Driving Self-Service Success with Rich Media:

SSPA MEMBER ADOBE SYSTEMS LEVERAGES VIDEO TO BRING KNOWLEDGE ALIVE

By John Ragsdale, Vice President of Technology Research, SSPA

With economic turmoil forcing companies to find creative ways to cut operational costs, many support organizations are looking for ways to migrate more assisted support interactions to Web self-service. Unfortunately, self-service success is at an all-time low, with a disappointing industry average of 40%. The reasons for this range from outdated knowledgebase technology to increasing product complexity, and until now the fix has been an expensive one.

One emerging approach to improving success of Web self-service involves adding rich media to the knowledgebase: sound, graphics, video, etc., to better illustrate a procedure or provide step-by-step instructions to a novice customer. In this article, learn how SSPA member Adobe Systems added video elements to knowledgebase articles with great results: Self-service success rose 9%, 68% of customers surveyed preferred video to plain text articles, and the rich media also helped cut training time for new support engineers. Not only do investments in rich media for self-service pay off, but Adobe found that incorporating video production in the content publishing process added little time or cost to the process while greatly improving the quality of the final product.

A Self-Service Success Crisis

For companies looking to cut operational expenses, deflecting more assisted support interactions to Web self-service seems an obvious strategy. Unfortunately, as seen in *Figure 1*, when customers do attempt self-service they are typically not rewarded with success: The percentage of customers who try Web self-service and find the answer to their question or problem has been declining steadily, with the current average self-service success across technology companies at a disappointing 40%.
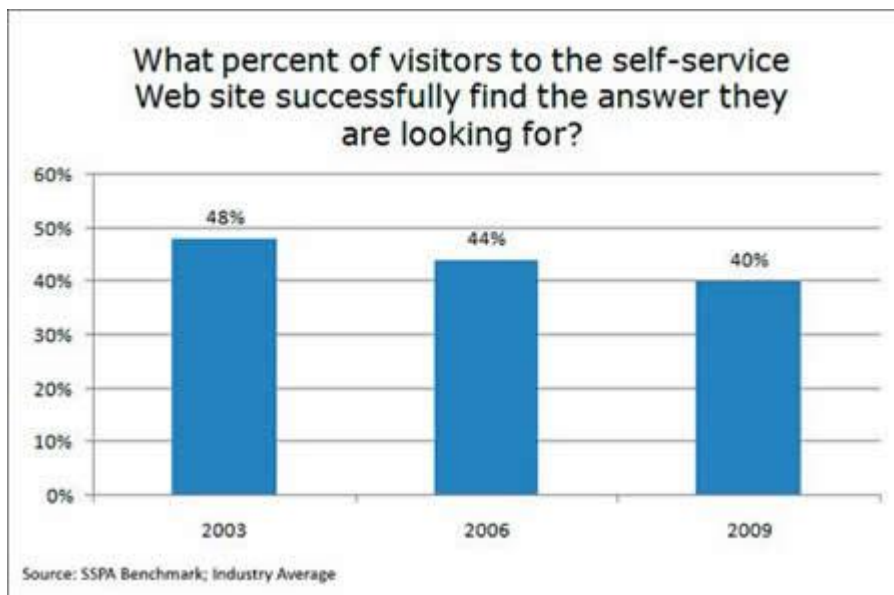

Figure 1: Self-Service Success Crisis

Why is self-service success declining? SSPA Research offers these drivers:

- **Rising product complexity.** According to the 2009 SSPA Benchmark, only 9% of members today say the products they support have "standard complexity," while over 63% of members now claim their products are "highly complex," up from only 42% in 2003. As technology complexity grows, support issues increase in

complexity as well, meaning customers must be more technology-savvy than before in order to self-solve.

- **Outdated self-service technology.** According to the 2009 SSPA Member Technology Survey, 26% of member companies use a homegrown knowledgebase (KB) solution, while another 22% use the KB that came for free with their CRM system. With limited functionality and often outdated search and retrieval abilities, these aging knowledge infrastructures prevent many companies from capitalizing on the latest KB trends and best practices.
- **Poor understanding of customer requirements.** While product complexity has rapidly grown, customer understanding of technology has not kept pace, especially in the mid-market and consumer industries, in which little formal training and onsite support is offered to speed technology adoption. A common theme among **SSPA STAR Award** winners for Best Online Support in the past few years has been in-depth use case analysis of self-service customers to understand the tools and user interface needed to meet the needs of customers at all skill levels, not just highly trained system administrators.

