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Creating & Managing a Knowledge Base: The Ultimate Guide

How to Create, Manage, and Optimize Your Knowledge Base to Improve Customer Success and Happiness



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It's a constant struggle to deliver amazing customer service. When you're buried in support tickets and live chats, and you find yourself answering the same questions over and over again, it can feel incredibly frustrating.

When you hit this wall, you may think, "How can I scale our customer support? How can I help more customers in less time with the same quality of service?"

[→ Access Now: Free Knowledge Base Article Template](#)

Enter customer education, otherwise known as self-serve customer service – or best-known as a knowledge base.



right – a good knowledge base can scale out your customer support program

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You know how important customer experience is to the success of your company, but did you know that **90% of consumers** use customer service and experience as a factor when deciding whether or not to buy from a business? That's a large potential margin of error.

The good news is that there are many ways to provide remarkable customer service. According to **HubSpot Research**, 62% of customers want to communicate with companies via email for customer service, 48% want to use the phone, 42% prefer live chat, and 36% like "Contact Us" forms.

More than anything, however, consumers want to find answers on their own. **A study by Forrester** confirmed that customers prefer knowledge bases over all other self-service channels. This is likely because the vast majority of customers want an immediate response to their customer service question – **90%**, in fact.

If you're struggling to keep up with reactive customer service, or if you simply want to invest in building and scaling a greater customer experience, it's time to look into building a knowledge base.

You can benefit from a knowledge base because it saves you time spent repeatedly answering the same basic questions over and over again.

This guide will serve as a comprehensive resource for creating and managing a knowledge base. Using the chapter links above, feel free to treat this guide like a choose-your-own adventure story and jump to specific sections to read what's applicable to you – or peruse the whole thing.



What Is a Knowledge Base?

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First off, let's define "knowledge base."

A knowledge base is a self-serve customer service library that includes information about a product, service, or topic. They usually look something like this.

The screenshot shows the HubSpot Academy homepage. At the top, there is a navigation bar with links for Documentation, Training, Certifications, Projects, and Community, along with a 'SIGN UP FOR FREE' button. Below the navigation, a large dark banner features the text 'What do you want to learn today?' and a search bar with the placeholder 'Search our docs and learning resources'. Three orange call-to-action buttons are displayed: 'Get certified.' (with a star icon), 'Watch our training videos.' (with a play icon), and 'View HubSpot Projects.' (with a pencil icon). Below the banner, there are three small icons representing different learning paths: a laptop with colorful icons, a video player, and a person with a backpack.

Source

Knowledge bases may seem like a simple enough concept, but let's step back and put the idea in context.

Customer service departments exist to improve the customer experience. The ways they do this can vary, but it usually starts out with some sort of ticketing or case management system.

When a user has a question or an issue, they get routed through this system and can get an answer through various channels, including email, live chat, social, etc.

All of this is reactive. And when it comes to reactive customer service, it's time-



act repetitive. For example, if you work at a photo-sharing startup, you might act

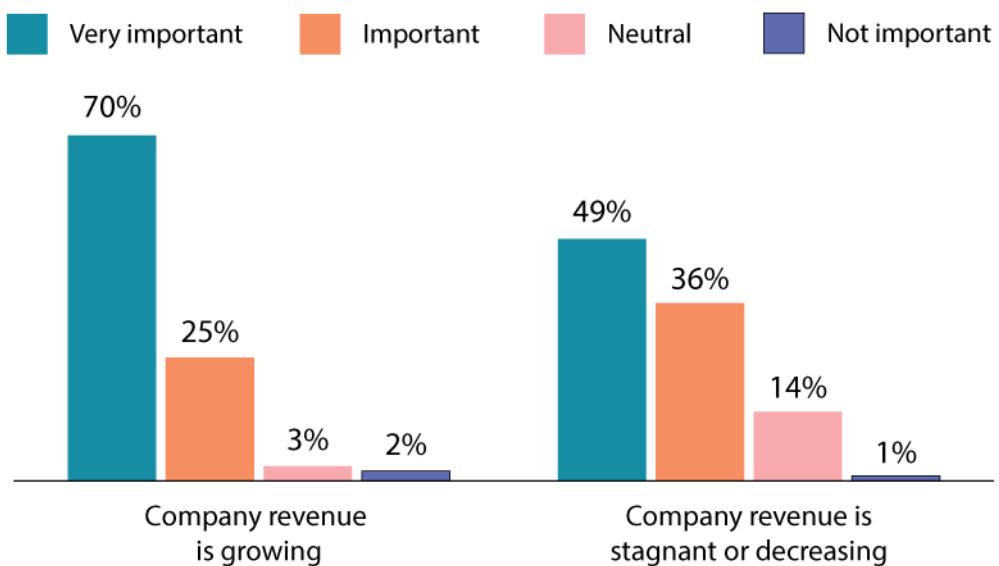
Sections

This repetition is valuable, of course. It shows you how your user experience may or may not be intuitive and how it could be improved. But in the meantime, this reactive repetition is time consuming, stressful, and isn't scalable.

This is where customer service organizations become aware of the need of knowledge bases. Scaling out your customer success initiatives allows you to be more proactive in creating happy and successful customers – and it saves customer service reps valuable time. Happy and successful customers then often turn into **customer advocates**, almost becoming an external sales force for your business. And you already know that leads to business success.

Growing companies are more likely to prioritize customer success

Please rate the following statement in terms of importance for your company:
Making the company's customers successful



Base: 752 C-level and VP business leaders in the UK, US, Ireland, Mexico, and Colombia;
515 Growing companies, 237 Stagnant companies
Source: HubSpot Customer Success Survey, Q2 2017



Source

A knowledge base allows you to create self-service customer support content around recurring topics, issues, and themes. Returning to our photo sharing app



send them the article via your regular ticketing system to save time.

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can also include functions like a frequently-asked questions (FAQ) section, a user forum, articles, white papers, how-to articles, video tutorials, case studies, and dictionaries or glossaries – essentially, anything that helps customers understand and use your products or services.

Technically speaking, a knowledge base could also fall under a few broader use cases. In most contexts, we think of it as an online knowledge base, something that helps customers find answers to common questions.

But you could also set up an IT knowledge base or an internal company knowledge base to help your employees learn how your organization operates, discover benefits and HR information, or get answers to common IT and technical questions.

