



THE CUSTOMER SUCCESS PLATFORM

Salesforce Knowledge

Overview and Best Practices

Overview of Salesforce Knowledge

The What and the Why?

Salesforce Knowledge

Is Knowledge Centered Support (KCS) Verified

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

Knowledge centered support (KCSSM) is a methodology for **capturing, authoring, refining, and publishing information** that is relevant to the support processes for an organization.

Salesforce Knowledge

Overview

Search



Salesforce Knowledge is a dynamic repository of information, a knowledge base, where users can quickly find and view relevant content, known as articles.

Contribute



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.

Share



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

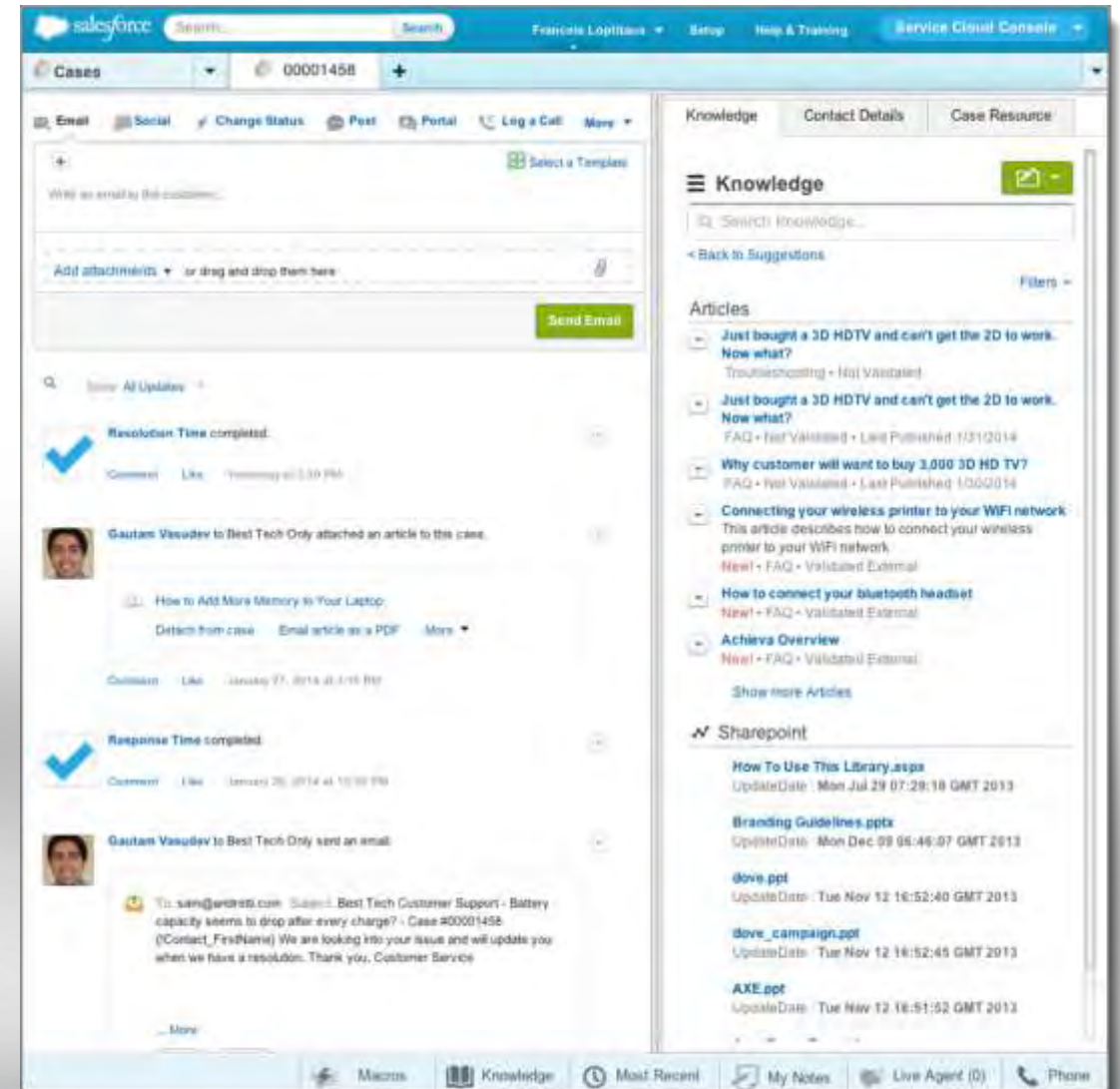
How Can Knowledge Help?

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



The screenshot displays a Salesforce Knowledge article titled "The television speakers are producing a humming, buzzi". The article interface includes a "Hide Chatter" button, a "Following" status, a "Rate This Article" section with five stars and "(Average Rating: No Rating)", and "Edit" and "Version 2" options. Below the article title, there are "Post", "File", and "Link" buttons, a "Write something..." text input field, and a "Share" button. A "Followers" section shows a profile picture of Francois Lopitiaux. The Chatter feed below the article shows three updates: Francois Lopitiaux published a new version of the FAQ at 5:38 PM; Francois Lopitaux @Admin User said "Here it's done." at 5:40 PM; and Admin User @Francois Lopitiaux commented "I think that we need to review this article since the incident has been solved." at 5:34 PM. Francois Lopitaux responded to the comment at 5:38 PM, saying "Thanks for the notice, it's correct. Let me speak with the @Michael Ramsey from R&D." The feed also includes "Sort by: Post Date" and "Write a comment..." input fields.

