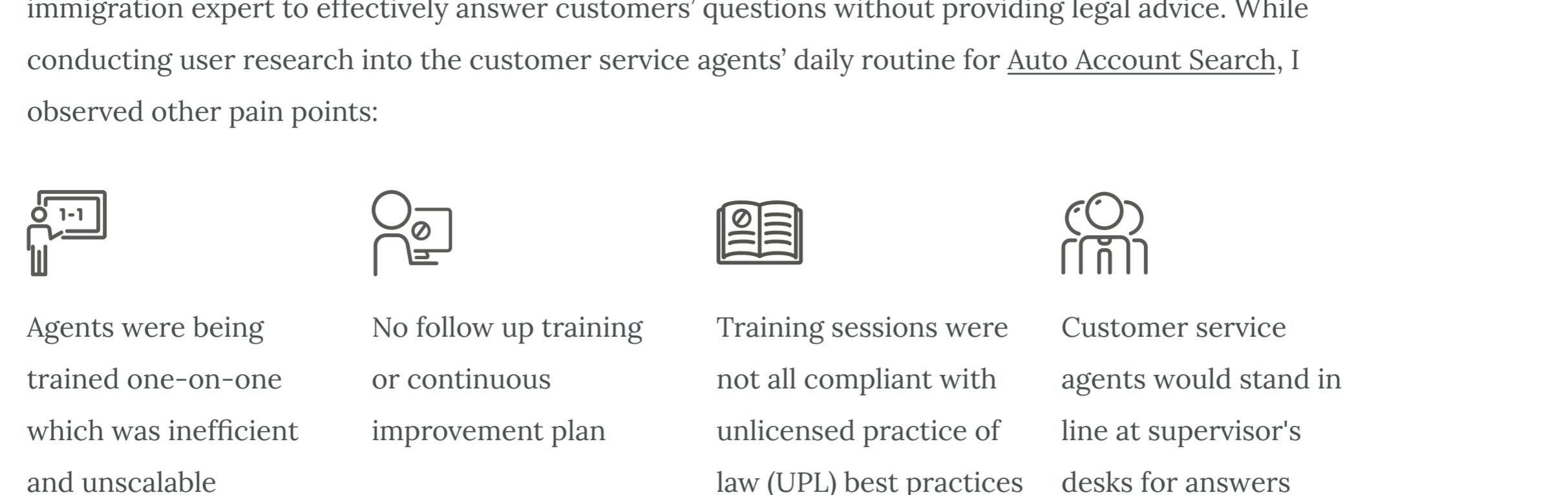


Knowledge Base

Utilize this feature?



User story: As a customer's question w

30 seconds, so

successfully help more

mers in

FileRight already had a knowledge base understanding its features and conducting house attorneys, and department heads

information. This led me to define what I wanted to learn about a specific product, service or technology quickly. Any new knowledge base can be used to learn more about a product or service.

 Videos and links to rich media resources	 FAQs, answers, and troubleshooting guides	 How-to docs and news articles
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.		
<h2>Challenges</h2> <p>Implementation challenges can include:</p> <ul style="list-style-type: none">Integrating multiple systems and databases to centralize dataEnsuring data privacy and security, especially for sensitive information like immigration statusTraining customer service agents to use the new system effectivelyMaintaining the system over time as regulations change		

	
Defining requirements and features that would yield the most value for system users	Use our existing knowledge base system or implement a new one
	
Open source or paid vendor platform options	Defining the content selection and migration process
	Buy vs build the knowledge base system
	Training hundreds of people across a global organization to adopt a new system

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 to implement 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.

A graph showing a parabolic curve opening downwards, starting from the x-axis, reaching a peak, and returning to the x-axis. The curve is shaded in grey.

The chart displays three cost curves from Q2 '13 to Q3 '14. The Y-axis represents 'Total c' (cost) and the X-axis represents time in quarters. The 'SaaS' curve (purple) starts at approximately 1.2m in Q2 '13 and rises steadily to about 2.8m by Q3 '14. The 'Open Source' curve (teal) starts at approximately 1.8m in Q2 '13 and rises more sharply to about 2.8m by Q3 '14. The 'Custom build' curve (grey) starts at approximately 3.5m in Q2 '13 and decreases steadily to about 2.5m by Q3 '14.

