

# FastInfo Deployment - Best Practices

## *Funnel Users Through FastInfo*

### **Telephone Numbers**

Do you have a CONTACTS link on your web site? Create an answer in FastInfo that contains the contact information, then replace the contacts link with a direct link to that answer.

Your website visitors will get the contact information just as easily, but they will also see FastInfo, and realize that self-service is an option.

### **Help/Support Email Address**

The best solution is not to have an email address advertised to end-users. Managing a joint email account is complex:

- Who accesses the account?
- What happens if they are not available?
- Who replies to the email?
- Where are copies stored?
- How do find the history when a user asks a follow-up days (or weeks) later?
- How do you ensure the loop is closed for each enquiry?

Discontinue email support. Advertise the FastInfo interface as a single point of contact for your users. In addition to resolving the problems related to email processing, using FastInfo encourages self-service, which can reduce the actual problem reports received by 50% (based on one year experience with Banner Finance).

Where an email address is already well-known, there are two ways to migrate users to FastInfo:

- ***Temporary forwarding***  
This is not an ideal solution, but can be used as a transitional step. Set up a forward from the email account to send each message to the email interface at FastInfo. Each email is converted to an incident, which can then be processed within FastInfo. Also send an automatic reply to the end-user telling them that future requests must be submitted through Ask A Question.
- ***Auto-reply***  
People have long memories – it is likely you will have to keep the email account active for at least a year before disabling it completely. In that time, set an auto-reply telling users the account is no longer in use, and redirecting them to FastInfo to enter their question.

### **Replace website Frequently Asked Questions (FAQs)**

It is often useful to have FAQs on the department's website; but there is no reason to store the answers on that page.

Ensure the answer to each FAQ is documented in FastInfo. Replace the FAQ answer links with a link to the FastInfo database.

To encourage self-service, note at the top and bottom of your FAQ section that this is just a list of the most popular questions; and that more information is available at <http://FastInfo.unm.edu>.

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## **Promotion**

Good promotion is essential to success of the deployment. Excellent knowledge content is of no use if end users do not know how to find it! Ensure all communications with end users include information about the knowledge base and self-service options. Add information to:

- direct mail pieces
- emailed newsletters
- UNM communications (listserv messages, printed documents)
- consultant's email signatures
- hold messages
- consultant's voicemail messages

Other options for promotion:

- Add to inter-departmental presentations (especially if given at management level)
- Make a campus announcement
- Include in new-employee orientation

## **Knowledge Management**

- Give end users all the information they need
- Don't give end-users anything they don't need

Creating good knowledge requires work and persistence. Knowledge articles should be developed from the end users' perspective, not the subject matter experts.

Review processes are needed to ensure that inaccurate or out of date information is removed promptly. If users find incorrect information in the knowledge base, they will lose confidence in the system, and may return to entering questions or calling, rather than using the self-service features.

Several common mistakes to avoid:

**Brainstorming new knowledge articles** – brainstorming sessions typically create many answers to questions that end-users never ask! Initially, the knowledge base should be loaded with the 'top 20' questions you know are asked repeatedly by end users. New knowledge should then be added in response to questions posed by end users. Knowledge should also be added in advance of the release of any new features and services, or updates to existing services.

**Assuming knowledge is static** – surprisingly, even relatively static answers need to be checked from time to time to ensure accuracy. Most answers do change over time, so setting up an appropriate review process is essential

**Knowledge is designed, not just documented** – there are two standards; those for presentation within the FastInfo environment, and those for the department. It is important that both are understood and followed. A knowledge article needs to be clearly written, must address a single issue, and must avoid redundancy. The choice of language in the answer and keyword section determines the success of an answer in serving the need of the end users

**I entered it, so users can find it** – if you assume that one answer is sufficient to cover a single topic, you may be disappointed. After creating a knowledge article, testing needs to include searching for that answer in several different ways, and using the language that may occur to the end user, rather than the specialist.

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## ***Managing Incidents***

Ask A Question, Chat, and Callback requests can be handled in any way that works for the current business processes of the department. During the implementation phase, it is important to design the business rules to ensure that these features work for you.

- Establish personnel roles and responsibilities for processing questions.
- Ensure expectations for customers are properly set (response times, type of service covered etc).
- Include escalation processes if necessary to ensure the user's expectations are met.

## ***Reporting and Statistics***

The Analytics tool provides important information about the effectiveness of your knowledge content. Ensure reports are checked frequently to detect the types of queries that are not being met in self-service. Use statistical reports to determine service level, questions avoided, and other metrics to help you manage capacity for chat agents, knowledge engineers, and incident specialists.