

## Getting People to Answers When Just Information is Not Good Enough



*Whether customers or support staff helping customers, people are in a hurry and have neither the time nor patience to surf through general information to get to specific answers. This easy read assesses common approaches used to get people to answers, as well as providing actionable criteria for selecting and integrating technology to meet your self-service and assisted-service customer care needs. The implications of doing it wrong are severe, resulting in increased costs, dissatisfied customers and eroded loyalty – assuming they don't just turn to someone doing it right!*

Human nature is such that people will generally only help themselves if they view it as easier and/or cheaper than their alternatives. These "people" include your customers, partners, members, prospects and staff.

**To help people help themselves**, companies often put general content search engines like Google on top of existing content and call it good. The thinking is that if a search engine can help people find information throughout the far reaches of the Web, it certainly can get people to desired information on a puny little Web site. The problem is that people don't expect to find specific answers to their specific questions within a matter of a couple minutes when perusing the Web using a search engine, but they do when trying to find answers required to do business with your organization.



For a search engine to effectively meet consumer expectations, it must bring the person directly to succinct content that specifically answers their question using terms that are understandable to them. You see the problem? Even if the search engine can quickly get them to the top of the page containing your relevant Web content – which is a BIG if -- it isn't written in bite-sized answers and it does not continually and naturally evolve with usage. Bringing the person to the top of a Web page with related but general content is just not good enough.

**That's where a knowledge base comes in.** It provides a central and highly searchable place where content can easily be created and evolved as a natural part of the support process by your staff answering questions every day. What's more, the search engine used by a quality knowledge base provides much more power than a general content search engine to control how each piece of content is indexed for searching and how it is placed in one or more categories to allow quick filtering of massive knowledge bases into manageable subsets of information.

The end objective of implementing a knowledge base into your customer care technology is more people helping themselves more often and staff providing consistent, accurate, prompt and personalized support across all your support channels. If done correctly, that will translate into reduced operating and training costs and more satisfied and loyal customers doing repeat business with your organization.

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Instead of just being for the techie knowledge engineers as in years past, several different vendors now offer knowledge bases that are intended to be used by anyone and can and should be extended to people internal and external to your organization. Let's now turn to calling out some helpful considerations for selecting and implementing any knowledge base technology intended to facilitate customer care across all your support channels.

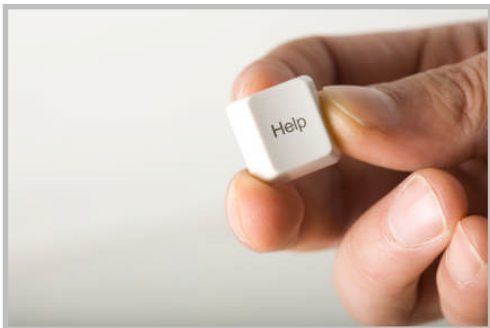
**The knowledge base (KB) must be tightly integrated with your assisted-service:** To be effective, your knowledge base content must continually evolve and be written in terms understandable by your intended audience. Who better to do that than the people providing support every day? But for this to happen, and for the knowledge base to not become stagnant, the KB must be fully assimilated in the support process across all channels. This provides several benefits:

1. Answers provided by all staff and across all channels are consistent and accurate.
2. New information is naturally added to the KB as general inquiries not already contained in the KB are resolved.
3. The content is created by staff accustomed to communicating using terms familiar and understandable by the intended audience.
4. When resolving online inquiries that are addressed by the KB but not found, staff can link the person to the relevant KB content. Not only does this help them get familiar with using the KB to help themselves but it also transports them directly into your Web site and ecommerce engine
5. Content included in the knowledge base but not found due to how it is indexed or categorized can be quickly adjusted to be found the next time.



**It has to be easy to create rich and highly cross-linked content:** The content provided through your knowledge base must be easy to read and continually evolve based on the needs of the people using it. As such, your staff and trusted partners must have simple editing tools that allow them to quickly and easily create content that is well formatted and includes visual and audio material as needed to quickly convey an answer. Since over time you will probably want everyone in your organization to contribute to different aspects of your knowledge base, the editing tool must be so easy that anyone can literally start creating content with little more than a 1-2 minute online tutorial.

**All relevant content can be placed at people's fingertips:** Creating great and succinct content is clearly important, but it won't matter if a person can't find it or does not even know what to look for. The search engine used by the knowledge base obviously must be good -- and not all are created equally -- but you also need to place the relevant content at the person's fingertips. One way to do this is to place links on your Web pages that directly link the person to sections or individual items in your knowledge base that is directly relevant to them at the time they see the link. Another similar method is to dynamically embed relevant questions directly in the page. These two methods allow you to do things like linking a person looking at say IRAs on a Web page directly to the most frequent questions people have about IRAs.