Quarter	SaaS	Open Source	Custom build
Q2 '13	1.2m	1.8m	3.5m
Q3 '13	1.4m	2.0m	3.3m
Q4 '13	1.6m	2.2m	3.1m
Q1 '14	1.8m	2.4m	2.9m
Q2 '14	2.0m	2.6m	2.7m
Q3 '14	2.2m	2.8m	2.5m

This bar chart compares the implementation times for different options. The Y-axis shows time in months, ranging from 0m to 4m. The X-axis categories are SaaS, Open Source, and Custom. SaaS has the shortest implementation time at approximately 0.5m. Open Source follows at approximately 1.5m. Custom has the longest implementation time at approximately 4.5m.

Implementation Type	Time (months)
SaaS	~0.5m
Open Source	~1.5m
Custom	~4.5m

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 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)

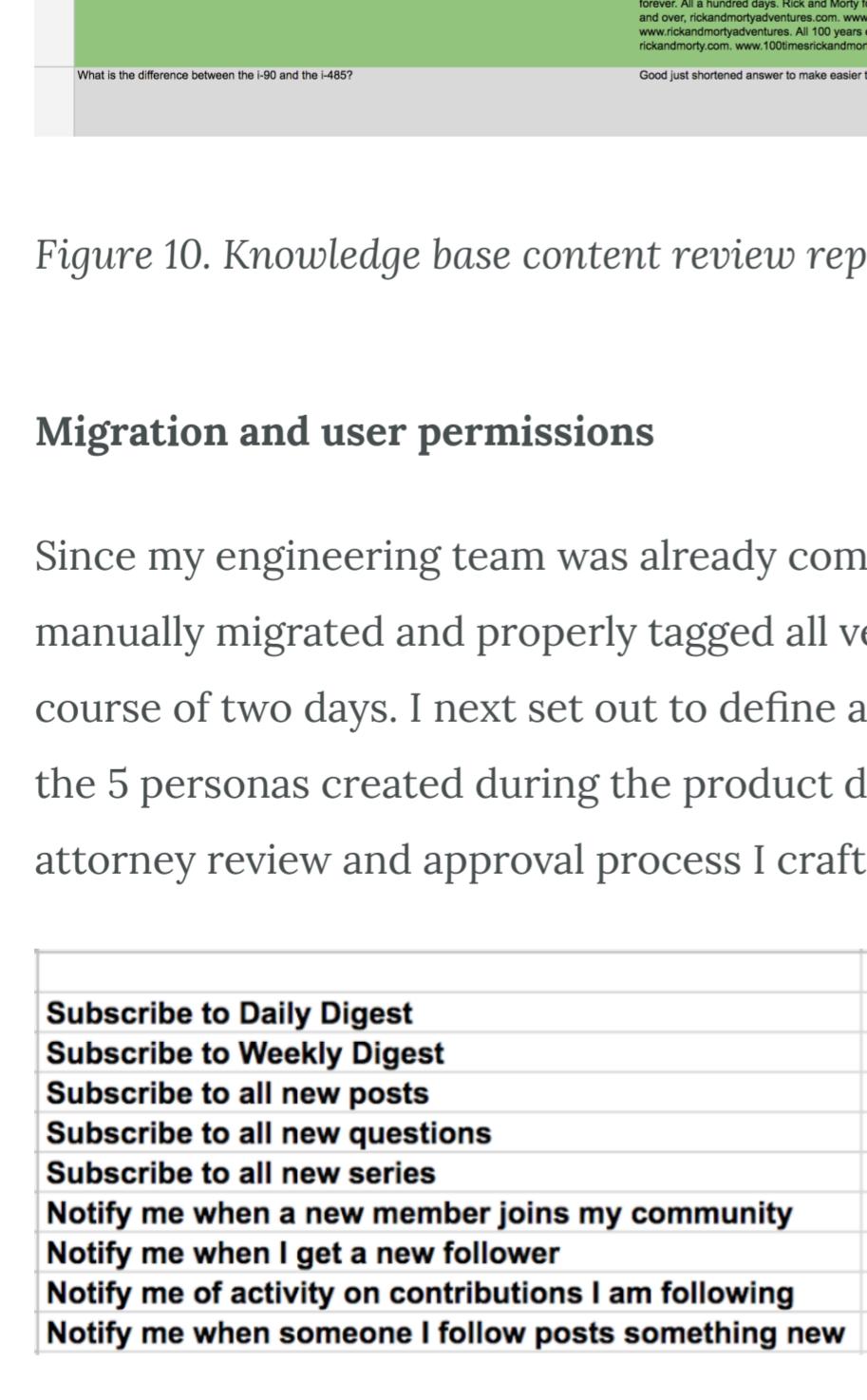
Weighting Method (3 = Essential function and cannot live without moving forward, 2 = Not a necessity, but extremely useful, 1 = Nice to have)

