



# Web-Like, Advanced Search is Business Critical for Customer Portals

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## Stop the Frustration - Provide a Self-Service Experience Your Customers Will Love

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Organizations have made major strides taking advantage of customer portals and communities to provide self-service options. The core idea of self service is to deflect calls by making every customer interaction with your portal successful while maintaining a high level of customer satisfaction. However, customers often complain about the inability to find information on self-service portals. This forces them to call your contact center, leading to customer frustration and increased costs for the business. A key reason for this is that search within these portals is simply not good enough to help customers find what they need. This is a consistent challenge that negatively impacts the customer experience, causing unfavorable brand perceptions.

**73%** of customers want to solve product or service issues on their own.

*Aspect Software*

Modern consumer web experiences have set a high bar, creating expectations around search and capabilities for customer portals that many organizations simply cannot deliver. It is critical that organizations address the customer experience issue with their customer portals, making it just as easy for customers to find information on these portals as it is to find it on the web.

“Advanced Search” from BAI provides a single, web-like search box that makes every customer experience relevant, personalized and connected. It helps customers quickly find answers and insights regardless of where they are, which device they use, or which information silo the answer resides in – whether it be a document, video, community post, or your website.

Additionally, if customers speak to an agent, then that person would already know their full history with every interaction.

BAI “Advanced Search” can even recommend specific content based on how an issue was previously resolved, and our natural language interface detects customer intent, using previous interaction data to automatically provide the content most likely to satisfy your customers.

Increasing customer retention rates by just 5% can increase profits by between 25% and 95%.

*Bain and Company*

The following illustrates the types of issues that surround basic search and how BAI “Advanced Search” can deliver meaningful improvements.

## Common Issues Resulting in Frustrated Customers

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- Portals support only keyword search, which provides a low relevancy match with customers’ questions. The result is that customers abandon self-service and escalate to support/services representatives.

Advanced Search brings web-like natural language to the search box. Customers can easily ask questions just like they can when they search using the internet.

- Customers do not use customer portals and go directly to support and service representatives to get assistance.

A positive, helpful digital experience increases portal use and self-service, resulting in fewer escalations and decreased support costs.

- Information required for customer self-service resides in systems that are not connected to the customer portal, impacting both customers and the support/service representatives that need the information.

Connecting other systems to the portal provides curated information immediately, making it easily findable regardless of where it is stored.

- Search results do not get personalized to the products or services the customer uses, nor to the geographical location they are searching from.

Advanced search personalizes results based on a variety of attributes including location, products purchased, previous interactions, and even customer priority.

- Information is presented using an antiquated FAQ methodology.

Advanced search uses a modern, automated Q&A process to provide answers to questions independent of which document(s) and system(s) the answers reside in.

- Lack of analytics makes it difficult to make recommendations based on searches by similar customers.

Use actionable data from the solution to predict customer requirements and push timely information proactively to deflect incoming traffic and enhance customer satisfaction.

- Analytics similar to what you would report on for your website are not available to evaluate the customer experience.

Data and analytics provide insights into customer behavior, gaps in knowledge usage, and trends in customer queries.

- There is no way for customers to use ratings to impact relevancy of results for other customers.

Advanced search enables ratings and uses it for filtering and relevancy tuning.

## Content Sources

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You can connect your customer portal to other systems in which the information resides, providing answers to customer questions without the need to replicate the information in the portal. Some examples of systems that others have connected to their portals are Confluence, ServiceNow, SharePoint Online, and Jira. You can find a list of all our available connectors [here](#).

*Note: BAI has pre-built connectors for all the systems on the list. If you use a content source that is not listed, then chances are it is on our development roadmap. Please [contact us](#) to discuss.*

## Next Steps

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If you can relate to any of the referenced challenges, then we encourage you to do one or both of the following:

- Conduct a [customer survey](#) to better understand your customers' views of your self-service portal (BAI can help with this).
- Conduct a [pilot](#) with BAI "Advanced Search" to see how your customer portal can immediately benefit from our solution.

## Advanced Search Pilot

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Here are the steps you can take to get your organization on the path to delivering a much better customer support search experience to your valued customers:

- Ask a few team members, acting as your customer, to participate in a pilot of an Advanced Search solution in your portal. Use their feedback to extend the pilot to customers for a larger deployment.
- Allocate one or two technical resources with part-time availability to help set up and configure your Advanced Search solution. You could utilize BAI's Managed Services, in which case you would require even fewer resources.
- Obtain user feedback from the pilot, which we can assist with, and make improvements so that the solution meets organizational needs.

*Our Advanced Search solution can be fully functional in a matter of weeks!*

If you are interested in conducting a pilot to bring meaningful improvements to your customer satisfaction, please contact us at [pilot@BAinsight.com](mailto:pilot@BAinsight.com).