

Case Study

A Dream Team: USU's Knowledge Base and Salesforce



At a glance

Company

Global biomedical manufacturer and digital health technology leader

Industry

Healthcare

Key figures

5,000+ Employees
Revenue: > 2 Billion USD

Solution

USU Knowledge Management

Challenges

- Using Salesforce CRM and Salesforce Knowledge
- In-house developers weren't familiar with Salesforce Knowledge
- Implementing changes and customizations required an IT project and Salesforce developers which made the process for changes time-consuming
- Contributing knowledge required an expensive "Knowledge Author" license
- Few employees could contribute, creating a bottleneck with content requests that often took months to fulfill
- Unable to easily create custom editorial workflows
- Search functionality was limited

Why USU

- Focused on the needs of customer service and contact centers
- Knowledge management software's flexible user roles (no editor license required)
- Easy access to UI and workflow customization
- Salesforce integration available on the AppExchange
- Competitive pricing compared to others

Requirements/Goals

- Migration of Salesforce Knowledge content to new system
- Easy to use and configure with flexible licensing
- Ability for all users to contribute to the knowledge base
- Incorporate knowledge management and creation into the workflows of the entire customer service team for the Americas
- Reduce complaints related to incorrect answers by service team members

Benefits

- 3x increase in weekly editorial output
- Shorter content lifecycle from content request to publishing via automated workflows
- Increase from 2 people with editorial privileges to nearly 20
- Knowledge managers can focus on QA, review and standardization vs. struggling with backlogs of content requests
- Incorporating e-learning and testing
- Increased sense of ownership of knowledge and participation by customer service team



About the customer

Founded in the 1980s, this customer is a global biomedical manufacturer and digital health technology leader. As a manufacturer of medical devices, customers trust them with their health and its customer service team receives around 10,000 emails and phone calls every week. That's where USU comes in.

With Salesforce as their customer relationship management (CRM) and case management software, they initially opted for the Salesforce add-on module for knowledge management. After three years, a more mature and robust system was sought with a focus on enterprise-level customer service. Limited features, further development and the high level of effort required for customization had become roadblocks to scaling up customer service and knowledge creation. Moreover, their knowledge base tool was instance-specific, meaning that agents in Australia for example, could not access English-language information from the United States.

“Salesforce Knowledge was fine as a starting point, but when you need a professional knowledge base, talk to USU.”

Migration and implementation

All USU's projects include implementation services and having an existing knowledge base made migration a straightforward task. Initial implementation was completed in April 2019.

“USU's consultants did an excellent job on scripting the conversion of our content to USU's active knowledge base. We had several different Salesforce article types, each with a different set of fields to be incorporated into the final documents. We converted 514 Salesforce articles to USU documents.”

A success from the start

Even with further phases of the project to come, the switch to a more comprehensive solution immediately began paying dividends.

Knowledge Center has been well received by users. A large part of this can be credited to the company's involving them from the beginning in the design and configuration process, a best practice for all knowledge base projects. This ensured a smooth transition, improved user experience and increased sense of ownership and participation among employees. Management has been equally satisfied, and USU's active knowledge base will enable the company to move towards a more KCS-like knowledge creation and nurturing paradigm.

“It's just been six weeks, but the impact is being felt. Primarily, we see a much faster turnaround on production of knowledge. Documents initiated by the editorial team members now reach publication quickly. We have also been able to reduce the cycle time required for document review with USU's automated workflows.”

About USU

USU is a provider of customer service and enterprise knowledge management software solutions. It transforms how businesses engage with customers and fosters customer success. USU's knowledge management platform centralizes internal knowledge, captures new customer service insights and empowers agents to provide better service. This creates a futureproof foundation for any customer service strategy to deploy chatbots, voice assistants, self-service and more.



USU's active knowledge base was more than just a tool change for us, it was a total paradigm change for our customer service.



Get in touch for further information.

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