

# Expanding features for CRM systems products, part 3

INTRO

AUTOMATIC ACCOUNT SEARCH

KNOWLEDGE BASE

APPLICATION FULFILLMENT

OUTAGE PROCESS

## Knowledge Base

### Why prioritize this feature?

Auto account search helped dramatically increase the customer service department efficiency. However, nearly 2-3x more agents would be needed to support FileRight's objective of 4 million new customers per year. At the time, it took 3+ weeks to train a customer service agent, as each had to become an immigration expert to effectively answer customers' questions without providing legal advice. While conducting user research into the customer service agents' daily routine for Auto Account Search, I observed other pain points:

Agents were being trained one-on-one which was inefficient and unscalable	No follow up training or continuous improvement plan	Training sessions were not all compliant with unlicensed practice of law (UPL) best practices	Customer service agents would stand in line at supervisor's desks for answers

User story: "As a customer service agent I need to be able to find the answer to a customer's question within 30 seconds, so I can successfully help more customers in a shorter amount of time, both contributing to the success of the business and higher customer satisfaction."

User story: "As a compliance attorney I need to be able to certify answers to questions that have been asked so that customer service agents can provide correct and UPL compliant information to customers."

### Redefining the Knowledge Base product

FileRight already had a knowledge base system to store and search customer information, so I started by understanding its features and conducting qualitative user interviews with customer service agents, in-house attorneys, and department heads to understand why they weren't using it. Consistent user feedback from these interviews was the existing knowledge base had out of date and difficult to parse information. This led me to define knowledge base systems as a self service collection or resources about a specific product, service, or topic that can be accessed on demand to answer user's questions quickly. Any new knowledge base solution would need to be dynamic and have the capacity to learn and grow with the users, so it was important to support rich content such as:

Videos and links to rich media resources	FAQs, answers, and troubleshooting guides	How-to docs and news articles
<p>An essential requirement was to increase our customer service agents' efficiency in acquiring information about immigration laws, company policies, and departmental procedures. This means it should be faster, more reliable, more accurate, and less effort than finding a human to ask. Even though we explored other solutions, it was pretty clear from the beginning that some sort of knowledge base system would still be required to achieve our objectives.</p>		
Defining requirements and features that would yield the most value for system users	Use our existing knowledge base system or implement a new one	Buy vs build the knowledge base system
Open source or paid vendor platform options	Defining the content selection and migration process	Training hundreds of people across a global organization to adopt a new system

## Investigating solutions

Not building a feature or product should always be considered, as the opportunity cost of any particular feature can outweigh the expected ROI. However, in this case, taking no action would've prevented Fileright from quickly and efficiently onboarding new agents to scale the business. Another option would have been to create stronger departmental policies around usage of the current knowledge base system, while refreshing the content to be more accurate, reliable, and UPL compliant.

I had a team of dedicated engineers that could have: built a knowledge base system from scratch, used an open source platform, or extended the features and functionality of the existing system. Lastly, there was also the option of buying a SaaS solution. Using a SaaS solution would minimize implementation risks, provide a solution ready on day one, and require little to no engineering resources. However, it would require finding a solution that met 100% of our MVP requirements. Using cost and time implementation charts, I compared approaches to understand the varied cost, effort, and risk both initially and over time (See figures 7 and 8). It was clear from this analysis that a SaaS solution would be the least effort, the quickest to implement, and the least costly solution for at least the first few years.

Figure 7. Cost curve chart by quarter

Figure 8. Implementation chart in months

## The solution

To objectively rank our current system and SaaS options, I created a vendor scorecard, structured by common knowledge base features that would solve for each product requirement. Each feature was then weighted based on importance and ranked based on functional availability and ease of use.

### Knowledgebase Vendor Scorecard

Ranking Method (2 = Simple to Use and/or Works Well, 1 = Not Simple and/or Only Works Adequately, 0 = Difficult to Use or Unavailable)

Weighting Method (3 = Essential function and cannot be without moving forward, 2 = Not a necessity, but extremely useful, 1 = Nice to have)

Functional Area or Requirement: General Features, General Information, Grant Permissions to Features, Degree of System Responsiveness, General Features, Questions are Answerable, The System Should Have the Ability to Allow Collaboration Around a Question ("alive"), Any Authorized User Should Be Able to Ask a Question, Any Authorized User Should Be Able to Respond to a Question, Any Authorized User Should Be Able to Vote on the Usefulness of Questions Answered, Users Should Be Able to Upvote Answers, Users Should Be Able to Downvote Answers, Users Should Be Able to Comment on Specific Answers, Content That Is Related to a Product or Service Should Be Able to Be Edited and Then Uniquely Categorized, Admins Should Be Able to Group/Tag Questions to Facilitate Questions (by Brand, Product, Issue, etc.), this can be done "further the fact."

Scoring Totals: 26

KnowledgebaseForce (Current): 26

Bloomfire: 47

Crowdbase: 45

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