

White Paper

Buyers Guide for Knowledge Management

Essential Features of Knowledge
Management Software for
Enhancing Customer Service



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Introduction

In the dynamic realm of customer service, where the fine line between good and exceptional often lies in the details, robust knowledge management is indispensable. This guide serves as your navigator through the intricate landscapes of modern knowledge management tools, examining essential features and key requirements critical for your success. Our aim is to illuminate how:

- Your business can benefit from an advanced knowledge management tool
- You can fully leverage the potential of your current solution
- Investing in new technologies could strengthen your position

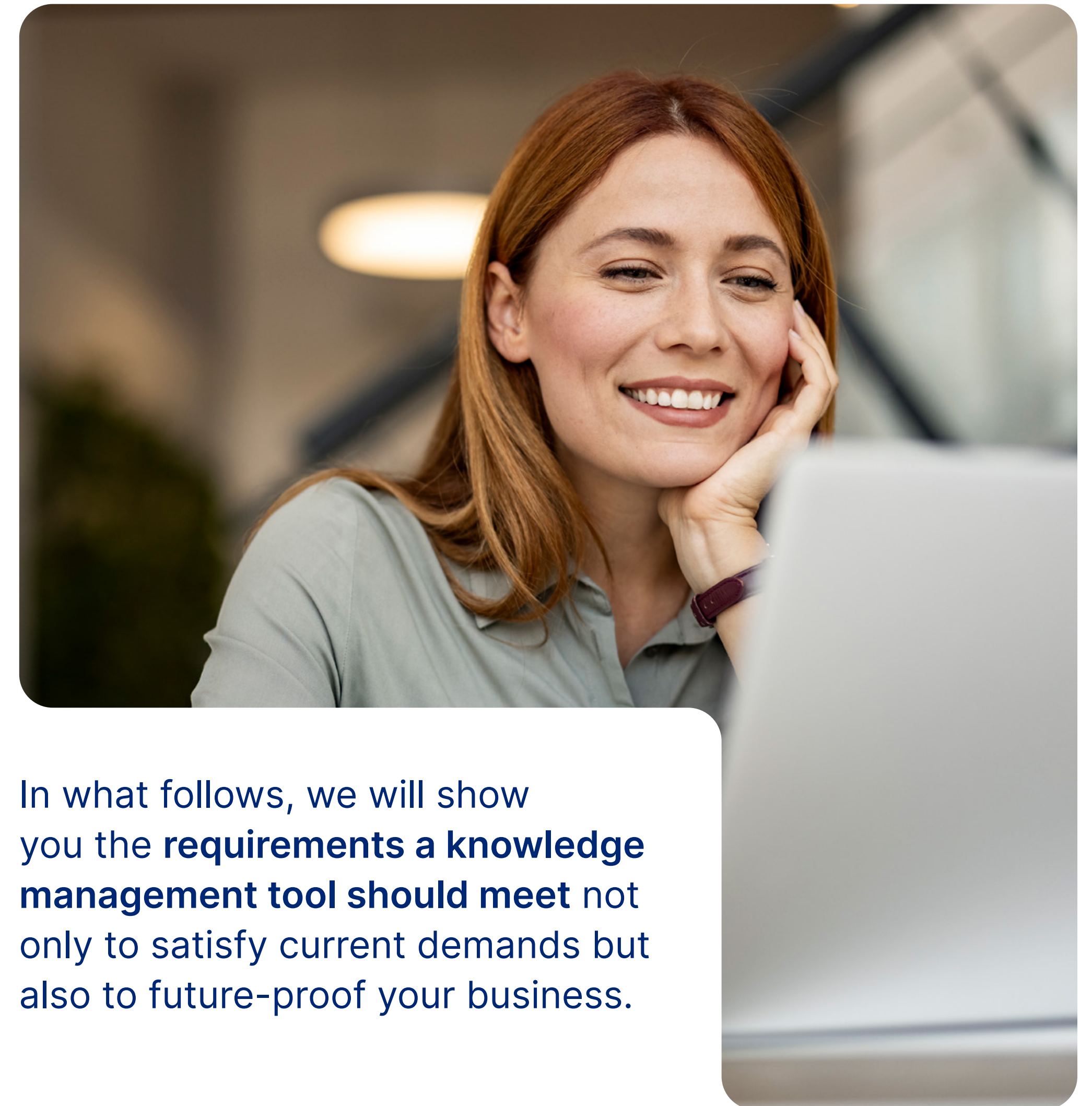
At the heart of top-tier customer service lies a knowledge management system that not only serves as a reliable and efficient single source of truth but also ensures information is constantly updated, quality assured, and easily accessible to all stakeholders.

In today's world, where information overload is the norm, the ability to deliver quick and precise answers is increasingly becoming a key competence. An efficient knowledge management tool proactively addresses the critical issue of knowledge loss due to staff turnover. It not only secures your valuable corporate knowledge but also facilitates the onboarding of new employees, ensuring your customer service continues to deliver excellent performance even in times of change.

The current revolution in knowledge management is driven by the integration of generative AI technologies such as ChatGPT and other advanced Large Language Models (LLMs).

These technologies have the potential to boost efficiency, enhance automation processes, and dynamically adapt to changing customer needs.

The capability of a knowledge management system to seamlessly interact with Generative AI (GenAI) is becoming increasingly crucial. GenAI not only contributes to the continuous updating and expansion of the knowledge base but also enables an unparalleled customer experience through personalized responses and solutions. Furthermore, integrating GenAI technologies offers an effective way to manage the exponentially growing volume of information and ensure the relevance and timeliness of the knowledge base. By automating routine inquiries, resources can be more strategically allocated to complex and value-adding tasks, ultimately enhancing customer satisfaction and loyalty.



