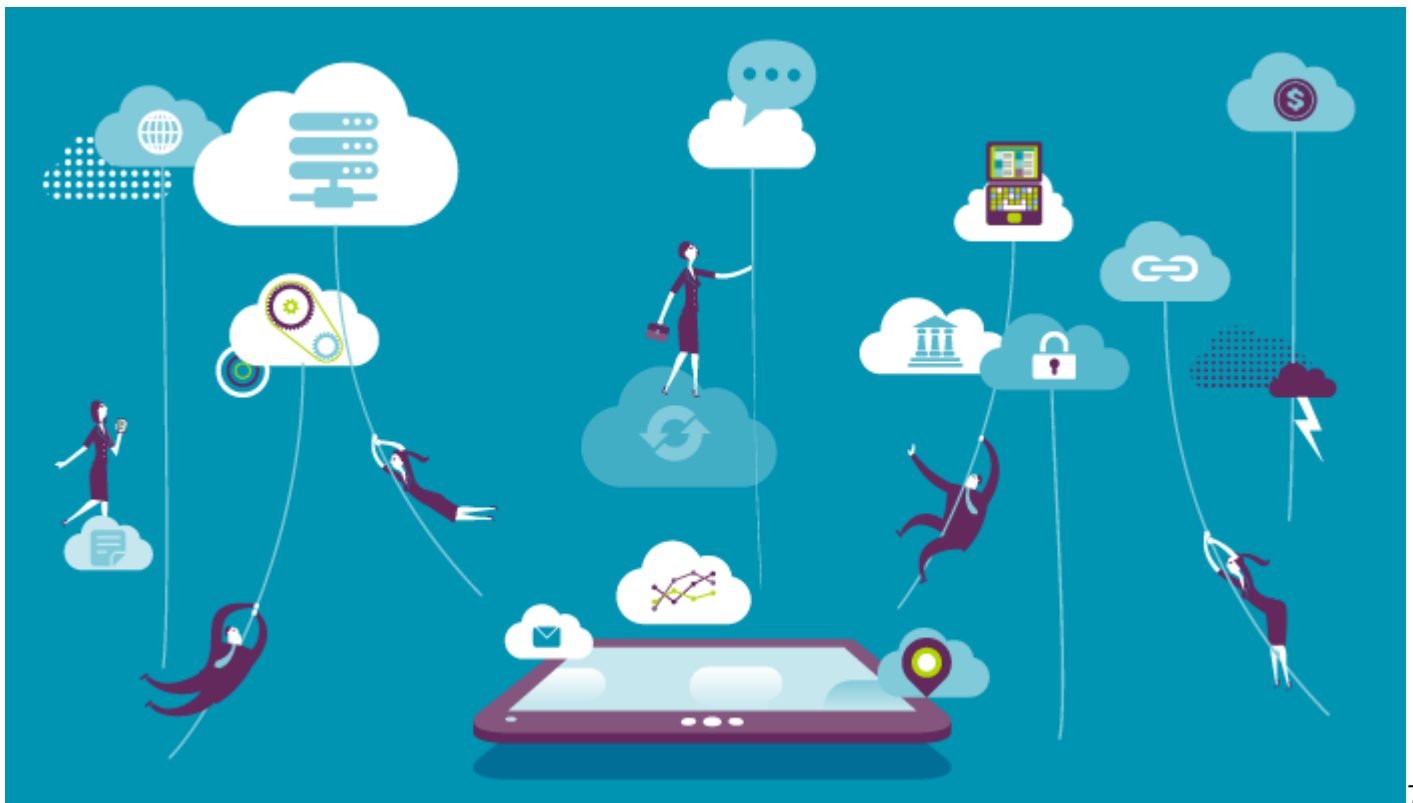# UNCOMMON KNOWLEDGE: SHARING SUCCESSFUL FIXES BENEFITS HELP DESK TECHNICIANS AND USERS

This

blog is the fourth in a series on best practices for transforming help desk operations at small to medium-size businesses from reactive to proactive.

So-called "tribal knowledge" or information known only to a group, can work against your help desk organization. If only one or two technicians have learned how to resolve a particular issue, their knowledge can easily be lost, either temporarily or permanently, if they depart on vacation, take a sick day, or accept a new job.

