Leverage your entire team to create the best self-service content

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In order to create the best self-service experience for your customers, you need to have great content that addresses the questions your customers have and the issues they are experiencing. In order to build that strong content, though, you need two things: people to write the articles and a process for vetting the content to ensure the right material is published.

It's no easy feat, but getting your whole team involved in the process will lighten the loads. This white paper will describe how to set everyone up for success.

As Gartner describes in the report, Knowledge Management Will Transform CRM Customer Service, "the goal of a knowledge management strategy is to empower as many people as possible to participate in creating and consuming relevant knowledge." Once the team is empowered and everyone is helping to contribute, it's critical to have the right process in place to ensure only the right content is published. But, as the Gartner report explains, "this can be highly complex, as there can be a few, or dozens, of knowledge management processes." The Team Publishing functionality within our Zendesk Guide Enterprise plan makes it easy for large teams to establish processes, collaborate on content, and manage knowledge internally, externally, and across multiple brands.

Establish a review and publishing process

If you think about your support organization as a knowledge organization instead, you're halfway to creating a great self-service offering. Self-service depends on generating, grooming, and retiring obsolete content. At Zendesk, we call this **article lifecycle management**, and we've built some great tools to make this process easier. Before we cover how our tools can guide the way, there are also a few key practices that will help your organization create the best content.
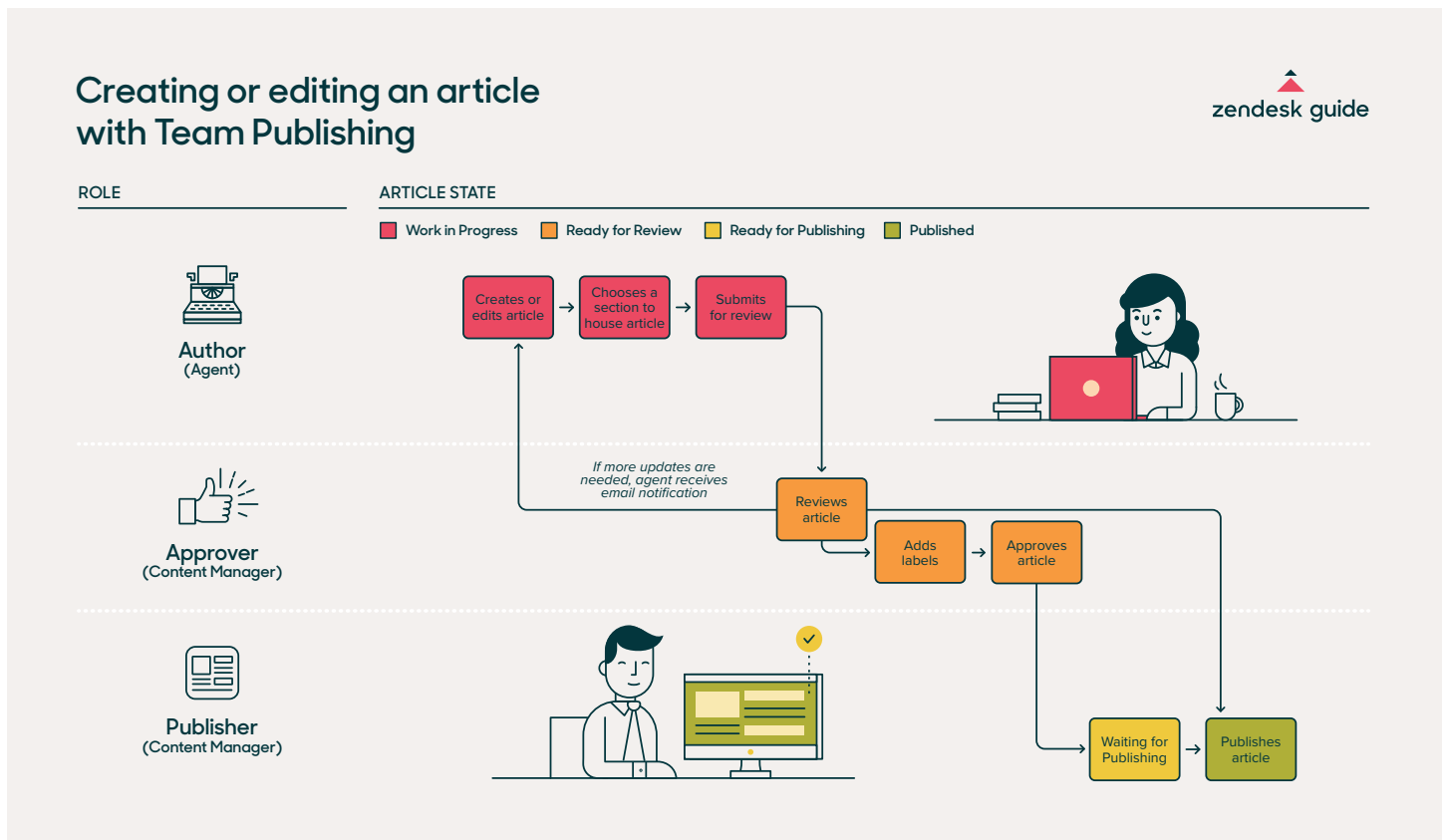
Rethink the "article"