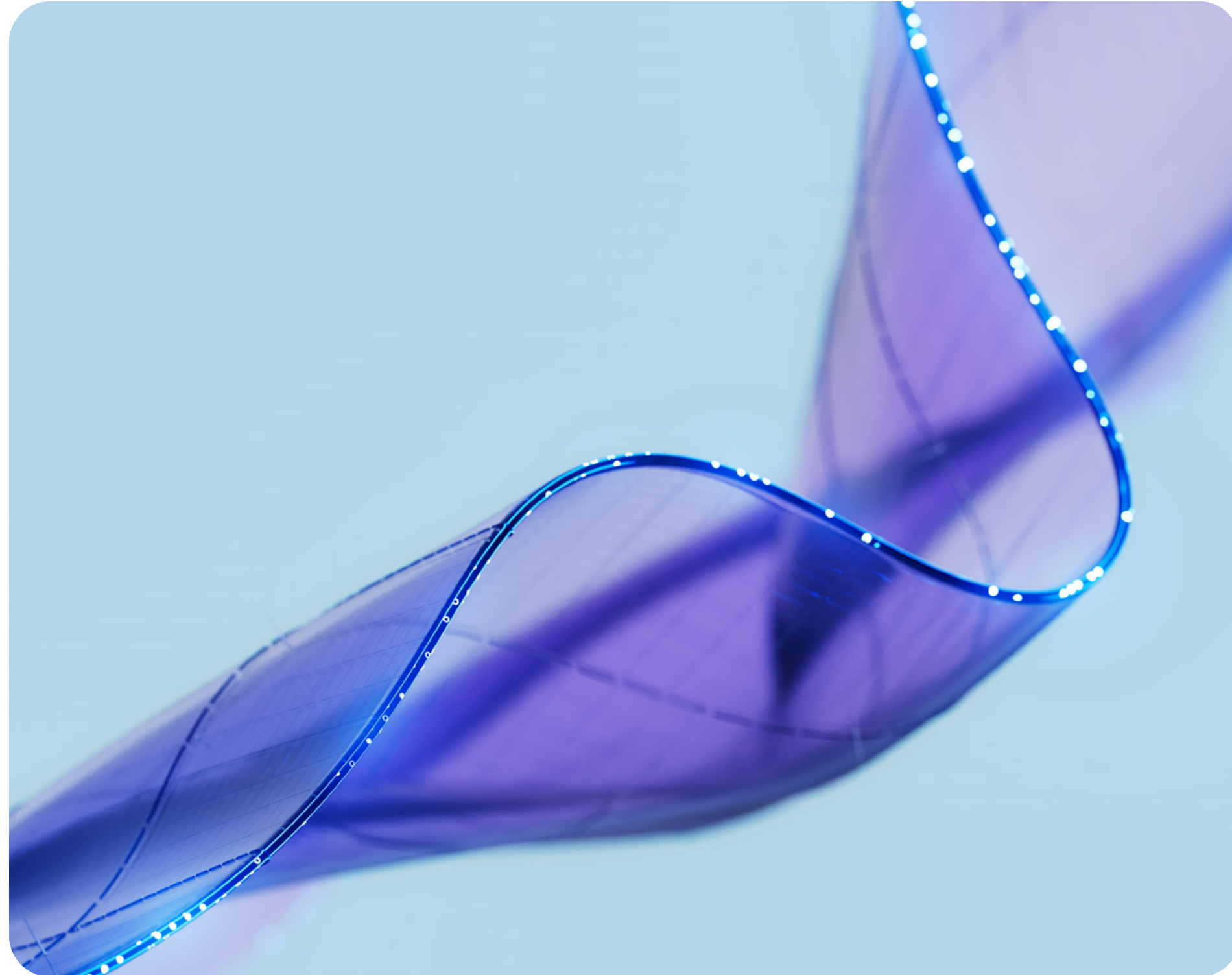
In what follows, we will show you the **requirements a knowledge management tool should meet** not only to satisfy current demands but also to future-proof your business.

Different User Groups, Different Requirements

Unlock the potential of a knowledge management system that’s precisely tailored to your company’s unique needs. Our USU KM Buyers Guide demystifies the process, focusing on the essential aspects that make a system truly effective.

We understand that each user group within your organization has distinct requirements, and our guide is designed to address these nuances, providing a clear pathway to a customized KM solution. It will also give you a comprehensive overview of what kind of features or functionalities an effective knowledge management system should bring to the table to support these specific user groups:





Integrating generative AI technologies

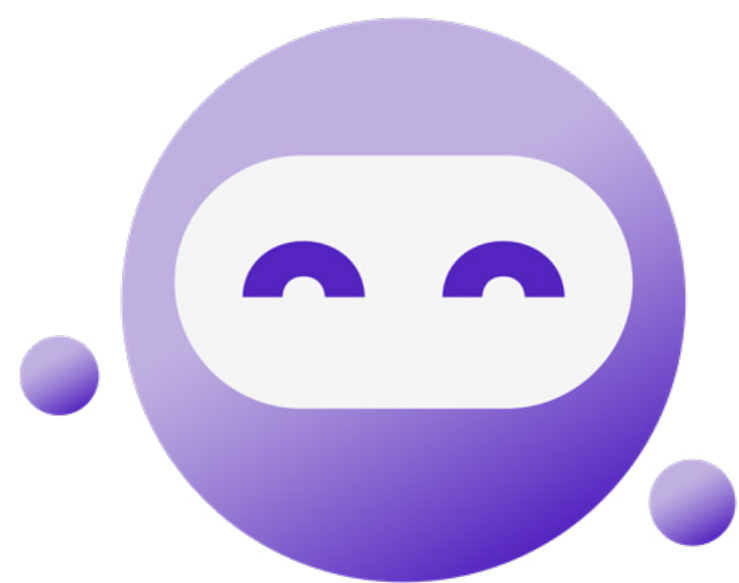
Embrace the future with USU's integration of generative AI (GenAI) technologies like ChatGPT, transforming the way knowledge is managed and delivered. GenAI is more than an upgrade; it's a game-changer, ensuring that your knowledge base is not just current but cutting-edge, offering:

- Enhanced Quality and Efficiency
- Personalized Content Generation
- Dynamic Content Adaptation
- Proactive Knowledge Creation

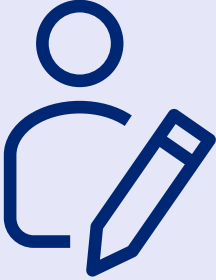
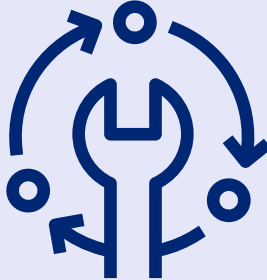
With USU's Knowledge AI (KAI), you're not just implementing a tool but activating a comprehensive support system that elevates the functionality of your KM.

KAI seamlessly integrates with USU Knowledge Management, providing a robust platform that aids editors, quality managers, developers, and management in creating and maintaining a state-of-the-art knowledge repository. Welcome to the next level of KM efficiency and effectiveness, powered by USU's GenAI capabilities.