At its core, no matter the purpose, a knowledge base simply helps users discover answers and achieve success in their endeavors.

For the sake of this article, we'll focus on customer-facing knowledge bases. Let's move onto best practices for building a self-serve customer education center.

How to Create a Knowledge Base

The truth is, **building a knowledge base** doesn't ensure it will actually be successful (or even useful for that matter). First, the customer has to actually be able to find answers to their questions. This brings **user experience**, design, **architecture**, and even SEO into the mix.



instructions, but it is possible.

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the content.

1. Start with the design and structure.

Let's start with the design and structure – essentially, the knowledge base article format. Most of these start out at a high-level, almost like a traditional home page for support-based content. This example from Evernote displays that clearly.

The screenshot shows the Evernote Help & Learning website. At the top, there is a search bar labeled "Search Help & Learning" with a magnifying glass icon. Below the search bar, the title "Evernote Help & Learning" is centered. Underneath the title are three circular icons with green outlines: "GETTING STARTED" (document with plus sign), "TIPS & TUTORIALS" (lightbulb), and "TROUBLESHOOTING" (hexagon with wrench and screwdriver). Below these icons is a section titled "Top Articles" which lists several articles with their titles. At the bottom of the page, there is a "Get More Help" section with three buttons: "Start a chat or Submit a ticket" (speech bubble icon), "Like us on Facebook" (Facebook icon), and "Discuss with others in the Evernote Community" (person icon).

Source

Evernote gives you the opportunity to search for a specific issue, navigate by categories ("Getting Started," "Tips & Tutorials," "Troubleshooting"), or search by top articles. You can also check out their other support options like tickets, social media, and their community.

Discoverability is incredibly important when it comes to knowledge bases. If a user has a problem, can they find the solution? Key focus areas here should be in sifting the most popular articles to the home page and making them prominent, as well as improving search functions so users can find their specific problems.



regards to your knowledge base. Here's a summary of Evernote's UX:

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TOPICS COVERED IN THIS ARTICLE:

- Delete notes
- Delete notebooks
- Manage the Trash
- Manage the Evernote Business Trash

RECENTLY VIEWED ARTICLES

[How to save email into Evernote](#)

Delete notes

When you delete a note, it's moved to the Trash. devices like all of your other synced content. Ho local notebook, that note will not become sync

► MAC AND WINDOWS

► IPHONE, IPAD, AND IPOD TOUCH

► ANDROID

► EVERNOTE WEB

1:18

2. Determine your writing process.

Once you've got the navigation and discoverability aspects down, you can start optimizing your process of how to write a successful knowledge base article.

Writing knowledge base articles is not unlike writing educational blog content. In both cases, you want to attract readers with a strong and clear headline, give lucid and helpful instructions, and allow them to walk away with new information or ideas.

Therefore, we can come up with a few general guidelines for writing knowledge base articles:

Write a descriptive title.

Be descriptive in your content.

Avoid typos.

Link to helpful resources.



Add most frequently-asked questions in your support ticket auto-responder or

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instructional formats apply to your knowledge base. Be clear, specific, and descriptive. The addition here is simply to link to as many helpful resources as possible and to prioritize readability and understandability over complexity and nuance.

But wait, that's only for text-based articles. What about video content?

While there is a **debate around which is more effective** – text or video-based support content – it's generally best to combine both. People learn in different ways – some prefer to read, while some prefer to watch.

Here's how **Craig Stoss**, Technical Support Manager at Vidyard, explains the benefits of using video content in your knowledge base:



Craig Stoss, Vidyard, Technical Support Manager

"A video enabled knowledge base allows you to reach a wider audience while reducing confusion of complex steps. Video allows you to bridge language barriers, knowledge/skill level barriers, as well as some accessibility barriers.

By describing visually, and verbally the actions you wish your users to take, you enable a wider set of your users to be successful. Difficult steps can be shown in place of complicated diagrams, or large lists of written steps. Text translations can be expensive, and can lose specific meaning in translation (especially with proprietary terms or deeply technical or industry specific terms). Text also assumes your user reads and understands at the level of the author, which can lead to confusion and frustration. Video removes these barriers by showing and not telling. Research has shown that searches related to "how-to" on YouTube are growing 70% year over year.

Customers' want to self serve and video is an increasing method to do so.



As I mentioned, it's best to use a combination of both. Text-based content is

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and step-by-step walkthroughs – although video content can rank on YouTube, which is the second-largest search engine after Google itself.

3. Always include helpful visuals.

No matter which format you choose to do, make sure you add some sort of visuals to your content. It really helps visual learners understand what you're talking about. Usually, simple screenshots with annotation will suffice.

The screenshot shows the Optimizely platform interface. On the left, there is a sidebar with icons for Optimizely, Community, Knowledge Base (highlighted), Academy, Certification, Developer Docs, and Support. The main area has a header with the Optimizely logo and a search bar. Below the header, there are two main sections:

- Setup**: A list of items:
 - Review the core concepts to find out what Full Stack is all about.
 - What is the [datafile](#), and why is it so important?
 - Find out how to create and manage [Full Stack environments](#).
- Define & debug experiments**: A list of items:
 - Design and run [A/B tests](#) and [feature tests](#).

Source

Here are a few more tips on making video content work for your knowledge management from Craig Stoss:

"They should be consistent in their tone, not display private information, and always end with a call to action that guides the viewer on what to do should the video not be helpful.

These videos will increase your customers' ability to self serve, improving customer satisfaction and reducing your caseload all while reaching a wider customer base in the medium they want to use."



