

# Getting started with Zendesk Guide



## There's nothing quite as empowering as solving a problem on your own.

When it comes to customer support, [73% of consumers](#) want to solve product or service issues on their own, and [90% of consumers](#) now expect a brand or organization to offer a self-service customer support portal.

Self-service support equips customers with round-the-clock information without having to wait for a response. It is one of the lowest-cost channels for providing excellent customer service and high resolution rates. However, the success of online self-service depends on the quality, quantity, and accessibility of your company's knowledge-base content.

But what exactly is knowledge management? According to Gartner, knowledge management is “a discipline that emphasizes an integrated approach to managing an enterprise's knowledge assets: the information available to an enterprise about its ‘best practices,’ critical business processes, and operating environment.”

To provide helpful self-service, businesses need to build a knowledge base with relevant content that addresses customers' biggest questions.

The challenge is knowing what type of content to build your knowledge base with and how to continuously improve your organization's self-service capabilities. That's why we developed [Zendesk Guide](#), a smart knowledge base for better self-service that's empowered customers and agents.

Guide is the only knowledge-base solution that works natively with [Zendesk Support](#) to help turn solved tickets into useful content, deliver seamless self-service experiences, and empower agents to provide fast, accurate support. An evolution of Help Center, Guide has new and advanced capabilities in capturing agent knowledge as well as providing more and more relevant self-service content to customers through [Answer Bot](#), a tool powered by artificial intelligence.

This eBook will not only get you started with Guide, it will also walk through key tips on how to provide effortless customer experiences through contextual self-service and speedier, more intelligent support.

Here are three goals to focus on when beginning your self-service journey.

## Goal 1:

# Build a quality knowledge base

A knowledge base is more than just a database or collection of information—it's a dynamic self-serve online library that acts as a resource for both customers and agents. While it's easy to fill a knowledge base with content, it's less easy to fill it with quality, easily accessible information. With properly managed knowledge-base content, however, you can address repetitive questions and free up agent time for more complex issues.



## Gather useful information

### One-touch tickets

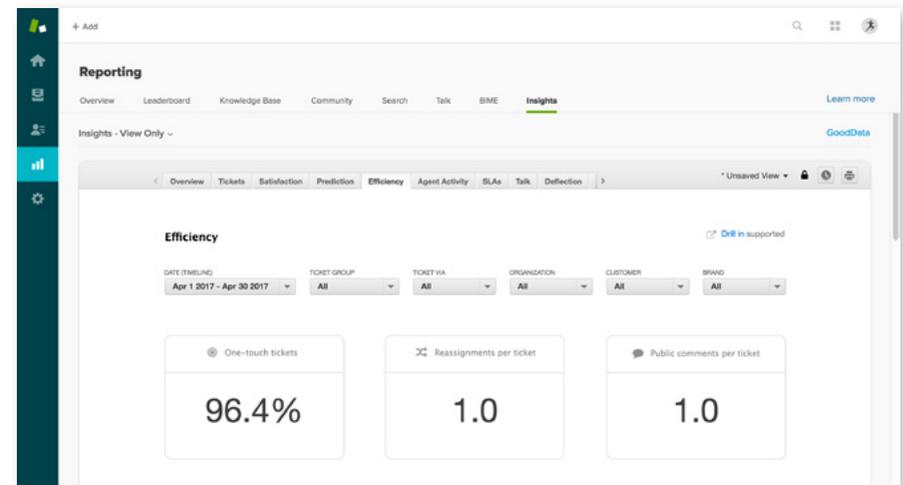
An agent's time is valuable, and getting bogged down with simple questions can impede an agent's ability to solve more complex issues. While it's easy to see a high resolve rate as a sign of efficiency, if your agents solve tickets with one response, there's usually an opportunity to provide a more immediate answer to a customer through self-service, such as through an FAQ page. One-touch tickets, or tickets resolved with one response, can provide insight into common queries and the self-service content your organization should provide. To find the percentage of one-touch tickets, use the default Efficiency tab of the Insights-View Only dashboard in Zendesk Support. The percentage of one-touch tickets can be found in the upper-left corner and is useful when evaluating how much time agents spend on low-effort tickets that could instead be turned into self-service articles.

### Automated responses

Your support team's top five to ten macros are another source of insight for useful content and can be used to create concise self-service articles for your help center. Macros are automated responses that enable you to quickly respond to common requests.

### Internal knowledge base

If you have an internal wiki or hold a lot of valuable information in other sources, consider tapping into existing internal documentation to leverage for public-facing, self-service content.



## Create a clear content flow

Customers want simple, straightforward answers to their questions.

