DOCUMENTED EXCELLENCE

How Visionary Companies are Using Documentation to Optimize Touchpoints & Enhance the Customer Experience

The Era of Customer Experience

In the past, companies focused on traditional product-based advantages in order to win over the minds, hearts and wallets of their target markets. However, surging competition and increasingly empowered consumers have shifted the paradigm to one that is far less about features and much more about engagement.

Simply put, we have entered the *Era of the Customer Experience* – and for companies, the most valuable differentiator in this dynamic new landscape is not primarily or exclusively the products they offer: it is the touchpoints they manage.

Understanding Touchpoints

The classic definition of touchpoints is that they are the interface of a product, service or brand with a customer at any point in the relationship – before, during or after a transaction. And while this definition is essentially true, it does not adequately capture just how dynamic and, indeed, influential touchpoints are.

Touchpoints are not merely static "meeting points" between companies and customers in the way that milestones on a project schedule represent some significant event or achievement. Rather, touchpoints are dynamic, on-demand and often (though not always) self-serve encounters where customers learn about offerings, compare features, read blog posts, access support and share feedback.

All of these touchpoints have the potential to inject an immense amount of value to the company-customer relationship, because when managed correctly they establish and evolve the customer experience into something unforgettable – and amazing. To echo noted product manager and author Adam Richardson, touchpoints "bring the customer experience to life."

Managing Touchpoints is Essential

Whether they are in the B2B or B2C space, today's customers want to meaningfully interact with companies and brands through touchpoints such as corporate websites, blogs, social media channels (LinkedIn, Facebook, Twitter, YouTube, etc.), knowledge bases, customer communities, call centers, and mobile apps.

Companies that fail to deliver on this demand – either through indifference or ineffectiveness – will not just be losing customers; they will be generating revenues and profits for their competition. Indeed, a report by the International Customer Management Institute (ICMI) found that 47% of customers who were satisfied with a company would still head to a competitor, if the latter offered them information through a preferred channel.

Yet with this being said, companies that have committed to managing their touchpoints cannot take anything for granted. A study by Deloitte concluded that 90% of customers expect the customer experience to be consistently excellent across all channels. And considering that the average customer searches for information across seven different touchpoints, it is clear that companies that want to triumph in the Era of the Customer Experience have their work cut out for them.

Customer Stage and the Pivotal Role of Documentation

As noted above, customers engage several touchpoints in their relationship with companies. However, the touchpoint journey that companies are most interested in is the one that governs how a typical customer goes from searching, to purchasing, and finally to becoming a loyal evangelist or brand ambassador.

While there are many ways that a company can strengthen and optimize its touchpoints (e.g. functional website, staff training, etc.), one of the most pivotal influencers of the customer experience journey – if not arguably *the* most pivotal – is the documentation that a company creates.

This is because customers routinely encounter and interact with company-produced documentation across various touchpoints. For example:

- **Pre-Sale Phase:** Potential customers rely on product documentation to learn more about product details and support options through multiple touchpoints. They typically refer to search engines, the documentation portal, the knowledge base and the customer community while searching and researching solutions and their offerings.
- **Post-Purchase Phase:** As new customers that have started to use the product, customers rely on documentation to access help and to personalize their user experience. They typically choose to do this via the customer community, knowledge base and, if available, the company call center.
- **Long-Term Loyal Customer Phase:** Loyal customers rely on documentation to deepen their awareness of a trusted company's offerings and to share and socialize with other users.

From the pre-sale phase through to purchase and beyond, company documentation is an essential asset that, if suitable crafted and effectively delivered, "brings the customer experience to life."

The Multiple Touchpoint Model and Product Documentation

A closer look at how customers seek support reveals that they typically use several key touchpoints to access technical documentation as they make their way through the customer journey:

1. **Search Engines:** These are almost always the first search option. With over 3.5 billion searches a day, Google is the go-to place for customers in search of everything from information to help.

2. **Documentation Portal:** Documentation portals provide customers with relevant information that guides them through the relevant steps of the journey. The documentation portal also typically includes formal technical publications that allow for deep technical research and reference.

3. **Knowledge Base:** Knowledge bases typically contain Subject Matter Expert-curated content, how-to articles, and support videos that are used by customers as well as the support organization. Furthermore, the ability to create topic-based

documentation for the knowledge base gives companies the option to repurpose assets from the documentation portal.

4. **Call Center:** Call centers provide real-time, live support for resolving customer support issues. The call center can also repurpose information created by other touchpoints, such as the documentation portal and knowledge base.

