

'The Help Journey'

Counting the costs of searching

Improved Apps  
White Paper



## The Enterprise Help Journey...

### Empowering your Salesforce users to help themselves

Struggling to find something is a familiar experience for all of us. Searching for information that we would rather have at our fingertips is frustrating whatever the situation but it's particularly infuriating in a business environment when it impacts productivity.

Success depends on customer satisfaction and the joy of a CRM solution such as Salesforce, is that it tracks every interaction a sales rep or company employee has with a lead or customer in one centralised place.

It allows the salesperson to record gathered knowledge on customers and prospects so that they can deliver rapid responses to enquiries, solve problems quickly, and create a personalised experience, which ultimately is a win-win situation for both the customer and the organisation.



## Life's too short to waste time searching...for information

However, it's ludicrous the lengths to which many Salesforce users are forced to go, to find the essential help that they need, to do the everyday tasks associated with their job and keeping customers satisfied:

Searching for Salesforce updates... Price updates...Competitor information updates... it all takes time... and time costs money.

## Current 'Help' in Salesforce – the Pros and Cons...

	Pros	Cons
Salesforce Standard Help	<p><b>System Administrators:</b></p> <ul style="list-style-type: none"> <li>Initial configuration</li> <li>Additions/Options</li> </ul> <p><b>Salesforce:</b></p> <ul style="list-style-type: none"> <li>Up-sell new features</li> </ul>	<p><b>Enterprise Users:</b></p> <ul style="list-style-type: none"> <li>Limited end-user help</li> <li>No custom labels</li> <li>Custom apps</li> <li>Mandatory help links confuse</li> </ul>
Salesforce Training Portal	<p><b>New Installations:</b></p> <ul style="list-style-type: none"> <li>Generic role basics</li> <li>Standard processes</li> <li>Standard apps</li> <li>Basic use cases</li> </ul>	<p><b>Enterprise Users:</b></p> <ul style="list-style-type: none"> <li>Too generic</li> <li>No customisation support</li> </ul>
Bolt-on Help		<p><b>Remote:</b></p> <ul style="list-style-type: none"> <li>Hard to access</li> <li>Always out of context</li> <li>Hard to maintain</li> </ul>

“Efficiency is doing things right.  
Effectiveness is doing the right things.”

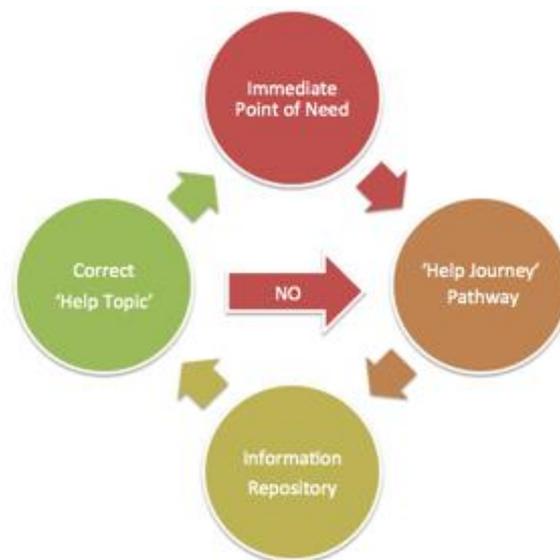
Peter F. Drucker: The Effective Executive 1993

## What's the problem with the traditional 'help journey'?

'Help journeys' begin and end at the task-in-hand...

Every help journey is cyclic (and contains a series of triggers and responses) – beginning and ending at the user's task in-hand:

- **Immediate Point of Need:** when the user needs help and sets off to find it
- **Help Journey and Route:** the steps taken to find the help with the specific task in mind
- **Information Repositories:** containing resources that may help – web pages, documents, presentations, videos, courses
- **Right Help Topic:** - the concise chunk of content that addresses the specific need



Whether the user finds such a '*golden nugget*' of help or not sets the outcome of their help journey.

### The Need...

Every 'Help Journey' is triggered by the user's task-in-hand, and generally falls under two categories:

#### Operational:

- A 'head-down' task that has got 'stuck' ...

*"How do I get this right (or correct it)?"*

#### Tactical/Strategic:

- Planning of next actions...

