



Optimize self-service
with the right metrics

Once you've gotten your footing with self-service, you'll naturally want to know how it's doing—where and how the content supports your business, as well as any opportunities for improvement. But as your help center evolves into a true knowledge base used more widely across your organization, the metrics that define its success will evolve, too. For scaling companies especially, what you're measuring and why can have added dependencies, since the KPIs for the business overall are also evolving.

It gets more complicated than tracking ticket-deflection rates or article pageviews—as important as both remain. We know that an agile, iterative approach to managing a help center is the most successful¹. Being a data-driven team gives you the tools to stay agile, where you're continuously iterating and improving upon your self-service.

Let's say you're an all-star with a robust help center filled with all-encompassing content. As that same content is more frequently surfaced in active tickets and multiple channels of support, you end up with more unique data points that correspond to the different ways in which customers are accessing and using your self-service—each of them tells a story worth listening to. The additional data provides essential visibility into how you can or should optimize your self-service, often with an added boost of AI.

You'll need even more business intelligence to address issues like these and more, achieving the dream state between your knowledge base and its stakeholders: where data provides insights into where you are and drives decisions about where you're going next.

It can be difficult to know where to start, but take these tips to get your self-service metrics motor running:

Tip 1:

Analyze common requests and identify where AI can help

Tip 2:

Identify most-linked articles to drive organizational process change

Tip 3:

Keep a close eye on search results—especially those that don't return answers

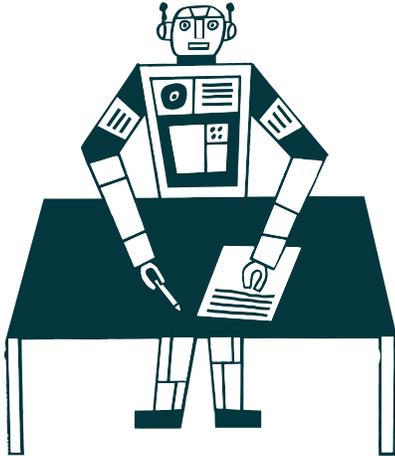
Tip 4:

Increase CSAT or meet SLAs more with data and info from the knowledge base

Tip 5:

Track agent engagement and make it easier for everyone to contribute

Tip 1: Analyze common requests and identify where AI can help



One-touch tickets can tell you a lot about your self-service. Many one-touch tickets—tickets that were solved in a single interaction—could mean that too many customers are contacting support when help-center content could have provided answers faster. They can also tell you where AI solutions can improve the customer experience: for example, by automatically surfacing the right content when customers need it most.

In Support, consider using an About field or Tags so your business can identify frequent customer questions, which can then inform your help-content strategy. Once you've examined the context of the one-touch tickets, you have a better idea of your quick wins—easy, high-impact articles that would improve both the agent and customer experience right away. With ticket data like this continuously at your fingertips, you'll be better able to identify how and where AI features like Content Cues can streamline further by prompting agents for new or updated content. You can also configure Answer Bot, another AI solution, so it responds to these types of requests with articles from your knowledge base.

