Building a best-in-class customer self-service experience

You're a knowledge management champion.

Although that title doesn't come with a fancy trophy or ring—though that would be nice—you take pride in driving your company's efforts to give customers what they increasingly prefer: self-service.

Why do you do that? Because the benefits are clear: customers don't want to wait, and providing them with great self-service content shows them that you value their time as much as they do. And since self-service lowers support costs, drives better customer satisfaction (CSAT) scores, and improves agent efficiency, it's just good business sense.

Yet while your knowledge management efforts have begun to bear fruit, there's a nagging sense that your organization could do better. Just how exactly will you take your knowledge-management program to the next level?

If there's a universal truth in knowledge management, it's that building a successful program requires a long-term, cross-organizational effort. In this guide, we'll show you the path forward, from building a solid foundation to becoming a truly knowledge-centered company.

Building a solid foundation

Your first step to laying the groundwork for a constantly improving self-service experience will be to commit the necessary resources: people and technology.

The backbone of your program will be team members with extensive expertise, technical skills, and a commitment to quality, so be prepared to do everything you can to set up your agents for success. That need for expertise stems from the changing role of the support agent—with artificial intelligence tools becoming increasingly powerful, the traditional tier 1 position (which handles basic tickets) has begun to disappear. For example, Zendesk's Answer Bot can answer the simple questions traditionally handled by entry-level employees thus freeing up agents to work on tougher problems and build better relationships with customers.

While Answer Bot's powerful machine learning abilities mean it continuously improves as it works, you'll need skilled agents and knowledge base curators to help it perform even better. Because Answer Bot surfaces content from your knowledge base, your agents can help improve the logic further by training it with better concept matching to ensure the correct information gets to customers, as well as continue to populate the knowledge base with high-quality content that Answer Bot can use.

Hundreds of companies already use Answer Bot, and the data is clear: support organizations report increased agent productivity, thousands of hours of customer wait time eliminated, and some are seeing it resolve up to 22 percent of issues without a live agent ever getting involved. And as bots continue to evolve over the upcoming years, they'll be able to handle even more complex issues, further reducing overhead and enabling live agents to focus on more complex problems, customer loyalty, retention, and keeping your knowledge base accurate and the best it can be.

Get agents involved in content creation

Some agents might be resistant to contributing content for the knowledge base, so in the beginning be sure to help them recognize the value of having good knowledge by surfacing it to them when answering support tickets. This will enable agents to understand the value and improved productivity that comes from having good knowledge base content that covers common customer questions, and documents more advanced knowledge or newer information that only some agents know.

Organizations that focus on building and maintaining a solid knowledge base and continuously improving it over time see 23 percent lower resolution times, 20 percent fewer tickets

reopened, and 2 percent better CSAT scores on average. These organizations of "agile improvers" distribute the creation of knowledge base articles amongst their teams as they know agents, and other knowledge workers, are most responsible for the success from good content. So make sure to leverage your team to ensure your knowledge base is getting better and better.

Given these statistics, it is crucial that your agents understand the importance of capturing institutional knowledge, as doing so makes it possible for your self-service options to answer increasing numbers of issues. One important way to do this is to make it easy for agents to take the content they write for individual tickets and convert it into knowledge base articles. But another key component of a top performing help center is the constant updating and improvement of current article. So in addition to adding new content, you should make flagging and improving suboptimal content an essential part of their job. Also, as agents get the hang of content creation—and start to add information more frequently—shift your focus to quality. Agents with editing skills and areas of expertise will begin to stand out, which will help you fine-tune your knowledge management process.