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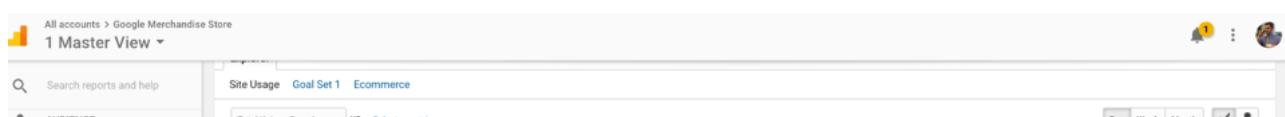
How to Choose Knowledge Base Topics

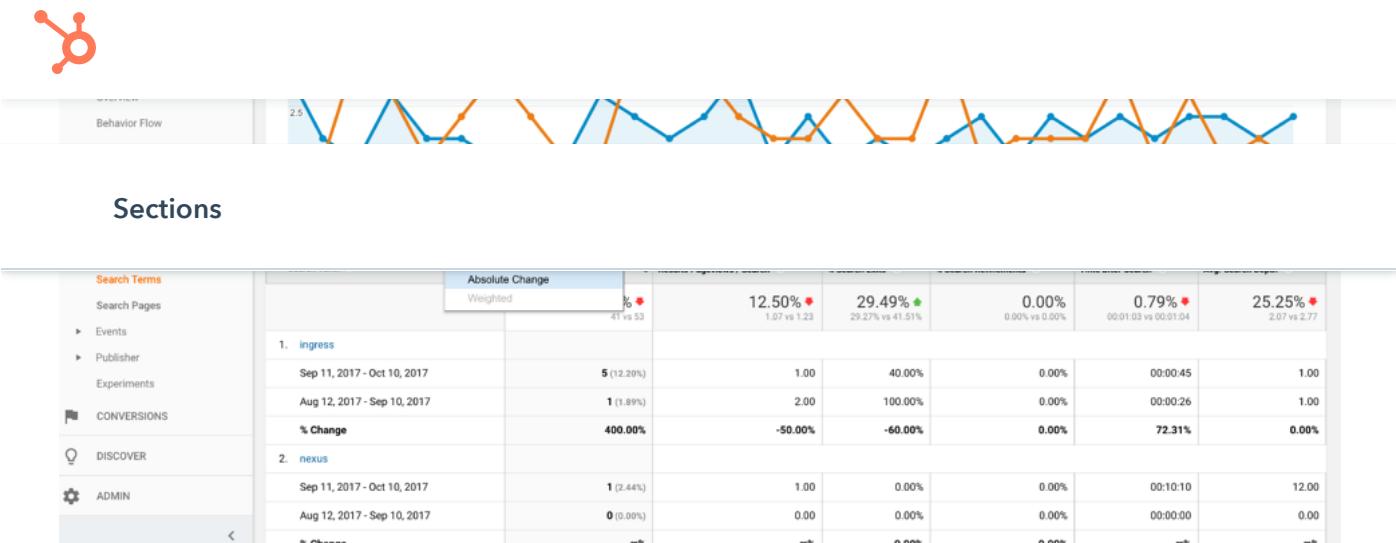
How do you know what topics to choose for your knowledge base? It's simple: Look for trends.

When you're getting the same question over and over again, it's probably time to write a knowledge base article about it. You can also find bottlenecks in the user experience of your website using tools like HotJar or Usabilla, or even simply by running some user tests to see where people struggle to complete tasks.

The main priority here should actually be to improve the core user experience to remove the usability bottlenecks, but in the meantime, you should definitely still consider writing help documentation to ease the process. No user experience will ever be perfect for all people, and if some are struggling with a task, you can improve their experience by giving them self-serve documentation to figure it out.

Finally, you can find insights for knowledge base articles in your Google Analytics setup. All you need to do is check out your internal site search analytics (make sure it's enabled). Just go to *Behavior > Site Search > Overview* to see the common terms people are searching for. (Tip: You can compare time periods and sort by "absolute change" to see rising trends over time.)





Sample view of Google Analytics from my own site

Here's how **Lizzie Burns**, Content Strategy Manager at **SurveyMonkey's Help Center**, finds trends for knowledge base content creation:

"Listening to customers is core to who we are as a company. We analyze article traffic, contact rates, and search queries from our help center, then compare it to customer support email data to uncover recurring themes and surface language patterns to create targeted content that resonates with customers.

We specifically focus on data from support emails that present self-service opportunities—common themes that can be answered in only 1 or 2 replies from our customer support team. If a question can be answered efficiently over email, it can likely be solved by self-service content, which means we can make a measurable impact with content improvements in our help center."

Now that we've covered how to choose your knowledge base topics, let's talk about how to manage your knowledge base.

Knowledge Base Management & Best Practices



and updated to best serve your customers. These few best practices will allow

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1. Know your audience.

Your marketing team isn't the only team that can benefit from your **buyer personas**. Reference your customer information when developing your knowledge base. Just as you researched trends to establish your knowledge base topics, use these trends to better understand how to write about and position your knowledge base articles.

You should put as much forethought into your knowledge base articles as you do your blog posts and sales copy. Craft the tone and style in a way that speaks to your audience, keeps them interested, and answers their questions. If they can't understand the answers you're providing, they'll get in touch with your customer service team – which defeats the purpose of proactively providing a knowledge base in the first place.

2. Keep your knowledge base on brand.

Your knowledge base is yet another reflection of your **branding**. Failing to keep your knowledge base consistent with your brand voice, colors, and design provides a disjointed experience for customers seeking to learn more about your products or services.

Try this: Create a style guide for your knowledge base. Keep it consistent with your overall company branding, and include formatting and writing guidelines specific to your knowledge base articles. This helps keep your knowledge base uniform and professional, no matter who's writing articles or updating content.

3. Consider accessibility.

Your website isn't the only digital space that should **follow accessibility standards** – your knowledge base should, too. Add alt text for all screenshots,



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confirm your knowledge base is mobile-friendly before launch.

4. Update your knowledge base with every product update or launch.

If your products, services, branding, or company changes in any way, so should your knowledge base. If you neglect your knowledge base content, over time, it'll be useless – and customers will notice. Just as you train your customer support staff on product or service updates, so should you actively update your knowledge base articles. The same goes for creating new articles for new features or entirely new products.

Here's a tip: Only explain major concepts or features once, and simply hyperlink to that article when developing new ones that reference that concept. This helps you avoid having to update content in multiple places.

5. Share your knowledge base everywhere.

A great knowledge base isn't only accessed when needed; it's also used to support marketing content, explain sales presentations, and convert leads. While its primary purpose is to answer questions and provide support to curious customers, it can hold value elsewhere.

For example, if you're writing a blog post and reference your relevant feature of your software tool, consider linking to a knowledge base article explaining this feature versus the product page. Not only does it provide a more in-depth explanation of the feature, but it also showcases your product in action for those readers who may not (yet) be customers.

