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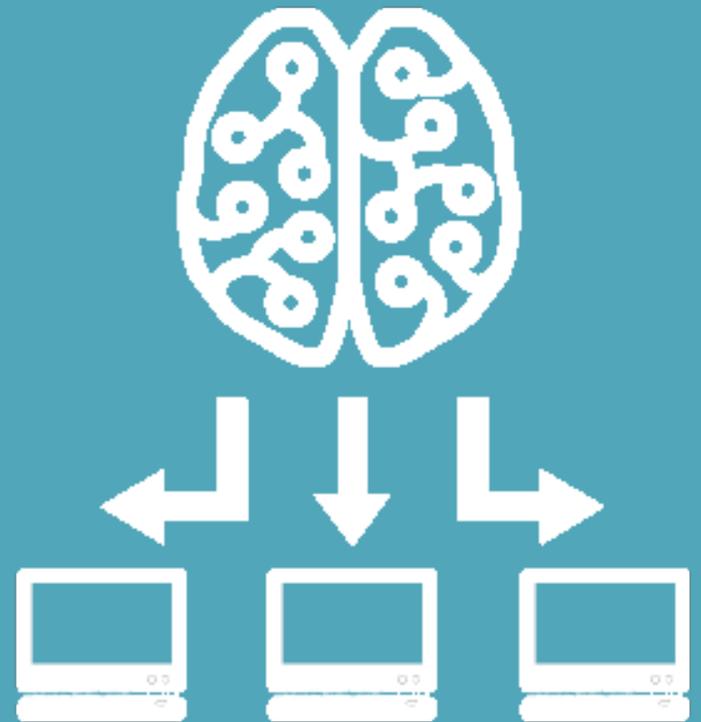
Buying a Knowledge Base in the A.I. Era: the Good, the Great, and the Necessary

INTRODUCTION

Every organization produces valuable information, but that data is only valuable if employees can find a way to harness its potential. That's where knowledge base software comes in. The right knowledge base solution can help your organization capture and leverage the expertise of every team to improve the performance of your business.

The trick is in finding the *right* knowledge base solution for your company. In this eBook, we'll examine the various functions and features of a knowledge base, so you can evaluate any solution and determine whether that software is right for you.

WHAT IS A KNOWLEDGE BASE AND WHY DO YOU NEED ONE?

A knowledge base is often - and inaccurately - described as a "database for documents." In fact, a knowledge base is in some ways the opposite of a database because the two systems deal with fundamentally different types of information.

A database deals in structured data; information that is not only highly organized, but so finely categorized so software can easily consume it and take actions based on it. Structured data is designed to be machine-readable. A spreadsheet or XML file is a typical example of structured data, where individual bits of information are parsed into discrete, well-classified fields.
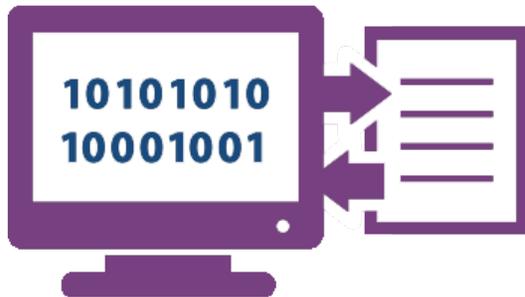
A knowledge base deals in unstructured data; information that isn't broken down into a finely detailed model or matrix. Text documents, infographics, images, videos, audio recordings, and even web pages are examples of unstructured data that are optimized to be human-readable. There is plenty of information in an unstructured data object like a newspaper article or whitepaper, but it's not data that an algorithm could easily parse and consume. People, on the other hand, can easily understand and absorb this type of narrative information.

A knowledge base differs from a *content management system* (CMS) in that, while a knowledge base may have all the content-creation and publishing tools of a mature CMS, the knowledge base is also concerned with leveraging that content to greatest effect - not just with sharing it with the widest possible audience. A knowledge base organizes information into a much richer degree than a typical CMS.

The purpose of a knowledge base isn't just to house unstructured, human-readable data but to make that data as useful as possible. When buying a solution that bills itself as a knowledge base, be certain that the focus of the software is leveraging your internal company knowledge. Otherwise, you might just be buying a CMS in disguise.

WHAT EVERY KNOWLEDGE BASE SHOULD DO

Every type of software solution has "table stakes" features that must be present just to be considered competent in the field. You wouldn't accept an email solution that didn't allow you to send attachments in a message, or a word processor that didn't include a spell-check feature. Below is a checklist of must-have features for any knowledge base. If a solution doesn't include any of the following, it isn't up to industry standards and is likely to be inadequate to your needs over the long term.

