So leadership just learned about ‘Self-Serve Support’ - now what?

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IT’S A TALE AS OLD AS TIME...

...or at least as old as bad FAQs.

Key Takeaways

So long as you...

Advocate for your users

Be predictable

Do the thing

...you can probably create something pretty good!

Don’t overthink it! Don’t over-research!

Spend your time doing the work instead of questioning it.

WHAT IS SELF-SERVE SUPPORT?

a support approach that empowers users to find information and resolve issues on their own without assistance from a company employee

WHAT DOES ‘GOOD SELF-SERVE’ MEAN TO LEADERSHIP?

You should ask about their goals, but there’s a very solid chance that:

- May want updates throughout the process
- May want regular metrics once the project is complete
- They mostly want to know the company ‘has it’

Based on our definition, good self-serve is going to meet users where they are:

Literally

Placing support content where users will most likely find and need it

Mentally/ Emotionally

Accounting for the user’s state of mind - looking for help!

Moving past the challenges

In an ideal world, you can control both the literal and mental/emotional needs of self-service with in-product context and links, support context in marketing communications, optimize for SEO, and more - work with those teams if you can!

More likely, this is where you'll face some silos

What's worth fighting for?

- General home for support content
- General control over publishing and maintenance
- Ability to get content to users

Focus on what you CAN control:

- Support communications
- **Support users once they find you**

SO NOW WHAT?

From here on out, I'm focusing on ways that we can take care of the user once they're on a support site: Remember, **they're looking for help!**

And you're constantly proving that they can **trust** you to help.

Content that works toward trust will:

- Priotize user needs
- Be predictable
- Exist
  (Because someone did the thing!)

DO SOME PLANNING!

How many bad FAQs have you seen? With the long scrolling list? Where you may not even find your question?

Think about a physical foundation and what can happen when it’s not great.

Take a deeper dive into the foundation metaphor!
Support Driven hosted an amazing talk led by Marybeth from Knowledge Owl

Intention can:

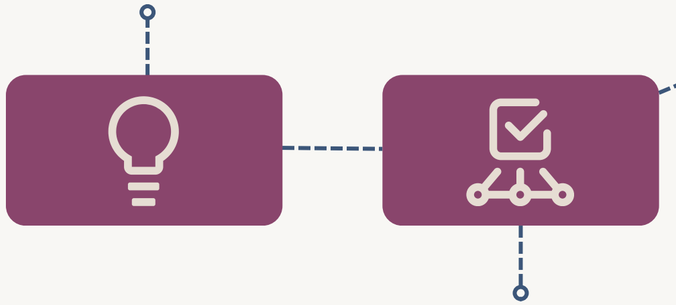
- Avoid unnecessary things to manage or work around
- Result in a site that’s ready for changes and growth over time
- Help us to stay predictable and advocate for our users

So plan ahead! (And document that planning!)

Answer some questions about your project

What are your goals?

Reduce tickets? Offer self-serve? Consolidate existing documentation? Create single source of truth?



Where will content be published or linked?

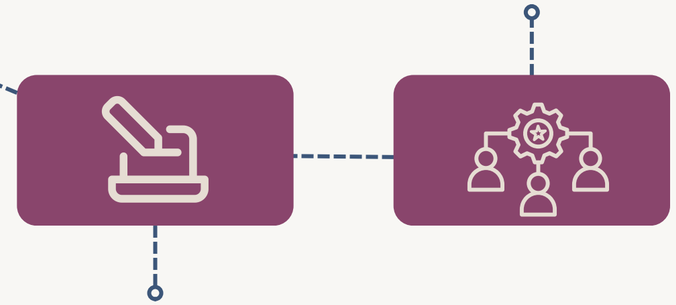
Bot, app API, product integration (help text, etc), marketing site, etc

Are there organizational guidelines you should follow?

Does your organization already have style guidelines? Anything else you need to know? Do you need to create or start documenting your own?

What resources do you have?