6. Measure its effectiveness.

It's hard to measure the effectiveness of a knowledge base. How do you know if customers are leaving your knowledge base article happily with new knowledge



you're creating the right content and actually answering everything your

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There are a few ways to measure how well your knowledge base is working. First, include basic, one-question feedback surveys at the end of each article. These surveys don't have to be complicated – you could simply ask "Was this article helpful?" and have customers click a thumbs-up or thumbs-down based on whether they found their answers. Secondly, provide an email address or phone number for customers to provide further feedback or ask additional questions.

You'll only know if your knowledge base is working if you ask the people who you're creating it for – your customers.

Now that we've covered some knowledge base best practices and how to write great knowledge base articles, let's look at some examples of companies that do it really well.

Knowledge Base Templates & Examples

You've got a good grasp of the theory and best practice, but what does an effective knowledge base look like? For that, let's go over some excellent knowledge base examples.

→ [Access Now: Free Knowledge Base Article Template](#)

1. Optimizely

Optimizely's knowledge base is huge, and it contains a community forum, a



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The screenshot shows the Optimizely Knowledge Base homepage. On the left is a vertical navigation bar with icons for Knowledge Base, Academy, Certification, Developer Docs, and Support. The main content area has a dark header bar with a search bar and a message: "A space to search and browse for answers and documentation." Below this are two columns of cards under "Popular Articles & Resources". The first column contains "Optimizely X Web Experimentation Resources" and "Optimizely X Full Stack". The second column contains "Stats Engine Resources", "Testing Ideas", "Optimizely Performance Edge Resources", and "Optimizely X Web Personalization Resources". To the right is a column titled "Common Support Questions" with links to various support articles. A blue button at the bottom right says "View all Support Questions".

[Source](#)

Here in this image, you notice that three elements are prominent: left-hand navigation, search functionality, and popular articles/common questions. This is just the tip of the iceberg (and it's a great way to get people started without overwhelming them). When you scroll further, you see the crazy breadth of topics they cover here.

The screenshot shows the Optimizely Knowledge Base homepage with a similar layout to the previous one. It features a vertical navigation bar on the left and a main content area with a search bar and a "Explore the Knowledge Base" section. Below this are eight articles arranged in a grid:

- Get Started**: Welcome to Optimizely. Use our Getting Started guides, FAQs, and video tutorials to get your program off the ground.
- Set Up Optimizely**: Implement the Optimizely snippet, manage projects and collaborators.
- Apps and Integrations**: Integrate Optimizely with your CMS, analytics platforms, tag managers, third-party data, and more.
- Generate Ideas & Hypothesize**: Generate ideas for experimentation, build a strategic roadmap, and grow your optimization program.
- Build Campaigns and Experiments**: Build experiments and campaigns with Optimizely's Editor or custom code.
- Target Your Visitors**: Use pages, URL Targeting, audiences, traffic allocation to decide who sees your experiments and campaigns, and where they'll run.
- Measure Success: Track Visitor Behaviors**: Measure the success of your experiments and campaigns with click, pageview, custom and revenue tracking events and goals.
- QA Campaigns & Experiments**: Make sure that campaigns and experiments look and work the way you'd like, before publishing them live to the world.
- Troubleshoot Problems**: Find and troubleshoot common issues.
- Analyze Results**: Interpret the Results page, learn how the Optimizely Stats

When you click into an individual article, like the following tutorial on personalization targeting, you'll be pleasantly surprised at the depth and



Good mix of images, video, and text as well.

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<ul style="list-style-type: none"> Community Knowledge Base Academy Certification Developer Docs Support 	<p>Pages The URL of the landing page.</p> <p>Audiences Visitors who match the "Ad campaign" audience condition. Hint: The Ad campaign audience condition is "sticky," meaning a visitor sees the same experience every time they come back to the site. Visitors who see the adventure imagery will keep seeing mountains and visitors who see gift-giving imagery will continue to see presents, even if they visit the page without the query parameter.</p> <p>Metrics</p> <ul style="list-style-type: none"> Clicks to the CTA ("Shop the sale") button (primary) Clicks to product detail page buttons below (secondary) Clicks to top-level navigation (secondary) <p>Editor Original:</p> <div style="background-color: black; color: white; padding: 5px; margin-bottom: 10px;"> Offer extended! Save up to \$20 on trackers and more, plus get free overnight shipping through Tuesday Dec. 20! SHOP NOW </div>	<p>Skip Ahead</p> <hr/> <p>Idea 1: Optimize for geographical differences</p> <hr/> <p>Idea 2: CTAs for new visitors versus subscribers</p> <hr/> <p>Idea 3: Remove distractions from the checkout funnel</p> <hr/> <p>Idea 4: Rearrange subscription price-points</p> <hr/> <p>Idea 5: Highlight key value propositions</p> <hr/> <p>Idea 6: Symmetric messaging</p> <hr/> <p>Idea 7: Personalize based on cookies</p> <hr/> <p>Idea 8: Test promotion formats</p> <hr/> <p>Idea 9: Optimize a form</p> <hr/> <p>Idea 10: Add social proof</p> <hr/> <p>Bonus: What not to test</p>
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You can also see that they frequently link out to other helpful sources within the body content as well as on the sidebar. This helps users find solutions to related issues.

Here's how **Adam Avramescu**, Director of Customer Education at Optimizely, talks about their knowledge base:



Adam Avramescu, Director of Customer Education, Optimizely

"As an experimentation company, we took a data-driven, iterative approach to our knowledge base. Through experimentation, we questioned common assumptions about how knowledge programs should work and explored search-first vs. browse-first behaviors; article lengths; recommendation algorithms; and more. What we have today is a knowledge base that not only helps customers answer support questions easily, but also serves as a competitive differentiator in the market. When you have a question about Optimizely or optimization, even if you're coming in through organic search, the knowledge base is often the first stop. This builds our customers' and prospects' trust, and shows that we're experts in the field of experimentation."

2. SurveyMonkey



visually prominent search bar and the clear topic categories.

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The screenshot shows a user interface for a knowledge base. At the top, there is a search bar with the placeholder "Search by keyword" and a magnifying glass icon. Below the search bar is a section titled "Browse by topic" containing six cards arranged in a 2x3 grid. Each card has an icon and a title: "Design & Manage" (document icon), "Get Responses" (paper airplane icon), "Analyze Results" (bar chart icon); "Account & Billing" (person icon), "Privacy & Legal" (padlock icon), and "Taking Surveys" (checklist icon).

