



Enhance Employee Experience with Freshservice

Build an intuitive touchpoint for your end-users and debut your service desk with our ready-to-use launch kit



www.freshservice.com

Self Service Implementation Checklist

Design

- ☒ Simplify your Home Screen
- ☒ Setup Crisp Forms
- ☒ The ReDeLI Philosophy
- ☒ Learn from Real Examples

Enable

- ☒ Shopify using Service Catalog
- ☒ Setup a Knowledge Base
- ☒ Make it Conversational
- ☒ Onboard Employees with Ease

Launch

- ☒ Promote your Portal
- ☒ Inform your Employees
- ☒ Curate a Glossary
- ☒ Educate your Workforce

Improve

- ☒ Stay on Top of Your Service Desk Metrics
- ☒ Garner Feedback from End-Users
- ☒ Gain insights about your Knowledge Base

DESIGN





Simplify your Home Screen

You can customize the Freshservice Portal to suit every need of your users, taking you a step closer to providing a user-friendly touchpoint. For frequently asked requests like password reset, you may add extra icons on the end-user portal to enable users to resolve their issues.

[Learn more→](#)



The ReDeLI Philosophy

The secret to an efficient self-service portal is understanding the phases involved:

Research, Design, Launch and Improve.

Here's a blog that talks in detail about how you can break down your implementation by sailing through the four magic steps of

ReDeLI.

[Learn more→](#)



Setup Crisp Forms

Lengthy forms with irrelevant fields result in bad user experience. Use dynamic forms to fetch contextual information from the user without bombarding them with too many fields. If field names don't convey the complete context to the users, use help texts and placeholder texts to let users navigate through the forms seamlessly.

[Learn more→](#)



Learn from real examples

From good examples, you can learn the level of customization that can be delivered to your users. Here are a few service catalog examples from our customers to give you an idea of how you can tailor the portal to suit your needs.

[Learn more→](#)

ENABLE





Shopify using Service Catalog

Often employees are unaware of services available in an organisation due to the disparate means available to access them. With the service catalog, provide a shopping experience to your end-users with a unified catalog for service items published on the end-user portal.

[Learn more→](#)



Make it Conversational

What if you could report an issue or request an item in your service catalog by merely conversing with a Bot? With Conversational Portal, users can interact with and raise tickets from the self-service portal in the most candid way possible.

[Learn more→](#)



Setup a Knowledge Base

Empower end-users to solve their own issues by facilitating them with right and adequate knowledge artefacts. Document tried and tested solutions to enable end-users to solve their own issues without awaiting an agent's help.

[Learn more→](#)



Onboard Employees with Ease

Setting up an onboarding process is critical to avoiding a chaotic and bitter experience for your new hires. With the employee onboarding module, enable your HR team to onboard employees in batches, right from the self-service portal.

[Learn more→](#)

LAUNCH





Promote your Portal

Ensure all your employees are aware of the self-service portal. Stick posters around the office with the portal's address to make it accessible for your employees. Here are a bunch of posters for you to get started with.

[Download here→](#)



Curate a Glossary

A controlled vocabulary helps your users get quickly acquainted with the terms in your portal. Use our glossary to get started with documenting your portal's vocabulary.

[Download here→](#)



Inform your Employees

Sometimes, shooting off an email in the traditional way helps inform your employees across the board about the launch of your portal. Here's an email template, along with resources to help your employees kick-start their self-service experience

[Download here→](#)



Educate your Workforce

A well-organized documentation is all your employees need to understand that there is an easy process in place to report issues, request assistance, or new services online. Use our comprehensive guide on accessing the IT Helpdesk Portal to educate and empower your end-users.

[Download here→](#)

IMPROVE





Stay on Top of Your Service Desk Metrics

A self-service portal should constantly evolve to cater to your users' needs continually.

Track the effectiveness of your self-service portal by understanding and analyzing your service desk metrics.

[Learn more→](#)



Garner Feedback from End-Users

A feedback loop is necessary to reflect and enhance the self-service experience.

Send out CSATs periodically to users to understand their pain points and constantly update your portal according to their needs.

[Learn more→](#)



Gain insights about your Knowledge Base

With employees using your articles to solve their issues, it's important to understand how impactful they are to provide a great experience. Get a clean, bird's eye view of all metrics associated with the articles in your knowledge base module to understand their usage. Use the insights tab to view articles ranked based on their usefulness score.

[Learn more→](#)

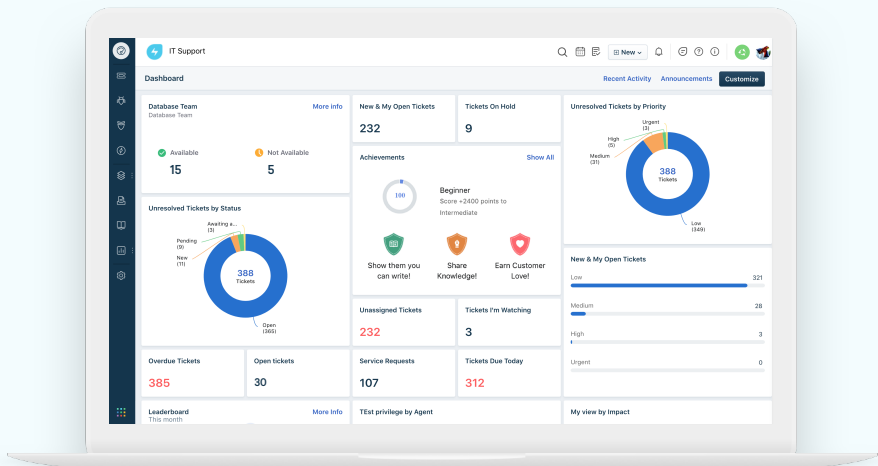
About Freshservice

Freshservice is a right-sized, intelligent, service management solution that extends digital capabilities and delivers exceptional employee productivity for modern enterprises that are looking to digitally transform their businesses.

Leveraging Freshworks' experience to build world-class products, Freshservice offers a cutting edge yet user-friendly solution with multichannel support.

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