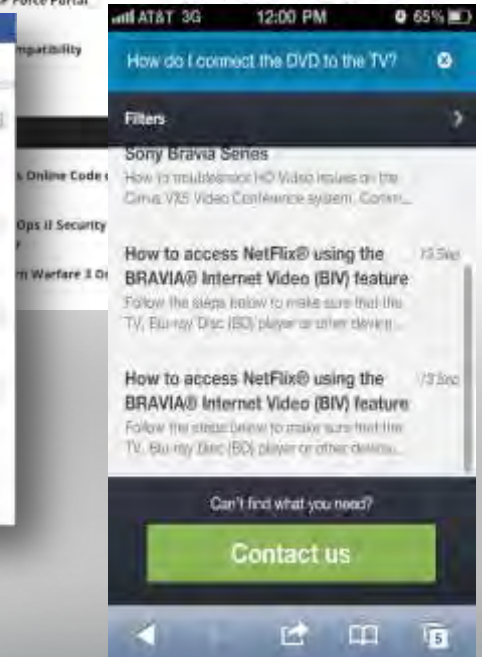
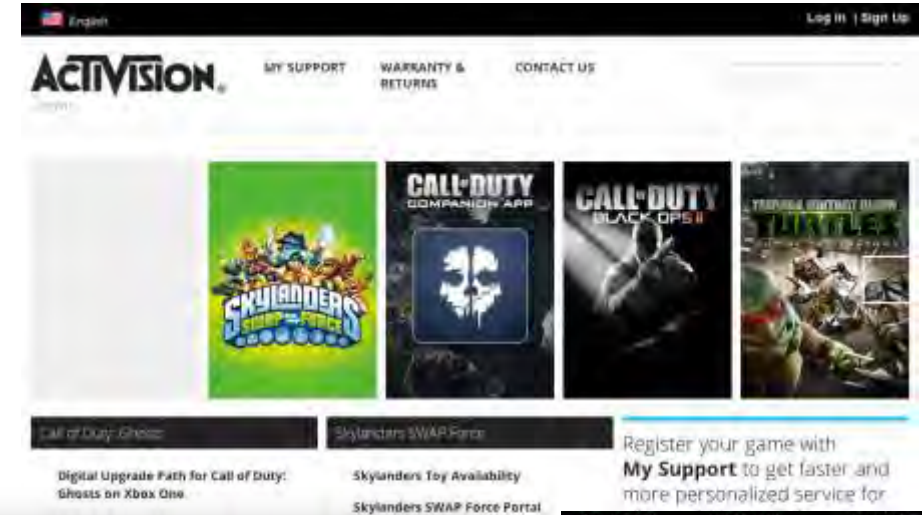
How Can Knowledge Help?

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

The screenshot shows a community knowledge base interface. On the left, there are navigation options: 'New here?' with a 'Sign Up' button, 'Have an account?' with 'Sign In' and 'Facebook' links, 'Best Answers' (highlighted), and 'Open Questions'. Below these are 'Topics' including 'TV & Home Entertainment' (highlighted), 'TV and Video Accessories', 'Televisions', 'Remote Controls', 'Internet TV', 'Blu-ray disk & DVD', 'Home Theater', and 'Hifi receivers & Speakers'. The main content area features a search bar with the query 'My TV is making noise'. Below the search bar, there are tabs for 'All', 'Questions', and 'Articles'. A list of related questions is displayed, including 'my 3d tv doesn't work with ps3', 'I've got dead pixels on the TV..', 'Sony KDL-55HX800 restarts itself infinitely. When i switch on the TV , the green light co...', 'How do I get the HD working on my Bravia TV?', and 'Unable to get a 3D image when the TV is connected to a PlayStation®3 (PS3) console.'. A 'Post Your Question' button is visible. Below the list, there are tabs for 'Popular' and 'Recent'. Two question entries are shown: 'How do I connect Sony Device to my TV?' (dated June 4, 2012, Useful 3) and 'What types of 3D content are available and can be displayed on a Sony 3D TV?' (dated June 4, 2012, Useful 0). A user profile for 'Brad Anastasio' is visible, with a post about a Bravia KDL-46XBR4 TV issue (dated June 4, 2012, Useful 0). At the bottom, a user profile for 'Antony Passemaid' is partially visible.

How Can Knowledge Help?