Tools?
People?
Budget? (to apply to above that you don't have)



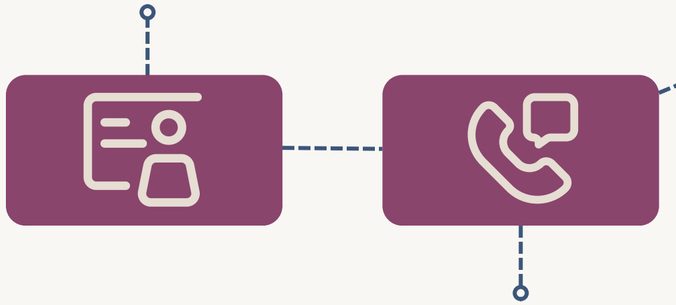
Are there any limitations that will impact the project?

Technically, like text limits or search rules? Topically due to your industry or organizational limits? Access to information?

Answer some research and user-based questions

What are your user needs?

Who are your users and what does that customer journey look like? What do they ask most frequently? Most urgently?



How and why do customers currently contact support?

Most common questions, especially in one-touch ticket? Main topic areas? Are there topics that more information could help? Or make worse?

What products does your organization offer?

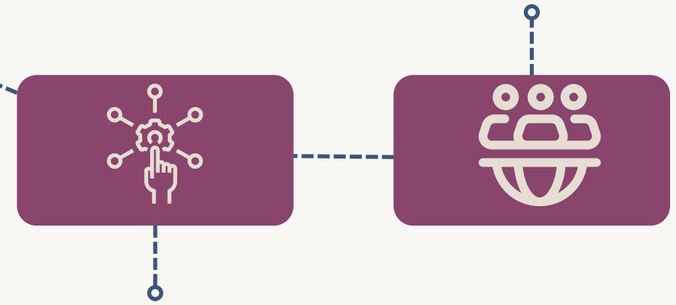
Technology app (browser, mobile, or both)

Tangible tech

Hard goods (like retail or grocery)

What are your agent needs?

What are some resources you wish you had? What repetitive tickets could benefit from ready-made content?



How do customers currently find your support site?

Why do they go there? Are there integrations? Do they get links there or search it?

General Research Suggestions

Existing resources

Check if product has any personas or journeys you can access

Support ticket data

If tickets effectively categorize tickets reasons and you have good reporting, use it!

Product reviews

In app stores, even Reddit - see what customers are saying, even the complaints. They may have suggestions or things they wish were easier!

Google Trends + Answer the Public

Look up your organization, industry, maybe compare competitors - whatever keywords make sense

You know your users!

Support teams are talking to real users every day - you and your agents are a great source too! And think about anything your team references or often sends in tickets too.

List out some articles you know you want to include

All of those planning questions should have started generating some ideas for articles that you want to include.
Don’t resist the urge to list them out!

80% of user issues are usually concerning about 20% of the product

Be aware of the 80/20 concept

SaaS article examples

- About us
- Contact us
- Get started guide
- How to login
- Change password
- Update contact information
- Add credit card
- Edit/update payment methods
- Cancel account (yes, this one!)

E-commerce examples

- About us
- Contact us
- Product guide
- How to place an order
- Track shipping
- Change delivery address
- Returns
- Broken goods

Don’t forget any key topics specific to your product!

Usually around product use, but don’t shy away from industry-specific topics if your team sees a lot of these questions.

STRUCTURE STILL MATTERS

Search and bots and AI are certainly the way of the future, however...

- Structure often informs the AI
- Prioritizing structure forces intention with your content
- Appearances still matter!

OPTIMIZE SEARCH FOR EXPERIENCED USERS

Keep articles focused on specific topics, and ensure titles and headers align with the terms your customers actually use.

STRUCTURE FOR NEW USERS

New users are going to click around in effort to get acclimated - and they're looking for guidance on how to think about your product, what's most important, and how to get started.

Importance of specific articles

Plan to keep articles directed to specific topics or tasks, and interlink articles if something else is related. This is crucial for search, but the benefits of doing this will extend to your entire support site.