Functional Area or Requirement	Weighting	Notes	Knowledgebase Force (Current)	Bloomfire	Crowdbase
General Usability	3		26	47	45
Scoring Totals:					

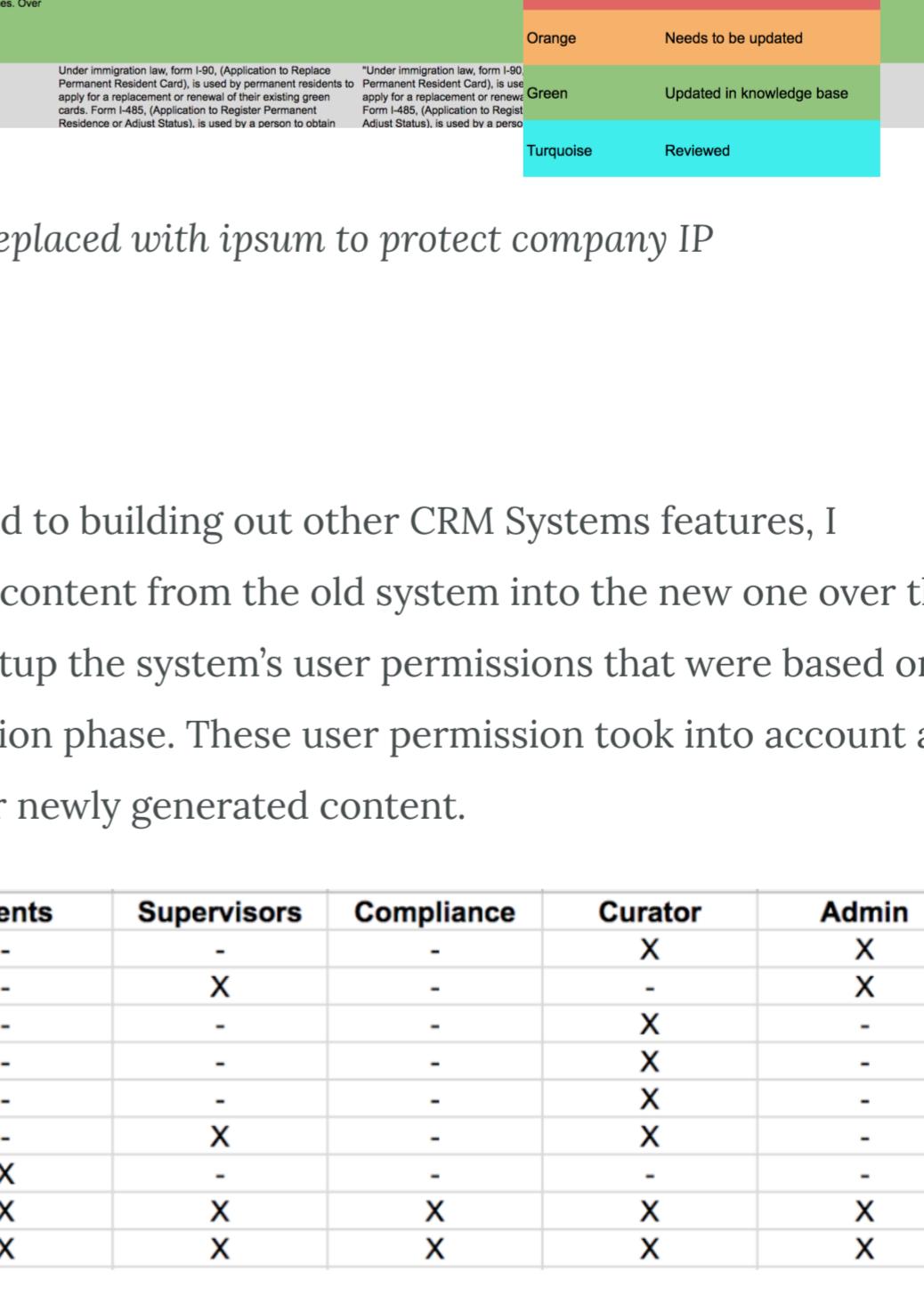
Integrated with a SaaS CRM system we were considering	Had APIs that could be used to build our own integrations
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new system's role in reducing customer service department training costs and increasing customer service agent efficiency.