Read more about GenAI and KAI in the white paper [Simplify and Streamline Your Knowledge Management](#)



KAI provides support in these areas

	Editors & Service Teams	• Answering user queries • Revising/rewriting documents • Translations • Execution of services
	Quality Manager	• Identification of quality problems • Management of QA tasks
	Architects & Software Developers	• Integration of external data sources • External AI-based search functions • Quality optimization of external RAG concepts
	Management	• Support with problem solving • Management of workflows • Management of authorizations • Creation of reports
	Talent Developer	• Creation of tests • Preparation of coaching sessions • Implementation of tests



Supporting service agents

Knowledge management aims to efficiently store, share, and keep information up-to-date by seamlessly integrating it into your service processes.

At the heart of every knowledge management software is the capability to centralize information and make it accessible—secure, easy to find, and perfectly tailored to users’ needs. A single source of truth ensures quality and relevance. Features such as intelligent search, favorites management, update notifications, and the use of artificial intelligence (GenAI) significantly enhance your team’s advisory and information quality.

High-performance search

Even high-quality content is of little use if it cannot be found at the crucial moment. That’s why advanced search is at the heart of every knowledge management tool. USU Knowledge Management equips your team with a powerful, AI-powered search that meets even the most demanding information discovery requirements. Inspired by search pioneers like Google, our search functionalities ensures no valuable content remains hidden:

01

Self-learning search

Our intelligent system learns from user interactions, continually refining search results to prioritize the most relevant content. It also suggests related terms and articles, enhancing the discovery process and reducing search times.

02

Semantic search

Dive deeper with a search that understands the context and relationships between topics. Our semantic search organizes information in an intuitive knowledge graph, offering a clearer, more navigable overview of search results.

03

Search filters

Tailor search results with precision, using filters for topic, date, author, and more. This customization allows users to pinpoint the exact content they need, even with complex queries.

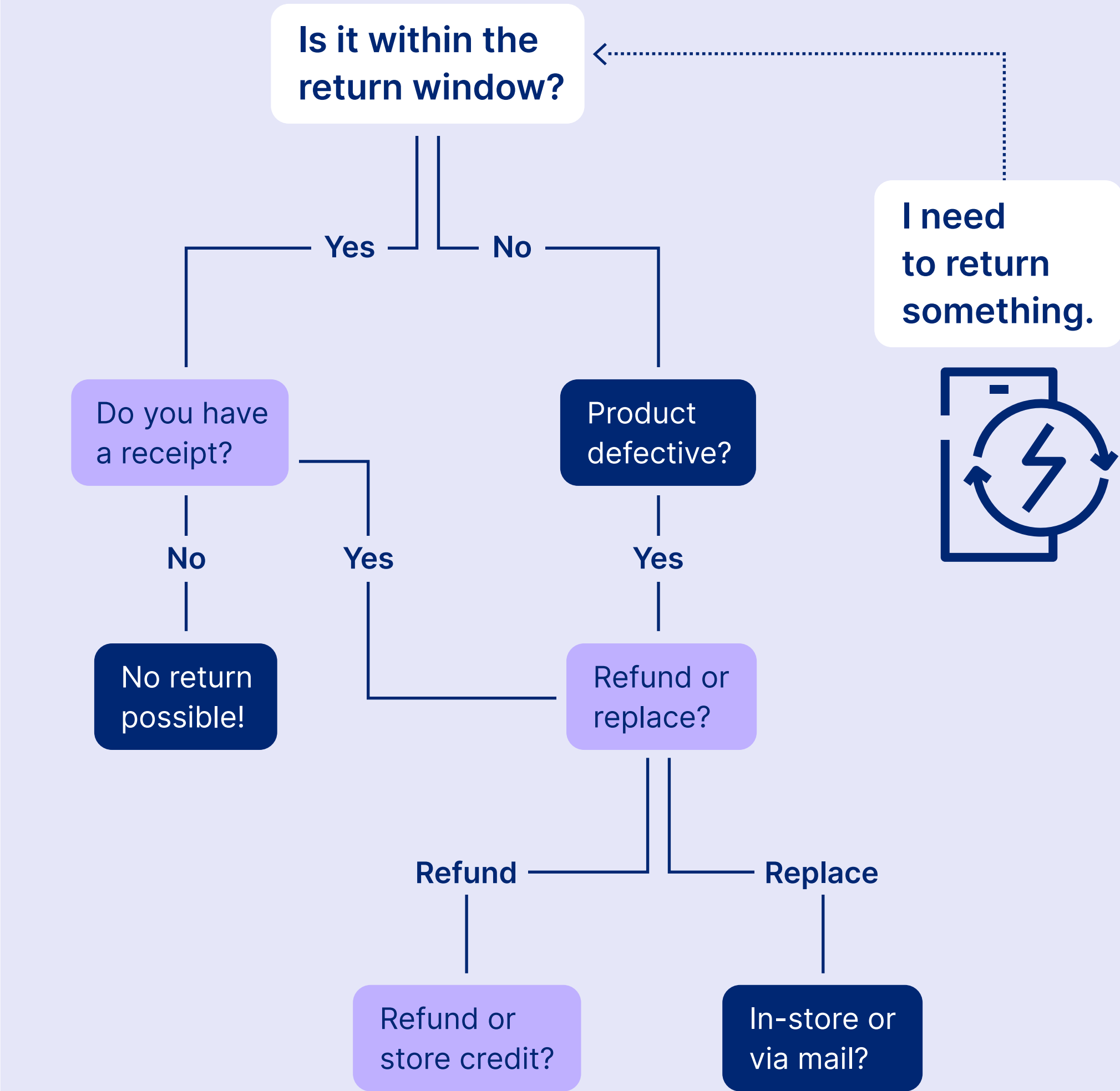
Enhanced favorites feature

The ability to create favorites, just like the search function, is a key element for the rapid retrieval of knowledge documents. The USU Knowledge Management system includes an enhanced favorites feature, designed for speed and efficiency. This function allows service agents to bookmark crucial content, making it instantly accessible with just a click. USU Knowledge Management transforms how service agents access and use critical information, making it simpler, faster, and more reliable to find exactly what they need, when they need it.