The Knowledge Capture App

An excellent tool for encouraging agents to get involved in adding and improving content is the Knowledge Capture App, which allows agents to access knowledge from within the Zendesk environment, link to it, and create both internal and customer-facing content. The Knowledge Capture App recommends relevant articles to agents, helping them quickly and accurately answer tickets, so they'll already recognize the value of having good content available. If they see something out of date or incorrect, they can flag that content for review, which will kick off a workflow for a content manager. Those content managers will be able to use the knowledge management dashboard to see which agents are flagging and adding the most content, as well as how effective that content is.
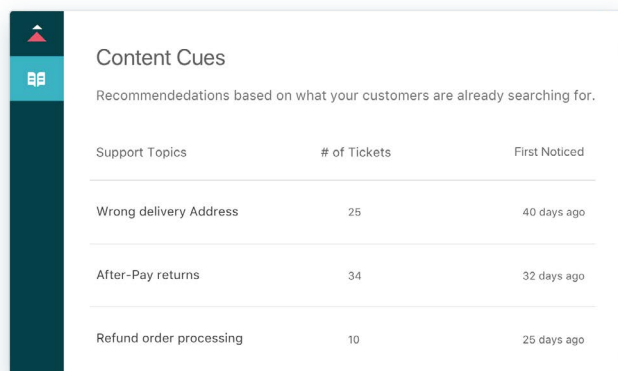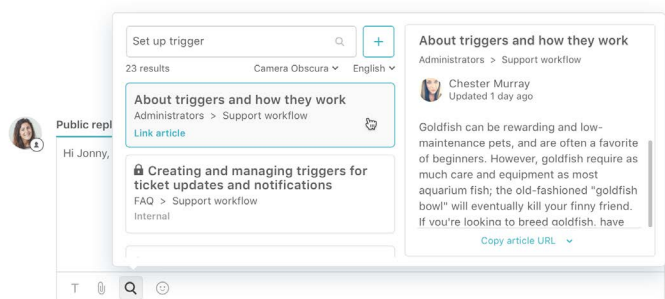
Once content has been flagged for improvement, Team Publishing comes into play by enabling your content managers to set up clear workflows for authors, approvers, and publishers who will finalize the articles. These stages—work in progress, ready to review, ready for publishing, and published—help keep your content creation process on track and ensure quality control. Content managers can also assign article updates directly to team members, ensuring that agents with relevant expertise will be prompted to help improve content and capture their institutional knowledge.

Become a knowledge-centered organization

Now that your agents are invested in content creation and are taking advantage of Answer Bot, the Knowledge Capture app, and Team Publishing, it's time to think about how to finish the transformation into a knowledge-centered company, one that constantly iterates and improves content. You'll want to:

- **Continue to create and maintain relevant knowledge**

- **Design a framework for knowledge management**

- **Drive organizational change and sustain engagement—articulate the benefits, promote teamwork, and recognize and reward those who contribute**

Content Cues

Recommendedations based on what your customers are already searching for.

Support Topics	# of Tickets	First Noticed
Wrong delivery Address	25	40 days ago
After-Pay returns	34	32 days ago
Refund order processing	10	25 days ago

You can also take your knowledge management practices a step further through analytics and AI-powered tools like Content Cues, which will help ensure you have the right knowledge base content. Content Cues identifies common questions customers are asking and searches for relevant content, and if none exists or current content needs updating, it will surface those insights. By identifying these knowledge gaps, Content Cues helps content managers understand opportunities to improve help center content so they can then leverage tools like Team Publishing to assign out content improvements or new articles that are needed.

As previously mentioned, Team Publishing provides clear workflows for content creation, editing, and publishing—but as a knowledge-centered organization, you'll also want to consider creating certain roles to ensure knowledge is maintained and vetted properly:

Authors:

Sometimes referred to as knowledge workers or these can just be your agents, authors write knowledge base articles and choose which section of the knowledge base to house the article, before sending the article for review. Oftentimes category owners are designated for authors with particular areas of expertise.

Approvers:

Once written, articles are sent to approvers who review, revise, and ensure quality before approving articles for publication. It's also the approvers responsibility to add the correct labels to each article.

Publishers:

Once approved, the publisher publishes the article. In addition to deployment, this role is often responsible for maintenance of the knowledge base. A subset of publishers are knowledge base owners, who handle the tactical execution of the knowledge management program.

Establishing these roles can help your team collaborate more effectively and get your customers and agents the content they need.

