



EBOOK

The All-in-One Guide to Customer Self-Service Portals



Fluid Topics

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INTRODUCTION

The popularity of self-service is nothing new. The advent of smart phones brought new do-it-yourself possibilities like sending a wire transfer or requesting a return slip with the touch of a button. Modern consumers and business professionals are tech savvy and more than capable of navigating digital devices on their own. And beyond being capable, users actually prefer to fix problems themselves rather than reach out for help.

Offering a digital self-service portal for customers is no longer a bonus or something “nice to have”. It’s a necessity, and one that businesses aren’t yet meeting because while [77% of companies](#) report having digital customer platforms, only 10% say those portals are fully scaled and adopted by their customers. It’s clear that organizations recognize the opportunity of customer portals, yet still need help choosing and implementing one that enhances self-service and boosts customer satisfaction.

Whether you still need convincing on the merits of a customer self-service portal, or you simply want to upgrade your offer to maximize its potential and returns, this eBook is for you. We will look at the benefits and must-have features of customer portals. Then, we’ll outline a solution that has it all and answer your most burning questions.



GLOSSARY

- **Chatbot:** A chatbot is a computer program made to simulate real human conversations with humans over digital devices. While not all chatbots use AI, modern ones use NLP to understand user queries and provide automatic, personalized, and contextualized responses.
- **Machine Learning (ML):** ML is a subtype of AI that consumes data and algorithms to build systems and enable AI to imitate how humans learn. By continuously learning, its goal is to improve the accuracy of its outputs.
- **Natural Language Processing (NLP):** NLP is a computer program's ability to understand spoken and written human language. NLP is used as opposed to programming languages (java, C++, Python, etc.). This allows humans to successfully interact with computers using natural sentences.
- **Responsive Design:** Responsive web design is about creating web pages that look good on all devices for a seamless user experience.
- **Retrieval Augmented Generation (RAG):** RAG is the process of enhancing a Large Language Model's (LLM's) output. This is done by allowing the LLM to retrieve data from a reliable source such as your product content.
- **Semantic Search:** Semantic search is a data searching technique that determines the intent and contextual meaning of the words a person is using to provide more accurate search results.
- **Search Engine Optimization (SEO):** SEO refers to the techniques used to help a website or web page rank higher in search engine results pages for specific keywords. A higher ranking means better visibility for that result.
- **WYSIWYG:** This acronym for What You See Is What You Get, is a software editing system that allows content to be edited in a form that resembles its appearance. This allows for easy-to-use, customizable portals.

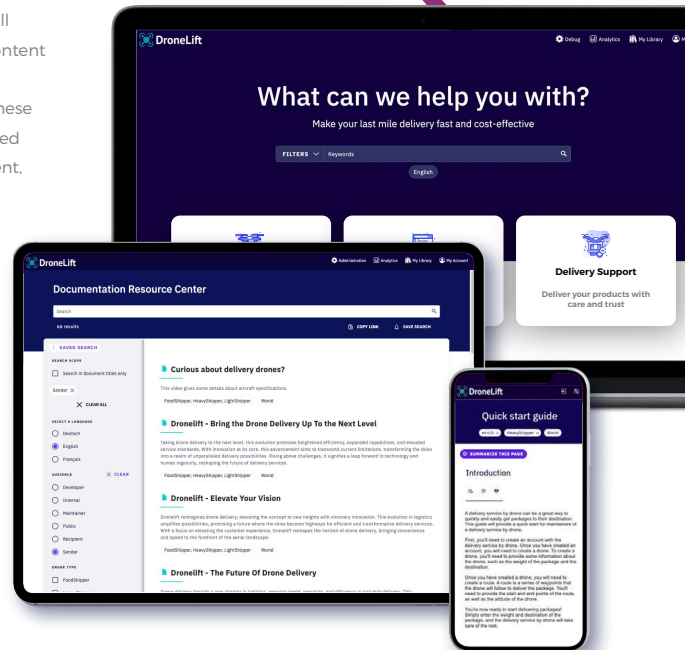
[See Full Glossary](#)

WHAT IS A CUSTOMER SELF-SERVICE PORTAL AND WHY DOES IT MATTER?