A competent knowledge base solution should have:

- Access Controls

Not all knowledge is for all audiences, and a knowledge base should include the ability to restrict access to confidential or sensitive materials

- Robust Search

Google-style text searching, including autocomplete suggestions and search operators, is required to make most knowledge base data easily accessible

- Knowledge Recommendations

Amazon-style recommendations for the most commonly requested or read knowledge base items, as well as items associated with an article,

make it possible for users to find the right information faster

- Browsable Categorical Structure

A knowledge base should allow you to not only organize its contents into categories and subcategories, but it should expose a breadcrumb structure or tagging system to make it easy to browse through those categories

- Rich Media Content Creation

WordPress-style text controls, including the ability to embed hyperlinks and multimedia images and video files, are required to make professional quality knowledge base content

- Layout Templates and Design Controls

Microsoft Word-style page templates that give structure and apply standards to content, as well as expedite content creation

- Attachment Uploading and Indexing

Not all data contained by a knowledge base is created with or transcribed into the knowledge base; the solution should support uploading and indexing external files like documents, images, and even software code elements for later download

- Custom Layout and Portal Styling

Knowledge bases are often integrated into company intranets or websites (or both); they should include CSS-equivalent controls that allow the knowledge base to match the styling, colors, and brand elements of these partner systems
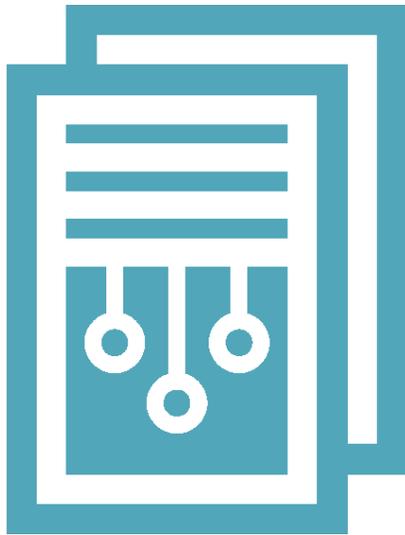
- Mobile Compatibility

The majority of internet traffic - and a surprising percentage of intranet traffic - occurs on mobile devices; a knowledge base should include responsive design capabilities that ensure its content is accessible and functional on mobile screen sizes

- User Feedback and Ratings

Yelp-style user reviews and ratings are a vital part of any knowledge base to ensure that the content provided by the solution is adequate to its users' needs

- Lifecycle Management

It's easy for knowledge base content to grow "stale" or fall out of date; a competent solution includes tools for proactively evaluating and updating content to ensure its accuracy and usefulness

These should be the first requirements assessed when evaluating any knowledge base offering. Which features are most prominent, and which should be most fully developed, depends on what you intend to use your knowledge base for.

WHAT IS A KNOWLEDGE BASE FOR?

Most knowledge bases are designed for a purpose - and that purpose should match your intended use case. Knowledge base solutions have many practical applications that break down into two broad categories: customer-facing knowledge bases and employee-facing knowledge bases.

The two categories aren't mutually exclusive, but knowledge base software is generally geared to one audience or the other.

External Knowledge Bases

Customer-facing knowledge bases tend to be designed for one of two use cases: *customer support tools* or *product catalogues*.

Customer support-oriented knowledge bases are almost always tied to helpdesk solutions and are there to provide troubleshooting information. These knowledge bases capture and display procedures for diagnosing and correcting common product problems.

Product catalogues, in contrast, house in-depth product specifications and price lists that help customers make informed purchasing decisions. They are, in effect, buying guides, and are usually deployed for highly technical and complex product lines or solution suites.

If you intend to purchase a customer-facing knowledge base, you need to ensure you aren't asking a helpdesk solution to be a buyer's guide, or vice versa.

Internal Knowledge Bases

Knowledge bases can and should be useful to every team across the business, not just specific groups like HR or IT.

Knowledge storage solutions that store customer-support information are useful both inside and outside the organization, as customer support staff can reference this data when addressing helpdesk tickets or answers support calls.

The same is true of product catalogues, as internal sales and marketing staff need access to the same product specifications and pricing guides as customers (though internal staff may be privileged to access more intimate product details or more generous price discounts). The main distinguishing feature between internal and external knowledge bases is access control.