How can companies make their existing KB content more easily consumable by customers of all skill levels? Rewriting all of the content, migrating to new KB technology, or adding additional search tools are all options, but the cost of each of these approaches may be cost prohibitive, especially in tight budget years like 2009–2010. For many SSPA member companies, the answer is adding rich media to their existing knowledgebase articles, either as embedded elements or attachments, which illustrate how to execute a process or a recovery procedure in such a way that even the most novice of customers can easily follow along successfully.

Adobe Systems Improves Self-Service Success with Captivate® Video

Adobe Systems Inc., headquartered in San Jose, CA, is a $3.58-billion company focused on delivering technologies and software that set new standards for producing and delivering engaging content. Adobe's customers include both consumers and enterprises. The product line features highly recognizable names such as Adobe Reader, Adobe Photoshop, Adobe FrameMaker, Adobe Dreamweaver, and Adobe Captivate.

In mid-2008, Adobe's global technical support operation (TSO) began investigating ways to enable customers to more effectively resolve problems, and ultimately, to reduce phone calls to support for a list of known repeatable issues that represent a large percentage of support volume. Adobe's plan was to create more dynamic and engaging experiences for customers on the support sites at Adobe.com by incorporating video files into knowledgebase articles, and then determine if the articles with movies delivered a higher resolution rate than articles with text only.

Unlike other SSPA members who attempted expensive video production using outside teams of experts and equipment, Adobe went for a very simple and straightforward approach leveraging one of Adobe's own products, Captivate. Adobe Captivate, which retails for $799, makes any knowledgebase author a video editor, with intuitive tools that require little or no training.

The majority of the videos created were for existing text articles of common problems and frequently asked questions, using the following basic process:

1. The knowledge author reviews the written steps and practices, running through them in the appropriate Adobe application.
2. The recording via Captivate is then initiated, and the author walks through the written process, recording each step. Captivate inserts auto captions at each step, describing the process to be followed.
3. After the recording, simple editing tools are provided so the author can edit the explanatory instructions at each step and create labels for important buttons or fields. Options also are provided to edit the captured graphics to remove personal information displayed or cut out annoying screen clutter.
4. Once reviewed for accuracy, the video file is added to the existing knowledgebase article as an attachment. Since Captivate takes a snapshot at each interaction and

represents each image similar to a slide, rather than capturing an actual video stream, the size of the final video is small and will not overload your knowledgebase.

The time to create the typical video from beginning to end was 20 to 60 minutes, and Adobe says the time is trending down, especially when creating videos as part of new knowledgebase articles, since planning and recording the video also serves as quality assurance for the written instructions. Knowledge authors needed no special skills or training other than a short overview of the features in Captivate.

To gather plenty of customer feedback, customers using any knowledgebase article with a video were prompted with a survey at the end of the session. This allowed Adobe to better understand the effectiveness of the solution as well as the overall user experience. Results of the project include:

- Seventy-seven Captivate movies were created over two quarters (Q3 and Q4 of 2008). During this time frame, the KB videos were viewed 13.6 million times. The current plan is to continue adding videos at a rate of 10 per month.
- The resolution rate for text-only self-service was 44%. After the introduction of videos, self-service success rose 9%, to 53%. This number is expected to continue rising as the video library expands.
- Of the customers surveyed, 68% said they preferred the videos to plain-text knowledge articles. Customers said the videos were helpful, as they showed exactly how to do every step, providing more detail than text-only articles, such as where fields and controls are located on busy application screens.

While the focus of this article was the impact of rich media on self-service success, Adobe TSO reports other positive impacts as well, particularly with technical support engineer (TSE) training. With a wide array of products to support, Adobe found that knowledge absorption and retention for new TSEs was a key challenge. The Captivate movies created within Adobe TSO have helped TSEs complete the on-boarding process much faster, and Captivate-enabled self-paced assessments are now effectively used to assess skills before phone "go-live" for new employees.

The SSPA Recommends
When embarking on a project to incorporate rich media into your knowledgebase, consider these recommendations:

- **Start with a strong metrics program.** If you don't have a good handle on current operational metrics you won't be able to accurately track the impact of adding rich media. Be sure you know your current rate of self-service success and the level of customer satisfaction with existing self-service offerings.
- **Survey, survey, survey.** Adobe took great care to survey customers to understand the impact of adding videos to KB articles, with over 5,000 survey respondents during the initial six-month trial. Ask customers what they like and don't like about your existing self-service site, and continue to gather feedback while new programs are introduced.
- **A picture is worth 1,000 words.** Adobe's survey feedback indicated that watching a video of a procedure proved a much better teaching aid than any amount of words. Also, videos communicated effectively across language barriers and skill levels.

 About John Ragsdale…
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