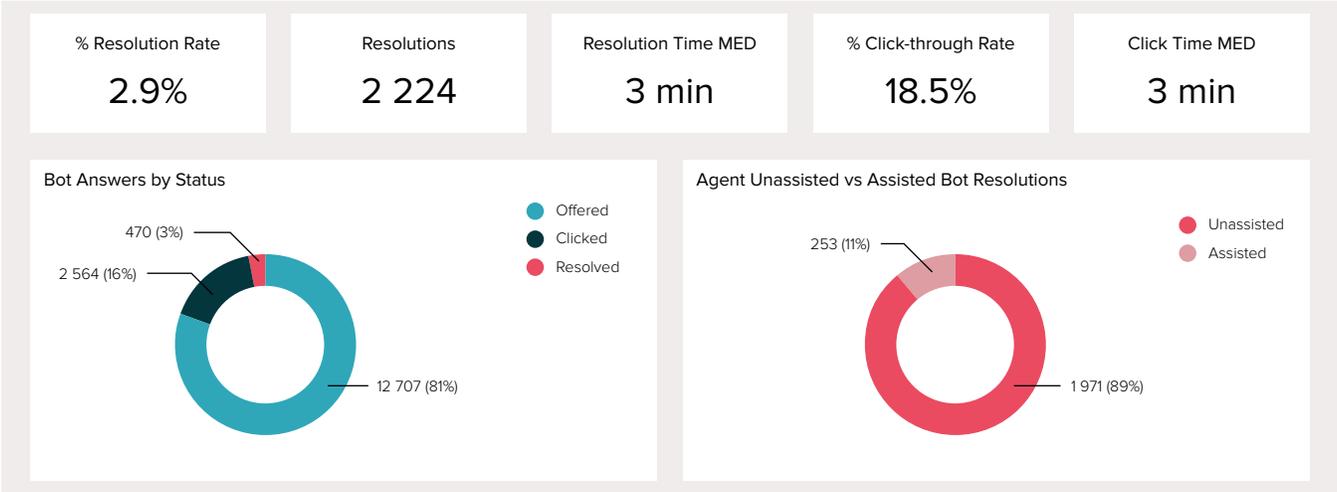
From there, even more data awaits. In Explore, you can see exactly how agent-unassisted tickets perform against Answer Bot-driven resolutions to make further tweaks to the content.

Some companies deemed data so essential, they took the time to source it the long way. The team at Freshly, for example, manually analyzed thousands of one-touch tickets to identify the most common queries customers were having. After creating content that matched those needs, they were then able to start optimizing with AI: Content Cues and Answer Bot. These solutions support both agents and customers by [finding patterns in how customers ask questions](#) and [surfacing relevant content from the knowledge base to customers](#), regardless of channel. They say this approach—analyze data, then optimize and streamline with AI—paid off with a better, more customer-centric experience.

The team at Expedia, which also uses Content Cues to augment their knowledge base, was also able to use data to make decisions about how and where AI solutions could support the customer care team.

“We now have a better sense of how many users are writing in about specific topics. Subjects that are most important to our customers are more confidently addressed first now,” according to Anne Cnockaert, who works in customer care at Expedia.²

Dedicated data dashboards like Explore can shoulder some of the data-mining responsibility, continuously putting information front and center and enabling you to make data-based decisions like these in real time.



Tip 2: Identify most-linked articles to drive organizational process change

[Knowledge Capture app](#) recommends helpful articles in real time during a Support interaction, allows agents to flag content that needs to be updated, and captures agent responses as they solve tickets, marking them as potential content that can be developed for the knowledge base. All of the data describing the interactions between the app and the agents who are using it can have a huge impact on your broader organization. Take, for instance, one data point: most-linked articles.

This data point refers to articles that agents are frequently linking to within tickets. Their frequent use alone means these articles are valuable resources, but it's a double-edged sword: The fact that the question is coming up so frequently may indicate a bigger issue elsewhere in the customer journey. With this data in hand, your sales or success teams could proactively connect with customers before the issue gets to support, or your product teams could investigate tweaks that may improve the user experience.

The feedback loop only gets stronger with data: If the issue is properly addressed further upstream, content managers may decide to retire an article that isn't necessary anymore, or edit it so it's more relevant. Customers, the product, and the knowledge base stand to gain from the availability of this one piece of data.

At Spartan Race, the team discovered that agents were linking to one particular article three times more than any other, according to Aja Varney, Customer Service Director. The diagnosis was that the information wasn't being properly delivered to customers, which resulted in new processes, in partnership with the customer success team, to get ahead of the communication breakdown.

“This helped us to see what our agents were talking about the most and where we might need better customer-facing communications,” Varney said.

Article Translation Title	Linked	▼	Flagged
What to do if your order doesn't arrive on time	2 703		0
How to contact your delivery driver	1 219		1
Payment options	829		3
Where we deliver	728		2

Tip 3: Keep a close eye on search results—including those that don't return answers

Another benefit of the agile approach: help centers maintained this way report the lowest percentage of searches with no response,¹ which is another essential metric for monitoring success. There are real dollars and cents attached, too: more than half of customers will abandon their online purchases if they can't find fast and easy answers to their questions.³

Below, searches with a low average number of results means no relevant help content was provided after a customer (or an agent) typed a phrase or question into the help-center search bar. A low click-through rate means the search resulted in a low number of clicks within the help center, indicating the content provided wasn't useful enough for the customer to click on it. Both metrics, monitored in Explore, indicate that the help content around that topic needs to be revised, either with more relevant article titles or with new articles that use search terms customers are using.