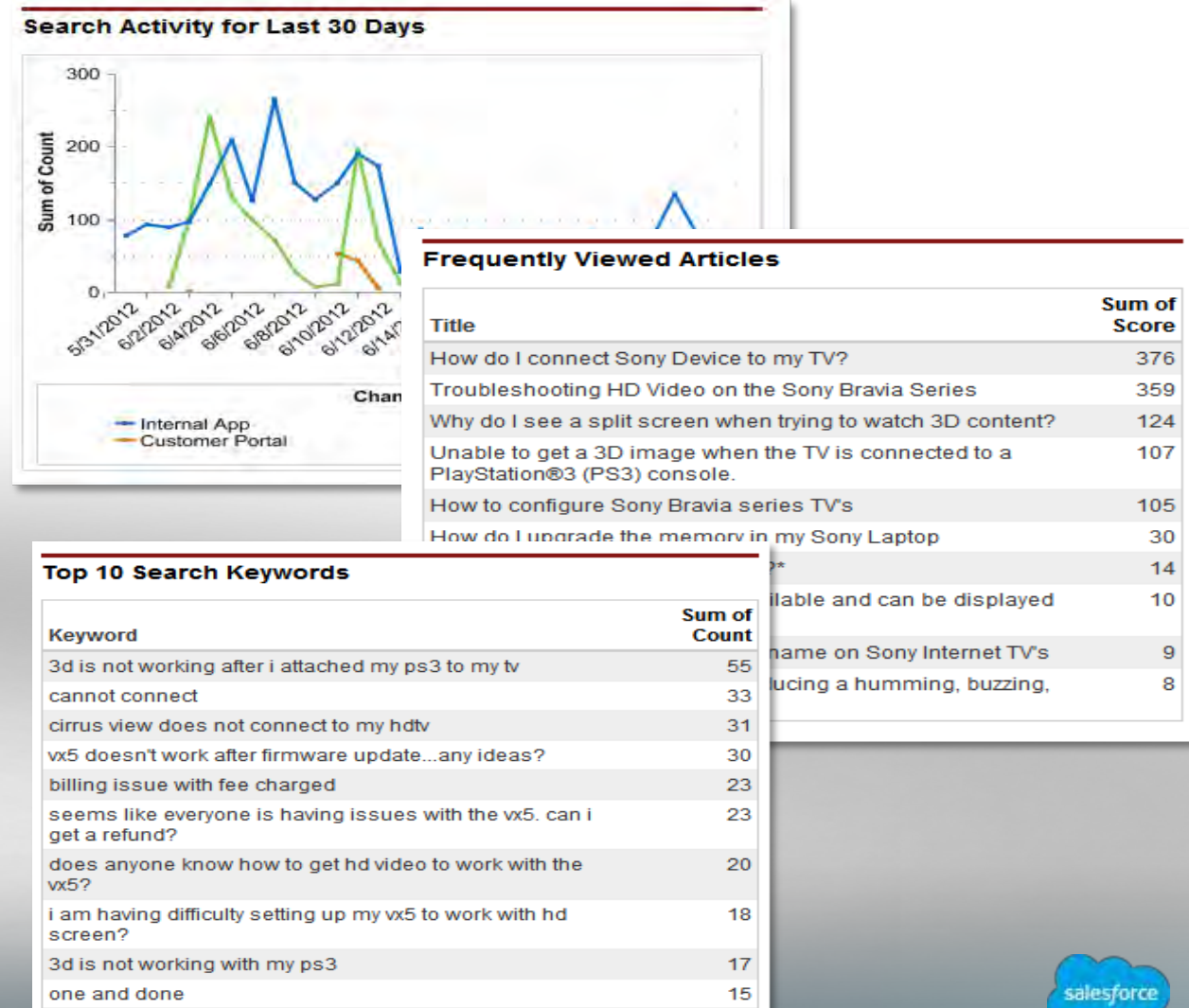
Knowledge analytics to measure success and improve usage

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

The screenshot shows a search interface for 'forgot password' in Salesforce Knowledge. The search bar contains 'forgot password'. Below the search bar are several filters: 'Published', 'English', 'Product Features', 'Department', 'Release', and 'All Article Types'. A 'Validation Status' filter is set to 'Reset'. A dropdown menu is open over the 'All Article Types' filter, showing a list of article types with checkboxes: 'All Article Types', 'Documentation', 'Getting Started', 'Internal Procedures', 'Knowledge Base', and 'Quick Starts'. The 'Apply' button is visible at the top of the dropdown. The main content area displays a list of articles under the heading 'Articles'. The first article is 'Password Policies - custom Forgot Password and Locked Account message', followed by 'INTERNAL Forgot Password Emails are not delivered to the Community Users', 'Retrieving Forgotten Passwords', 'MobileSDK: login controller issue - users directed back to login page forgot password process does not work', 'Support: Handling Password Reset/Unlock Requests (Premier & Standard)', and 'What are some tips for Password Reset Assistance?'. Each article entry includes a title, a brief description, and metadata such as 'Knowledge Base', 'Validated External/Internal', and 'Last Published' date.

Salesforce Knowledge Features

Using Article Types

Formatting Templates

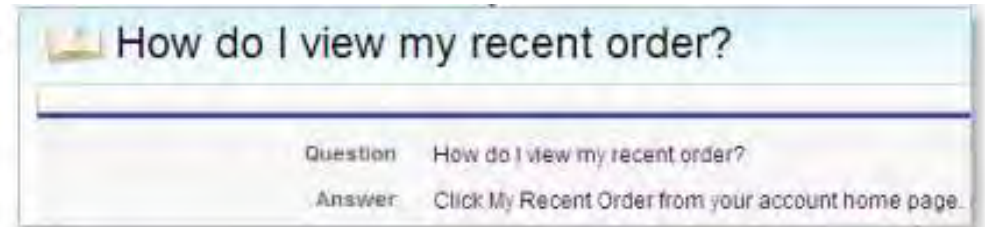
An article type is a template for articles, defining the structure and format of the article. Article types ensures consistency across articles and makes them more readable.