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Internal knowledge bases can cordon off sensitive or privileged information in a manner that external knowledge bases typically don't allow.

Additionally, internal knowledge bases offer more functionality than external ones, such as *training system*s and *reference guides*.
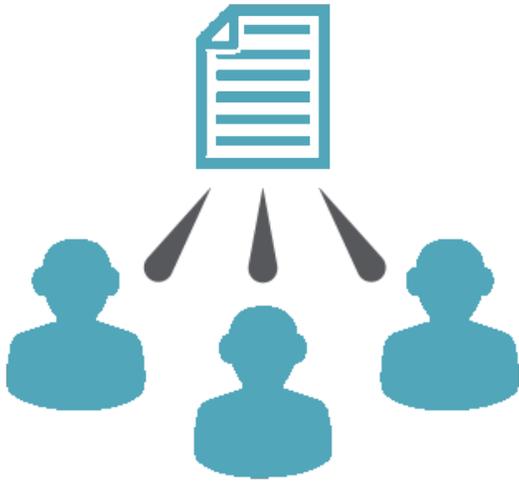
Training-oriented knowledge bases offer tools for organizing and presenting that information as part of a course of instruction. This can include generating quizzes or tests, as well as setting up milestones that a "student" must complete to pass a course. Training-oriented knowledge bases are typically integrated into a *learning management system* (LMS), but are distinguished by their ability to house and present data from outside the LMS as part of a teaching course.

Reference guides are perhaps the "purest" form of knowledge bases, as they exist simply to make it easy to create, maintain, and access detailed internal documentation. Reference guides are usually attached to company intranets, and often consist of documentation like employee handbooks, company policies, and process manuals. Human resources departments, marketing divisions, and sales enablement teams often make prominent use of reference guides, as these knowledge bases are best disposed to manage the ever-changing, intricate documentation used by these groups.

When purchasing an employee-facing knowledge base, first make certain it has sufficient access controls to ensure that only the appropriate employees can access sensitive or confidential information. Beyond that, be certain any knowledge base that will be used for instructional purposes can either integrate with a robust learning management system, or at the very least, leverage its stored knowledge in an instructional manner.

THE FOUR C'S OF KNOWLEDGE BASE EVALUATION

No matter the audience or the use case, every knowledge base should help your teams capture, create, curate, and consume your company's most vital information. These "Four Cs" represent the areas in which every knowledge base should be critically evaluated.

Capture
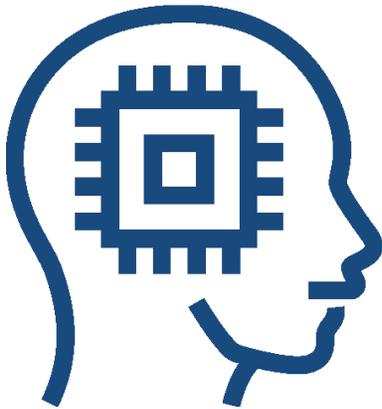
Your employees, partners, and customers have expertise and experience with your products and services. How easy does your knowledge base make it to capture this information? How many steps does it take to add information to a draft knowledge base entry, or backlog of items? How easy is it to embed links or prompts for your knowledge base into other critical systems, like your company website, intranet, *customer relationship management* (CRM), or email solutions?

The ability to capture knowledge is a distinguishing feature of the best knowledge bases; it separates them from mere file-sharing or content management systems.

Create

Once company knowledge is captured, it must be organized into mature content items like articles, checklists, or even workflows. How rich are the content-creation features of your knowledge base solution, and how easy are they to use? How intuitive is the content-creation process, and how successful is the average employee, partner, or customer likely to be when tasked with adding knowledge to your inventory?

The ability to easily create useful content is critical to success of any knowledge base solution.

Curate

Once content is in your knowledge base, it must be organized and indexed in a meaningful, intuitive fashion. Cross-linking related articles and gathering associated items into categories or lists gives structure to your knowledge base and makes it easier to navigate and maintain. Curation means more than just building folders and subfolders as you would in a shared file drive; it includes the capacity to view your knowledge base content from a higher level, to determine what items are missing, out of date, or improperly associated with other content.

The ability to curate content - to organize, evaluate, and update- is what elevates a knowledge base above a conventional file storage or file-sharing solution.