1

OPTIMIZE SEARCH

2

SIMPLIFY STRUCTURE

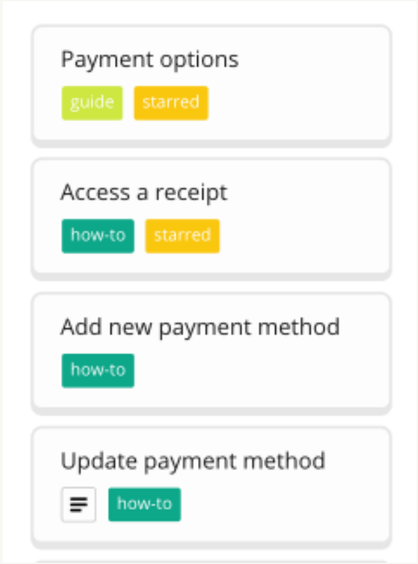
3

EASE MAINTENANCE

4

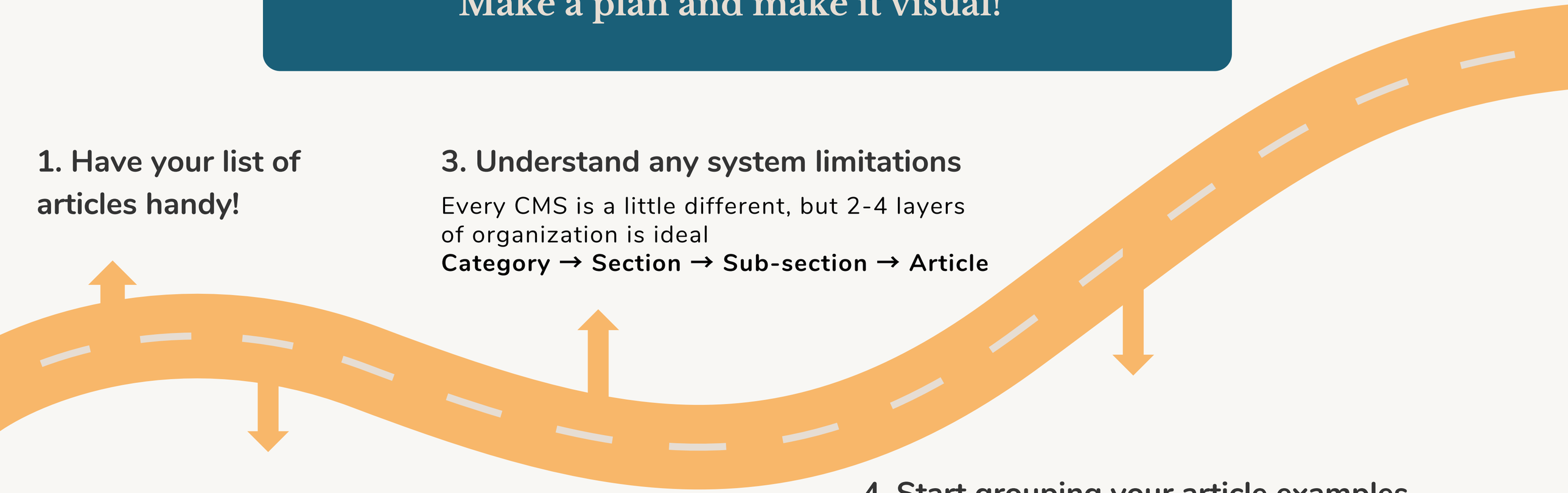
MOBILE FRIENDLY

Payment method example



Instead of one article that details payment options and then requires scrolling for how-tos on adding/updating them, a ‘guide’ article can link out to separate how-to articles that meet the exact user need.

Structure mapping:
Make a plan and make it visual!



1. Have your list of articles handy!

3. Understand any system limitations

Every CMS is a little different, but 2-4 layers of organization is ideal
Category → Section → Sub-section → Article

2. Find a shareable, editable method to plan

Miro is free, or a whiteboard in person never fails!

4. Start grouping your article examples

DO NOT OVERTHINK THIS. Often, your first instinct is the most logical. ***Overthinking Overcomplicates.***

GROUPING ARTICLES

Start with small groups, then find ways to place them within broader ones

THINK VERTICAL STRUCTURE

Ultimately, you are working in a hierarchical map. Articles should stay specific, but broad categories up top leave more flexibility for growth!

Biggest note: Structure should mirror customer needs, not an org chart!

^ This is a general structure in Miro, and I've shared how you can access it on the last slide!

GOOD NEWS!

It’s finally time to start writing. Well, a little.

To be clear, you still want to plan for how the articles will look and feel.