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).

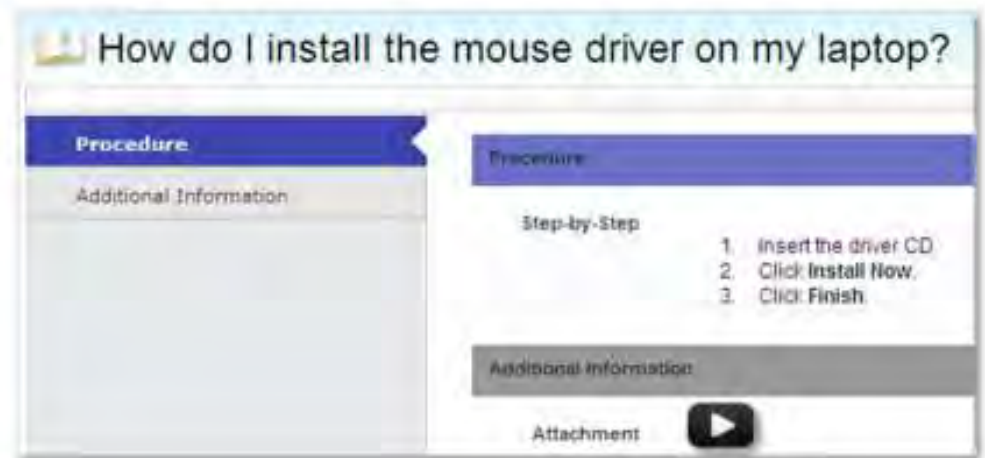
Example: FAQ, How To, Best Practice, Training

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

FAQ



How To



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.

Article Edit
New Article

Save & Close Save Cancel Assign... Preview

Article Assignment

Assigned To Rachel Rosales
Assigned By Rachel Rosales
Instructions -
Assignment Due Date -

Article Properties

Publishing Status Draft
Type Internal Procedures
Article Number
Created By
Last Modified By Rachel Rosales
Language English
Translations

Categories

Product Features No Category

Department No Category

Release No Category

Channels

Internal App
 Partner
 Customer
 Public Knowledge Base

Article Number
Title Release Readiness
URL Name Release-Readiness
Summary
Validation Status Validated External

Information

Description

I. JOIN COMMUNITY GROUPS

1. Success Release Readiness

While there are many helpful groups, the best group to join in order to stay current on the latest and greatest is the Success Release Readiness Group which is designed to help you stay up to date on the latest and greatest product enhancements and innovations. Consider this group the central location for release information, technology updates, solution ideas, and interactive product discussions.

The group provide resources such as:

- Best practice guides
- Product demos and webinars (https://success.salesforce.com/_ui/core/chatter/topics/TopicPage?id=0TO300000004YUe)
- Tip Sheets/Documentation
- Release Overview Decks (<https://success.salesforce.com/06930000004jnmjd>)
- Release at a Glance <https://success.salesforce.com/06930000003vMyB>
- Video snippets <https://success.salesforce.com/0D53000001pFHLh>