*"What's the right thing to do now/next?"*



## Self-help and mining for the 'golden nuggets' of help

This cyclic journey, at first glance, would appear to be a quick and simple route to success – you have a query, you set off on the easy navigable pathway, find the exact piece of information you need and utilise it to good effect.



BUT so often it just isn't that easy...

Because here lies a problem - that of MULTIPLE CHOICE:

- ⦿ Multiple routes – each with their own individual layers of complexity, with some easier to negotiate than others
- ⦿ Multiple information repositories
- ⦿ Multiple facets of information

In order to find the right help topic, that 'golden nugget of information', the 'self-helping' user must drill down and sift through the nitty-gritty of options and know how to select and pick out the right elements.

They need to unearth:

- ⦿ The most appropriate information repository holding the type of help needed
- ⦿ The correct keywords to search and short-list resources
- ⦿ The search results best to focus on for further analysis
- ⦿ The most appropriate use cases and contexts to focus on and search for within the selected documents and presentations
- ⦿ The 'Answer' – the golden nugget needed to address their specific task-in-hand

## Complications in the 'help journey' confound users

This time-consuming and frustrating scenario means that not all 'help journeys' are successful. Complex search systems and multiple pathways and options often mean the user's needs are not addressed and the journey falters.

Misdirection and misinformation lead to frustration and often the need to re-start, repeat or abandon the search. This ultimately leads to the user either giving up on the task-in-hand or guessing what needs to be done, which in turn has huge implications for bad data.

And it seems this problem of searching is not a small one. The world is awash with

In 2006, Butler Group, a London-based IT research and analysis organisation released a report titled 'Enterprise Search and Retrieval', which concludes that:

'...ineffective search and discovery strategies are hampering business competitiveness, impairing service delivery and putting companies at risk.'

Specifically, the research firm contends that as much as 10% of a company's salary costs is "frittered away" as employees scramble to find adequate and accurate information to perform their jobs and complete assigned tasks.

companies that aren't dealing effectively with this extraordinarily, costly problem...

Over the years companies have attempted to bridge the gap between users and content with...

Document Management Systems...

Learning Management Systems...

Plugged-in Enterprise Content Management Systems...

All have played their part but none of these systems really offer much advantage to the end user, as they are still rooted in a convoluted search.

## Advances do not always lead to advantage

Despite the considerable advances in delivery methodologies, information is not really easier to find, it is no more specific to the needs of the individual, and reflects nothing of the unique needs of a specific organisation.

So the mecca for many companies should be to find a way to efficiently bridge the gap between users and content – to provide the right information, in the right place, at the right time, for the right user – and increase the efficiency of the Salesforce user.

## Successful journeys lead to successful outcomes

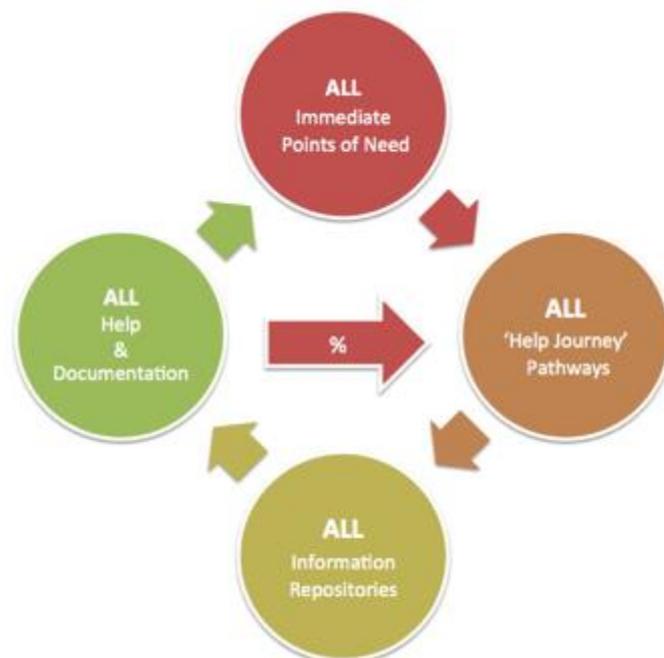
Successful outcomes result when the user's moment of need is addressed. For that to happen it needs to be:

- **Effective:** Namely the task-in-hand has been progressed
- **Correct:** The right thing has been done, and done right
- **Efficient:** The correct help 'nugget' has been delivered quickly
- **Measurable:** All journeys should be monitored and satisfaction tracked

Most organisations have no handle on the 'help journeys' that users need to take to address their task-in-hand, or what inefficiency in this process costs them.