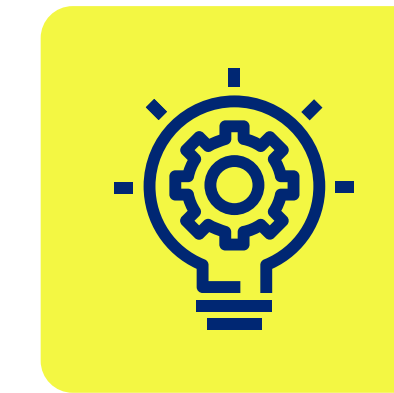
Interactive guided dialogs

USU Knowledge Management revolutionizes the way information is discovered, understood, and applied. Our solution goes beyond mere searchability to ensure that every piece of content is not only easy to find but also to comprehend and use effectively. Our dynamic tables of contents provide a clear overview of the topic landscape right from the search. Once in the topic, structured features like conditional (clickable) documents, which unfold additional information as needed, along with decision trees and “guided dialogues,” intuitively lead users through complex processes, facilitating a swift comprehension and utilization of knowledge.

Discover the full potential of guided dialogs in our white paper: [Using Decision Trees in Customer Service.](#)



USU Knowledge Management refines the information intake through intuitive hints directly in the document. Tooltips, screen tips and thumbnails provide quick insights without users having to change context. In addition, images and the integration of media and iFrames make it easier to illustrate and simplify complex topics. For date-specific content, an integrated calendar view ensures clear time allocations and sequences.



Pre-defined industry knowledge

Unlock the power of tailored expertise with USU's pre-defined industry knowledge. Our extensive experience across key sectors like financial services, IT, retail, technology providers, and telecommunications has been distilled into actionable insights and ready-to-deploy knowledge structures. These customized solutions are designed to seamlessly align with your specific industry demands, significantly reducing implementation time and propelling your organization toward immediate, measurable success.

Accelerate your success: Benefit from a knowledge management system that's been fine-tuned with best practices from your industry, enabling faster, more effective decision-making and service delivery.

Sending update alerts

In the fast-paced customer service landscape, staying updated is not just important – it's imperative. USU's Knowledge Management system ensures your team is always informed with real-time update alerts. These notifications are pivotal for maintaining operational continuity and building customer trust, especially during times of change or service interruption.

Stay Informed and Reliable: Our Update-Widget offers a direct line to the most current information, eliminating the need for your team to manually search for updates. This means your staff can focus on what they do best: delivering outstanding service to your customers, backed by the latest knowledge in your industry.

Intuitive usability

What good is a tool if nobody understands it? Nothing, of course. That’s why it’s important that a knowledge management system is intuitive to use and, above all, that it is suitable for all user groups (1st, 2nd, 3rd level) in the service department.



Easy navigation

Experience the pinnacle of user-friendly design with USU Knowledge Management. Our system is engineered for effortless navigation, ensuring that every piece of information is just a few clicks away. With its intuitive structure, sophisticated filtering options, and advanced faceted search capabilities, finding the right information has never been faster or easier:

- **Effortless Information Retrieval:** Experience seamless search with USU’s smart categorization and streamlined content presentation for an unmatched user experience.
- **Optimized User Journey:** Navigate a well-organized knowledge base that simplifies finding the right information, enhancing productivity and satisfaction.

Configurable roles & rights

At the heart of effective knowledge management lies the ability to fine-tune who sees what and who does what. USU Knowledge Management excels in providing a sophisticated roles and rights framework, essential for safeguarding your data and customizing user experiences. This system empowers you to:

- **Customize Access and Permissions:** Set granular access levels and permissions to ensure the right people access the right information at the right time.
- **Dynamic Role Assignment:** Adapt the system to your organizational needs, assigning roles and permissions dynamically to accommodate evolving business structures and requirements.
- **Automated Rights Management:** Benefit from a system that intelligently manages access rights with automatic updates and expirations to ensure security and relevance.