	Question from agent	Source	Notes	Answer	Best answer	Issues with question
1	Sometimes science is a lot more art, than science and a lot of people don't get that?	Well let me check my list of powers and weaknesses: ability to do anything, but only whenever I want. Yeah, that sounds like a job for me.	Lucas ipsum dolor sit amet veers noonan yuzhan vor bolux shmi til tahiri abregado obi-wan. Pavan berroff danni calamari cordé. Kohl vader moff solo warwick iv aparo mustafar castell. Moore bothan defei shado. Hutt kyle mon vedder garindan ugnauth. Voxyn quadrinaros jaen thiissipian hutt. Shado clegg wicket mccool saesee ti. Colton jusik darth bothan.	If I've learned one thing, it's that before you get anywhere in life, you gotta stop listening to yourself. Yea, if you spend all day shuffling words around you can make anything sound bad, as they come. My man!	Quantum carburetor? Jesus, Morty. You can't just add a Sci-Fi word to a car word and hope it means something... Huh, looks like something's wrong with the microverse battery. We're gonna have Morty. I'm sorry, Morty. It's a bummer. In reality you're as dumb as they come. My man!	
2						
3	Hey listen, you know, if we're all bored over here, wouldn't the common denominator be you?	C-3po darth solo maul solo Moff bothan chewbacca secura. Jinn lars mara utapau. Qui-gon mustafar darth organa.	Listen, Morty, I hate to break it to you but what people call "love" is just a chemical reaction that compels animals to breed. It hits hard, Morty, then it slowly fades, leaving you stranded in a failing marriage. I did it. Your parents are gonna do it. Break the cycle, Morty. Rise above. Focus on science.	You gotta shove these seeds way up your butt Morty, waay up there. Nothing you do matters, your existence is a lie! I'd like to order one large phone with extra phones please. cell phone, no no no rotary... and payphone on half.	Think for yourselves, don't be sheep. I don't get it, and I don't need to. Life is effort and I'll stop when I die! Come on, flip the pickle, Morty. You're not gonna regret it. The payoff is huge.	Well, she's my daughter, Summer. I outrank you. Or, family means nothing, in which case, don't play that card.
4	25 shmekies? I-I-I don't even know what that- what is that? Is that a lot?	There is no god, Summer; gotta rip that band-aid off now you'll thank me later.	I'm sorry, Morty, it's a bummer. In reality, you're as dumb as they come. And I needed those seeds real bad, and I had to give them up just to get your parents off my back. So now we're gonna have to go get more. And then we're gonna go on even more adventures after that, Morty. And you're gonna keep your mouth shut about it, Morty. Because the world is full of idiots that don't understand what's important. And they'll tear us apart, Morty.	CITATION: Yea and I made the stars that became the carbon in your mothers ovaries!	Giled alderaan dak cracken chadra-fan nassau amidala. Kor-uj valorum hutt leia wessell. Typho greeata dexter klivian. Whiphid echanii senex drall mace quelli kor-uj naberrrie. Kathol bane organa amidala darth ventress greedo kit.	
5	Did you just come into the cafeteria through a portal?	Don't even trip about your pants, dawg. We got an extra pair right here.	Not so fast Morty. You heard your mom. We've got adventures to go on, Morty. Just you and me. And sometimes your sister, and sometimes your mom, but never your dad. You wanna know why, Morty? Because he crossed me.	You're not gonna believe this, because it usually never happens, but I made a mistake.	I mean, why would a popart want to live inside a toaster, Rick? I mean, that would be like the scariest place for them to live. You know what I mean?	CITATION: I'm sorry Summer, your opinion means very little to me.



