

Digital Customer Service Portal Retirement

January 2020 Shutdown and Decommission

DCS Business and Product teams

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Introduction

The Digital Customer Service (DCS) Portal was launched in March of 2018 as a test-and-learn initiative to assess the merits of a personalized customer gateway that provides access to Fannie Mae tools, insights, and content while offering simplified access to human support. DCS sought to achieve these goals by:

- Simplifying the process and resolution time of responding to customer inquiries regarding Fannie Mae’s policies and products;
- Developing digital capabilities that enable customers to self-serve;
- Tailoring an authenticated user experience towards each individual user and role; and
- Providing a digital customer service experience that helps navigate Fannie Mae support and services.

Methodology

Fannie Mae tested the initial concept of DCS with a small number of customers and then expanded the population to gather further insights from additional customers. Customers who used the portal agreed to participate in monthly interviews and provide additional feedback during quarterly surveys.

Profile of Research Participants

A mix of Fannie Mae seller and servicer customers from various regions across the country.

Key Findings/Observations

Customers would like support options other than phone and email

- The ability to submit and reference customer support records in writing, as well as share them, is essential.
- Chat allows for multi-tasking and the ability to receive answers in real time.
- The ability to submit a ticket after hours allows customers to continue with their job (“meeting our customer where they are”).
- By choice, customers would only use the phone conversations in extremely rare scenarios.



Customers want us to aggregate/integrate information for them

- Aggregating Fannie Mae tools in one place provides customers easy access and the insight they need to understand all the tools that are available to them.
- Integrating different content sources, e.g. Selling and Servicing Guides, into a global search tool provides a holistic view of Fannie Mae content in one location.
- Tool-specific trainings that are informed by customer feedback are ideal.

Customers want transparency and attention

- Reinforcing “certainty” and instilling “confidence” throughout the digital experience is a priority.
- Customers are looking for transparency on the status of their submitted requests.
- Customers do not want to lose their personal relationships, so providing the same / higher level of quality (responsiveness, attention, etc.) that’s available via current communication channels.

Customers struggle to navigate Fannie Mae complexity to receive support and advice

- Customers need a unified experience that provides a simplified way to access Fannie Mae support.
- DCS simplified some complexity but could not reduce the need for multiple tools for customers to do business with Fannie Mae.

Next Steps

In 2020 Fannie Mae is focused on delivering a more holistic approach to ensuring our Single-Family customers receive the information and support they need. We’ll reach the first milestone in this effort later this month with the introduction of a redesigned Single-Family web experience on [Fanniemae.com](https://fanniemae.com) that will deliver a more streamlined experience. As such, we have made the decision to retire the Digital Customer Service portal effective January 25, 2020. We are in the process of analyzing which features from the Digital Customer Service portal would provide the best value for customers based on the insights we gathered from DCS. Once the team completes their analysis, we will determine the best forum to host these features.

Thank you for being a valued customer co-development partner. If you have any questions, please contact your customer support team.