5. **Customer Community:** Customer communities have been widely adopted over the last few years and provide an interactive, live platform for customers and support agents to collaborate and interact with each other regarding products, experiences and brands.

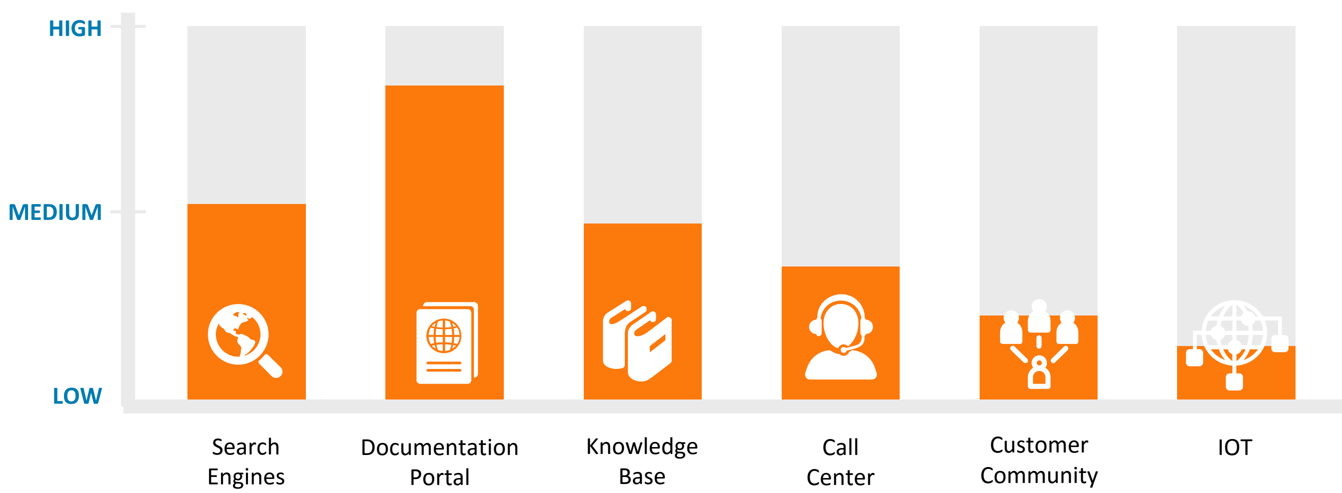
6. **Internet of Things:** When a company's devices are smart and connected, they can be better utilized to self-diagnose – and potentially even self-recover – based on documentation that can be delivered directly to the product.

All these touchpoints represent ideal opportunities for companies to engage with customers. Yet many companies are still not fully exploiting this opportunity.

Utilization of Documentation across Touchpoints

This begs the pivotal question: why aren't more companies leveraging their documentation assets across these touchpoints? There are three core reasons:

Use of Touchpoints for Content Distribution across Organizations



1. **Awareness:** Many companies do not realize the potential of content repurposing that is made possible by topic-based authoring.

2. **Ownership:** Various touchpoints are often managed by different departments, each focusing on its own output and measuring its own performance against specific KPIs. The lack of a unified knowledge strategy and defined ownership results in under-utilization of documentation assets.

3. **Feasibility**: Most companies use multiple systems and formats to author and manage their product documentation. However, they lack an efficient solution for publishing content to *all* touchpoints. And companies that have attempted to develop custom in-house solutions have typically found that they are not scalable, and are prohibitively expensive to maintain.

In short, many organizations are not maximizing the full potential of their product documentation at each touchpoint. As a result, they are struggling with three key consequences:

1. **Duplication and Inconsistencies:** Various departments, such as the Tech Docs, R&D and Support departments, duplicate each other's efforts when they work on support materials. This can also lead to chronic inconsistencies within the materials created. In fact, a study by Eptica found that when asked the same question by email, Twitter, and web chat, just 11% of companies provided consistent answers across two or more channels.

2. **High Costs:** Since the support materials offered through each touchpoint are different, they cannot be updated systematically or cost-effectively. As such, they are not regularly maintained and updated.

3. **No "Voice of the Customer":** Due to the issues noted above, there is limited interaction with customers, which means that a major source of feedback that would otherwise enhance documentation is left out of the picture. The above-noted Eptica survey found that over 50% of customer questions are unanswered across all channels.

Ultimately, these combine to prevent customers from getting the answers, support and information they want, which leaves customers frustrated and sends them in another direction – straight to the competition. A study by the Harvard Business Review found that customers who face these frustrations are four times more likely to become disloyal rather than loyal.

From the company's perspective, this also means that the organization is spending time and money producing documentation that few customers can find, let alone read. In addition, by under-utilizing the potential of their documentation, companies create a strain on customer support, who must answer customer questions already addressed in published documentation.