Most articles shouldn't be hard to write—or read. In fact, a great rule of thumb is to shoot for just a few sentences long, breaking up long reads into discrete ones. The most effective articles answer very specific questions as concisely as possible, matching the topic as closely as they can. This short format also helps improve your search accuracy. Long introductions, boilerplate text about your company, and brand puffery will only frustrate customers' efforts and convolute their searches, so keep articles as short, simple, and to-the-point wherever possible.

Write articles in your customer's language

If you talk about your product or service in words customers don't use, they won't connect the content to their problem, and they likely won't find what they need when searching for help. To guard against this, aim to put your customer's language and style, not your brand's, at the center of self-service. For example, if you refer to an "outage" but your customer says "#fail," go ahead and put #fail into your article. When a customer searches for #fail, they'll get the answer they're looking for, and, likely, the exact help they needed.

Now that you understand the best format and voice to use in your help center material, it's time to get your agents involved in creating that material. New content, including articles created via our Knowledge Capture app, all flow through a lifecycle workflow called **Team Publishing**, which helps facilitate the writing and publishing process. This flowchart walks you through those steps:

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

Get your agents to start contributing

Many agents won't feel comfortable with writing at first. But almost every single one will have topics they know a lot about, and are constantly answering questions about, which is the perfect starting point. A great approach is to mandate contributions every day or week, just to start the flow of content. Building the writing muscle is easy to jumpstart using our Knowledge Capture app, which enables agents to easily flag content that needs to be improved, as well as create new articles as they answer tickets. Once the articles start flowing, you can work on upping the quality of the writing. Over time, you'll likely discover some of your agents are natural editors and have certain areas of expertise. Using the Team Publishing functionality in Guide Enterprise, you can leverage that expertise by assigning article updates and writing notes to your team members, ensuring they know where content is needed.

Establish the right process to vet agent content

Using these features makes it much easier to generate and push content out when it's ready. Once agents make updates to content or create new articles, they can submit the content for review. Content managers can then see the status of each article for each of the workflow states, which include "work in progress" or "ready for review." If an article still needs more updates, content managers can send it back to the agent for more changes. Or, if the article is ready to go, they can add labels so the article is categorized, and then approve the article so it's ready for publishing. Depending on how many levels of review you want to establish, the same content managers can approve and publish articles. Or, you can restrict the publishing permissions to select agents who have the final say in what goes out.

Turn around articles quickly

In many organizations, you see heavyweight, command-and-control content cycles more appropriate for handling uranium ore than for getting answers in front of customers. Some industries require more content oversight than others, but ask yourself: How you can slim down approvals to only what is needed? Lower the barriers to writing and publishing if you can. Through the assignment, reviewing, approving, and publishing workflow we've developed in Team Publishing, you can facilitate the writing process and get the right content out the door quickly.

Building the content generation, grooming, and retirement process is vital to creating a high-quality, organically improving self-service experience. Learn more about how Zendesk can help you kickstart your own content process with Team Publishing, among other great features, in our shiny new Guide Enterprise product.