Customer self-service portals are digital hubs where users can access all relevant company content from a single source. Types of self-service content include technical documentation, [knowledge base](#) articles, FAQs, community forums, installation guides, product manuals, and more. These portals put the customers in control, allowing them to search for needed documentation, follow significant updates, interact with existing content, submit requests, and even contribute to community forum posts.

Customer portals often offer secure login methods. As a result, when users log in to portals, the system registers who they are: their profile, preferences, content accessibility level, etc. This allows the portal to provide personalized information tailored to their user profile.

[88% of today's customers](#) expect companies to offer a self-service portal, and it better be mobile responsive! At the same time, they expect easy access to information, consistency between channels and great customer experiences. The top portals provide customers with exactly that without having to engage with human customer service representatives.



BENEFITS OF A CUSTOMER PORTAL

1. ENHANCE SELF-SERVICE

Customers can and want to solve issues autonomously. Specifically, [67% of customers](#) prefer using self-service options over speaking with a company representative. However, they frequently open tickets for questions that could have been answered by referring to your documentation. Effective self-service options must provide a powerful search engine that will come up with personalized results that are related to the search terms.

Next generation [self-service portals](#) combine Natural Language Processing, Machine Learning, and semantic search capabilities to deliver even better search results.

Discover how **swissprint** launched a self-service portal available 24/7 for employees, partners and customers and see how they moved from a culture of "call for solution" to one of "information self-service"

Read the
case study



86%

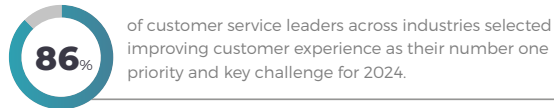
of B2B customers are more likely to integrate digital solutions that offer self-service capabilities.

(Source: [Forbes](#))

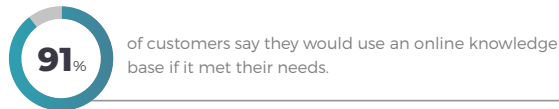
BENEFITS OF A CUSTOMER PORTAL

2. IMPROVE CUSTOMER ENGAGEMENT

Top-of-the-line customer portals present new opportunities for users to interact with content and receive personalized replies. FAQs, troubleshooting guides, and product suggestions can be tailored to individual user needs. As a result, users feel heard, understood, and supported leading to higher customer satisfaction or CSAT scores. With such a positive experience, it's no wonder user adoption for customer portals is so high.



(Source: [Gartner](#))



(Source: [Zendesk](#))



Improve CSAT with GenAI Self-Service

Fluid Topics' AI-powered Content Delivery Platform empowers customers to independently resolve issues anytime, anywhere.

[Learn how](#)



BENEFITS OF A CUSTOMER PORTAL

3. REDUCE SUPPORT COSTS

[37% of support leaders](#) report that costs remain a top priority in their decision making. All the more reason why customer portals are essential investments. With a customer portal, all product information is available in a single place. Therefore, users find information easily and open fewer level one help desk tickets. In fact, [65% of support teams](#) report decreased call volumes after investing in self-service options, freeing up agents to focus on more complex issues.

Furthermore, given the widespread applications of AI, customer portals are now great candidates for hosting AI chatbots to take self-service to the next level. A well-designed portal with an [AI-powered chatbot](#) supplements the work of human agents. Customers get 24/7 access to human-like, accurate, contextualized, and trusted responses to their questions without putting the additional burden on the support team. Instead of manually sifting through a list of links, they get immediate solutions right in front of them.