Consume

Information that can't be found may as well not exist. No matter how well developed and well organized your knowledge base content is, the software is inadequate if your employees, customers, and partners can't get the information they need. Mature knowledge bases make content browsable and searchable. The organizational structure you install to aid curation should make the knowledge easy to navigate, too, and curated cross-association should feed a Google-style search index and an Amazon-style related items feature.

Bottom line: when one of your users goes looking for an answer in your knowledge base, how easily and quickly will they find it? If the solution can't excel at content consumption, every other feature is irrelevant.
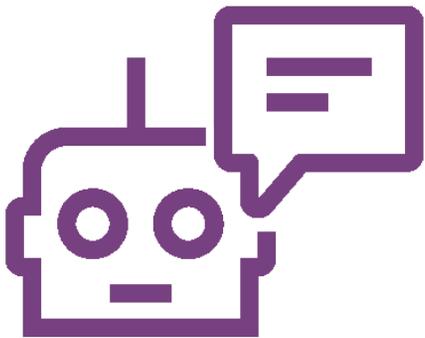
THE FIFTH C - CASE DEFLECTION

The declared purpose of a knowledge base is to answer questions posed by your employees, customers, and partners. The best use of a knowledge base is to answer questions that your employees would have otherwise had to answer themselves, distracting them from more valuable work. Thus, we must add another a fifth to the "Four Cs" - case deflection.

In customer service or helpdesk solutions, requests for assistance are often referred to as cases, and any practice, process, or solution that lowers the numbers of cases filed per hour or day is known as a case deflector. While the terminology is often different in marketing, operations, or human resources departments, the use case is the same: making vital information available to interested parties automatically, so staff doesn't have to manually answer questions every time an issue arises.

A mature, properly configured knowledge base solution can be the best deflector your organization ever sees, as it can answer questions and solve problems before a case is filed.

If a knowledge base easily captures employee knowledge, it's more likely to contain the answers to frequently asked questions and solutions to frequently experienced issues or errors.

If a knowledge base turns captured knowledge into human-readable content, those answers are more likely to be understood by employees and customers without any additional staff assistance.

If the knowledge base curates knowledge into a well-organized form, so that it's easily consumed or delivered, then customers and employees are much more likely to use the knowledge base to find answers than they are to wait on the manual response from a team member.

> Case deflection: automating delivery of information to employees who make requests, so staff doesn't have to answer manually.

If a knowledge base enables people to solve a problem proactively instead of filing a case (or even ask for help by phone or email), then that knowledge base is not just a highly effective case-deflection tool, but also a force multiplier that can make your entire staff more productive. If your case load goes down, you have more time and resources to focus on more important tasks.

A knowledge base that excels at case deflection is the most valuable knowledge base of all.

CONCLUSION

A complete knowledge base solution records the all the know-how and expertise your team possesses and leverages it to its greatest potential. It makes your company data and your team's experience easy to capture, curate, and consume - and frees your staff from the often-tedious task of sharing their notes and answering questions, once customer and one case at a time.

Evaluate knowledge base solutions using the criteria above; you'll ensure that its features and functionality are appropriate for your organization's intended use case. The "Four (or Five) Cs" guarantee that your staff gets the most productivity out of the software, and that your company can get the most productivity out of your team.
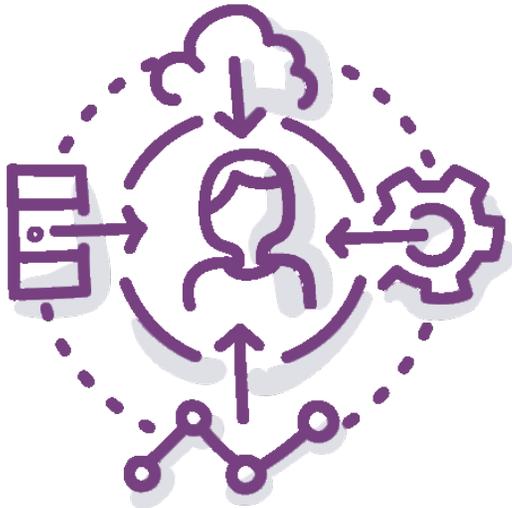
ABOUT TALLA

Talla's AI-powered knowledge base and intelligent agents bring IT and other business teams into the future of automation and insights. The Talla platform uses machine learning to surface relevant information in the right context, and keeps regularly changing information up-to-date. Use Talla to onboard new employees, for policy and procedure management, and more. Deliver and collect information through chat in the TallaChat application or through Slack or Microsoft Teams. Get started today at Talla.com or by calling 617-517-4156.