

THE ESSENTIAL GUIDE TO CHOOSING AN ONLINE KNOWLEDGE BASE PRODUCT

E، SE، So you have been tasked with **choosing a knowledge base solution** for your product. Maybe you have been working in customer support for awhile. Or maybe you are brand new to the problem. But you are probably feeling a bit overwhelmed. There are a lot of knowledge base products out there and the choice can seem overwhelming.



WHO IS THIS GUIDE FOR?

This guide is primarily for businesses that have a software product they are supporting. It will be most applicable to **B2B** software companies, but **B2C** companies will find the information applicable as well.

In this guide we are assuming that you are pretty new to this process so we will do our best to make the information simple to understand and easy to implement. Choosing a knowledge base platform is a big deal. Hopefully this will make it easier.



FIRST STEPS

LIST YOUR GOALS







The first step is to list your goals. If you don't know what your goals are you will never know if you chose the right product. For most of your goals it will probably be something like the following:

- Decrease support requests
- Improve product adoption
- Improve customer adoption
- Make your support agents more productive
- Centralize your product training/information

Once you have listed your goals you need to do one more thing: choose a primary goal. No matter which solution you choose you are going to have to make compromises. There is no one solution that will do everything you need. Choosing a primary goal will help you focus on what matters most as you evaluate the different options.

LIST YOUR REQUIREMENTS

You also want to make sure that you list your requirements. Do you need to make your documentation public on the web or should users have to login? Do you want users to login to your documentation site through your own web application? Do you need to translate the documentation into **multiple languages**? Do you need full control over the branding or will adding your logo to your documentation site be enough? Does it need to be able to integrate with other parts of your support system, such as a help ticketing system?

Make a list of real requirements you have right now. Don't list things that aren't real requirements yet. Make sure you focus on the most important requirements.



2CHOOSING YOUR PLATFORM

The next step is to start to decide which type of platform you want to use for creating your knowledge base. There are a few options including;

- The knowledge base included with your ticketing system
- A standalone knowledge base or wiki
- Home grown solution

TICKETING SYSTEM KNOWLEDGE BASE

Many help ticketing systems come with some form of knowledge base. Some examples are **Zendesk** and **Desk.com**. There are many, many help ticketing solutions and the quality of their knowledge bases can vary dramatically.





The main advantage of your ticketing system's knowledge base is that it is often integrated with your help ticketing system. This can make it faster for your support agents to respond to support requests.

The disadvantage is that many times these knowledge bases lack features such as revision control and authoring workflows. Most will only have simple **WYSIWYG**, web-based editors. In general these systems don't have an option to export your documentation as **PDF files**.



STANDALONE KNOWLEDGE BASE OR WIKI

Standalone or wiki based systems generally focus more on:

- The quality of the authoring experience
- Revision management
- Author collaboration



These can include:

- Simple Content Management Systems (CMS's) such as WordPress
- •Full blown wikis such as Confluence or MindTouch
- Dedicated knowledge base products such as ScreenSteps (our product)









Once again these systems will be very different in terms of functionality and cost. Some can integrate with existing help ticketing systems and some can't. Some can be highly customized and styled while others can be quite ugly.

The main advantage is that these systems are generally dedicated to improving the authoring and management of documentation so they will have features that are more focused on the authoring process.

You will only find a disadvantage if you need a tighter integration with your existing help ticketing system.



HOME GROWN SOLUTION

The third option is to create **your own help system**. Many companies choose to do this so that they can have the help system tightly integrated into their application.

The advantage is that you have full control over what the help system can or cannot do.

The disadvantage is that you have full responsibility for making the help system do anything.

I have seen organizations that build out a home-grown documentation solution by putting a few developers on the project. But those developers soon get moved to other tasks and the documentation system gets neglected.



By using the knowledge base that comes with your ticketing solution or a standalone knowledge base/wiki you will generally get a more **robust** feature set as well as a team that is dedicated to continually improving the knowledge base product.

3 EVALUATE THE KNOWLEDGE BASE PRODUCT

DOES IT MEET YOUR REQUIREMENTS?

Once you have decided on a few knowledge base products to evaluate, the first step is to find out if it meets your top requirements. Most likely there will be pros and cons to each solution so make sure that you focus on your **primary goals** first.

WHAT DOES THE PRESENTATION LOOK LIKE TO YOUR CUSTOMERS?

Once you have met your key requirements the next step to see what the knowledge base will look like for your customers. Knowledge bases that are disorganized or that present a "wall of text" will generally get very little usage from your customers. You want your knowledge base to look clean, organized and professional. Make sure that the solution you pick will allow you create a knowledge base that meets that criteria.





WHAT IS THE AUTHORING EXPERIENCE LIKE?

Finally, evaluate the authoring experience. If you have better **authoring tools** then you will write better content. If creating content is laborious, then you and your team will avoid creating and updating articles.

4 CONSIDERATIONS



Here are some common considerations to make when choosing a knowledge base.



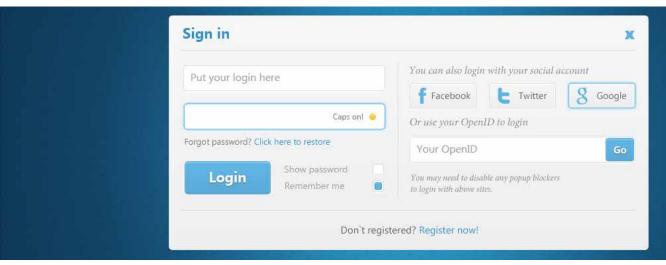


- •Can you use your own domain?
- •Can you make the knowledge base web site match the visual branding of your marke ting website or web application exactly? Or are you limited to just uploading a logo and adjusting some colors?
- •How much control do you have over the styling of the site?

AUTHENTICATION

Here are some common considerations to make when choosing a knowledge base.

- •Do you need to require users to login to view your documentation?
- •Do you need to integrate the knowledge base with your own login system?
- •Do you just need to create a simple password authentication for your site?
- Do you need to be able to create user accounts in your documentation system?





SCREENSTEPS



Hopefully this guide has helped you understand some of the things you need to think about when are choosing a knowledge base product. Let me take a moment to introduce you to our product, ScreenSteps.



ScreenSteps

ScreenSteps is a help authoring and publishing tool that helps you create beautiful knowledge base content without going crazy. With ScreenSteps you can create standalone knowledge bases that are public or require users to login. Or you can author content in ScreenSteps and publish it to web applications such as Zendesk, Desk.com, WordPress, Jive and Help Scout.

You can learn more about ScreenSteps here: http://www.screensteps.com

Or sign up for a free trial here: http://www.screensteps.com/trial