\$8.01

The average cost of each **live support** interaction

\$0.10

The average cost of each **self-service** interaction

(Source: [Gartner](#))

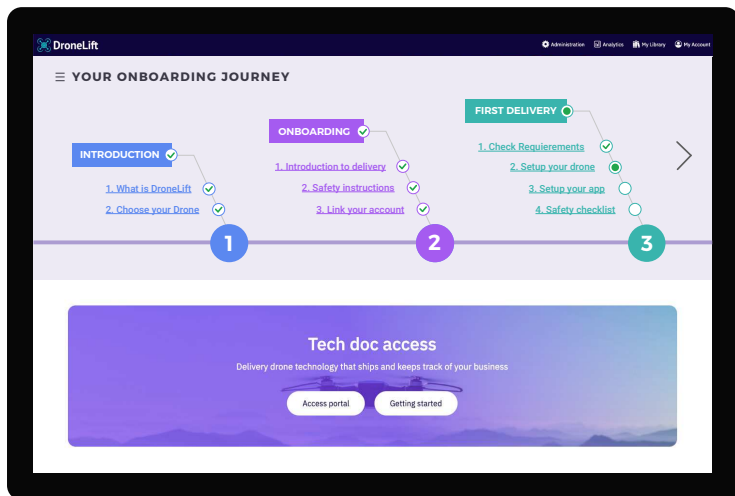
The AI Corner

Incorporating an AI-powered chatbot – which responds to natural language queries – is a must-have for companies these days. The Q&A nature of chat interactions makes bots an ideal use case for Generative AI (GenAI) because understanding the context of a question leads to a more accurate and relevant response and delights your customers.

BENEFITS OF A CUSTOMER PORTAL

4. STREAMLINE ONBOARDING PROCESSES

Offering an effective customer onboarding process is essential for product adoption. Depending on the product complexity, digital self-service onboarding can supplement the manual process. Customer portals provide all the relevant training materials, tools, services, and content users need for their profile. This personalized, flexible onboarding experience allows them to learn how to become experts in your product in their own time.



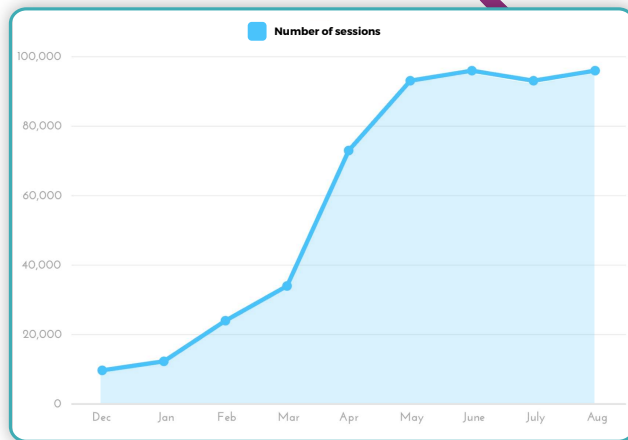
BENEFITS OF A CUSTOMER PORTAL

5. INCREASE PRODUCT VISIBILITY

Companies are great at improving their corporate website SEO yet miss out on opportunities to improve product awareness and brand visibility thanks to product documentation. With SEO capabilities, document metadata management, and site map generation, portals help search engines index your content.

Better indexing leads to heightened visibility of your documentation portal content in search results and, therefore, increased awareness around your product and brand on the web.

A key part of making this work is finding a portal solution that allows you to define which content is public – therefore indexable and available to be crawled – and which requires user authentication to access.



How Teradata Hit 5 Million Portal Visits in 1 Year

Discover how Fluid Topics helped [teradata](#). increase their product visibility by turning their technical docs into the company's most visited website.