Another important aspect of putting the right information at a person's fingertips is to ensure that the content within the KB item itself includes links to all other relevant content. Like a good support person, a well-constructed knowledge item should anticipate the person's intent for asking the question and provide all other information potentially relevant to what the person is trying to do. As an example, if a person was looking at content relating to the cost of tuition, they should also have links directly to things

like when registration is open, the enrollment requirements, types of payment accepted, if loans or scholarships are available, etc. A good knowledge base will enable you to easily associate these various pieces of content and dynamically display links to the content based on the person's access rights to view the content.

**Collaboration is facilitated:** Content that has been created by multiple people with different perspectives and skills is generally better than anything a single person can create. To optimize your knowledge base content you need to facilitate collaboration among staff and trusted partners in two phases of knowledge creation: **1.** When calling upon subject matter experts internal and external to your organization when responding to a person's inquiry, and **2.** When refining the content originating from an inquiry response or created from scratch. Unlike most WIKIs, the collaboration facilitated through knowledge base technology is targeting staff and trusted partners to create and refine content, rather than openly engaging external users to create content.



**Your expected protocol required to publish content for viewing must be supported:** Although you will want to likely allow and encourage all staff and trusted partners to create content in your knowledge base, you certainly will want to ensure the content created goes through an editorial review process that is warranted based on who can view the content and how they will use it. For instance, content created for internal usage by staff to deal with computer-related issues may just require review by

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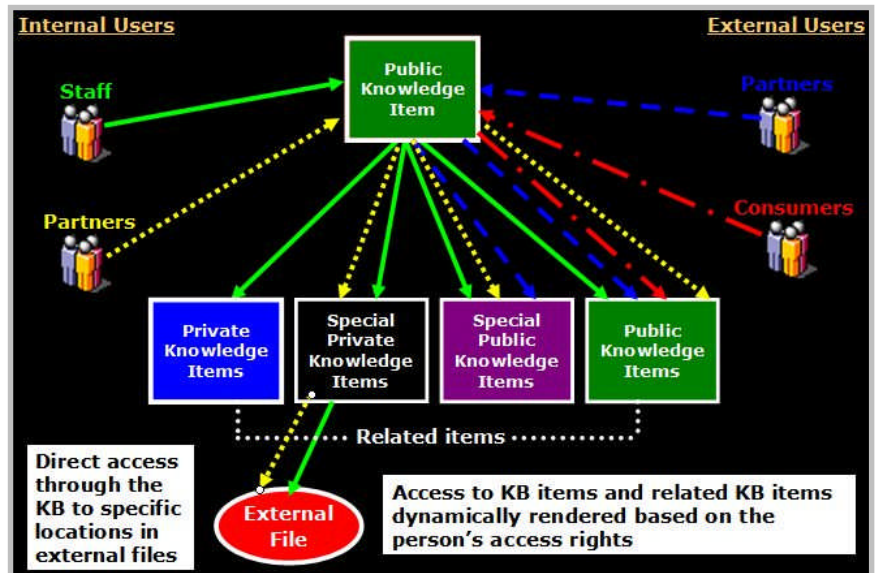
an IT manager, while content to be used by your customer or member to resolve an order issue may require review by someone in operations and someone in marketing before being accessible. We often see a third review with especially sensitive content where someone in Compliance is required to do final review. What's important is that the technology must support your publishing protocol based on the nature and usage of the content.

**You can get access to content external to the Knowledge Base using the KB search engine:** There are cases when you already have content outside the knowledge base in Web pages and various documents that do a great job in answering questions and you want to use them. For these cases you will want a knowledge base that allows you to index all words or specific words in these external files and either upload the files to the knowledge base or leave them where they are. It generally is preferable to leave these external files where they are unless they are not accessible to the desired people and by uploading them to the KB you can provide access. Wherever possible, you will want to direct the person viewing the external file through your knowledge base directly to the location in the file that best answers their question. Otherwise, you will do no better than general content search engines that merely bring people to the top of relevant pages.

Some knowledge bases also have some level of integration with general content search engines so that the knowledge base content can be easily indexed by the general content search engine, and access to the general content search engine is provided from the KB search engine in cases where the person is looking for general content and is unable to find it searching your knowledge base. Some organizations replace the general content search engine with a knowledge base, while others elect to keep both.