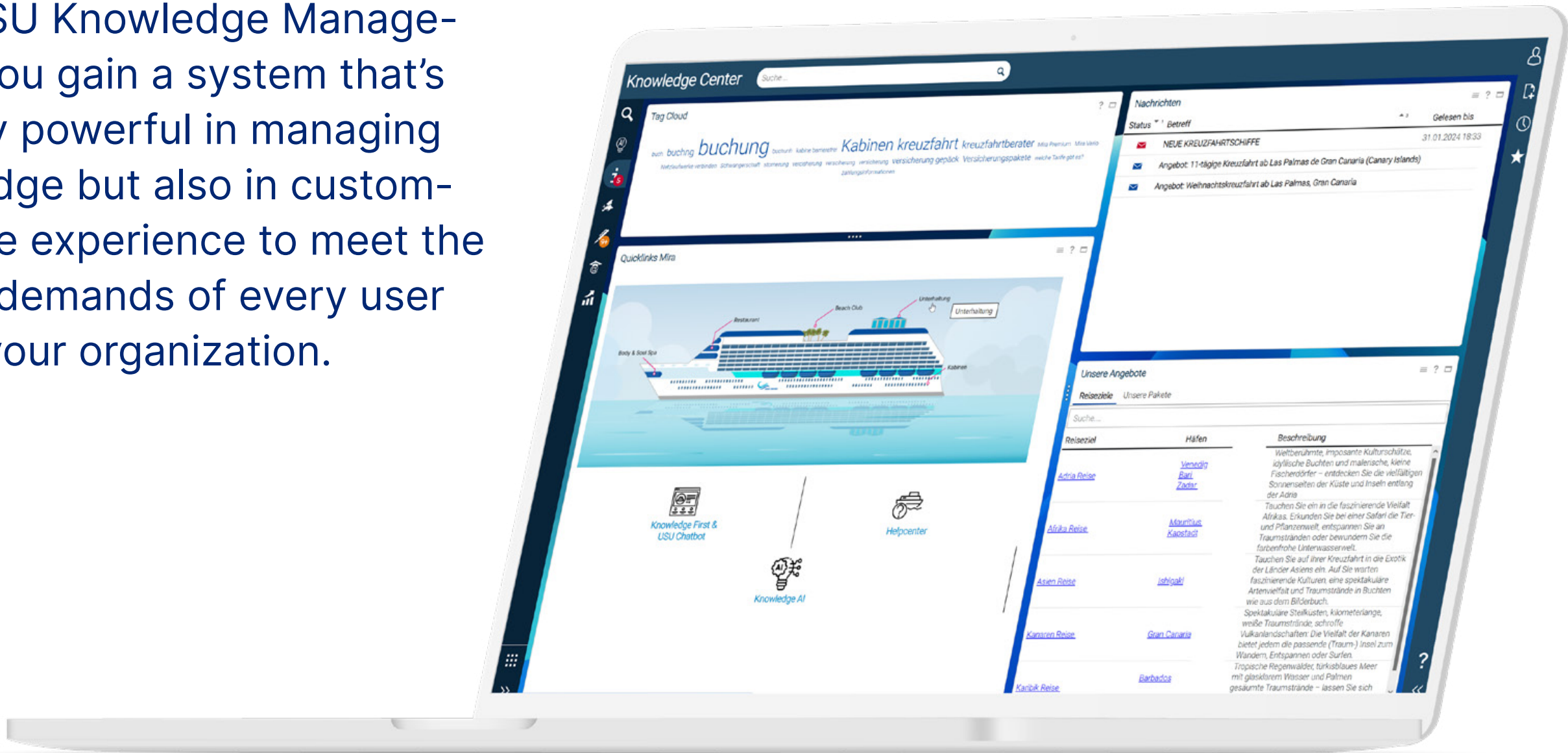


Clearly structured dashboard

For intuitive usability, customization is key. A straightforward way to achieve this, making the tool's use even simpler, is through the audience-specific organization of essential information within an appropriate dashboard. Simplicity and customization converge in USU Knowledge Management's dashboard, designed to present precisely what each user needs, when they need it. This user-centric approach ensures a smooth, intuitive experience with features like:

- **Tailored User Experience:** Access a dashboard that's organized around your specific role and needs, putting essential information and tools at your fingertips.
- **Effortless Navigation:** Engage with a clean, organized interface that simplifies how you interact with the knowledge base, enhancing productivity and reducing cognitive load.

- **Role-Based Content Curation:** The dashboard's intelligent design reflects the roles and rights architecture, ensuring users see content and options relevant to their responsibilities and access level.
- **With USU Knowledge Management,** you gain a system that's not only powerful in managing knowledge but also in customizing the experience to meet the unique demands of every user within your organization.



Streamlined content creation & management

In order to make knowledge centrally available, the creation of content is of central importance. For this reason, a great deal of attention should be paid to editing.



Content editor

Dive into content creation with USU’s WYSIWYG (What You See Is What You Get) editor, designed for simplicity and efficiency. Seamlessly import content, effortlessly format text, and enrich your documents with links, attachments, and multimedia elements. Our editor’s layout templates and customizable designs help you craft high-quality content tailored to every need, supported by predefined schemas for easy updates and consistent quality.

Task management

Organize editorial tasks with our visual Kanban board, streamlining your workflow with prioritized task lists. Assign deadlines, sort tasks by urgency, and never miss a beat with automated reminders and color-coded alerts for overdue items. This intuitive system boosts productivity by ensuring a well-organized and responsive editorial process.





Multi-level workflows

Set the standard for quality with workflows that cater to every detail, from draft to final approval. Whether it's for rigorous sectors like pharmaceuticals or finance, our no-code, customizable workflows ensure thorough reviews and seamless collaboration. With the help of KAI, our AI assistant, streamline the creation and modification of workflows, saving time and enhancing content quality.



Document management & feedback

Enhance your knowledge base with metadata that makes management and retrieval straightforward. Automatic tagging and categorization simplify navigation, while direct feedback mechanisms allow service agents to contribute insights, ensuring content remains relevant and valuable.

Duplication & consistency checks

Tackle content redundancy with our duplicate check feature, enabling easy identification and resolution of identical documents. KAI takes it a step further by analyzing documentation for inconsistencies, ensuring your knowledge base remains accurate and reliable.



Keeping content current

USU Knowledge Management automates the upkeep of your content, from update alerts to link checking, ensuring your knowledge base is always accurate and relevant. With features like automatic archiving, maintain the freshness of your content without losing access to historical data.





Automatic document archiving

In knowledge management, having access to historical content is crucial. USU Knowledge Management ensures this through an automatic archiving function. Content marked as “old” is not deleted but carefully archived, making it readily available when needed. This practice ensures that valuable knowledge is preserved and can be accessed at any time, without compromising the currency and clarity of your knowledge database.



Seamless system migration

Transitioning to USU’s KM system is smooth and lossless, whether you’re moving from Confluence, SharePoint, or another platform. Our solution guarantees a hassle-free migration, preserving the integrity and accessibility of your valuable knowledge.

Multilingualism



Seamless global operation

USU Knowledge Management is designed for the global stage, enabling businesses and service units to thrive across borders. With our multi-tenancy feature, manage a unified knowledge system across different countries while allowing for localized independence. This approach ensures a consistent yet flexible KM solution that adapts to the diverse operational needs of each region.



Fast translation

Break language barriers with USU’s advanced translation workflows, automatically activating once content is approved in the primary language. Our system integrates with leading translation memory tools like Trados and MemoQ, streamlining the translation process for linguists. For even more agility, leverage automatic translation services such as DeepL or Google Translator, enabling instant, on-demand translation into various languages.



Customizable content for specific markets

USU Knowledge Management supports collaborative content approval, essential for materials needing validation by experts from different domains or markets. Create market or topic-specific content effortlessly by modifying knowledge blocks to suit particular requirements, ensuring that your KM system is not only comprehensive but also precisely tailored to the nuances of each market segment.





Media integration

Streamlined media library

Elevate your content with USU's dynamic media library, where integrating images, videos, and documents like Excel, PPT, or PDF transforms complex data into understandable insights. Our organized repository ensures media assets are easily accessible and manageable, with a simple linking system that updates content across all platforms instantly. This not only streamulates content management but also optimizes storage efficiency, keeping your knowledge base current and resource-friendly.

Own media server

For handling larger media files, USU boasts a robust media server integration, adept at managing extensive video content without burdening your system's performance. Knowledge Tube, our dedicated streaming service, is seamlessly integrated into the knowledge management system, allowing for the smooth inclusion of substantial multimedia files, ensuring they're an asset, not a hindrance, to your knowledge base.

iFrame integration

USU Knowledge Management's versatility extends to embedding external services and websites directly into your system via iFrames. This integration enriches the KM experience, providing users with direct access to additional tools and information like internal directories, without ever leaving the knowledge management environment.