[Learn more](#)

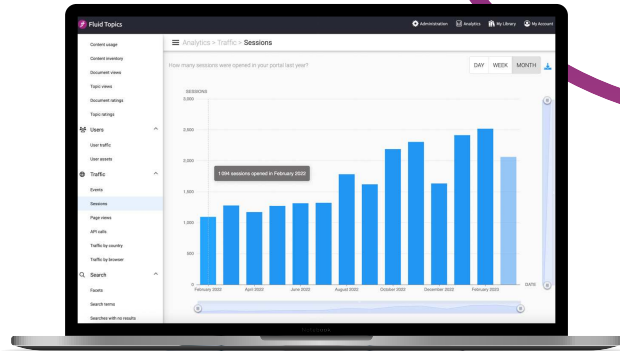
BENEFITS OF A CUSTOMER PORTAL

6. OPTIMIZE CUSTOMER JOURNEY INSIGHTS

Portals contain comprehensive insights into what users need, how they use your documentation, and whether your content is useful to them.

The most advanced form of portal insights is dedicated content analytics which include metrics like the most searched terms as well as those that yield no results. To improve the customer experience, you need to understand what the average journey looks like for your users and where they experience pain points.

Some portals also allow you to solicit documentation feedback via ratings and reviews directly from within the portal itself. From 5-star ratings for exceptional content to open-ended feedback on how to improve documentation, facilitate direct communication between users and content authors.

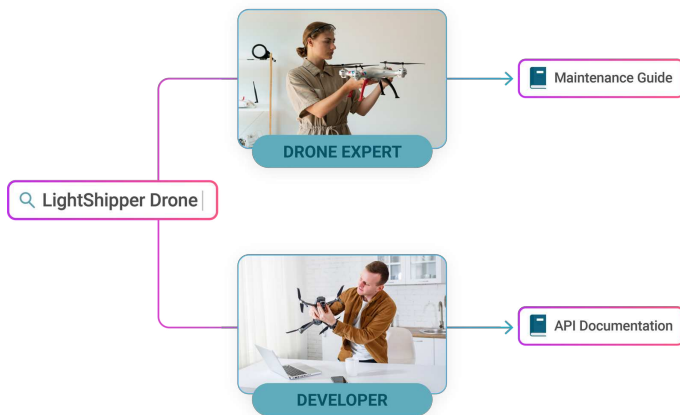


MUST-HAVE FEATURES FOR A FUTURE-PROOF CUSTOMER PORTAL

1. PERSONALIZED SEARCH

Each client is unique, so they should have the ability to receive a personalized experience to better meet their specific needs. Today, people expect a Google-like experience when searching your content portal. In fact, [71% of customers](#) expect a personalized experience when interacting with a brand and 76% express frustration when they don't get it. Customer portals should provide a smart search engine to give the level of personalization and relevance users want.

Your portal must personalize content and responses based on user preferences, past behavior, and their profile and rights. These search capabilities reduce customer frustration and improve case deflection by helping users find the information they need.

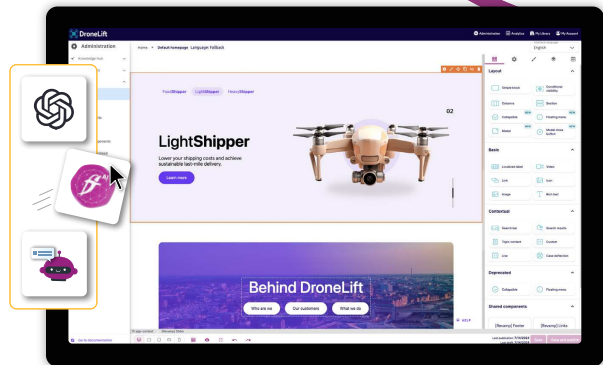


MUST-HAVE FEATURES FOR A FUTURE-PROOF CUSTOMER PORTAL

2. FULLY CONFIGURABLE PORTAL DESIGNER

To design the ideal content experience for your users, your portal needs to be a flexible, turnkey solution. Platforms like Fluid Topics offer a WYSIWYG editor that give companies the freedom to tailor their customer portal to their branding, saving them time and money while creating an intuitive user experience. Some design capabilities include:

- **Page Creation:** Design as many pages and home pages as you want.
- **Customization Options:** Configure the layout and add branding elements for a seamless user journey.
- **Intuitive Editor:** Drag and drop components to personalize the experience. You'll deploy your portal faster.
- **Local Adaptivity:** Customize differences in your portal display based on user locations.
- **Responsive Interfaces:** Adapt content to device type (laptop, tablet, smartphone, etc.) to optimize the user reading experience.
- **AI Applications:** The most advanced tools will let you add AI applications directly from your editor.