You may not figure this out until you draft the first few, and that is 100% ok.

Work from the general article titles we’ve already ID’ed, and **START SIMPLE**!

I like to start with how-to articles, namely:

- Login
- Password reset

PREDICTABLE ARTICLES

Predictable = Consistent

Style guidelines

You'll want to standardize certain choices across the board.

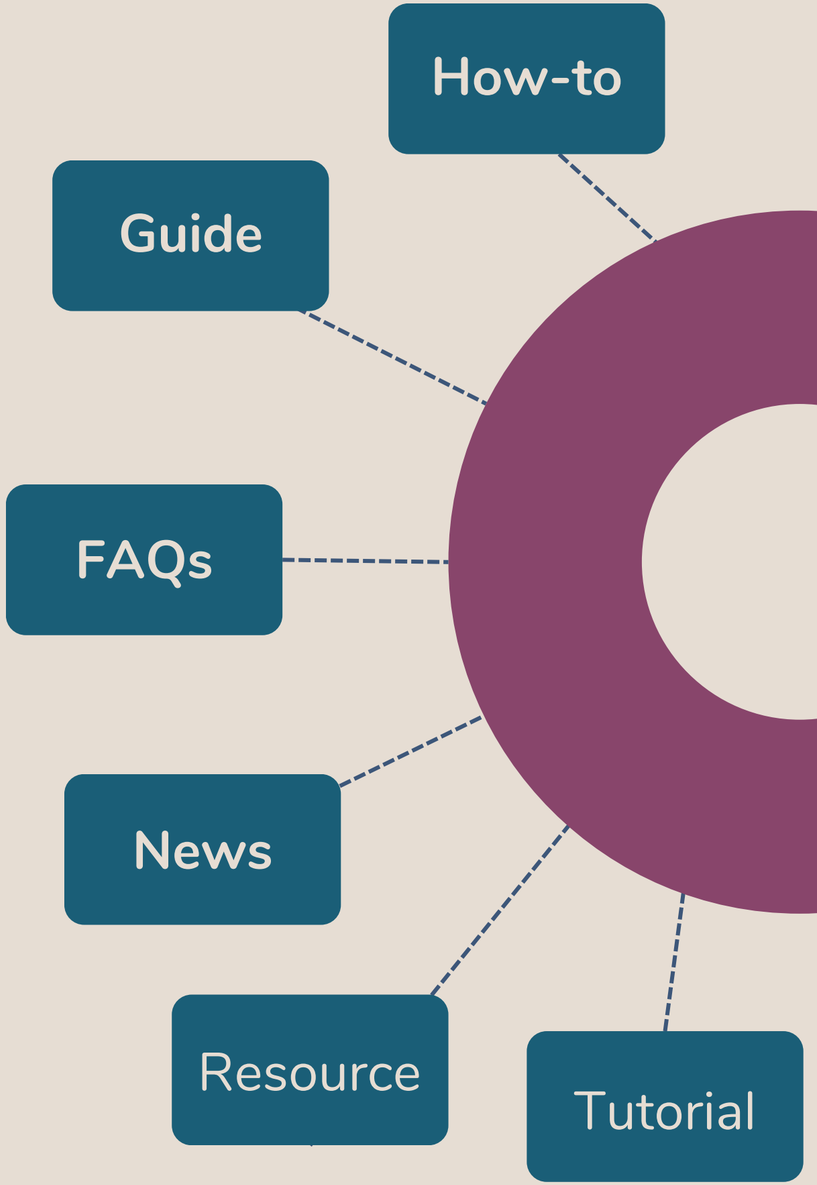
Work with, create, or simply track style guide choices, thinking about:

- Voice and tone
- Title patterns
- Grammar
- Component formatting
  - (links, phone numbers, callout tips or warnings)
- Image sizing
- WORD CHOICE

Article types and templates

Support teams should prioritize the first four types:

1. **How-to:** direct user action to complete a task
2. **Guide/Reference:** inform user on actions around broader task completion
3. **FAQs:** supplement for how-to/reference articles, often dynamic information
4. **News**: inform on time-based updates
5. Resource (explanation): inform user's knowledge/learning around broader task completion
6. Tutorials: direct user's knowledge/learning on completing a task