For useful and clear self-service content:

- Keep it short and concise.
- Use simple language; avoid jargon.
- Use rich media like videos and visual images when possible.

## Improve knowledge-base visibility

Good knowledge-base content means nothing if your customers can't navigate your help center. Gartner reports that improved delivery of contextual knowledge to an employee or a customer reduces a provider's time to answer by [20 to 80 percent](#). Follow these tips to improve content visibility.

### Label your articles

With Guide, you can label relevant articles based on keywords and increase discoverability. Guide is also search engine optimization (SEO) ready; search engines like Google will suggest your knowledge base as a resource to customers when they look for a particular piece of content for help.

## Give contextual help

- Use [Contextual Help](#) in your [Web Widget](#) to directly serve up relevant content—that way customers don't have to leave your website to search for help. With Contextual Help, the top content related to a particular web page instantly populates without the customer lifting a finger.
- If you have a mobile app, you can use the [Mobile SDK](#) so your customers don't have to leave the app experience for help. You can get started [here](#).

## Enable customers to discover your self-service content

Customers often reach out because they are unaware an organization has a help center or because they want a quick resolution without having to search. A gentle nudge toward your help center can help customers better help themselves. Guide's [Answer Bot](#) instantly suggests relevant self-service articles based on a customer's query. The customer is then empowered to close their request if the suggested content resolved their issue. If Answer Bot didn't resolve the issue, the customer can provide feedback, while simultaneously being transferred to an agent for help. Guide's Answer Bot resolves repetitive queries and raises your customers' awareness about your organization's self-service capabilities.

Goal 2:

# Improve agent efficiency

An agent-only knowledge base can improve agent efficiency for more accurate, consistent service, and higher resolution rates. Instant access to valuable information like troubleshooting steps is crucial to speedy, intelligent support. However, leveraging untapped agent knowledge can be tricky. That's why centralizing your support team's internal know-how is so important.



## Create, share, and search agent knowledge

Although agents are a trove of valuable information, their knowledge often goes undocumented. It can be hard to find time to document and share knowledge with the collective team, especially if the process requires agents to use a different, unfamiliar workflow. Setting aside time to create useful knowledge often requires agents to go out of their daily workflow—something not all organizations can afford to do.

Guide's [Knowledge Capture app](#) enables agents to create a piece of content from a selection of templates as soon as they solve a ticket. It also lets agents provide feedback if an article is out of date. With the right tools, your support team can quickly and effortlessly tap into quality answers, making it easy to continuously enrich your knowledge base and offer efficient, consistent support experiences.