The 'Enterprise Help Journey' is the aggregated view of every 'help journey' taken by all users – across all points of need, routes, repositories and help/documentation content.

It's only by understanding the journeys that your users are already taking, and that they need to take but can't, that it becomes possible to find how and where to improve.



## Analysis of 'help journeys' will ultimately save you time...

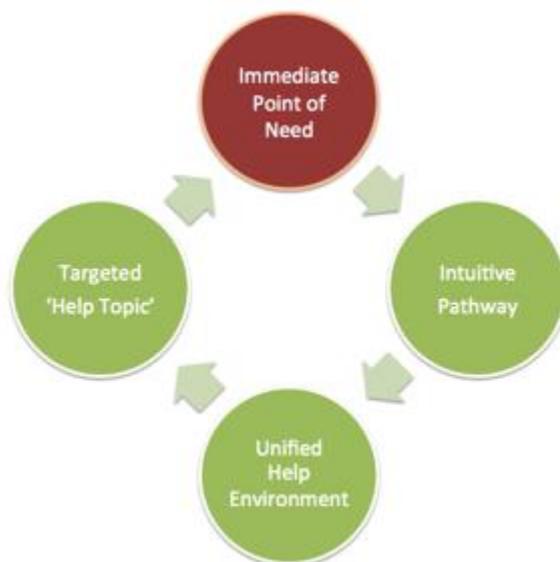
The fragmented nature of help content makes the analysis of the 'help journeys' harder, but it is possible to gain some insights by reviewing representative samples of:

- ⦿ User 'help journeys': namely the common tasks & help needs, the known points of need and the currently available routes
- ⦿ Documentation: existing help content

It is also often possible to set a benchmark for current help by measuring some of the associated problems, such as:

- ⦿ User errors and data quality issues in Salesforce
- ⦿ Help desk/support calls from users who should know
- ⦿ Customer complaints

## The ideal 'help journey' is...



- ⦿ **Simple:** One obvious, easy, 'least effort' route, with a click as near to the point of need as possible.
- ⦿ **Short and direct:** One click to the correct help topic targeted at this point. No need for the user to search (or have knowledge of repositories or search keywords). No requirement to select potential help from lists or mine through short-listed results to formulate their own view of the correct help for their task in-hand.
- ⦿ **Unambiguous:** One obvious path in a unified 'help environment'. By using context-sensitive 'signposting' we can remove the complexities involved with accessing pre-existing remote help resources.
- ⦿ **Successful:** Requiring only one help journey for 80+% of needs
- ⦿ **Secure:** uses Salesforce security and sharing rules to ensure the safe and secure use of the powerful capabilities inherent in the Salesforce platform.

## Counting the cost of time wasted searching...

“According to a McKinsey report, employees spend 1.8 hours every day—9.3 hours per week, on average—searching and gathering information.

Put another way, businesses hire 5 employees but only 4 show up to work; the fifth is off searching for answers, but not contributing any value.”

## The positive impact of placing help in the heart of the application

It's clear that if you get the 'help journey' wrong, the implications are serious and costly in both time and money. It underlines just how important it is to get the 'help journey' right, as the rest will follow...

A successful 'help journey' is simple, clear and short; the perfect 'help journey' is one that places information directly at the point of need and is relevant to the place and the person.

It would seem self-evident that providing tailored information at users' fingertips simply makes life easier for everyone - sales, support, training, services and management alike.

The cycle of frustration is broken and time wasted across the board is significantly reduced.

And at the end of the day a happier workforce is more efficient, more productive and much less likely to walk out the door!





## Sharing knowledge for shared success

“Improved Apps – Improved Help and Improved Noticeboard – will be a game changer”

Alicia Walters, Kerry Inc. - CRM Global Data Lead

“We were able to roll out the first version of this to our global users after a couple of days”

Ulrika Grahn, Qlik - Senior Global Operations Training Manager

“I’m now confident that our Salesforce users get the help that they need”

Sam Copley, Alere Toxicology – Online Development Manager



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