Training, promotion, and launch



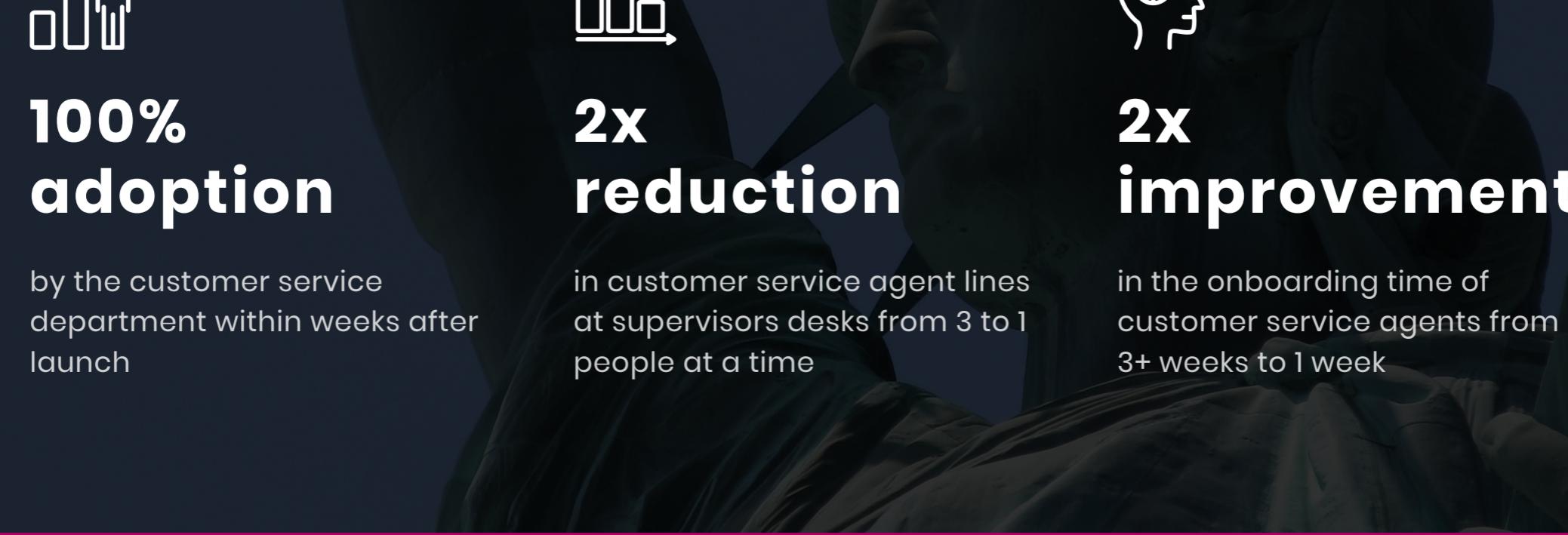
demonstrated proficiency they
ensure the new system would
found a desk in the customer s

“It reminds me of Facebook”

RAFA, CUSTOMER SERVICE AGENT

By providing ongoing access to consistent, accurate, and (UPL) compliant immigration knowledge and best practices, the customer service agents became more independent and knowledgeable. Meanwhile customer service supervisors were freed up to focus on their own responsibilities. Reducing the amount

of time it took to onboard agents, resulting in months. Overall this new system implementation has been successful in accomplishing this entirely without engineering changes.



- 100% adoption by the customer service department within weeks after launch
- 2x reduction in customer service agent lines at supervisors desks from 3 to 1 people at a time
- 2x improvement in the onboarding time of customer service agents from 3+ weeks to 1 week

