

## **Self-Service Readiness Checklist**

**Evaluate your organization's preparedness for effective, customer-centric self-service.**

### **Foundational Readiness**

- ✓ Do you have clear data on your top 5–10 most common customer support queries?
- ✓ Have you mapped key friction points across your customer journey?
- ✓ Is there leadership buy-in for self-service initiatives?
- ✓ Have frontline teams been consulted during tool selection or process design?

### **Self-Service Tools Assessment**

- ✓ Do you currently offer any of the following? (Tick all that apply)
  - ☐ FAQ Page — Updated and searchable
  - ☐ Knowledge Base with guides/tutorials
  - ☐ Chatbot or Interactive Troubleshooter
  - ☐ Self-Service Account Portal
  - ☐ In-Store Kiosks or Self-Checkout
  - ☐ Self-Service Return/Exchange Process

✓ Are your self-service tools:

- ☐ Easy to discover (clear website links, mobile visibility)
- ☐ Simple to use with clean, intuitive interfaces
- ☐ Mobile-friendly and responsive
- ☐ Accurate, regularly updated, and reliable
- ☐ Accessible to users with disabilities (WCAG compliant)
- ☐ Designed with clear escalation to human support

## **Team & Organizational Readiness**

- ✓ Have staff received comprehensive training on existing self-service tools?
- ✓ Are there continuous upskilling or knowledge-sharing initiatives?
- ✓ Is there a system for employees to provide feedback on tool performance?
- ✓ Are support teams empowered to guide customers to self-service when appropriate?

## **Data, Feedback & Improvement**

- ✓ Do you actively monitor:
  - ☐ Usage analytics for self-service tools
  - ☐ Search terms and failed search queries

- ☐ Chatbot performance and escalation rates
- ☐ Customer feedback (e.g., "Was this helpful?" ratings)

✓ Is there a regular process to:

- ☐ Analyze self-service performance
- ☐ Update knowledge base content
- ☐ Iterate chatbot scripts or tool functionality
- ☐ Incorporate user feedback into improvements

### **Advanced Readiness (Optional)**

- ✓ Are you exploring AI-driven personalization in self-service?
- ✓ Is there proactive communication to pre-empt customer issues (e.g., automated alerts)?
- ✓ Do your tools support multiple languages or cater to diverse user groups?

### **Final Tally**

0–10: Just Starting – Begin with FAQs or knowledge base improvements

11–20: Emerging – Time to optimize UX and expand tool offerings

21+: Mature – Focus on AI, personalization, and proactive support

Remember: Self-service is a journey, not a one-time project. Revisit this checklist regularly as your business evolves.

This checklist has been put together with inputs from the Palas self-service team. Palas is a leading Indian manufacturer specializing in AI-based POS systems, frugal technology, predictive self-service and self-checkout systems. For more information, contact Ritin Srivastava at 9811001546 or [sales@palasretail.com](mailto:sales@palasretail.com).