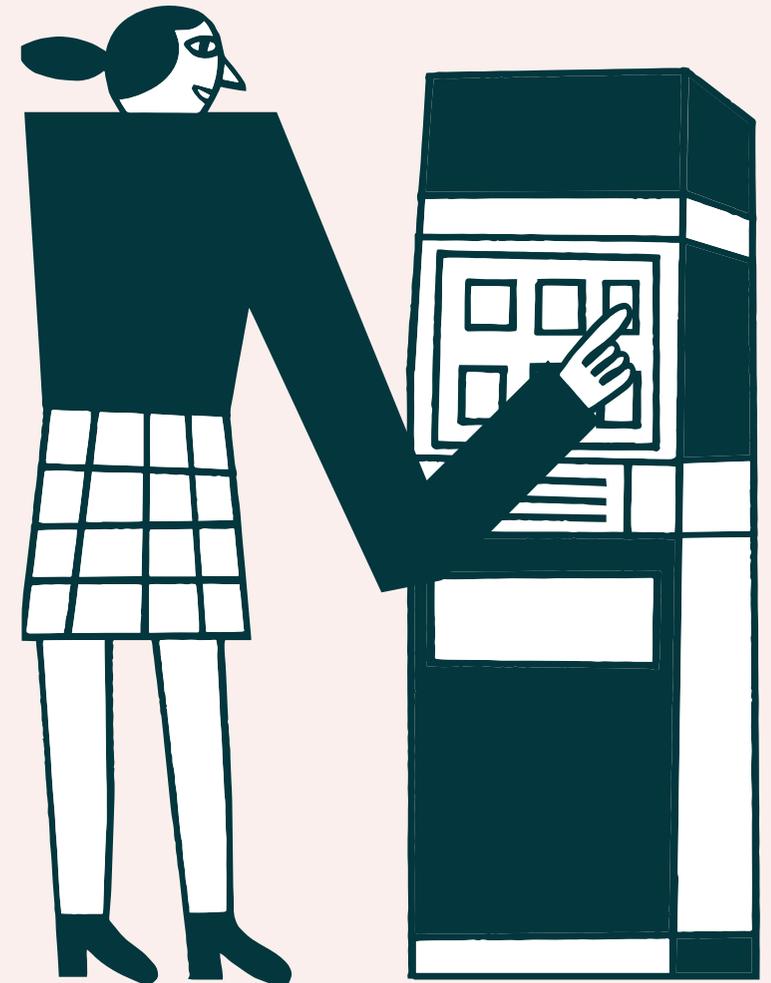
## Create an agent-only knowledge base

Creating a private agent knowledge base enables agents to quickly find accurate answers. Guide empowers agents to contribute and share knowledge as they solve tickets from their agent interface. Each piece of content they create can be posted in the central agent knowledge base or published in customer-facing help centers. As a result, new agents can tap into your organization's agent-only knowledge base and onboard more efficiently and effectively. According to the [KCS Academy](#), optimized resources can improve employee satisfaction 20 to 40 percent. With access to collective knowledge, new agents don't need to rely on their more seasoned colleagues to find reliable answers, they can tap into this central resource and search for answers themselves—whether to answer an internal or customer question.

Goal 3:

# Optimize self-service capabilities

Optimizing and continuously improving your organization's self-service content should be a habit and a mindset. If you have an active help center, this section will help you continue to strengthen your self-service capabilities.



## Evolve your knowledge base

Improving your organization's self-service capabilities is easier when you're equipped with the right tools. [Pathfinder](#) gives insight into your customers' self-service journey—the app helps businesses know when customers have visited a help center article or community forum before and after they submit a ticket. It's a useful app for agents to discover the steps customers take before they reach out for support and to learn whether certain articles are effective or not. That way agents can flag articles that need to be updated through the Knowledge Capture app.

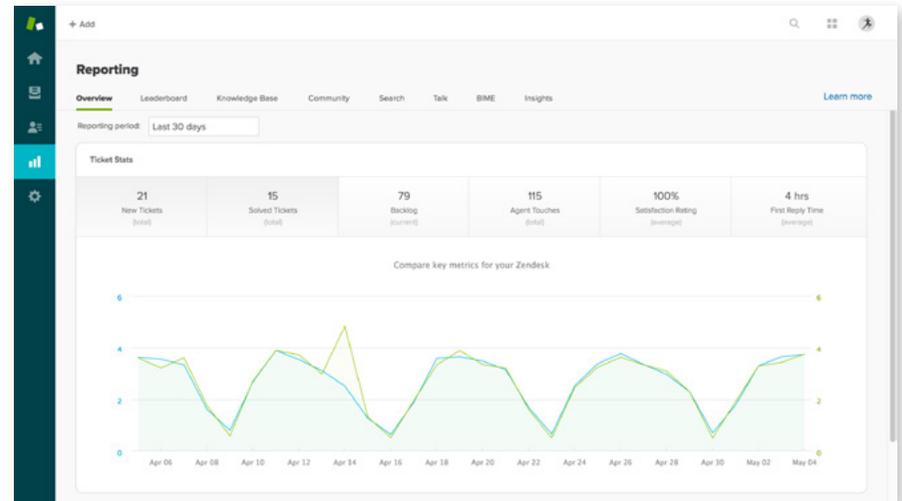
The [Knowledge Capture app](#) is fundamental in building out and evolving your knowledge-base content. It enables agents to create content on the fly, while simultaneously letting them flag content for improvement. The app creates a ticket for each flagged piece of content that needs an update. Creating a dedicated view of flagged content in Zendesk Support for all your tickets makes it easier to sort through and update articles.

## Review your performance: Dig into reporting

Reporting is key to evaluating the effectiveness of your self-service content. Three Insights dashboards within Zendesk Support hold a wealth of information about the effectiveness of your self-service content. Navigating to the bar chart icon in the left-hand side of your account will bring you to your Reporting section, with the Knowledge Base, Community, and Search dashboard tabs along the top. Like the Overview dashboard you initially land on, a date filter enables you to look back up to three months.