Categorizing Articles

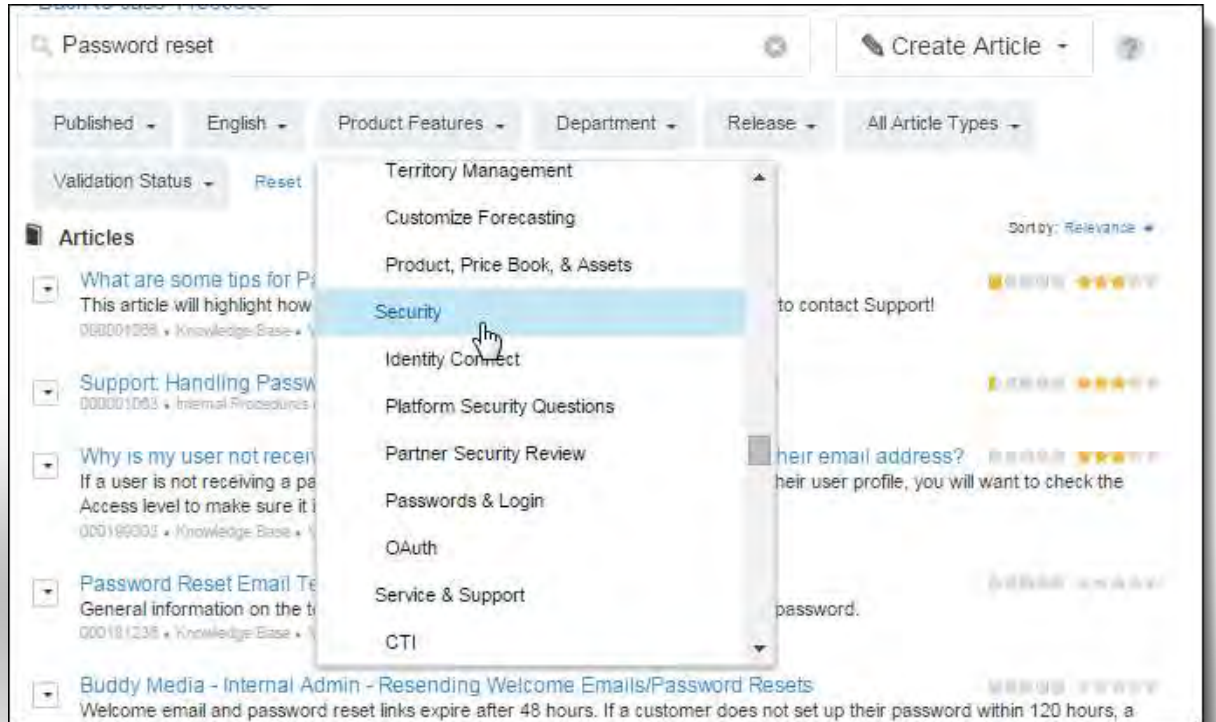
Access and search-ability

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.

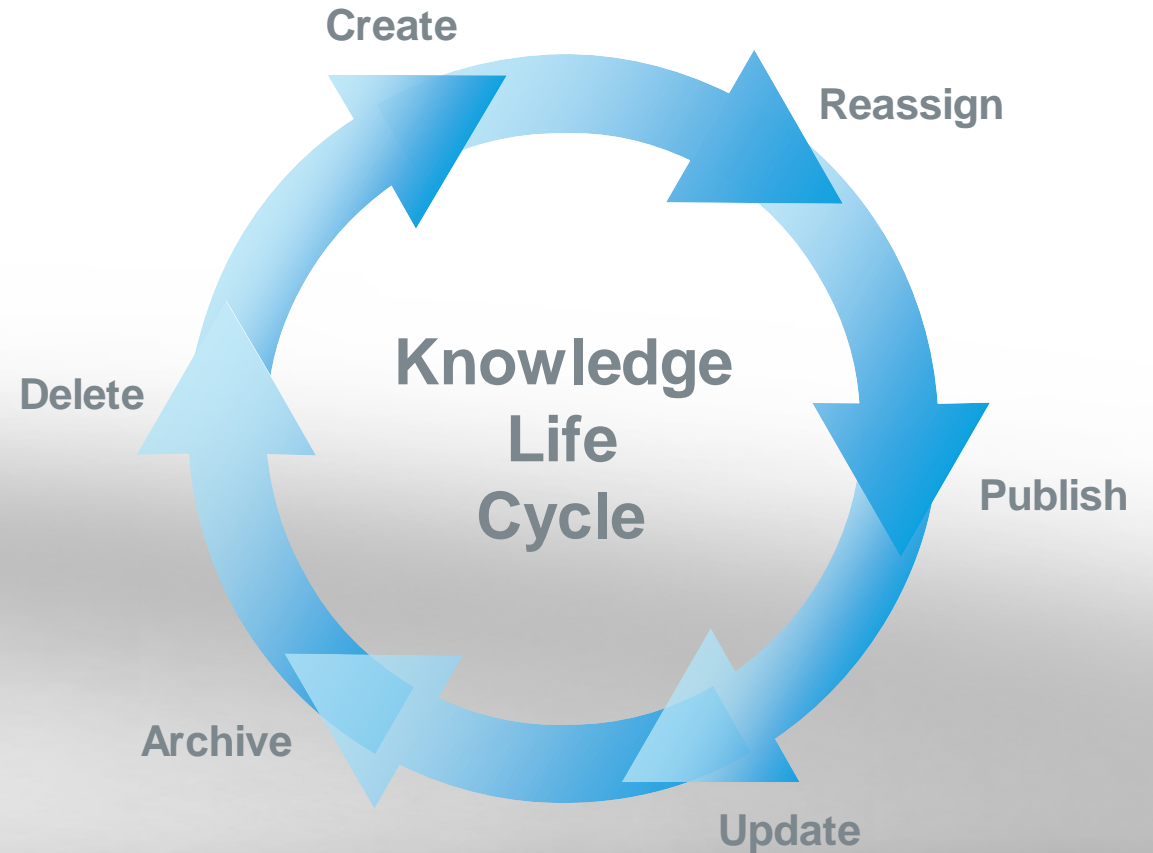
Reassign the article

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

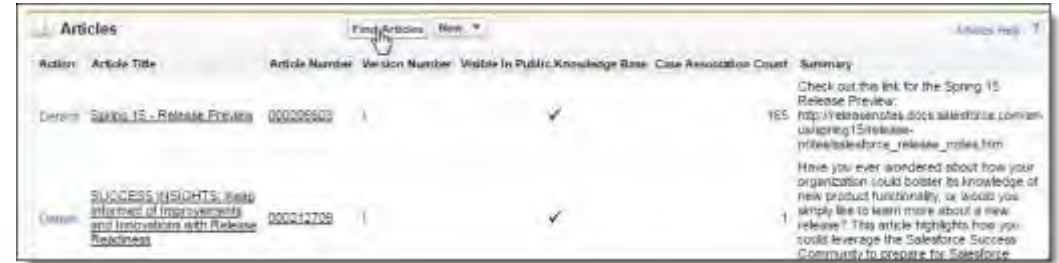


Using Articles to Solve Cases

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.