**You will want one place for all content with control over who can see what:** As long as your KB content can easily be filtered using categories, you are best served by having a single KB to

direct all people internal and external to your organization. This will eliminate redundant administration, duplicate data and confusion for staff and consumers about where they should look for their answers. A quality knowledge base should allow you to easily define who can see what at an individual or group level. It should do this by dynamically displaying KB categories and content based on the access rights of the person searching the knowledge base. Controls should also exist so that you cannot inadvertently publish publicly accessible content in private categories.



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### **The KB search results should get better with age and usage.**

Insights are gained every time a person searches your knowledge base and looks at content. Content that is commonly viewed for specific types of inquiries and rated highly should naturally be percolated to the top of search results when relevant. Much of this KB learning will occur automatically, but to get the most from your KB you must have the tools to easily identify and manually adjust your knowledge base by reviewing search activity and the feedback provided by people on the quality of your content and their ability to find it.



### **You need flexibility in how the content gets indexed, categorized**

**and sorted:** Sometimes you are not quite sure how a person will search for desired content and you want the KB search engine to index all words and synonyms in the KB item. Other times you want to focus access for a KB item on particular words. Since not everyone will categorize your content the same way, you will also want to have the ability to place a KB item in one or more categories. Lastly, there are times when you want control over what content is placed on the top of search results. As an example: you may want a KB item talking about system availability over the weekend to be on top of search results the week prior, and searches for say a particular product to provide access to buying that product from your organization on top of search results.

**The system should motivate staff to contribute to the KB:** You clearly need your management team to consistently reinforce with staff that they want them to contribute to create content in your knowledge base, and to do so they must have metrics that are visible to them and the staff, surfacing who is contributing and who is not.

### **You must be able to capture and proactively manage feedback on KB content:**

An important part of continually improving your knowledge base content is to actively capture and direct KB feedback to the people in your organization responsible for that specific content. Unless all your content publishers can publish all KB content equally, you really need to place accountability with individuals based on their responsibilities.



### **How can the knowledge base help you offer content that assists consumers make a buying decision?**

In addition to answering all the questions about buying and using your products and services, it is often helpful if consumers are provided with content that helps them make the best possible decision for their particular needs. This content is sometimes created internally by your organization, but other times it is advantageous to include KB content that is maintained by someone else seamlessly in your knowledge base. This type of content also lends

itself well for requiring a person register to view it, assuming the KB can enforce this need.

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**People want to be proactively notified of new and changed KB content they care about:** Different content in your KB will be of interest to different people and they often want to be automatically notified when content they care about has been added or changed. Some prefer using RSS for this and others want emails sent directly to them via a KB alert. Some KB solutions only enable people to set these notifications for individual KB items, but the real power is afforded when notifications can be set for categories of information.

**Don't lose the valuable consumer insights exposed during the self-service and assisted-service processes:** Every time a person looks at KB content, sets an alert, asks a question or provides feedback, you can learn something about their needs. Unless you track this information in a highly usable form, it is only anecdotal and cannot be reliably used to provide more personalized service or to produce targeted contacts for marketing efforts. Do you really want to only know what your consumers actually buy from you and leave these other exposed insights on the table?

**Integration:** Your knowledge base and other customer care components must work well together to be effective and provide a true understanding of your relationship with each individual consumer. This includes your phone and operational systems and as appropriate should include feeds to and from your SFA and Marketing applications. Not long ago this was a challenge not easily overcome due to disparate systems using different technologies, but Web services and XML have made this much easier. Be sure to get technology that can play nice!

**Conclusion:** A well engineered knowledge base that is fully integrated with your other customer care technology and is easy to use and administer can significantly improve the consistency, accuracy and promptness of your self-service and assisted-service customer care across all your channels and from all your staff. Tracking the rich consumer insights exposed during the support processes will enable you to provide more personalized support and to create better targeted contact lists for marketing efforts. The achievable objectives are more loyal and profitable customers that cost less to support. Everybody wins!



**About the Author:** Chuck Van Court has over 25 years of experience in technology, operations and finance and is the president and founder of [Fuze Digital Solutions](#). Fuze Digital Solutions is an employee-owned customer care software provider supporting over 10 million end users and 100 customers in several different industries and countries. Fuze's offering, called the Fuze Suite, provides robust, integrated and affordable software [modules](#) that are [EASY](#) to use and enable organizations to build consumer loyalty by providing outstanding and consistent assisted and self-service customer care across all support channels and from all staff. Find out why so many customers have elected to move from the RightNow's of this world to get a [fast ROI](#), over 99.99% system uptime, a product with the critical features you need but that is easier to administer and use, and support that is more flexible and attentive. Companies like Careerbuilder.com, First Tech Credit Union, NOAA and AAA Arizona have made the move to Fuze and [could not be happier!](#)