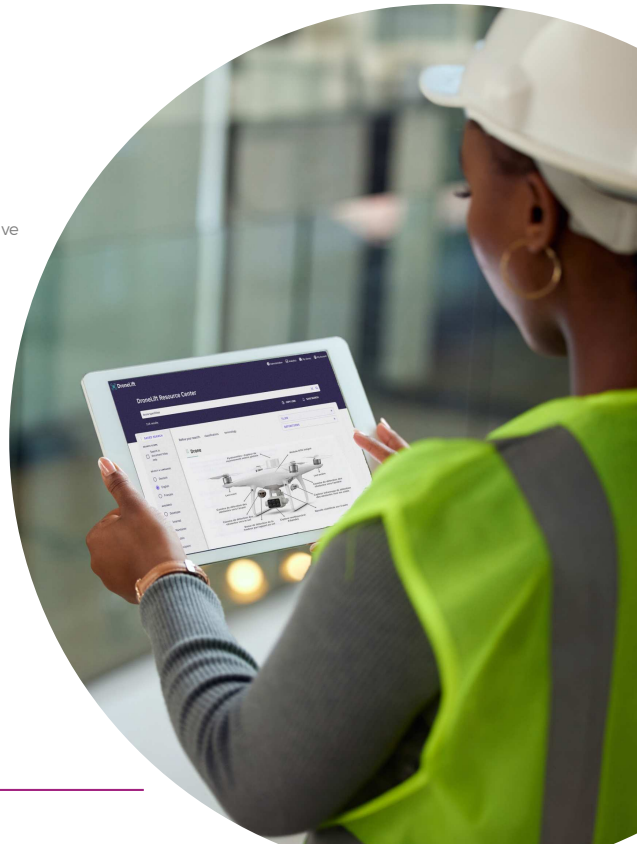
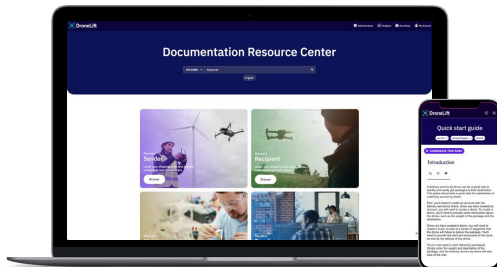
[Watch a demo of our Portal Designer](#)



MUST-HAVE FEATURES FOR A FUTURE-PROOF CUSTOMER PORTAL

3. NATIVE MOBILE EXPERIENCE

Many users prefer to use smart phones than computers, meaning a mobile-friendly portal is a necessity. This becomes even more critical for field service and maintenance procedures where quick access to mobile-responsive content is essential for limiting downtime and meeting SLAs. Regardless of the device or use case a customer needs your portal for, it should be an efficient, reliable, and intuitive experience. To meet all user requirements, you need a solution that takes every documentation format (text, 2D, 3D, multimedia, etc.) and device (laptop, tablet, smartphone, AR-VR goggles,) into account. This ensures a seamless and consistent portal experience for all users.