Source

As a large percentage of your users will use the search feature to find a solution to their specific question, I tested out the functionality here, and it brings up super-relevant search results (but also keeps the categories prominent in case you'd rather browse). In addition, you can see a visually prominent sidebar module to sign up to get faster service, as well as a less prominent module to contact them for support (as a last resort, presumably).

The screenshot shows the SurveyMonkey Help Center. At the top, there is a green header bar with a "Help Center" button and a "SIGN IN" button. Below the header is a search bar with the query "how to design nps" and a magnifying glass icon. Underneath the search bar is a row of six category cards: "Design & Manage" (document icon), "Get Responses" (paper airplane icon), "Analyze Results" (bar chart icon), "Account & Billing" (person icon), "Privacy & Legal" (padlock icon), and "Taking Surveys" (checklist icon). Below these cards, a message states "223 results for how to design nps". The results are displayed in a grid format. The first result is a summary of the Net Promoter Score (NPS) with a brief description: "When you use our pre-built NPS template or question type, we'll calculate your score automatically so you can easily see if your Promoters outweigh your Detractors." The second result is "SurveyMonkey Audience Design Guidelines" with a description: "Having run thousands of projects, we've learned what works and what doesn't when it comes to designing a survey to send through SurveyMonkey Audience. Follow these requirements and best practices and you'll be on your way to launching a successful project!" The third result is "Survey Design & Character Limits" with a description: "A list of survey design and character limits you may encounter while creating or taking a survey." The fourth result is "How to Pay by Invoice" with a description: "If you'd like to be emailed an invoice to pay rather than be automatically charged at your next billing date, you can pay by invoice. Invoicing is available for annual plans only." To the right of the search results, there is a green sidebar with a "Get answers" heading, "SIGN UP" and "SIGN IN" buttons, and a message: "Create a free or paid account." Below the sidebar, there is a "Contact Us" section with a message: "Fill out this contact form and we'll get back to you soon."



possible questions your user may have. SurveyMonkey has this feature and I can

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The screenshot shows a search interface with a search bar containing "how t". Below the search bar is a list of search results:

- How to Buy Benchmarks**
- How to Contact SurveyMonkey**
- How to Opt Out or Unsubscribe**
- How to Analyze Survey Results**
- How to Pay by Invoice**
- How to Create a Survey**
- How to Sign Up or Upgrade**
- How can I obtain consent from respondents to set cookies, according to EU cookie directives?**
- How do I clear or enable cookies to use SurveyMonkey?**
- How does SurveyMonkey help me to comply with financial privacy laws?**

A green sidebar on the right is partially visible, showing the words "Get", "Create", and "a".

Finally, when you do click into a knowledge base article, the design is still great, and you get the information you need. More notably, look at the highlighted topic category and navigation breadcrumbs – **you know exactly where you are** on the site. (**It can be stressful to get lost on a website**, especially when you're searching for answers).

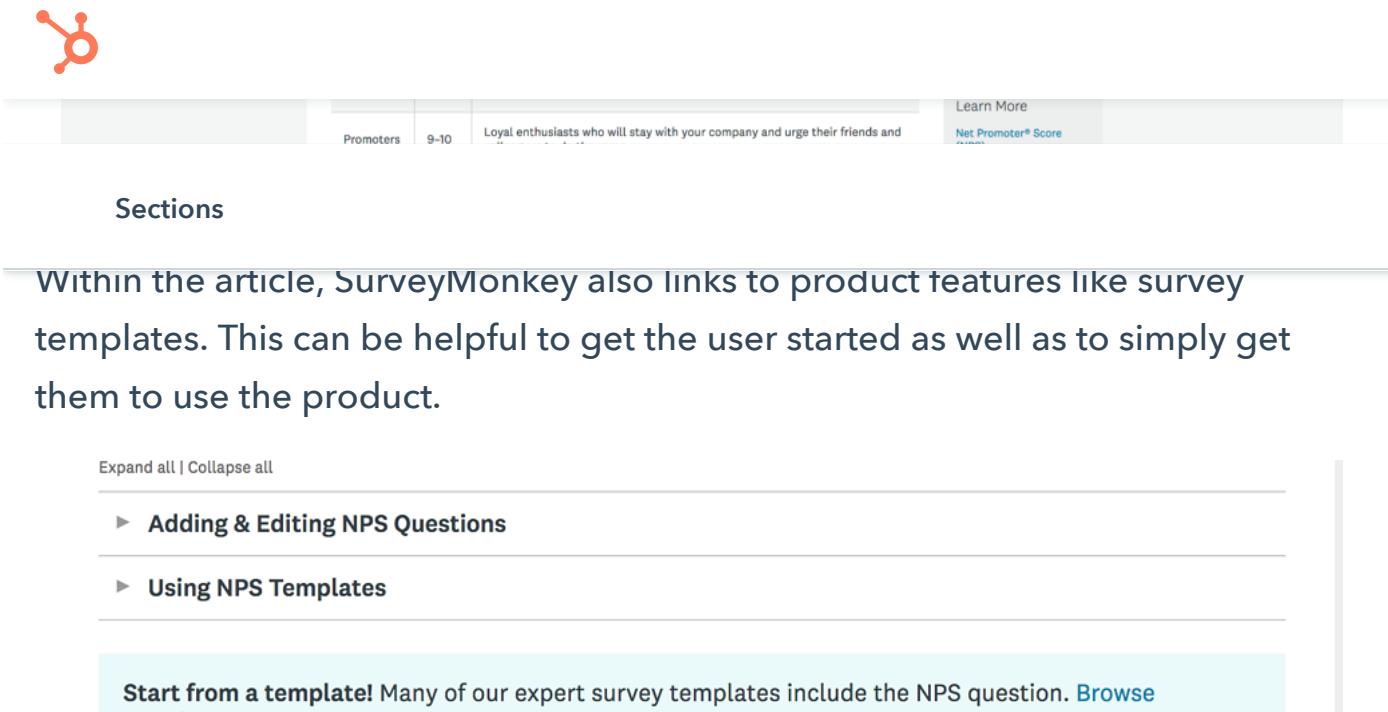
The screenshot shows a knowledge base article page for "Net Promoter Score (NPS)". At the top, there is a navigation bar with a "Help Center" link and a "SIGN IN" button. Below the navigation bar is a search bar with the placeholder "Search by keyword".