As in tip #1—analyze common requests and identify where AI can help—automation can come in handy once you have the data in hand and are ready to optimize your process. With assistance from Content Cues, the Freshly team continuously tailors its language to more closely match that of customers'. For example, the phrases "My delivery hasn't arrived" and "Where is my box?" are associated with the same help article. The impact is two-fold on the customer experience: content is robust and easy to find when people need it.

Search string	Total searches	Avg number of results	Click-through rate
shipping	9	7.0	25%
policy	4	3.0	0%
clean	2	1.0	0%
email	2	4.0	75%
time	1	2.0	200%
policies	1	3.0	0%
whatsapp	1	0.0	0%

Tip 4: Increase CSAT or meet SLAs more with data and info from the knowledge base

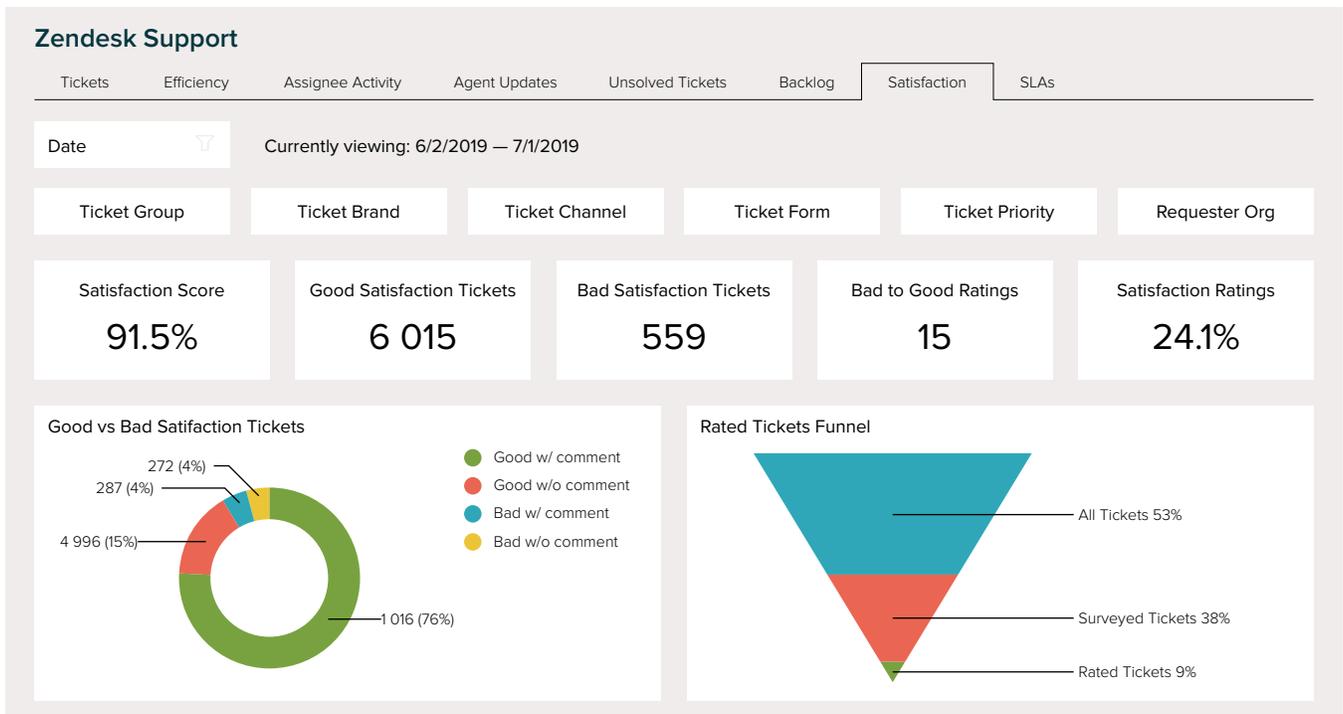


Understandably, not every support interaction ends the way we'd like it to, which can impact agent satisfaction and morale. But you can use data to help agents succeed in the future.

