customers to engage in when they are ready. Real-time interaction with customers provides an effective way to improve sales by engaging customers who are on the verge of abandoning a shopping experience. In addition, it can engage other high-value customers who have been identified with behavior targeting or other analysis methods.
- **Phone.** Although this channel is the most expensive, it also provides unparalleled FCR rates. High-complexity, low-volume problems are best suited for this channel.
- **E-mail.** This communication channel allows for asynchronous communication between customer and organization. This style of interaction is useful for low-priority, low-complexity issues and provides the customer with the ability to respond when it is most convenient.
- **Assisted browsing.** Although not strictly a support channel in itself, the ability to directly take control of the user's computer can greatly reduce handle time in both the chat and phone channels. This mechanism also assists in achieving optimum FCR rates.
- **Click to call back.** This is not strictly a channel in itself, but it enables a customer to schedule a call at a convenient time rather than wait on hold. Caution should be used to make sure that this feature is offered in customer-centric, not organization-centric, terms. The organization can realize scalability benefits by using this approach to flatten the peaks and valleys of incoming call traffic.

To offer true multichannel choice, companies should integrate live wait-time notifications into the Web self-service customer portal. This enables a customer to quickly understand which channel has the shortest wait time and can act as a dynamic load balancer if one contact channel's queue starts to get too long. It also enables you to creatively encourage use of certain channels (see also best practice 10).



Figure 5. Channel wait times should be integrated into and displayed on Web self-service pages.

An example of an organization making excellent use of multichannel choice is the telecommunications company BT, whose Website automatically guides consumers to only the appropriate channel types for their issue type. See the **Contact BT** Web content at btbusiness.custhelp.com/app.

6. Optimize Based on Customer Feedback

To provide a superior customer experience, it is important to have an intimate understanding of the audience served and to detect when there is a change in their behavior and take action. There are many different methods for gathering customer feedback. The list below provides a high-level overview of tools and approaches:

- Surveys such as customer satisfaction surveys (CSATs)
- Metrics such as Net Promoter
- Web analytics and search logs, such as Website Analysis and Measurement Inventory (WAMMI) services
- Getting customer feedback on individual answers
- Conducting firsthand customer interviews and focus groups
- Doing usability testing and collaborative design

There is no one right way to understand and empathize with your users, so information may come from a variety of sources. Companies that take the time to continually measure and improve their Web self-service experiences, based on customer input, are the ones that are most likely to achieve their business goals.

Usability testing is among the most powerful measurement tools for understanding the customer experience. The do-it-yourself usability testing book *Rocket Surgery Made Easy*, by Steve Krug³, is useful.

³ Steve Krug, *Rocket Surgery Made Easy*, <http://www.sensible.com/rsme.html>, 2010.

There are some new startup services (such as Loop¹¹, UserZoom, Tealeaf, and ClickTale) that offer “unmoderated” usability—essentially technology that enables a simple usability test to be automatically administered remotely over the Web to real visitors. This type of analysis can be very valuable and cost-effective but typically adds the most value when you already have an advanced understanding of your site and are looking to take that knowledge to the next level. This type of technology is not the best starting point.

7. Measure the Site’s Performance Data

When an individual Web page takes a significant time to load, that increases the overall site bounce rate (the percentage of visitors who initially load or try to load a page but then do not continue and view other pages on the site).

Given the tendency of users to take the path of least resistance, a slow, awkward Web self-service experience is likely to cause abandonment to an assisted channel that costs the organization more. This aspect of the user experience is often overlooked during Web design. Oracle has taken exceptional steps to ensure high performance with both Oracle RightNow Customer Portal Cloud Service and the optimized display and JavaScript code it utilizes, which runs efficiently in a variety of browsers.

Make sure that any graphics you use have been optimized for the Web and that you place multiple images into a single *sprite*, a method of graphical overlay, where possible. The use of sprites improves Web performance, because only a single server request is sent and then all images are returned in a single burst.

To do a quick checkup on the current load performance of your Web self-service site, you can avail yourself of a variety of free speed-check analysis tools online. For example, you may want to run a quick check with the tool available at websiteoptimization.com/services/analyze.