The main content area features a grid of icons and labels:

- Design & Manage** (with a clipboard icon)
- Get Responses** (with a paper airplane icon)
- Analyze Results** (with a bar chart icon)
- Account & Billing** (with a person icon)
- Privacy & Legal** (with a lock icon)
- Taking Surveys** (with a survey icon)

Below the grid, a section titled "Design & Manage / Question Types" contains a brief description of the Net Promoter Score (NPS) question.

On the right side of the page, there is a green call-to-action button labeled "Get answers" with a "SIGN UP" button below it. A smaller text box says "Create a free or paid account."



The screenshot shows a section of a SurveyMonkey article titled "NPS Score". It includes a navigation bar with a hub icon, a search bar, and links for "Promoters", "9-10", "Loyal enthusiasts who will stay with your company and urge their friends and family to do the same", "Learn More", and "Net Promoter® Score". Below the navigation is a heading "Sections" followed by two sections: "Adding & Editing NPS Questions" and "Using NPS Templates". A callout box highlights "Start from a template! Many of our expert survey templates include the NPS question. [Browse templates »](#)".

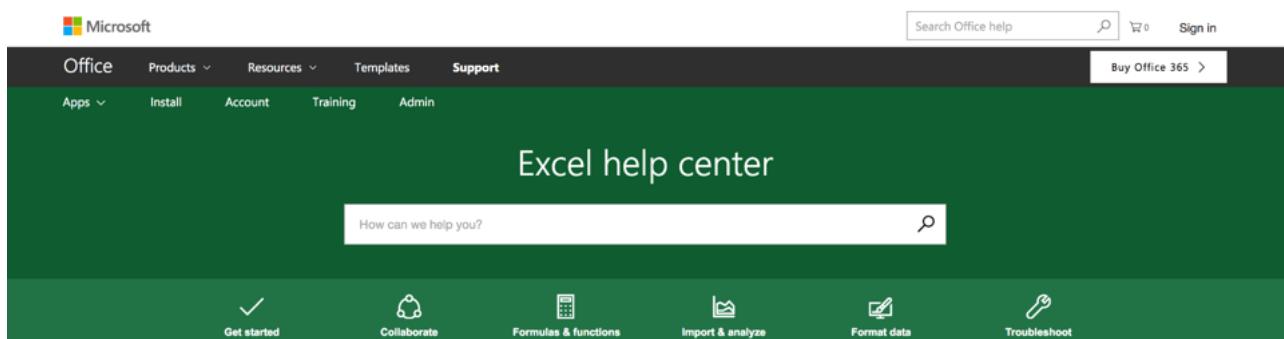
Sending Your NPS Survey

The only thing I can think that they could add is some sort of feedback mechanism to see whether or not an individual article is actually helpful (or how it may be improved). In absence of a feedback related action, it's really hard to optimize a knowledge base for usefulness.

3. Microsoft

The next knowledge base example we have here does a great job of capturing and utilizing feedback.

I've spent a ton of time on the knowledge base for Microsoft Excel (as I'm sure many other people have). It's generally a really good example of how to build a knowledge base.



The screenshot shows the Microsoft Excel help center. The top navigation bar includes links for "Office", "Products", "Resources", "Templates", "Support", "Buy Office 365", and "Sign in". Below the navigation is a search bar and a "How can we help you?" input field. The main content area features the title "Excel help center" and a "Get started" button. At the bottom, there are six categories: "Get started", "Collaborate", "Formulas & functions", "Import & analyze", "Format data", and "Troubleshoot".



10 Steps to master Excel for Windows

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Source

The cool thing is that Microsoft has clearly done its research and analysis and has built the knowledge base homepage to reflect top user concerns.

Featured topics

What's new in Excel 2016 for Windows?	Create a drop-down list	List of all Excel functions available	Accessibility support for Excel
Move or copy worksheets or worksheet data	Freeze panes to lock rows and columns	How to avoid broken formulas	VLOOKUP function
Save a workbook in another file format	Calculate the difference between two dates	IF function	SUM function

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They also offer trainings and higher-level education on Microsoft Excel.

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Excel Table Talk

Find out about the latest features and improvements, from the people who make Excel. This month we talk about connecting to external data sources with Get & Transform (Power Query) and shaping your data with the Data Model (Power Pivot).

[LEARN MORE >](#)

Table Talk
with Olaf Hubel

The actual knowledge base article itself is readable, scannable, and helpful. You can jump to specific sections, and they also link out to related content frequently in case you're not in the exact right place.



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The IF function is one of the most popular functions in Excel, and it allows you to make logical comparisons between a value and what you expect. In its simplest form, the IF function says:

- = IF(Something is True, then do something, otherwise do something else)

So an IF statement can have two results. The first result is if your comparison is True, the second if your comparison is False.

If you want to skip ahead to working with multiple IF statements, see: [Advanced IF functions - Working with nested formulas and avoiding pitfalls](#).

Learn about IF logical tests

Build your knowledge of IF logical tests with



Finally, they give you the chance to rate the quality of the article on a binary scale. This helps them measure effectiveness and optimize knowledge base articles as needed.

formula. Those are required to complete both of the IF functions, and if you try to enter the formula without both of the closing parentheses, Excel will try to correct it for you.

A word of caution

While Excel will allow you to nest up to 64 different IF functions, it's not at all advisable to do so. Why?

Was this information helpful?

Yes

No

4. HubSpot

We focus a lot on customer education here at HubSpot.

As such, our knowledge base contains a bunch of different elements, including documentation (for developers, designers, and general users), training (online, consulting, and classroom on a variety of topics), certifications, and a huge variety of community features (like forums, case studies, a customer blog, and more).

The screenshot shows the HubSpot Academy homepage. At the top, there's a navigation bar with links for Documentation, Training, Certifications, Projects, and Community. A prominent blue button on the right says "SIGN UP FOR FREE". Below the navigation, a large search bar asks "What do you want to learn today?". Underneath the search bar are three orange buttons: "Get certified.", "Watch our training videos.", and "View HubSpot Projects.". The background features a dark blue header with lightbulb icons.



Sections

Because of the large variety of customer education features, we 1) put a lot of emphasis on our navigation structure and 2) include a prominent search bar feature. This allows visitors to find the specific section of the knowledge base they're looking for or to search for a specific solution to their problem.