### Knowledge Base dashboard

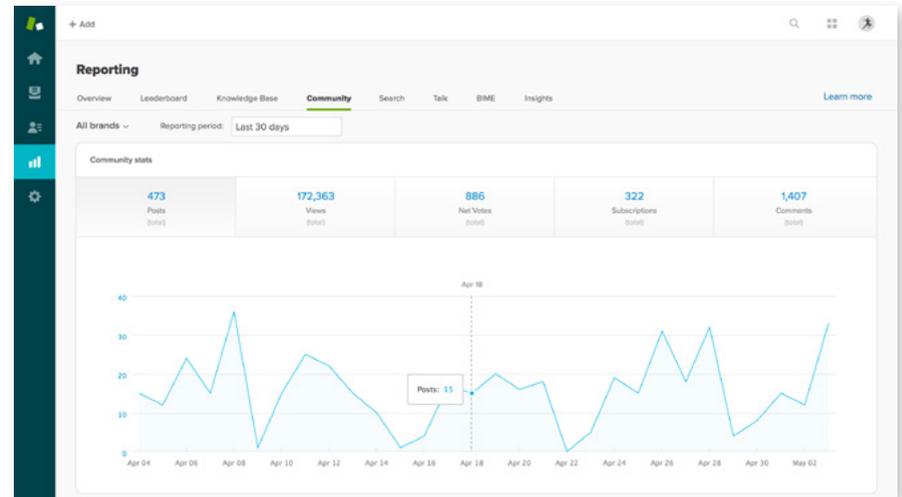
The Knowledge Base section shows you vital stats like how many articles you have published, the total number of views, net votes, visitors' subscriptions to articles, and comments posted on articles. You can toggle between these charts and set your date range, filter by brand, or even isolate a specific channel from the default view of all help center, Mobile SDK, and Web Widget stats.



### Community dashboard

A community is a great way to empower your customers to collaborate with each other and with you. It offers a space to ask questions, and provide feedback, ultimately helping customers help themselves. The Community dashboard provides statistics around your community: how many questions have been posted, total views, votes, how many conversations are being followed, and how many answers have been posted.

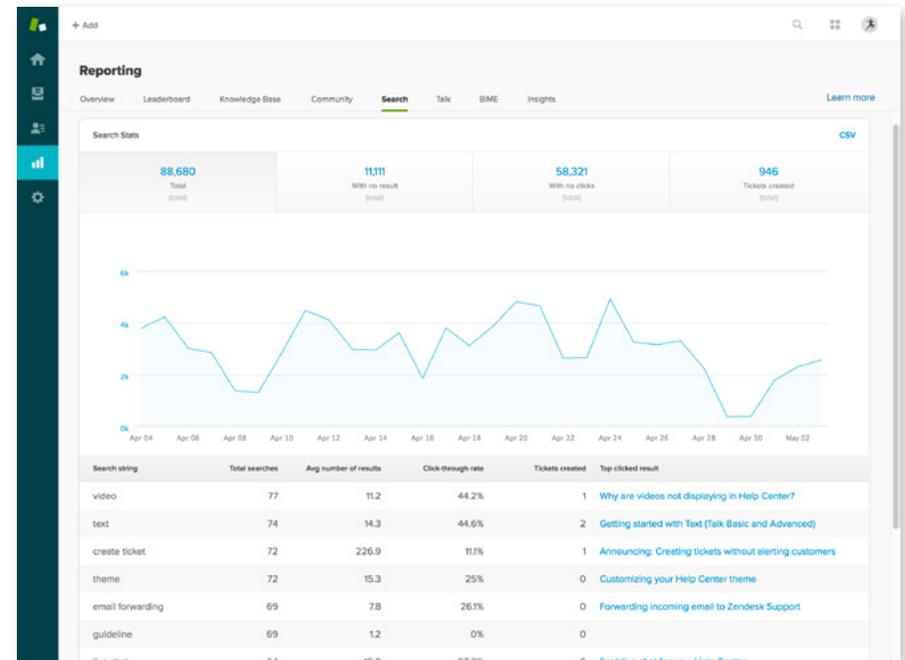
Ideally, you should see consistent or growing trends in traffic; however, if you see a significant decrease, you may want to investigate how customers navigate to your community. We recommend using [Google Analytics](#) across all your sites, including your help center or community in Guide, to see the paths your users are taking and notice trends across your user base. Simply pop in your Tracking ID under the General settings of Guide, and you'll see an Event flow of how your users travel between pages or articles in your Google Analytics account.



### Search dashboard

Customers often miss or can't find the answers you already have in your help center. In Guide, the Search tab holds invaluable information by surfacing the exact search strings entered. Understanding how customers ask questions enables you to speak their language and more accurately label your content.

Look to the Searches without any results or clicks: They indicate when users can't find the results worth clicking into and which searches result in a high volume of incoming tickets. Are there opportunities for improved content? This dashboard was built to empower you to figure out what content your customers are looking for and the efficacy of what you already have.



# Conclusion

A knowledge base with contextual self-service options can help scale your organization's support through improved resolution rates, lowered support costs, and 24/7 service. Self-service doesn't just empower your customers to help themselves; it also frees up agent time to focus on more complex problems.

[Get started with Zendesk Guide, here.](#)