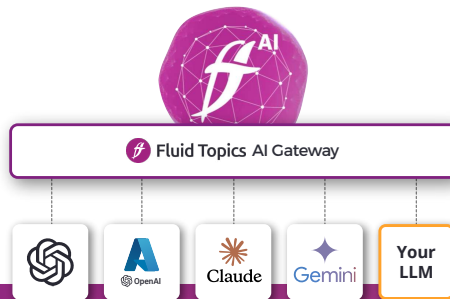


MUST-HAVE FEATURES FOR A FUTURE-PROOF CUSTOMER PORTAL

4. AI CAPABILITIES

This wouldn't be an up-to-date list of must-have features without talking about AI applications. Integrating the following AI-powered interactions will improve user engagement.

- **New Search Functionalities:** AI extends how users find information with voice and visual search processing. A customer can search with an image of a machine part to find product installation or repair manuals rather than explain what the part looks like.
- **Content Experience:** GenAI-enabled portals offer various types of experiences. From summarizing documents to designing product knowledge quizzes, translating code into other languages, or extracting maintenance tools needed for a procedure, users further engage with content.
- **RAG Chatbots:** AI-enabled chatbots respond to customer questions so naturally, users will feel as if they're speaking to a human support agent. Adding RAG capabilities, these chatbots provide specific, accurate, and up-to-date answers. As a result, your portal offers self-service which boosts case deflection.
- **Recommendation Systems:** Machine Learning algorithms study user behavior and search patterns to provide personalized content recommendations.



DELIVER YOUR AI PORTAL TODAY

Fluid Topics accelerates the deployment of AI applications in your user portal with out-of-the-box services for powering RAG scenarios.

[Learn how](#)

MUST-HAVE FEATURES FOR A FUTURE-PROOF CUSTOMER PORTAL

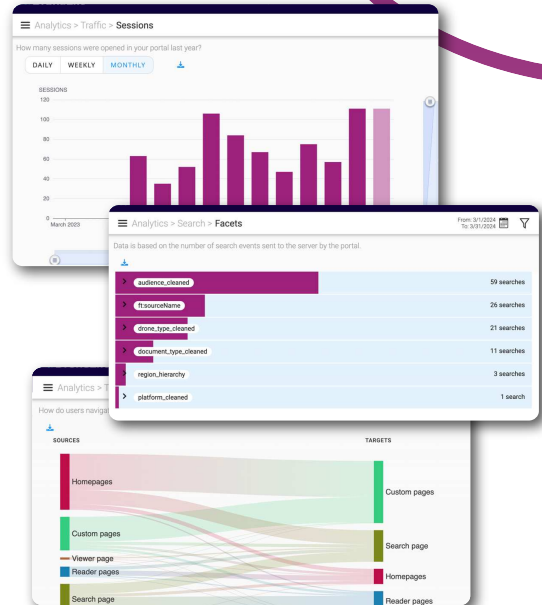
5. DEDICATED CONTENT ANALYTICS

When you hear “content analytics” your mind may go to marketing initiatives, but companies with customer portals need content-centric, user-focused analytics to optimize authoring and improve the user experience. Forget the Google-like metrics of page views and document downloads. These don’t provide concrete insights to analyze and improve your portal quality.

Remove the guess work of how effective your content is for users. Your portal should look at critical data:

- » **Searches with no results**
- » **Most and least read topics**
- » **User ratings per topic**
- » **Average time spent reading a section**

Analyzing these metrics allows your teams to identify content gaps and user patterns. Then, documentation teams can update, modify, and create new self-service content to ensure it is accurate and functional for customers to autonomously find answers and resolve problems. With better insights, unlock higher quality content.