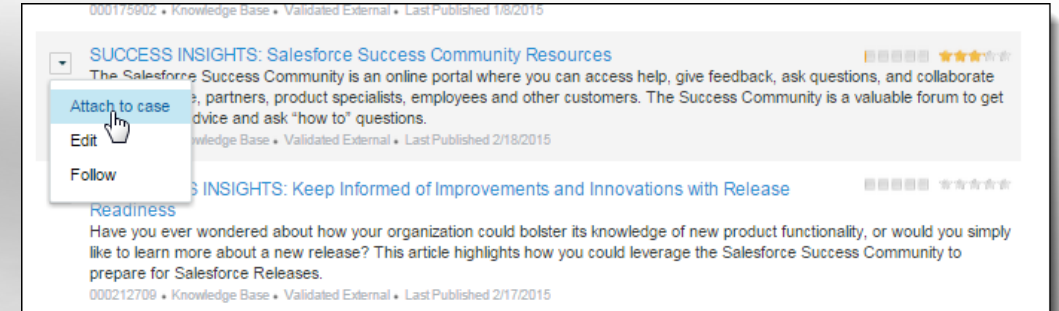
Search



A screenshot of the Salesforce Knowledge Articles list. The table has columns for Action, Article Title, Article Number, Version Number, Visible In Public Knowledge Base, Case Association Count, and Summary. Two articles are visible:

| Action | Article Title | Article Number | Version Number | Visible In Public Knowledge Base | Case Association Count | Summary |
|---------|--|----------------|----------------|----------------------------------|------------------------|--|
| Details | SALES 15 - Release Preview | 000006800 | 1 | ✓ | 165 | Check out the link for the Spring 15 Release Preview: http://releasesales.docx.salesforce.com/en-us/spring15/release-prepare/salesforce_release_ready.htm |
| Details | SUCCESS INSIGHTS: Keep Informed of Improvements and Innovations with Release Readiness | 00012708 | 1 | ✓ | 1 | Have you ever wondered about how your organization could bolster its knowledge of new product functionality, or would you simply like to learn more about a new release? This article highlights how you could leverage the Salesforce Success Community to prepare for Salesforce |

Attach



A screenshot of the Salesforce article 'SUCCESS INSIGHTS: Sales Success Community Resources'. The article title is 'SUCCESS INSIGHTS: Sales Success Community Resources' and the content is 'The Salesforce Success Community is an online portal where you can access help, give feedback, ask questions, and collaborate with partners, product specialists, employees and other customers. The Success Community is a valuable forum to get advice and ask "how to" questions.' A dropdown menu is open over the article, showing options: 'Attach to case', 'Edit', and 'Follow'. The 'Attach to case' option is highlighted. Below the article, there is another article snippet titled 'SUCCESS INSIGHTS: Keep Informed of Improvements and Innovations with Release Readiness'.



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.

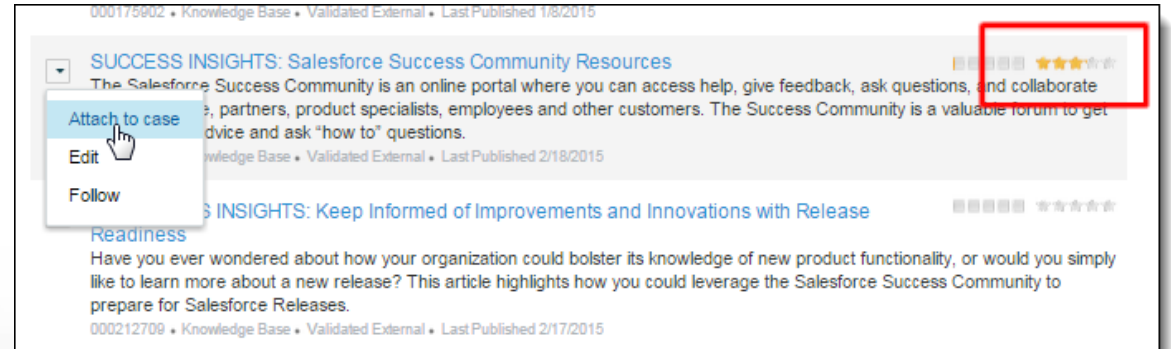
You can filter search results by language, validation status, and category and sort the list view according to several criteria such as highest-rated or most-viewed.