HOW-TO ARTICLES

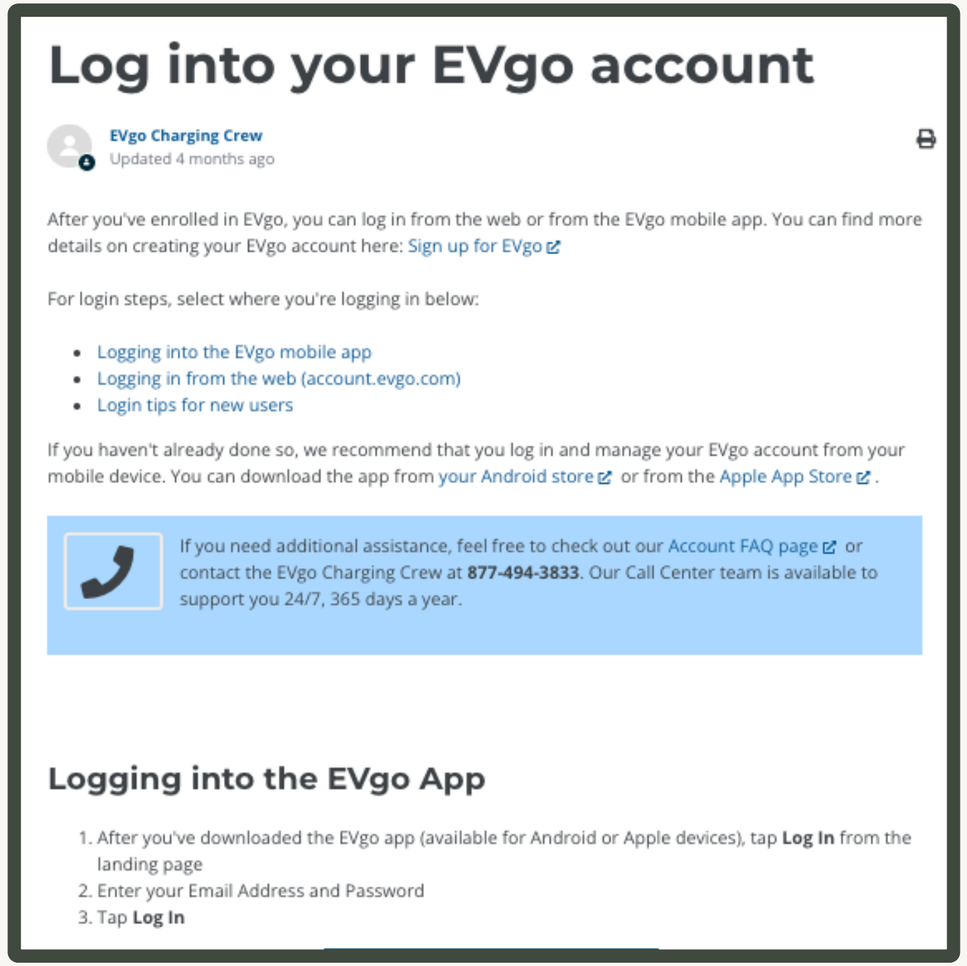
Purpose:
Direct user action to complete a task

Structure:

- Step-by-step guidance on using features in any relevant platform
- Includes a 1-3 sentence intro, may include the 'why' behind a feature or flow

Tips: Most common type!

- Keep it directed to just one task
- Use a template for these, which could include repetitive instructions
- Front-load your steps, meaning put the action/most important things first



Log into your EVgo account

EVgo Charging Crew
Updated 4 months ago

After you've enrolled in EVgo, you can log in from the web or from the EVgo mobile app. You can find more details on creating your EVgo account here: Sign up for EVgo

For login steps, select where you're logging in below:

- Logging into the EVgo mobile app
- Logging in from the web (account.evgo.com)
- Login tips for new users

If you haven't already done so, we recommend that you log in and manage your EVgo account from your mobile device. You can download the app from your Android store or from the Apple App Store.

If you need additional assistance, feel free to check out our Account FAQ page or contact the EVgo Charging Crew at **877-494-3833**. Our Call Center team is available to support you 24/7, 365 days a year.