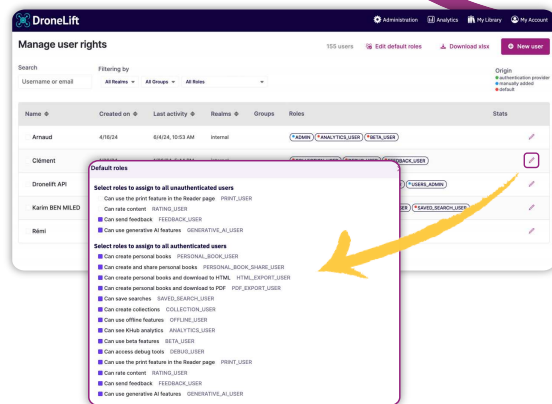
MUST-HAVE FEATURES FOR A FUTURE-PROOF CUSTOMER PORTAL

6. TOP-NOTCH SECURITY

Customer portals are a valuable tool to improve the user experience and help companies better understand their customers. Furthermore, the leading portals employ Generative AI to create a competitive search and answer experience. However, GenAI tools also bring new security challenges. To ensure your AI-enabled portal benefits from this next-gen technology without sharing confidential information with unauthorized users, you need two things.

- **Internal Embeddings Management:** Look for solutions that allow you to deploy a customer portal that incorporates embeddings computation and a vector database in its architecture. This ensures that the AI model solely processes content in the platform internally, never leaking it to external systems.
- **Content Access Management:** Choose solutions with the option to apply specific content access rights. Managing user identities, permissions, languages, and more, determines which information appears in search results and AI-generated responses. As a result, protect internal information by establishing user authorization procedures.

Prioritize your portal's safety and traceability throughout the content delivery process.

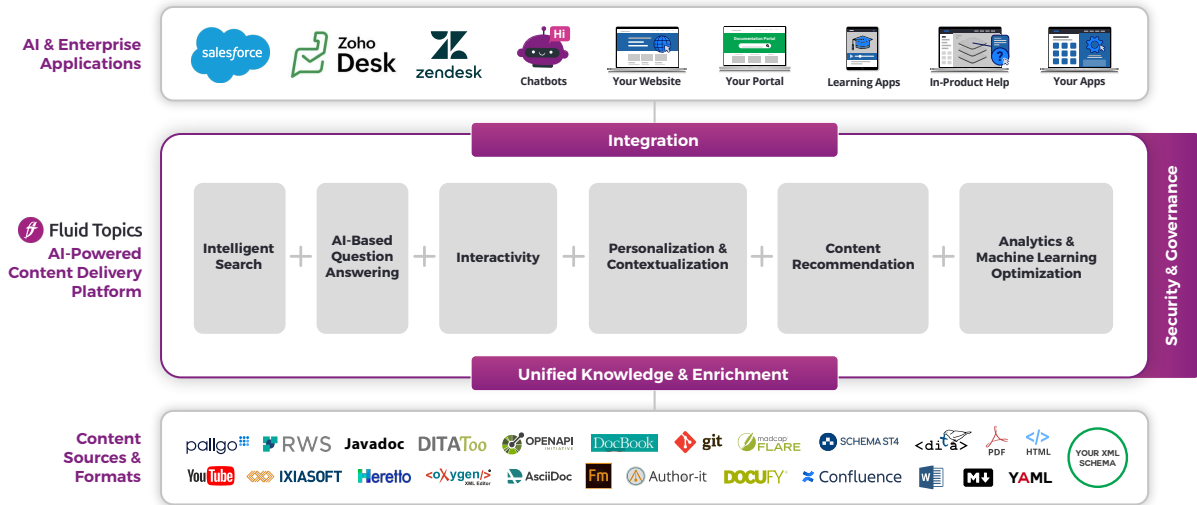


of privacy and security professionals report companies need new techniques to manage emerging risks from AI tools.

(Source: [Cisco](#))

HOW CAN FLUID TOPICS SUPPORT YOUR CUSTOMER SELF-SERVICE PORTAL?

Helping customers solve their own problems has never been easier with [self-service portals](#). Fluid Topics' AI-powered Content Delivery Platform (CDP) offers the foundation of a user portal plus the advanced features needed to maximize the benefits of your user portal. Our world-renowned CDP is the top choice for a portal across industries. It offers content freshness and findability, personalized self-service options, robust security, and consistent content experiences across devices and endpoints. Build your new customer portal with Fluid Topics to reduce support costs, improve customer engagement, and enhance agent productivity today.