Never stop improving

The benefits of self-service, for your customers, your team, and your company, are significant. But fully realizing those benefits will take some work and preparation. While it can feel overwhelming at times, focusing on the fundamentals will help simplify everything:

Start off with a solid foundation

Success begins with the right talent—knowledgeable, committed agents who provide quality support—and tools—technology that enables great self-service support for your customers. And with Answer Bot, it's possible to enable more customers to self-serve, freeing agents to focus on more complex issues and building better customer relationships.
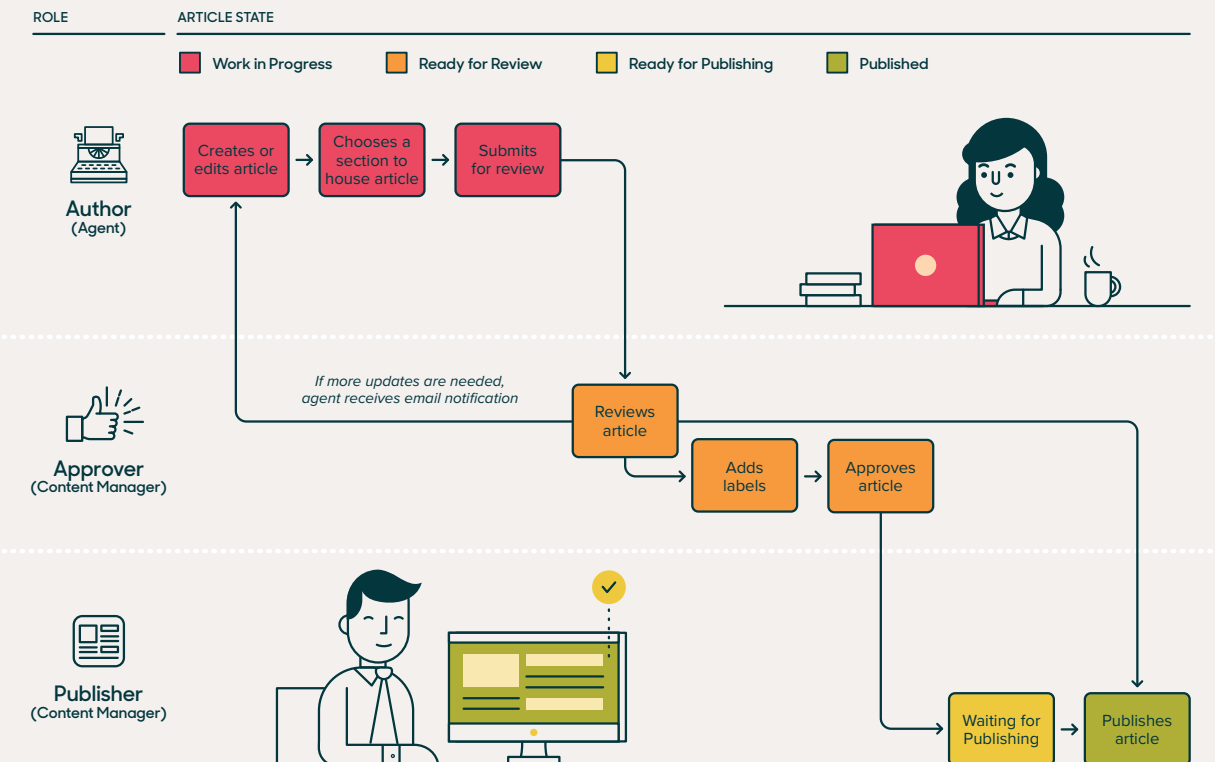
Create high-quality content

Self-service support requires great content that enables customers to solve their own issues. Use the Knowledge Capture App to empower your agents to consistently write and update knowledge base articles that do just that.

Become a knowledge-centered organization

Build a framework for the constant creation and improvement of your knowledge base. Use Team Publishing to collaborate on content and establish specific roles—authors, approvers, and publishers—to have responsibility for content, as well as use Content Cues to understand where you have knowledge gaps that can be improved.

Creating or editing an article with Team Publishing

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ROLE | **ARTICLE STATE**

■ Work in Progress ■ Ready for Review ■ Ready for Publishing ■ Published

Author (Agent)
Creates or edits article → Chooses a section to house article → Submits for review

If more updates are needed, agent receives email notification

Approver (Content Manager)
Reviews article → Adds labels → Approves article

Publisher (Content Manager)
Waiting for Publishing → Publishes article

Conclusion

We hope this guide will help you take your knowledge management practices to the next level, but it's not meant to be the final word on the subject. Please visit Zendesk to learn how you can continue to adapt self-service to meet the needs of your customers.

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