In addition to technical performance, it is also important to measure the business performance of your Web self-service experience. This is often referred to as the *deflection rate*, but the term *self-service success rate* may be more accurate, because it describes the true benefit of Web self-service.

A self-service session is considered a success if any answers are viewed by the user and the session neither involves use of the Contact Us area nor results in an incident submission. This usage data is then used by Oracle RightNow CX Cloud Service to dynamically optimize and rank useful answers. Note that this measure does not deterministically define task success—the user may have viewed an answer and then simply given up! Also note that you could immediately bring your self-service rate to 100 percent by eliminating the Contact Us area. This obviously isn’t a good idea, though, because the increased rate would be due to false positives rather than true positives.

TABLE 1. EVALUATING WEB SELF-SERVICE BY CUSTOMER INTERACTION

| VIEWED ANSWER | DID NOT VIEW ANSWER | CONTACTED COMPANY | DID NOT CONTACT COMPANY | LEVEL OF SUCCESS |
|------------------|------------------------|----------------------|----------------------------|---|
| x | | x | | Self-service failure |
| | x | x | | Need to encourage use of self-service. See best practices 1 and 10. |
| | x | | x | Unknown. Customer may have accidentally visited the Support home page or was just browsing. |
| x | | x | | Self-service success! |

Healthy self-service rates may vary considerably, and there is no particular target number you should strive for. Depending on the nature of the business, some companies have a 20 percent success rate and are looking to decrease it whereas other organizations have a 90 percent or higher rate and are trying to increase it. It is, however, important to keep careful watch over this key performance indicator, because it provides the greatest overall snapshot of Web self-service.

Be sure to track the bounce rates for each page in Web self-service. A *bounce* is defined as a visitor who views only a single page. In evaluating the success of the Support home page and other nonanswer pages for Web self-service, use Table 2 to roughly measure success.

TABLE 2. EVALUATING WEB SELF-SERVICE BY BOUNCE RATE

| BOUNCE RATE | WEB SELF-SERVICE SUPPORT HOME PAGE SCORE |
|---------------|---|
| Below 20% | Excellent. Can be difficult to achieve in practice. |
| 20–35% | Good. |
| 35–50% | May be cause for concern. Needs additional investigation. |
| 50% and above | Bad. You have a significant Web self-service problem with your Support home page. |

This bounce rate table *does not apply* to individual answers. A customer who performs a Web search (using Google or Bing, for example) and is taken directly to an answer page (and doesn't look at any additional answers) is technically counted as a bounce. In such a case, a high bounce rate is actually good, provided that the company is receiving positive answer feedback from customers and that the time spent on the page seems reasonable for the amount of content on that page.

For instance, if you have a thousand-word answer on a Web page with a high bounce rate (50 percent or more) and a very short time spent on the page (less than 10 seconds), you'll know that you have an issue that needs to be corrected. Consider rewriting the answer based on Web content best practices.

8. Deliver a Personalized Experience

Make sure to take into consideration information that you already know or that can be automatically retrieved to inform you about a given customer's current situation and state of mind. Personalized experiences build brand loyalty and can help companies achieve simplicity by avoiding the need to ask for customer information. Here are a few recommended ways to personalize the online experience:

- Don't force users to re-enter login information when they are already logged into another portion of the site or system, and consider using a single-sign-on capability such as pass-through authentication (PTA). You may also want to examine the business acceptability of using a universal sign-on ID such as that for Google, OpenID, or Facebook. Capabilities for PTA and widgets for universal sign-on are available in Oracle RightNow Customer Portal Cloud Service.
- Automatically populate data fields and other site information if the user is already logged in or has entered similar information on a related page. Enable users to edit or modify these fields as desired.
- If applicable, enable customers to "register" their product, and remember this when the customer submits a support incident or visits your Web self-service to find information.
- Provide special contact channels or custom knowledgebase articles, depending on the user's service-level agreement (SLA).
- When a customer is authenticated, welcome that person with a personalized greeting.

There are often many opportunities to provide other nice-to-have personalization options. Use your imagination, and put yourself in the customer's shoes as you evaluate your Web experience: what little extras would help you have a better, more pleasurable, less painful experience?