Touchpoint Expansion Cycle

The good news is that companies do *not* have to reinvent the wheel and create new content, or invest enormous resources in a customized in-house solution – which, as noted earlier, is not scalable and can be prohibitively expensive to maintain.

Instead, companies can solve these problems in a cost effective, consistent, systematic and scalable manner, while taking full advantage of the outstanding documentation that they have worked so hard to create, by implementing a touchpoint expansion cycle.

The Touchpoint Expansion Cycle

With seamless publishing to any touchpoint, companies can publish to a single touchpoint and receive feedback from the support organization as well as end users. The documentation team can then implement the feedback and edit and re-publish to the documentation portal *and* to the knowledge base. The result is product documentation that has become even more effective, reaching more customers and continuing to improve each time it is shared to more touchpoints. The bottom line: higher value for your content.

A touchpoint expansion cycle creates a cycle of feedback inside and outside the organization, leading to co-sponsoring and co-authoring with other departments. This increases content creation and distributes content budgets across several departments for future projects.

Companies are empowered with "one-click" capacity to create, publish, share and improve product documentation in a seamless manner. For example, a company can publish a new document to its documentation portal, receive feedback from customers, update the document accordingly, and simultaneously republish it to the documentation portal and knowledge base.

With a touchpoint expansion cycle, organizations can leverage their documentation in order to:

- Take full advantage of topic-based authoring.
- Increase the number of customers exposed to touchpoints.
- Generate interactive feedback and sharing of product documentation.
- Help customers access better and more relevant information.
- Improve customer satisfaction and enhance the overall customer experience.
- Help all departments appreciate the business importance of product documentation.

Touchpoint Expansion Cycle: Best Practices

While each company is unique, there are a core set of best practices for reaping the rewards of a Touchpoint Expansion Cycle.

Organization

- Identify and get buy-in from all stakeholders by communicating with any relevant partners, including the support organization, the corporate knowledge management function and the product department.
- Make sure that everyone is aligned on the purpose and goals of the relevant product documentation and touchpoints.
- Prioritize touchpoints by determining where consistent product documentation is needed most.
- Make note of the technical documentation that is reusable across multiple touchpoints along the customer journey.
- Start small and thing big by focusing on one touchpoint, measuring, and then expanding slowly. It is best to choose a touchpoint that will clearly benefit multiple audiences and focus on creating a consistent and personalized user experience.

- Build a business case early on by communicating the relevance of each touchpoint.
- Since everyone is benefiting from an improved customer experience, determine ways to co-share budgets, since product documentation has an effect on every department within the organization (e.g. Product, Support and Marketing).

Process

- Progress towards companywide taxonomy and tagging guidelines by classifying the important aspects of each content piece, and how it should be directed to different audiences. This is the “glue” that holds all the technical documentation together, and will no doubt achieve considerable savings in resources.
- Make feedback and curated content an inherent part of the process by including responses from employees and customers. Utilize the customer community and review what people are sharing and requesting.
- Embrace subject matter expert (SME) contributions and implement them into the workflow. Also ensure that SME contributions and user-generated content are incorporated back into the original content, so that documentation is continually improved.
- Create an agile documentation process, with a focus on implementing shorter publishing and feedback cycles. Intelligent content has enabled technical writers to work with topic-based and object-like reuse.

Choosing the Right Technology Solution

Lastly, to reap all the rewards of an optimized Touchpoint Expansion Cycle companies must ultimately ensure that they choose the right technology solution. The right solution:

- Is future-proofed by supporting changing standards and being adaptable to an increasing number of touchpoints.
- Is flexible, versatile, and supports open standards wherever possible.
- Leverages existing investments by ensuring the efficient use of all product documentation across every touchpoint.
- Personalizes information delivery so that documentation fits each touchpoint and customer in an optimized, engaging manner.

- Is easy to deploy, configure and customize, so that it aligns with evolving company needs and scales with changing infrastructure.

In light of these “must-have” requirements, it is easy to see why companies around the world that want to get the most out of their documentation and deliver a consistent exceptional customer journey are choosing **Suite Solutions.**

The **Suite Solutions** Advantage

Suite Solutions is an intelligent content platform for structured content. It seamlessly integrates with open standards and technologies used by Tech Pubs departments, and empowers companies to deliver personalized documentation across various touchpoints so they can ultimately “bring the customer experience to life.”

Furthermore, companies can leverage the Suite Solutions platform to generate usage analytics for intelligent business decisions related to content optimization, product trends and issues, content recommendations, sales leads, marketing insights, and more.