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

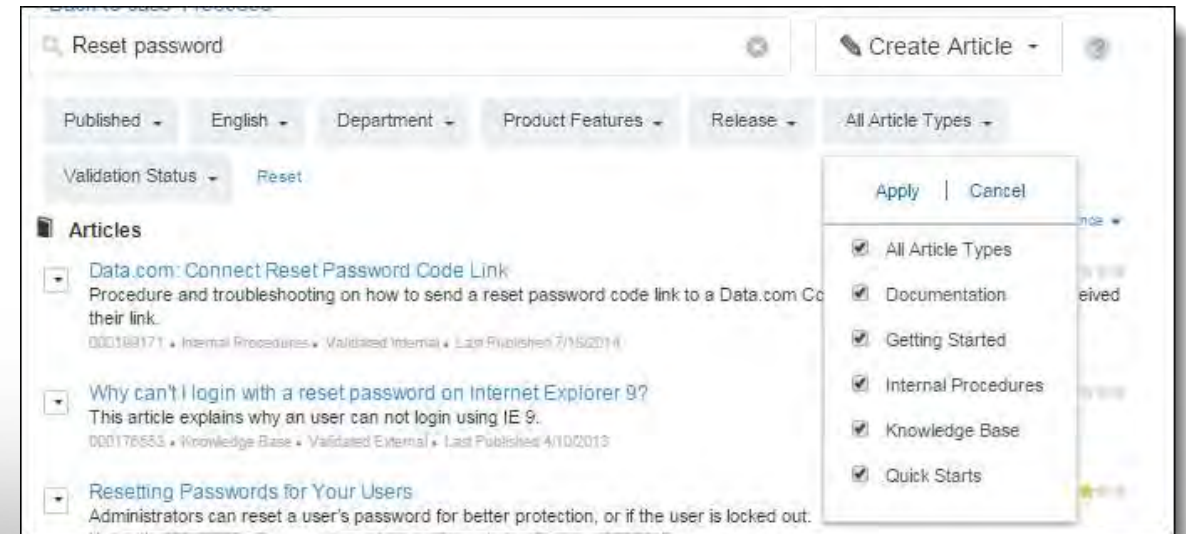


2. Create Search Filtering Dimensions

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.

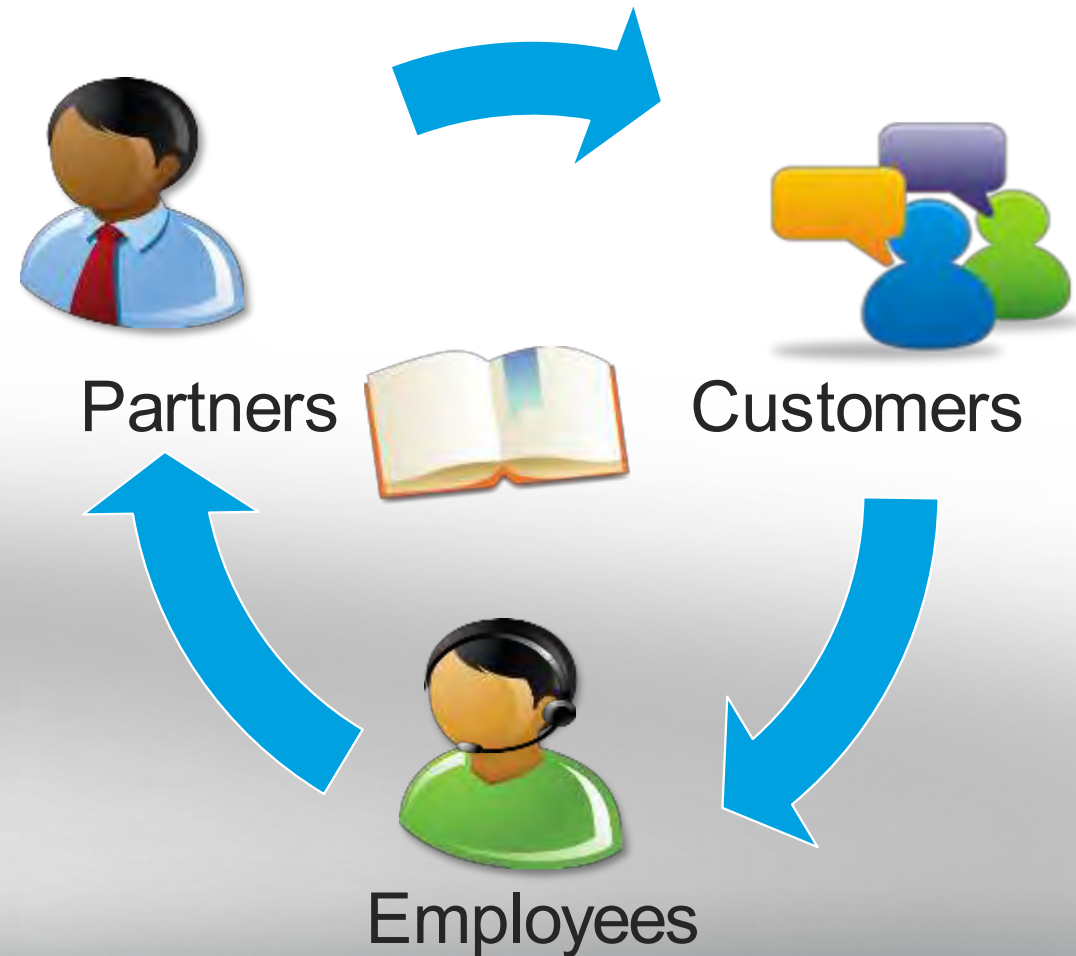
Also consider how would agents want to look for information? How do customers look for information?



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.



