

GETTING STARTED

Help center content strategy

Calling all help center fans! (I know you're out there...) Leanne from Mintedleaf here.

This document outlines all the moving parts in a typical help center project. Use it as a starting point for discussing a help doc refresh with your team.

...Maybe you need to figure out a strategy so you can plan what's next

...Maybe you need someone to do the work because your agents or writers are overloaded

...Or both.

Whichever the case, the processes described here should get you started.

Goals

What's on your help center wish list?

- Turn the help center or knowledge base into a measurable customer retention tool.
- What else?

Problems or issues

Which of these sound familiar?

- Help center lacks a user-friendly style, recognizable hierarchy, and clear format for instructions.
- Help center topics don't comprehensively answer frequently asked questions. As a result, customers raise support tickets rather than use self-service.
- Some help content is not integrated with the rest of the help center, such as video tutorials, podcasts, webinars, and transcripts.
- Help center voice and tone is off-brand. For example, help docs have an overly-formal or unfriendly tone.
- No process for adding new help topics, or revisiting existing content to make sure the help center stays up to date.
- Help center usage isn't measured consistently (or at all) so you don't know what's working and what isn't.
- What else?

Process

Mintedleaf divides help center projects into two phases: content strategy and implementation. Your goals, in-house resources, and budget determine which of the following activities you need.

Content strategy

	Activity	Description
☐	Help content audit	<p>Review existing help docs, topic by topic and score them based on specific criteria. For example: keep, update, archive.</p> <p>Review other sources of help docs used by support, including internal knowledge bases, Jira, Google docs, Word, etc.</p>
☐	Tool review	<p>Review current tools being used for documentation and investigate how they could be used better. Research new tools if needed.</p>
☐	Stakeholder interviews	<p>One-on-one interviews with core team members to understand how and when help docs are created, and what the problems and challenges are.</p>
☐	Customer or user research	<p>Conduct user research using various techniques:</p> <ul style="list-style-type: none"> ● One-on one Interviews ● Online Surveys ● Online user tests (video recordings of customers using the help platform) ● Review of support tickets, or calls

<p>☐</p>	<p>Data review</p>	<p>Review analytics from the website, help center or marketing platform to identify frequently accessed topics, keywords used in search, time spent using the help platform, etc.</p> <p>For example: data and trends from Google Analytics, Hubspot, Zendesk, Intercom analytics.</p>
<p>☐</p>	<p>Style and writing guidelines</p>	<p>Create a help doc style guide for use by customer support, product management, and help doc stakeholders.</p> <p>Combine an industry standard style reference (such as Microsoft Style Guide) with a list of custom styles and standards.</p>
<p>☐</p>	<p>Information architecture</p>	<p>Create an information architecture for help docs, specifying how topics should be organized, tagged, and linked.</p> <p>Identify existing content to be reused or re-purposed, and new content to be created.</p>
<p>☐</p>	<p>Key findings and recommendations</p>	<p>Communicate key findings from the above activities, and recommend next steps for implementing a successful help center strategy that meets customer support and user needs.</p> <p>Identify trends, insights, and KPIs to track moving forward.</p>

Implementation

	Activity	Description
☐	Content writing, editing and publishing	Manage content creation by in-house writers. Or, write, edit review and publish content as the sole implementer.
☐	Content migration	Migrate content from PDF documents or other online platforms to the help center.
☐	Help center setup or reorganization	Implement the information architecture in the help center platform.
☐	Help doc training	Train in-house support agents, tech writers or marketing writers to use new page types, templates, and new tools (such as: Paligo, Zendesk, Intercom).
☐	Page types and content templates	Create page types and templates for help center topics. Page types define the structure of each type of topic. For example: how-to, procedure, procedure+video, checklist. Templates may contain boilerplate or global content chunks.
☐	Help doc processes	Define a process for creating, updating, and archiving help docs.

Project pricing

Each phase of a help center project is priced separately. Costs vary depending on the deliverables and timeline. For small help centers (<200 topics) pricing for each phase ranges between \$6,000 and \$10,000.

About Mintedleaf Story Studio

Mintedleaf is run by me, Leanne Tremblay. I'm a conversion copywriter and help docs specialist focused on customer experience. I've written technical help docs in the high tech industry for more than 20 years, and produced everything from standalone user guides to documentation suites.

I'm also all of these things (in no particular order):

- Vocal and dedicated content strategy owner who considers how documentation can measurably improve the overall product experience
- Comfortable, focused, and organized in engineering and software environments, with a friendly, personable style for interviewing and consulting product managers, SMEs and stakeholders
- Committed to UX best practices applied to the realm of docs
- Creative, "make it happen" content creator who can adapt quickly to last-minute changes, make do with less, and roll with the ups and downs
- Enthusiastic about technology, and has the drive to ramp up quickly to any tool or platform

If you need someone who can get into the weeds using data, customer research, AND product exploration, I'm a good fit for you.

Want to learn more?

Contact Leanne to talk about your project.

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