Meanwhile, others on the team are forced to figure out that fix on their own. And if they don't have a way to capture, document, and share this hard-won solution, the cycle repeats itself. Reinventing the wheel is inefficient, time-consuming, frustrating to users, and wastes help desk resources. Plus, it can lead to variations in fixes from one technician to another.

That's why most help desk organizations deploy some type of knowledge base and in many cases, make selected information accessible to users, not just their technicians.

Good knowledge base content is important to the success of a help desk and has even led to the development of formal knowledge base methodologies like Knowledge Centered Support (KCS), which is currently a hot topic among help desk organizations. KCS has its own certification (the KCS Foundation Certification), and focuses on knowledge as a key asset of the organization.

Knowledge base basics

For those just starting out, there are plenty of things to think about when selecting, operating and managing your knowledge base, so let's discuss some of them.

1. **Software structure:** Should you choose a solution that provides a framework to be filled out with your own content, or one that comes with answers to commonly asked questions, such as Microsoft Office issues? The first option allows you to totally customize the knowledge base for your company, but it requires time and effort. The second may be easier up front, but asks you to pay for information that can easily be copied off public websites and turned into articles.

2. **Usability:** What types of functionality make it easier for technicians to turn new solutions into knowledge base articles, and to quickly locate existing articles in the system? Let's face it technicians know they need to document successful fixes and use existing articles, but they're very busy people. Automation can mean the difference between capturing important information and losing it.

    Look for features such as these:

   - Automatic search triggered by data entry. After typing a subject such as an error message into the ticket, the technician clicks a button and the system automatically searches the knowledge base for relevant articles.
   - Integration between the ticket system and knowledge base. After typing a new solution into a ticket, the technician simply clicks a button and the software copies the information into a new knowledge base article.
   - Another aspect of usability is content enhancement. Knowledge base software that allows you to embed HTML links and screen shots, and edit the text for better readability, can increase the value of the solution. If the article involves a process, it's nice to be able to attach a form to it.

3. **Access:** A particularly valuable aspect of knowledge bases is the opportunity to share articles,

so users can search for solutions to their issues before logging a help desk ticket. This saves time, gives users greater control, and lightens the load on technicians. However, there must be a balance between facilitating and controlling user access. On the one hand, you want users to think about choosing self-service when they're logging a ticket. On the other, you don't want them attempting something complicated, secure, or sensitive that should be referred to a technician.

- Some knowledge base systems have a mechanism for passing proposed articles through a reviewer/approver who decides if the content should be public or private. Others allow technicians to determine whether an article will be made available to users during a search.

- To help users find content appropriate to their issue, the system may prompt them to conduct a search of the knowledge base prior to logging a ticket. This brings up another delicate balance. Some tools actually force users to search the knowledge base first. But since people vary widely in their confidence and comfort level regarding IT, they could perceive this approach as a brush-off by the help desk. A better alternative may be to offer a neutral choice between a search and a ticket.

4. **Management:** A knowledge base full of articles isn't enough. To make sure the content is accurate and relevant, you need a mechanism for overseeing, culling and updating entries.

- Some systems allow end users to indicate whether a solution was useful. Ratings provided by users help rank knowledge base content according to its value.

- Look for functionality that allows you to track the number of times a knowledge base article was utilized as the solution for a ticket, which provides another indicator of relevance.

- Another helpful tool is sorting capability, which allows you to prioritize the most recent additions and review older articles for possible deletion.

- Report generation is also helpful for spotting trends about knowledge base use.

Beyond the "tribe"

A robust, up-to-date and accessible knowledge base benefits your help desk team, your users, and the organization as a whole by turning tribal knowledge into a database of proven guidance, best practices, and tips and tricks.

1. **Collect your thoughts:** Documenting, organizing, and sharing successful solutions prevent them from vanishing if someone leaves the team or is temporarily unavailable.

2. **Develop new expertise:** Learning from each other is a great way to build technicians' skills and orient new team members. For users, learning to solve a routine issue builds self-confidence and raises the comfort level with IT.

3. **Minimize routine tasks:** Encouraging users to solve their own simple issues can free your staff to tackle more-demanding problems, and helps avoid burn-out caused by fixing the same issue over and over again.

4. **Become more efficient**: Every help desk team is trying to do a lot with limited resources. Referring to successful fixes in the knowledge base reduces the time and mental effort

needed to assist users.