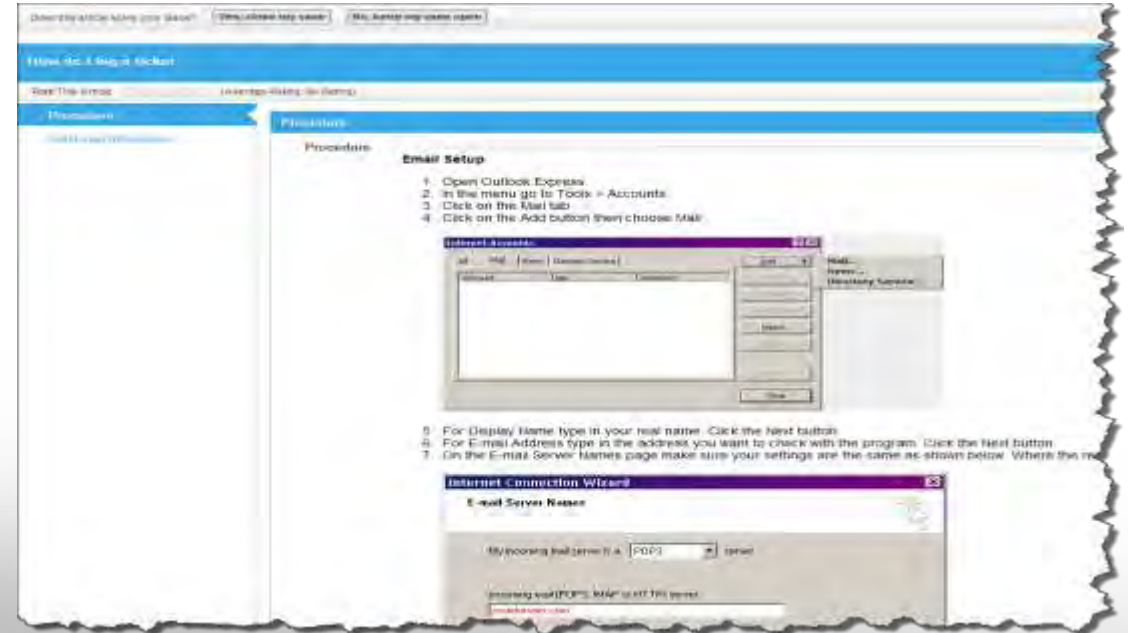
4. Knowledge Automation

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

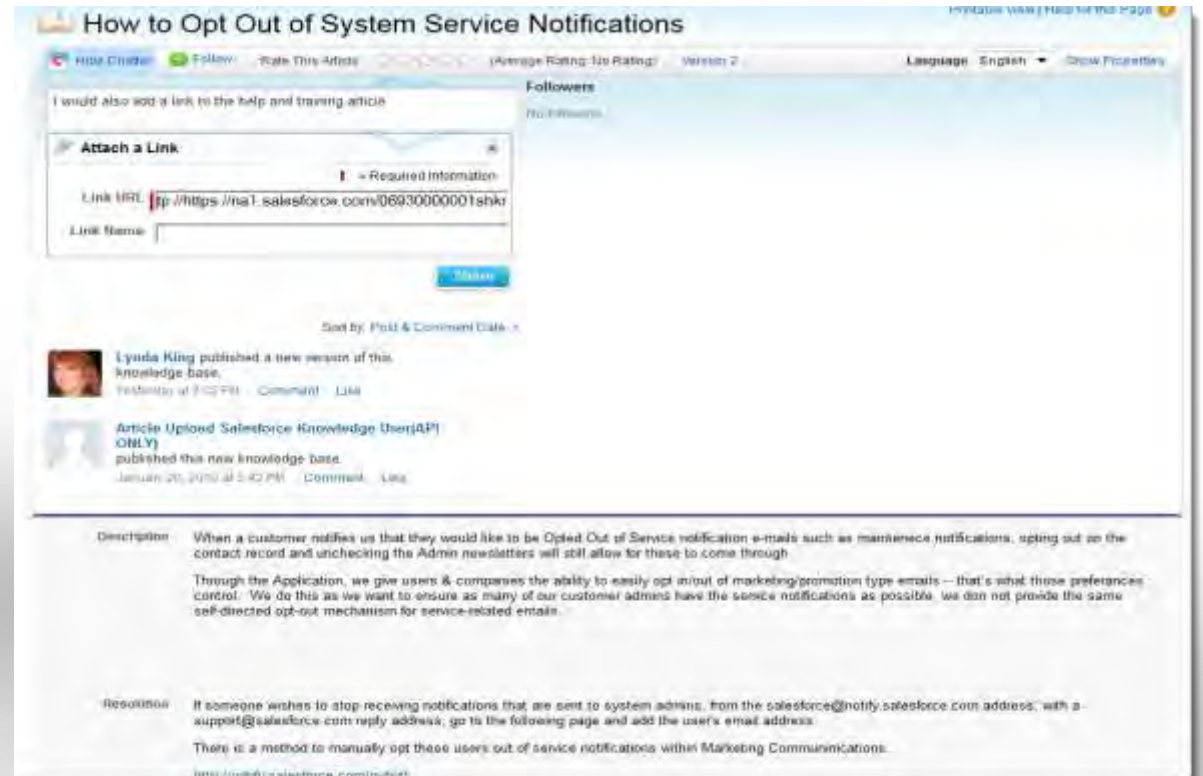
Create reports and dashboards that gather Most Viewed Articles, Highest Rated Articles and also Least Viewed and Least Rated articles.

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