According to Lauren Pacifico, a technical writer at HubSpot who works on the knowledge base ...

"Self-service resources are a critical part of reducing customer friction and deflecting cases from your customer support team.

As creators of those resources, the goal for us is to provide clear, concise information to our customers so that they can find the answers they need quickly and get back to getting things done."

5. Decibel Insight

Our next example comes from a user experience and conversion optimization powerhouse, Decibel Insight. Their product has many distinct features, so their knowledge base is organized by each function:

Dashboard (5)

- Selecting Your Property
- Dashboard Metrics
- My Activity & Subscription
- Anomalous and Interesting Sessions
- Comments and Mentions

Heatmaps (14)

- Decibel Insight Heatmap Extension
- Viewing Heatmaps
- Dot Heatmap
- Attribution Heatmap
- Hybrid Heatmaps

[See more](#)

Segments (12)

- Segments Summary
- Creating Segments
- Using Segments
- Editing Segments
- Cloning Segments

[See more](#)

Sessions & Session Replays (12)

- Sessions Dashboard
- Session Details
- Viewing Sessions by Date
- Applying Filters to Sessions
- Session Statistics

[See more](#)

Forms (9)

- Dynamic v Tagged Forms
- Form Data
- Editing Form and Field Details
- Form Elements
- Pages

[See more](#)

Funnels (9)

- Funnels Summary
- Creating Funnels
- Viewing Funnels
- Editing Funnels
- Cloning Funnels

[See more](#)



They also maintain a strong searchability factor on their knowledge base

Sections

company at the top right hand of the page. Everything is clear, intuitive, and lacks clutter and complexity:

Accessing the App (2)

- Logging In
- Forgotten Your Password?

Implementation (9)

- Decibel Insight Tracking Code
- Form Tagging
- Form Submission Tagging
- Passing User IDs
- Implementing Using Google Tag Manager

[See more](#)

Dashboard (5)

- Selecting Your Property
- Dashboard Metrics
- My Activity & Subscription
- Anomalous and Interesting Sessions
- Comments and Mentions

Sessions & Session Replays (12)

- Sessions Dashboard
- Session Details
- Viewing Sessions by Date
- Applying Filters to Sessions
- Session Statistics

[See more](#)

Looking at the actual knowledge base articles, you'll see Decibel Insight often uses a combination of thorough text instructions and visual video-based education. This maximizes for both distinct learning style and the SEO benefits of thorough how-to text:

Create Segment button.
Segments can also be created and edited in [Sessions](#), [Heatmaps](#), [Forms](#) and [Reports](#) by clicking [Filters](#) and then the [New](#) or [Edit](#) buttons next to the Segment dropdown.

NAME	TYPE	SHARED	CREATED BY	TOTAL SESSIONS	AVG PAGE VIEWS	Avg Focus Time	ACTIONS
Goal Achievers MR	Standard	No	Mark Reeves (09/14/2017)	133 (9.29%)	3.32	2m 29s	
MR - Aggregate Heatmap Segment	Standard	No	Mark Reeves (09/18/2017)	653 (45.6%)	2.67	3m 17s	
MR - Birds Nest Demo Filter	Standard	No	Mark Reeves (09/12/2017)	2 (0.34%)	66	27m 31s	
MR - Desktop Demo Request Complete	Standard	Yes	Joshua Brewin (05/12/2017)	0	0	0ms	
MR - Desktop Demo Request Fail	Standard	Yes	Mark Reeves (09/12/2017)	0	0	0ms	
MR - Device Rotation	Standard	No	Mark Reeves (10/16/2017)	0	0	0ms	
MR - Multi Click (Responsive) Demo Filter	Standard	No	Mark Reeves (09/13/2017)	0	0	0ms	
MR - Multi Click (Unresponsive) Demo Filter	Standard	No	Mark Reeves (09/13/2017)	0	0	0ms	
MR - New Visitors	Standard	No	Mark Reeves (09/06/2017)	943 (65.9%)	1.69	2m 20s	
MR - Returning Visitors	Standard	No	Mark Reeves (09/06/2017)	2.42	1m 49s		

In the 'Segments' dashboard...



InVision, a product design and prototyping software, also includes a multi-

Sections

everything together.

Source

They also have a **status indicator** that updates in real time to let you know if there have been any technical incidents.

Some of their articles are comprehensive and educational, others are more



for.

Sections

INVISION SUPPORT / KNOWLEDGE BASE / PROTOTYPE & SCREEN MANAGEMENT

Search



Beth Vanderkolk
Updated September 15, 2017 10:11

Follow

Can I embed a video?

Our platform currently doesn't have the ability to embed videos within your screens, but this feature is on our radar for a future release.

For now, you can upload a static image from your video and set an external hotspot to the actual video file. That way, when a user actions the hotspot, a new tab will open directly to the video.

Alternatively you can upload an animated gif displaying your video content.

Please feel free to stay in touch and/or keep an eye on [our Twitter account](#) for the latest updates. You can also subscribe to our [blog](#), and we'll email you updates as we roll out new features.

Was this article helpful? 33

Still need help? Contact us.



InVision Help Center

Terms of Service

Privacy Policy

Back to InVision

@InVisionSupport

7. Moz

Moz is a stellar example of using knowledge base content not simply for reactive customer support, but for proactive customer education as well. They even refer to their knowledge base as a "learning center," which shows you how they're framing their efforts.



Products

Blog

About



[Learn SEO](#)

Moz Pro

Moz Local

Free SEO Tools

[Log in](#)

SEO Learning Center

Whether you need the latest advanced tactics, a refresher on the basics, or to start from scratch, this is your home for SEO knowledge.



New to SEO? Start here. There's no better way to begin your SEO education. Check out the Beginner's Guide to SEO and unleash the power of SEO on your web marketing campaigns.

[Read the Guide](#)

Ready for more? Explore by topic.

Ranking & Visibility

Learn about the website elements you can change to earn more relevant search engine

On-Site SEO

Learn about the elements of a website you can change (and how to change them!) in order to

Links & Link Building

Learn why links matter for SEO and techniques for earning and analyzing them.

Source



explicitly product focused. It's not about what Domain Authority means or how

Sections

different facets of SEO.

Finally, you get to a point where you can get product specific content.