It could be that your customers didn't have the information they needed. Or, it could mean your agents didn't have the right articles in hand to help them solve the problem. Explore allows you to dig into tickets that returned poor CSAT or those that missed an SLA target, learn why, and deploy your knowledge base in assisting next time.

With insights like these about CSAT and SLAs, support leaders are empowered to make data-driven decisions that can put agents on the right path. Encouraging agents to turn to the knowledge base as a resource in high-stress situations with customers is one way to put them on that path, as tickets with links to help center articles perform better, reporting 23% lower resolution time, 20% fewer reopens, and a 2% better average CSAT rating.¹

At Spartan Race, reviewing CSAT scores and one-touch tickets were great opportunities for development: **"Explore has helped us understand self-service in the context of our support operations. Insights into SLAs and CSAT across channels helped us understand areas where we were falling short and where we can leverage automation to improve coverage,"** Varney says.



Tip 5: Track agent engagement and make it easier for everyone to contribute



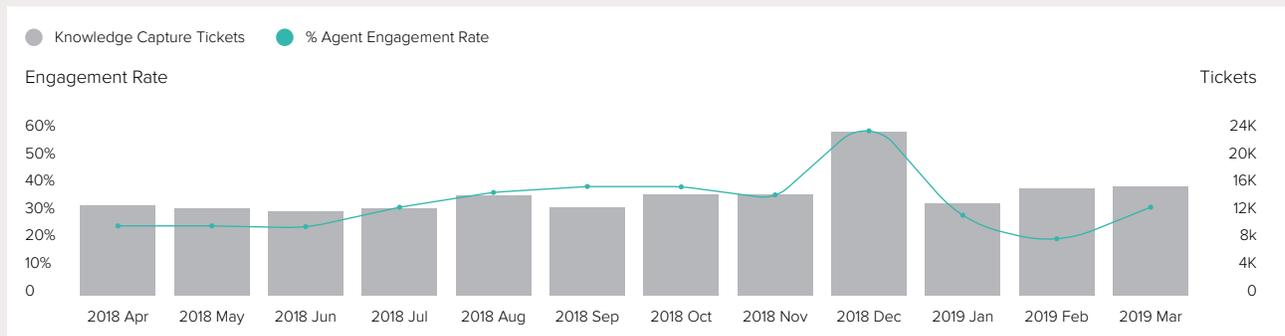
As agents become more engaged with the knowledge base, hopefully with rising CSATs and confidence, they're more likely to develop further in their support careers, becoming trusted partners in your organization equipped with important contextual knowledge. Learn more about which agents are contributing content, how much of it, and on which topics, then use that data to incentivize agents to contribute in a way that speaks to their skills and interests.

With the Knowledge Capture dashboard in Explore, you can measure how agents are engaging with the knowledge base over time.

Those with a flair for writing or particularly deep expertise about a product or feature, for example, may do well with writing, editing, or publishing articles.

It's a worthwhile use of agent resources, as **83% of customers on the Guide Enterprise plan say the Team Publishing feature made it easier to involve their team in content creation**, allowing them to gather insights and knowledge from more people in their organization. Jessica Haas, Director of Customer Experience at DBH², estimates a time savings of five to 10 hours per week and reports increased employee satisfaction now that agents are allowed to publish their own work.

Agent Engagement Rate by Month (12 months)



The tools for measuring self-service success should innovate alongside your knowledge-management solution—all of which move, hand in hand, at the pace of your business.

Ready to Explore the wide, wonderful world of metrics? [Learn more.](#)



Sources

¹ The Zendesk Benchmark: <https://www.zendesk.com/benchmark/>

² TechValidate survey of Zendesk Guide users: <https://www.techvalidate.com/tvid/D64-8F3-6B1>

³ Forrester: "Online Self Service Dominates Yet Again. Why? Its An Effortless Way To Get To Your Answers" https://go.forrester.com/blogs/16-01-28-online_self_service_dominates_yet_again_why_its_an_effortless_way_to_get_to_your_answers/