9. Ensure Accessibility

Also often overlooked is the importance of information accessibility. True accessibility means support for a variety of browsers as well as for assistive technology for people with disabilities. Good accessibility ensures that your Web self-service content has maximum reach into the marketplace and helps the greatest-possible number of customers succeed in self-service or assisted service tasks.

A Web self-service site that is not technically accessible will provide a low or zero self-service rate for disabled individuals. These individuals will be forced to use another available channel. For instance, a blind person trying to use a screen reader to interact with the Web will not be able to properly utilize your Web self-service site if it is not accessible, and that person will likely be forced to ask a friend to retrieve a phone number for the company and will then call the company. This results in both a poor experience for the disabled customer and a phone call that costs the organization more than a Web self-service interaction.

Proper visual design, clear use of icons, and appropriate font size help all users but especially the elderly and those with impaired vision. As the baby boomer generation continues to age, the importance of usable and accessible Web self-service will only increase as boomers' sight and skills begin to deteriorate.⁴

Several laws and standards provide guidance for accessibility both in the U.S. and internationally. The reference implementation of Oracle RightNow Customer Portal Cloud Service meets the technical requirements of the U.S. Section 508 amendment to the Rehabilitation Act of 1973 and the international Web Content Accessibility Guidelines (WCAG) 2.0, and it was developed following the guidance of PAS 78, a guide to good practices in commissioning accessible Websites published by the British Standards Institution (BSI) and the Disability Rights Commission (DRC). Oracle encourages all organizations to build Websites that meet these same criteria—not only to increase their ROI but also because it's the right thing to do.

For a quick visual accessibility audit of your site, the nonprofit organization Web AIM provides a free tool that can be used through a Web browser at wave.webaim.org.

10. Cultivate Good Customer Behaviors

People naturally gravitate to the path of least resistance. If certain customers who require low-complexity, high-volume interactions use a channel such as the phone, which is relatively expensive for the organization, it is likely a result of their mental model. A mental model is how an individual internalizes the inner workings of a complex system. Sometimes these models are accurate, and sometimes they are not. For instance, if a customer's mental model says that making a phone call will be the path of least resistance, it may be because this customer has had a history of bad experiences with Web self-service.

Taking the time to “train” problem customers to utilize self-service by orienting them to the Web self-service experience enables you to restructure this mental model to more accurately reflect the true path of least resistance.

It has been shown, through interviews with users of Oracle products, that most users *do* have a tendency to avoid the phone if possible. They often fear being placed on hold for an extended period of time or being connected to a representative who has poor communication skills or lacks empathy.

Behavior modification techniques can also be used to remove the reward that may occur if a customer tends to overuse the phone channel. One way to do this is to erect a small barrier to phone usage (a short but reasonable wait time, regardless of agent availability). This implicitly establishes the phone

⁴ Erika Steinmetz, United States Census Bureau, “Household Economic Studies/Current Population Reports P70-107/Americans with Disabilities: 2002,” census.gov/hhes/www/disability/sipp/disab02/awd02.html

channel as a path that is not of least resistance. Customers will learn over time that they can use self-service instead and resolve their issues more quickly and with a greater feeling of empowerment. This desired behavior can be fostered with a recorded message that tells customers what they can accomplish via Web self-service during the imposed wait time.

Another example of behavior modification is the priority offering of an assisted channel such as phone support to customers who have already visited Web self-service. This may involve providing customers with a reference number to enter via an automated interactive voice response (IVR) system when they call the organization. These customers can then be taken to a special higher-priority queue instead of waiting in a general queue, and they won't need to explain to the agent who they are or what answers they have already looked at.

Conclusion

The Web self-service content and services of today's typical organization are in need of improvement. Areas for improvement range from content and contact information that is difficult to find, to cluttered and crowded content that doesn't address typical customer needs and the inability to collect customer feedback in a meaningful and productive way.

Depending on your circumstances, it may feel overwhelming to adopt 10 best practices at once. It often takes organizations years to increase their maturity from simply being aware of Web self-service concepts to practicing them and then eventually to growing into industry-leading providers of amazing customer experiences.

Oracle products and expertise can serve as your expert guides on your journey to achieve better customer experiences, and the clear benefits—brand loyalty leading to increased sales and revenues over the long term—make the investment well worth it.



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