Logging into the EVgo App

1. After you've downloaded the EVgo app (available for Android or Apple devices), tap **Log In** from the landing page
2. Enter your Email Address and Password
3. Tap **Log In**

GUIDE (REFERENCE) ARTICLES

Purpose:
Inform user on actions around broader task completion

Structure:

- Similar to landing pages or a home base for a larger topic - ‘Get started’ is great example
- Can catalog feature configuration options if not a guide

Tips:

- Always link to more information on specific concepts; guide articles serve as a basic knowledge point with summaries at most, never diving deep into a certain topic
- Think of them as a home-base for the savvy users who can figure out the specifics, but link out to more details for the users who need more support.

Start a charging session with EVgo

EVgo Charging Crew
Updated 3 months ago

After you have found an available charger that meets your needs, you can start charging right away!

You have a few options to start a charge. The below methods are listed in order of what usually gets our drivers charging the most quickly. You can select any method below to jump to a section with basic steps to get started!

1. **Autocharge+**
   - *Open the full guide to EVgo Autocharge+ here*
2. **Start a charge from the EVgo app** - *#1 recommended!*
   - *Open the full guide to **Start a charge: EVgo app** here*
3. **Tap your EVgo RFID program card on the charging station**
   - *Open the full guide to **Start a charge: RFID program card** here*
4. **Use the credit card reader on the station***
   - *Open the full guide to **Start a charge: Credit card at the station** here*
5. **Call the EVgo Charging Crew for support**
   - If you decide to call for support, expect to verify your account information, such as your name, email and last 4 digits of your credit card. Please also let the team know about any payment methods you've attempted before you called.

▶ **Jump to some general troubleshooting tips from the EVgo Charging Crew**

Learn more about what happens when you plug your EV into a DC fast charger from our CTO!

**If you are enrolled in a paid EVgo subscription plan and pay using your credit card at the station, you will not be able to apply your plan benefits to your charging session and the session information (and receipt) will not be available. If you are having trouble starting a charge from the EVgo app or with your RFID program card, we recommend calling the EVgo Charging Crew for support so that your session can be linked to your account.*

If you have any other questions or need additional support, please contact us! The EVgo Charging Crew is available for urgent issues

FAQ ARTICLES

Purpose:
Dynamic complement to supplement core how-to/guide content

Structure:

- Difficult to apply a template as it depends on the issue, but generally keep them short!
- Should usually point users to full articles with more context

Tips: Generally nice to avoid!

- Great space for short-term issues, topical questions, etc
- Most common questions should be answered with how-to articles that capture key words of a question someone might ask; don't duplicate content just to have the question available!
- Many sites will place at end of how-to articles; for bots/search, might be best to create unique articles in subcategories if your CMS allows.

Why does the EVgo app show that I'm still charging after my session has ended?

EVgo Charging Crew
Updated 2 months ago

During an active charging session, you will see the **Charge in Progress**, or charge monitoring screen, in the EVgo app. The screen typically disappears after the charging session ends, and you can find the details in your transactions.

While the EVgo app is usually able to receive updates in real time from the charging stations, the EVgo app may lag behind in some instances.

If the charge monitoring screen is still visible after the charging session ends at the station, please know that the session itself has in fact ended. Your transaction history will reflect the length of time and amount paid based on your time physically charging at the station.

If you continue to see the **Charge in Progress** tab after a few minutes, then you should treat the issue as an error with the EVgo app. Please review our article for further steps on resolving the issue:

General EVgo app troubleshooting steps

NEWS ARTICLES

Purpose:

Inform on timely updates

- Used for release notes, might detail new feature + the why
- Can also include promos, partnerships, or anything where support + marketing need to coordinate