How Tos

- Getting Started
- Moz Pro Help
- Research Tools Help

Using Moz Tools

- Get Started with Moz Pro
- Ready to get oriented with Moz Pro? Check out our getting started guide to get a quick intro into Moz Pro!
- Check Out Our Support Forum

Online Marketing Help

- Online Marketing Beginners Guide
- We have a great beginners guide to getting started with SEO, social media marketing, brand marketing and more.
- Articles, Guides, and Videos on the Moz Blog

This breaks down further into different knowledge base sections, such as **support community**, their outstanding blog, and a video-based academy. Here's an example lesson from their academy:

Moz Academy
Moz Pro

[= Back to Moz Academy](#)

Keyword Research with Keyword Explorer



it's hard to imagine walking away without finding your answer.

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The screenshot shows the Moz Pro software interface. On the left, there is a sidebar with various links: Mozscape Index Updates, How we index the web, Fresh Web Explorer, On-page Grader, Crawl Test, Rank Tracker, MozBar, Keyword Explorer, Followerwonk Help, Moz Local Help, Moz API Help, Moz Community, Moz Glossary, and Moz Procedures. The main window displays a video player with the title "Open Site Explorer" and a progress bar at 5/13. Below the video, a call-to-action button says "Try OSE, right here and now". A tooltip over the URL input field says "Type in your URL and hit search to get started." The URL input field contains "URL: Search for any URLs, for example: http://yoursite.com or https://yoursite.com". To the right of the URL field is a "Search" button. At the top of the main window, it says "Moz Pro RogerMuellerPRO's Account Open Site Explorer Recent Reports ⓘ".

Now, we've gone through what makes a good knowledge base article, and we've also seen a few good examples and templates. Even though, technically, you should do the research on your own to consider what topics you should write about, it's helpful to have a sort of FAQ template, or at least something to get you thinking about what types of articles to write. So here are a few ideas:

When does my order ship?

How long will it take to get my order?

How can I cancel my subscription?

How do I enter a promo code?

When do you charge my card?

How long does my trial last?

How can I get in contact with support?

Same deal with knowledge base articles: if you're getting the same question over and over, write up an FAQ page for it.



be running a complicated software product for this to be beneficial. **Ecommerce**

Sections

SHIPPING

When is my order shipped?

How long will it take to get my order?

What shipping carriers do you use?

How can I track my order?

Entering discount/gift card code.

On the last page before your click "complete my purchase" there will be two boxes where you can enter your discount codes or gift card code. Once you have entered either of these codes click "Apply". Your total amount will be updated to reflect the discount. Now press "complete my purchase". You cannot enter coupon codes if you click the "pay with PayPal" option or combined with other discount codes and also when signing up for subscriptions as when signing up for a subscription you are already receiving a 10% discount, you have to use the direct checkout feature to enter a code. Please contact us at (518) 400-1050 with any problems.

Where's my package?

What are the shipping rates?

Where do you ship?

International Orders

Customs Fees

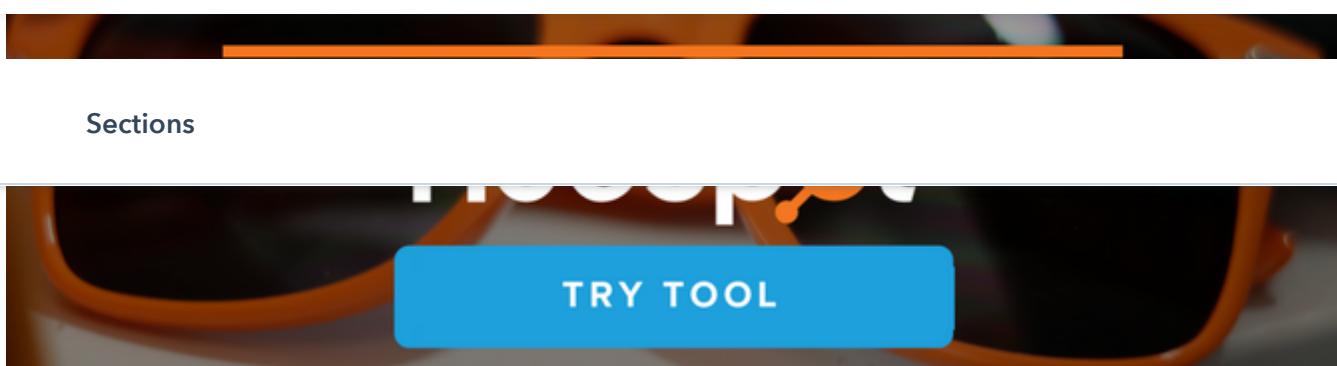
DWC POINTS

Knowledge Base Tools & Software

As companies have increasingly started valuing the idea of creating a knowledge base, it's been easier and easier to build one – at least from a technological standpoint.

As a result, there is now a variety of knowledge base tools and software for companies of any size or stature. Options range from knowledge base software and FAQ software all the way to enterprise solutions.

To start lean, let's cover **knowledge base software**.



First, if you can rig up your CMS software to serve the purpose of a knowledge base, that may work alright for you. So whether you use **HubSpot** or another system to manage your website content, it's quite likely you could also use this to set up your customer education content.

If you're using WordPress, it's easy enough to find free knowledge base solutions as plugins - one of the most popular options is the **WP Knowledge Base plugin**. With this, you simply need to install the plugin, add categories, add articles, and choose a page where your knowledge base will be accessible. **Further instructions for building a knowledge base on WordPress can be found here.**

Of course, if you're in search of scalability and flexibility, you may have to use a specific knowledge base solution. While there are many out on the market, you simply have to choose base on the business criteria you've chosen. Some questions that may help you choose could be:

Is this knowledge base software free? What does it cost?

Do we need forum or community features? Is this the best forum software for us?

Does this software give us the analytics we need?

How is the support for this software?

Does the software integrate well with other tools we're using?

In short, it's like any other decision where you must weigh the pros and cons and



companies you're interested in to see if they can offer the features and support

Sections

Conclusion



customer success efforts – without having to add new customer support staff. As

Sections

In addition, it can help you to focus more on proactive efforts such as customer education and empowerment instead of simply reacting to support tickets. This shift can be a huge organizational win.

There are many ways to build an effective knowledge base, but it all boils down to answering important and frequent issues that come up with customers.



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Sections



Get early access to knowledge base software

HubSpot is releasing knowledge base software in 2018. Get notified when it's ready for action.

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