FLUID TOPICS FAQ

1. What is Fluid Topics?

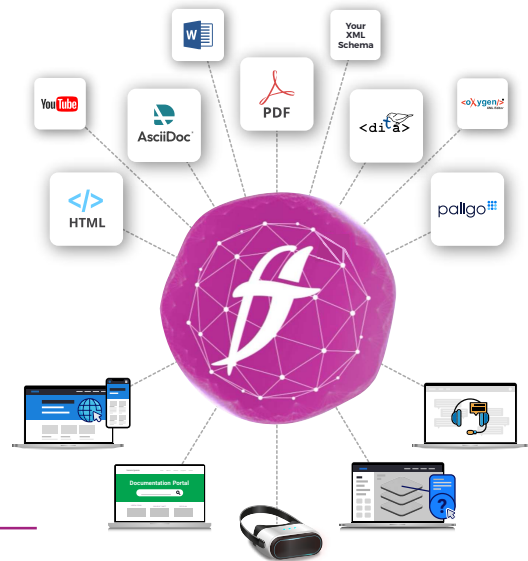
Fluid Topics is a full-fledged AI-powered Content Delivery Platform that ingests and unifies product information – from manuals to API docs to support articles – no matter the initial source and format. Our solution then delivers the most relevant and personalized content to any digital channel (like a customer portal), device, and application, in context with the users' needs and environment. As a SaaS solution, the Fluid Topics Platform is designed to integrate with your existing infrastructure and tools to enable dynamic publishing without disrupting your writing process.

2. What is the difference between a CDP and customer portal?

For many companies, organizational knowledge is fragmented - scattered across multiple systems and repositories. A CDP aggregates knowledge to deliver accurate, relevant content to your different channels - documentation portals, community channels, in-product help, chatbots, and more. CDPs like Fluid Topics give you the possibility to create [customer-facing](#) self-service portals. Specifically, Fluid Topics provides an out-of-the-box portal that is fully customizable and that natively integrates with the Fluid Topics Platform.

3. Can Fluid Topics integrate with our existing company systems, databases, and content channels?

Yes, Fluid Topics seamlessly integrates with any CMS, CCMS, and other enterprise applications, offering ready-to-use integrations for all your content sources and tools.



FLUID TOPICS FAQ

4. Does Fluid Topics' portal support content delivery in multiple languages?

Yes, portals like Fluid Topics ensure full support for your global operations. We apply advanced Natural Language Processing to **23 languages**, providing enhanced relevance through stemming, compounding, and more. The UI comes by default in 10 languages: **English, French, Spanish, German, Italian, Portuguese, Japanese, Korean, Chinese Simplified, and Chinese Traditional**. Clients can effortlessly add additional UI languages via the Admin UI.

5. How can users interact with a customer portal?

Users can interact with content inside customer portals in various ways, including the following options offered by Fluid Topics:

- » **Bookmarks:** Save shortcuts to key pieces of content.
- » **Personal Books:** Mix and save pieces of content to create bespoke manuals in a few clicks.
- » **Feedback:** Send feedback to the writing team with suggestions for improvements.
- » **Rating:** Allow users to rate documents, pages, and topics.

All are offered as standard with the power to deactivate those not relevant to your organization.

Want more information on how Content Delivery Platforms can benefit your self-service portals?

[Read the article](#)

GET TO KNOW US

Website:

www.fluidtopics.com

Blog:

www.fluidtopics.com/blog

Socials:



Learn more about Fluid Topics
for customer portal projects

Contact us

About Fluid Topics

Fluid Topics' AI-powered Content Delivery Platform is a software solution that collects and unifies all types of documentation, no matter the initial source and format. It then feeds the relevant content to any digital channel, device, and application, including Fluid Topics' native customizable customer portal, in context with the users' needs and environment.



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Trusted by
Industry
Leaders