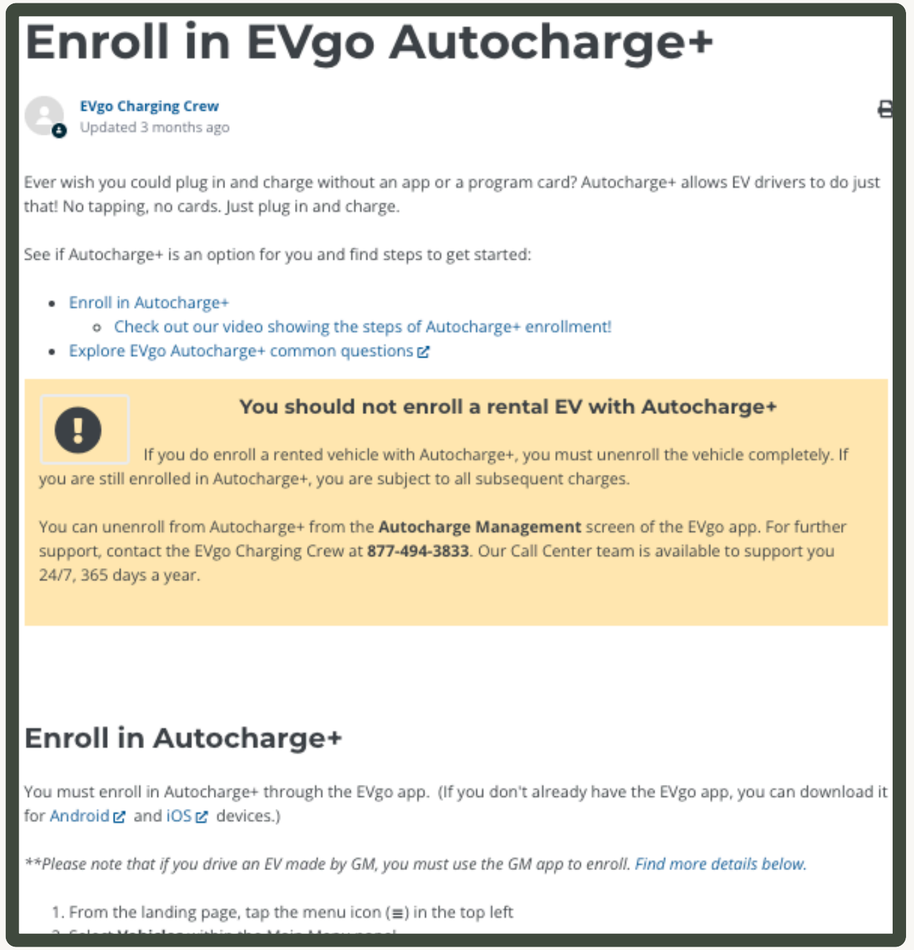
Structure:

- Often a combination of any article type based on needs

Tips: Generally nice to avoid!

- New features: Treat as any other product feature in general how-to or guide structure; have a plan to integrate into regular content if it will live in a specific ‘News’ space of the help center
- Have a process with related teams (usually marketing and/or product) to ensure News content is published in a timely manner (or even sent out with larger campaigns to notify users)

EVgo Autocharge+ Has Arrived!



Enroll in EVgo Autocharge+

EVgo Charging Crew
Updated 3 months ago

Ever wish you could plug in and charge without an app or a program card? Autocharge+ allows EV drivers to do just that! No tapping, no cards. Just plug in and charge.

See if Autocharge+ is an option for you and find steps to get started:

- Enroll in Autocharge+
  - Check out our video showing the steps of Autocharge+ enrollment!
- Explore EVgo Autocharge+ common questions

You should not enroll a rental EV with Autocharge+

If you do enroll a rented vehicle with Autocharge+, you must unenroll the vehicle completely. If you are still enrolled in Autocharge+, you are subject to all subsequent charges.

You can unenroll from Autocharge+ from the **Autocharge Management** screen of the EVgo app. For further support, contact the EVgo Charging Crew at **877-494-3833**. Our Call Center team is available to support you 24/7, 365 days a year.

Enroll in Autocharge+

You must enroll in Autocharge+ through the EVgo app. (If you don't already have the EVgo app, you can download it for Android and iOS devices.)

***Please note that if you drive an EV made by GM, you must use the GM app to enroll. Find more details below.*

1. From the landing page, tap the menu icon (≡) in the top left

TL;DR

So long as you...

- Do some planning and research
- Create an intentional structure
- Work toward an intentional process
- Get to writing!

Advocate for your users	Be predictable	Do the thing

...you can probably create something pretty great!

THANK YOU

To access my style guide or support site structure templates:
contentbymfe.com

And stay tuned for my course coming to the UX Content Collective later this year!

SD Handle: Maring Eberlein
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