Salesforce Knowledge

Overview and Best Practices
Overview of Salesforce Knowledge

The What and the Why?
KCS is a simple idea: integrate the creation and maintenance of knowledge into the process of interaction.

Knowledge centered support (KCS\textsuperscript{SM}) is a methodology for capturing, authoring, refining, and publishing information that is relevant to the support processes for an organization.
Salesforce Knowledge is a dynamic repository of information, a knowledge base, where users can quickly find and view relevant content, known as articles.

Users can also contribute to the knowledge base content by creating new and managing existing content. Users can write, edit, publish, and archive articles using the Articles Management tab, or find and view published articles using the Articles tab.

Customers and partners also can access articles if Salesforce Knowledge is enabled in a Salesforce community. You can also create a public knowledge base so website visitors can view articles.
How Can Knowledge Help?

One central place to access all information
Consistent knowledge across channels
Contextual knowledge at agents’ fingertips
Easy, intuitive content authoring
Analytics to understand usage, measure success to build a knowledge-driven service organization
How Can Knowledge Help?

Empower your agents

Articles suggested in the context of solving a case

Share a solution in just one click with a customer

Create new articles in the context of a current case
How Can Knowledge Help?
Collaborate to create the best article

Leverage Chatter to collaborate and enhance knowledge

Moderate knowledge publication

Tag articles using Topics
How Can Knowledge Help?
Empower customers

Expose your knowledge base content to your corporate website, embedded in your application.

Push articles through social media networks, such as your Facebook page.

Delivery content to every device, phone, tablet, desktop.
How Can Knowledge Help?
Leverage crowd sourcing to create content

Create articles from crowd-sourced information in the best threads

Push to community knowledge base
How Can Knowledge Help?

Knowledge analytics to measure success and improve usage

Use analytics to understand knowledge base usage

Run analytics to measure success

Fill gaps of missing articles

Recognize and reward top contributors
How Can Knowledge Help?

Advanced search for quick access to information

Most timely and relevant articles are boosted to the top based on:

1. Key words and additional filters such as article types, categories, etc.
2. Language recognition – spell check, stemming
3. Article usage – most viewed, attach rate to solved cases
Salesforce Knowledge Features
Using Article Types
Formatting Templates

An article type is a template for articles, defining the structure and format of the article. Article types ensure consistency across articles and makes them more readable.

An article type can have custom fields to capture information, organized into sections in the article layout, and can be assigned to a specific channel (internal users, customer community, public knowledge base).

Example: FAQ, How To, Best Practice, Training

Article types should enable agents and customers to search for and access the information online with ease.
Creating Articles

Be an author

Authors create articles by selecting an article type, writing content, assigning categories, and choosing one or more channels. Depending on the article type, several fields may be available for different types of data.

Articles can be created within the context of resolving a case or in the Article Management tab.
Categorizing Articles
Access and search-ability

Categories classify articles in Salesforce Knowledge.

This classification helps users search for and find the articles most relevant to their needs and allows administrators to control access based on role hierarchy thus dictating article visibility.

After data categories have been set up, article managers can assign the relevant categories to draft articles.

When users search for articles in any channel — Internal, Customer, Partner, or Public Knowledge Base—they can use the categories to help locate information. If your organization uses a role hierarchy, access to data categories is determined by the user's role.
Managing Articles

On the Article Management tab, article managers can create new articles as well as find and manage existing articles in any phase of the knowledge life cycle.

- Create and save a new article.
- Reassign the article
- Publish the completed draft to one or more channels
- Update the article as needed
- Archive the article when it is obsolete
- Delete the article when appropriate
Using Articles to Solve Cases

Salesforce Knowledge and cases combine to provide a powerful customer support tool. To search the knowledge base directly from a case and attach related articles to the case for convenient reference, add the Articles related list to case page layouts.

When closing a case, support agents can easily create a new article to capture important information and help solve future cases more quickly.
Searching for Articles

Finding articles in Salesforce Knowledge is quick and easy. Enter a search term on the Articles tab to initiate a full-text search of the knowledge base and narrow your search by selecting specific article types and categories.

You can filter search results by language, validation status, and category and sort the list view according to several criteria such as highest-rated or most-viewed.

On the Article Management tab you can search for a specific article within the chosen list view. The Article Search component allows you to search for articles from the Home tab.
Rating Articles

Internal app, Customer Portal, and partner portal users can rate articles on a scale of 1 to 5 stars and view the average rating for an article. Average ratings are not static. Every 15 days, if an article has not received a new vote, its average moves up or down according to a half-life calculation. This change ensures that over time, older or outdated articles don't maintain artificially high or low ratings compared to newer, more frequently used articles. Articles without recent votes trend towards an average rating of 3 stars. The Articles tab also allows users to compare the ratings for different articles and sort the list view according to highest or lowest rated articles.
Salesforce Knowledge Best Practices
1. Implement a Knowledge Lifecycle Process

Knowledge is a continuous process

- **Analyse**
  - Analytics to find knowledge gaps and track effectiveness

- **Deliver**
  - Deliver across multiple channels to agents, customers, and public web site users

- **Author**
  - Author using pre-defined article types for service and sales

- **Categorize**
  - Tag with business role, customer, product & agent dimensions

- **Review**
  - Collaboration to ensure accuracy

- **Provide metrics for management of people & processes**
2. Create Search Filtering Dimensions

Create dimensions of Knowledge to filter content to allow for faster, easier, and more relevant search results:

1. Create a minimum of three article types. For example: FAQ, Training, Internal Procedure.
2. Create data categories. For example: product groups, product versions.

Also consider how would agents want to look for information? How do customers look for information?
3. Let the Community be your source of information

Enable the same knowledge base for all internal departments, as well as customers and partners.

Allow for new content to be added by each of these channels.
4. Knowledge Automation

Ensure that an approval workflow process is created for managing any newly created or updated content to ensure that it adheres to the standard verbiage used by the company.
5. More Than Words

Use content that is not just text based, include videos and images. This allows another avenue to deliver your content and makes it easy when describing a problem and the resolution.
6. Leverage Analytics

Create reports and dashboards that gather Most Viewed Articles, Highest Rated Articles and also Least Viewed and Least Rated articles.

This allows you to review which content is working and not working.
7. Create a Feedback Loop

Use Chatter to collaborate and provide feedback on articles.
Other Best Practices

8. As part of the migration process, highly recommended to scrub data before importing
9. Create content as a by-product of solving problems
10. Evolve content based on demand and usage
11. Develop a knowledge base of your collective experience to date
12. Reward learning, collaboration, sharing, and improving
Thank You