Seamless integrations

No matter how powerful a knowledge management tool may be, it must also harmonize with other systems in order to support the daily work of customer service. After all, nothing takes up more time than having to juggle several systems in order to provide quality-assured information.



Ticketing systems integration

Elevate your case handling with seamless integration between USU Knowledge Management and top ticketing systems, including Jira, Zendesk, and our own USU IT Service Management. Directly access the knowledge base and response templates within ticket interfaces, streamlining the support process and enhancing the customer service experience.

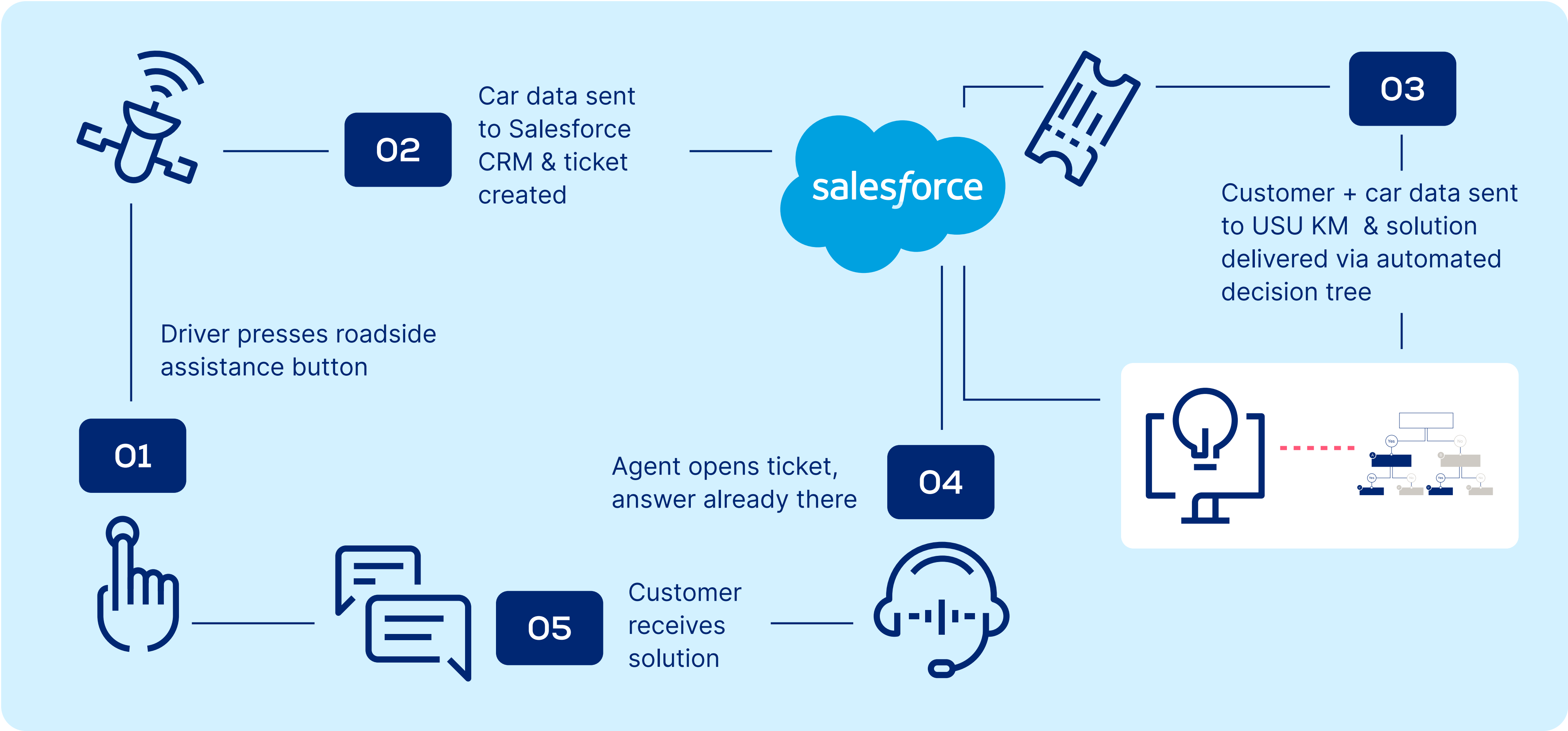


CRM-system synergy

Merge the power of CRM with knowledge management, as USU seamlessly connects with systems like Salesforce and NICE inContact. This integration provides a unified platform for accessing customer data and knowledge resources, facilitating faster and more informed responses to customer inquiries.



For example, Volkswagen has succeeded in providing top-level roadside assistance for its customers by leveraging USU Knowledge Management and Salesforce:



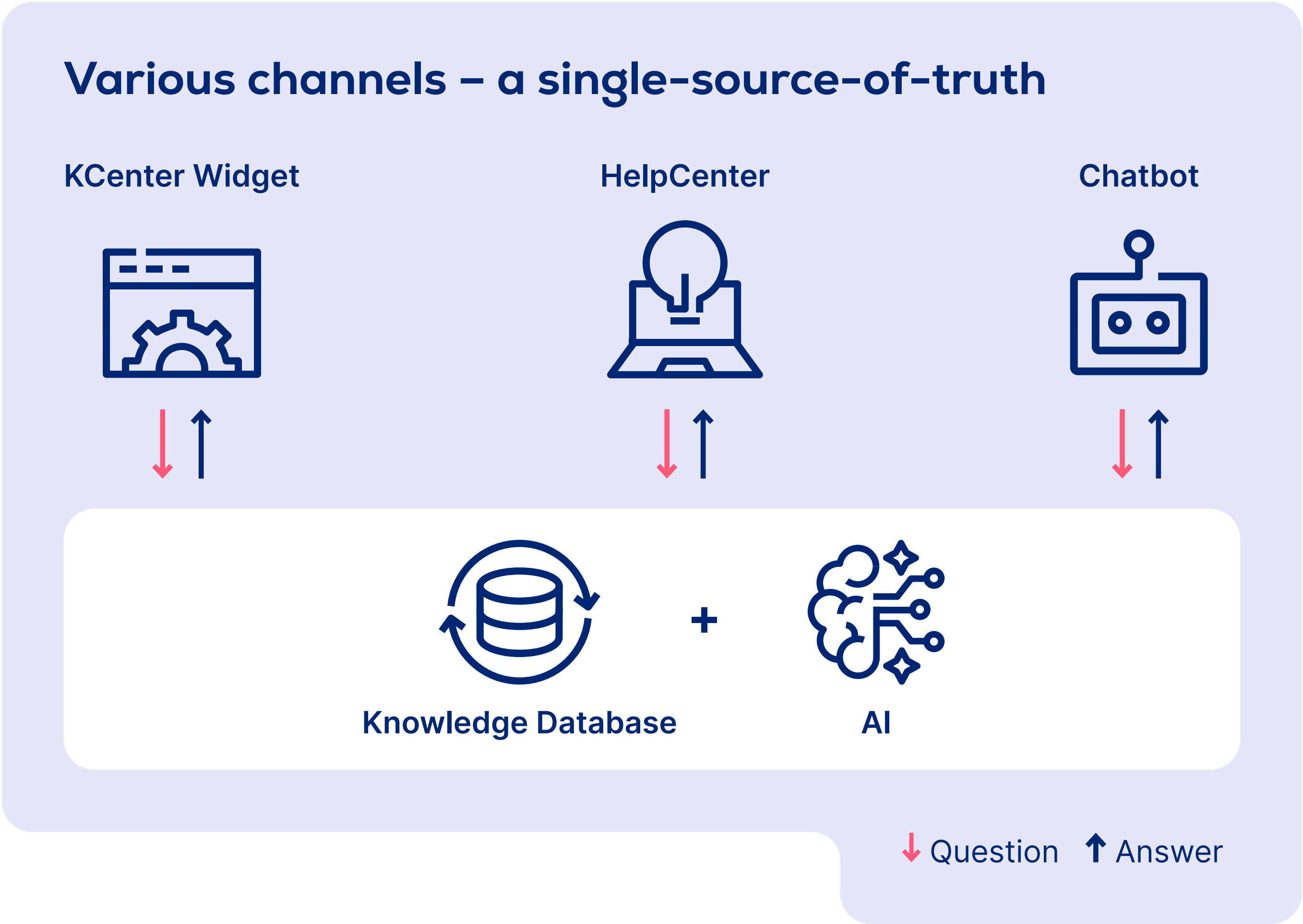
[Read our VW Case Study](#)



Self-service & chatbot solutions

Meet the modern customer’s demand for instant solutions with USU’s self-service and chatbot capabilities. Integrated with USU Knowledge Management, these tools offer direct access to a comprehensive knowledge base, empowering customers to find answers quickly and efficiently.

More about self-service in our e-book: [Increasing Customer Satisfaction through Self-Service.](#)





Enhanced e-learning

USU Knowledge Management enhances the onboarding process through e-learning directly integrated into the system. Guided dialogues enable both new and experienced employees without prior knowledge to quickly learn and effectively apply their knowledge. Additionally, the tool allows for the creation and evaluation of questionnaires and tests within the knowledge database, facilitating seamless learning and assessment of knowledge levels.



With the integration of KAI in USU Knowledge Management, trainers can now easily undertake tasks such as developing training dialogues, for example, based on the latest changes in return policies. KAI thoroughly sifts through the provided documents and policies, crafting realistic customer conversations that encompass all critical aspects of a potential customer service scenario. This not only saves significant time but also ensures consistently high quality of training materials.

Process integration using forms

Streamline customer service operations with form-based process integration, capturing customer data and channeling it effectively to the right department. This automation enhances the customer experience by ensuring prompt and accurate service.

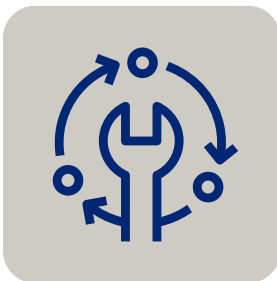


External provider integration

Extend the capabilities of your knowledge management system by integrating with external service providers like translation agencies and freelance content creators. USU Knowledge Management facilitates secure, role-specific access, ensuring collaboration is both efficient and protected.



Technical requirements



Flexible deployment options

USU Knowledge Management adapts to your company’s unique needs with customizable deployment methods:

- **On-Premises:**
Complete control in your IT environment, ideal for stringent data governance.
- **Hosting:**
Our ISO 27001 certified data centers offer secure and reliable hosting solutions.
- **SaaS:**
Experience streamlined scalability and reduced hardware dependency, optimizing operational efficiency.

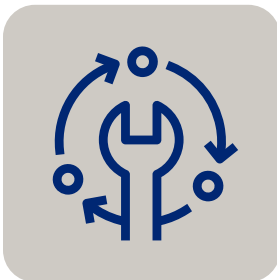
All options are designed with high-availability architecture, featuring mirrored servers for enhanced reliability and adherence to top security standards.



Operating system

Our system is built for diversity, supporting a wide range of operating environments including various versions of Microsoft Windows Server and Linux distributions, ensuring seamless integration and full functionality across different IT infrastructures.





Mobile accessibility

With USU Knowledge Management, access critical knowledge anytime, anywhere:



- Responsive Mobile Version: Adapts fluidly to different screen sizes and work environments, ensuring information is always at your fingertips.
- Native App: Tailored for specific operational needs, providing an optimized user experience for on-the-go access.



Integration via web-API

Extend the power of USU Knowledge Management with extensive RESTful Web-APIs, facilitating smooth integration with third-party systems. Comprehensive documentation and coding examples are provided to support your development team's integration efforts.

Offline access

Our robust offline client guarantees that vital knowledge is accessible even without internet connectivity, ensuring uninterrupted productivity for field personnel and remote operations.

Single Sign-On

USU Knowledge Management simplifies access with integrated SSO technology, supporting various authentication methods like SAML and Active Directory, streamlining the login process and enhancing user adoption.





Support and future viability

Provider security

When selecting a knowledge management software, the range of features is important, but so is the security provided by the vendor. With over 30 years of market presence, USU is supported by a team of over 800 experienced and dependable experts worldwide. Our software ensures future-proofing through regular updates and releases. With successful references across various industries, we offer you a proven solution and act as a reliable partner for your knowledge management needs.

Support

When it comes to support, one might easily assume it's a minor detail—until the moment it's urgently needed. Therefore, being able to rely on professional support that's ideally available 24/7 and in every required language is crucial. At USU, we adhere to these standards and go even further: We offer you personal contacts and a team of permanent experts distinguished by their high quality and dedicated service. It's our commitment to provide you with the support you need, anytime and anywhere.

User-Community

Support is not only provided by traditional vendor services but also through a community. Within this community, there's an exchange of ideas, help from other users, and the sharing of best practices. Thus, a community serves as both a support and innovation platform. Enhanced with templates and models, users worldwide benefit from each other, including those from different companies, if desired. A key component of USU Knowledge Management is the Knowledge Community. In our online forum, KnowledgeHub, users discuss the implementation or use of USU Knowledge Management. In the community, you'll find:

- The Info Center—with best practices, use cases, release notes, FAQs, and technical documentation.
- The Help Community—for global networking with users from other companies.
- The Market Place—featuring integration modules and services from the partner network.

Future focus

The future-proofness of a tool depends not only on its ability to keep pace with evolving requirements and trends but also on its seamless integration into the growing needs of your organization.

At USU, we understand that a powerful knowledge management tool must offer both regular updates to adapt to new challenges and flexible usability across various departments and scenarios. A crucial factor that makes our USU Knowledge Management solution future-proof is the integration of Generative Artificial Intelligence (GenAI). With our architecture, we can swiftly respond to changes and developments in the market. Our approach enables knowledge management to expand beyond the service domain and integrate into areas such as HR, product management, marketing & sales, and partner management.

With USU, you invest in a tool designed for “New Work” and remote work, supporting comprehensive enterprise knowledge management and ensuring ongoing adaptability and relevance in a rapidly evolving world through the integration of GenAI. This ensures that your knowledge management solution meets the needs of your organization not only today but also in the future.

Reporting/Analysis

At the core of an efficient service strategy lie optimized service KPIs such as Call Handling Time or First Call Resolution Rate. USU Knowledge Management plays a crucial role in not only achieving these objectives but also continuously monitoring them.

Our platform’s reporting and analysis features provide deep insights into the effectiveness of your responses, e-learning, and more. They highlight areas where knowledge content needs adjustment to better support your teams.

By analyzing common inquiries, strategies can be developed to potentially redirect them through alternative communication channels. Additionally, the reporting identifies topic areas that require longer response times and offers solutions, such as structuring knowledge into guided dialogues, to effectively reduce Call Handling Time. With USU Knowledge Management, you not only find answers to existing questions but also discover new perspectives and opportunities for improvement to continuously optimize your service.

Conclusion

As you've seen, an excellent knowledge management tool offers undeniable value to every company and service center. It not only facilitates direct customer support and promotes (self-) service but also supports diverse user groups through a wide range of features in their daily work. A forward-thinking system that seamlessly integrates knowledge into all service and self-service channels without causing additional effort underscores the importance of carefully selecting the right tool.

Discover the key to unparalleled service excellence with USU Knowledge Management. Beyond just supporting your team, this tool is a game-changer, enhancing self-service and empowering users with intuitive, advanced features. Streamline your operations with seamless integration across

all service channels, effortlessly keeping pace with the evolving demands of your customers. Embrace the future with USU's cutting-edge AI and GenAI technologies, ensuring your knowledge base remains dynamic and ahead of the curve. With USU, you're not just meeting current needs; you're anticipating future challenges, guaranteeing your customers always have access to the most effective solutions.

Choose USU Knowledge Management for an investment in sustainable success. Transform your approach and lead with confidence, powered by the most forward-thinking solution on the market.

Find out more about Knowledge Management

Comparison of the Best Knowledge Management Systems

What distinguishes the best-known knowledge management solutions?

[Download](#)

The Ultimate Knowledge Management Provider Comparison

In this overview we compare leading knowledge management providers.

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USU Knowledge Management—Important Features

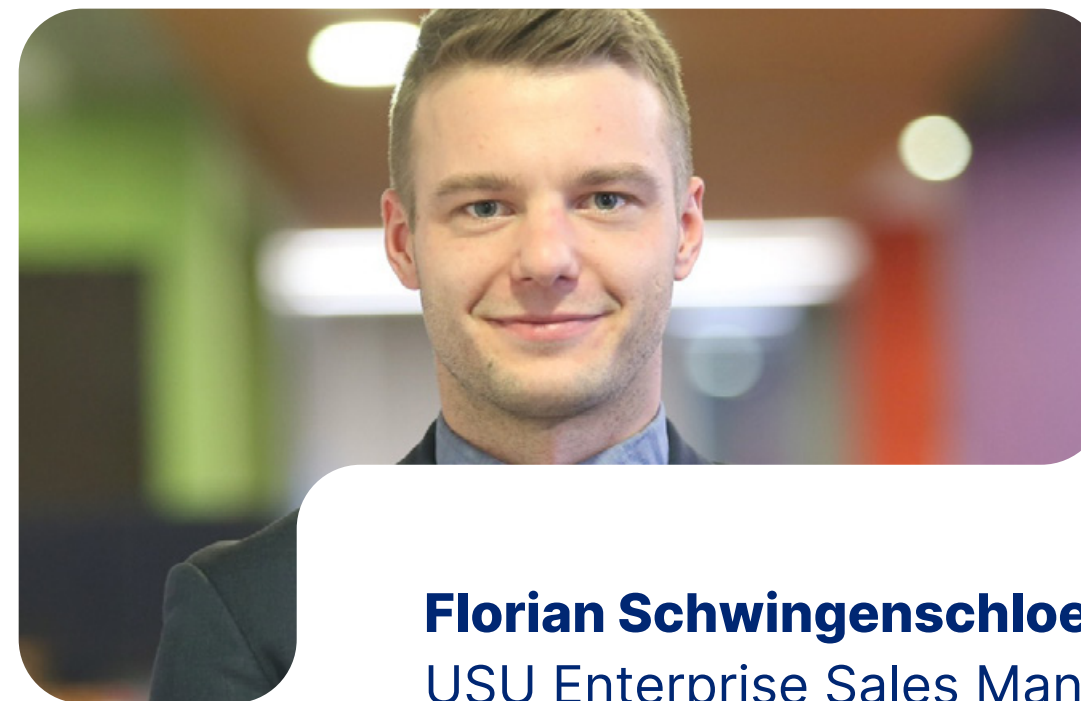
Gain important insights for a manufacturer comparison.

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Do you need further information, a live demo, or do you have any questions?

Most questions can best be clarified in direct contact. I look forward to answering your questions and requests.

[Schedule an appointment now.](#)



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