

IMPROVING PRODUCT DOCUMENTATION WITH A CCMS AND A KNOWLEDGE GRAPH



THE CHALLENGE

LA financial solutions provider wanted to improve and personalize customer interaction with support and technical documentation as well as streamline the content authoring process to ensure consistent messaging and avoid duplicated information. Before the EK team's involvement, technical product documentation was developed and maintained by siloed groups, creating inconsistent vocabularies and content experiences. As a result, customers were often frustrated and confused as they tried to leverage the product documentation to perform tasks. The organization was looking to improve customer experience by providing personalized content and intuitive content navigation.



THE SOLUTION

EK collaborated with the financial provider to better leverage a componentized content management system (CCMS), enabling the organization to consistently model, create, and reuse content previously curated and authored by siloed business units. The "componentized" feature was critical to allow the organization to produce reusable product documentation segments. EK integrated an auto-tagging system to more accurately and efficiently apply consistent vocabularies to each of these segments so that the organization could assemble and reassemble content components, aligning them with customer profiles to create personalized customer experiences. Once product documentation content was more meaningfully structured and tagged with consistent vocabularies, EK developed a series of APIs to deliver the content for display in various omnichannel front-end delivery platforms and experiences.

Additionally, EK worked with organizational subject matter experts to design and implement a taxonomy that enables authors to associate content segments with financial topics, solutions, and user-facing views. These associations help drive the personalization of content for each user and organization. On top of the CCMS, EK architected and implemented a knowledge graph to store the content segments and their metadata for quick reference when building content and front-end views. Segments are stored separately and pulled together from the graph to create a seamless search and documentation experience for users.



THE EK DIFFERENCE

The EK team leveraged our experience with taxonomy design, content management, ontology design, knowledge graphs, and enterprise search to strategize and implement the CCMS solution for the organization. Our taxonomists and ontologists collaborated with the organization's subject matter experts to capture and translate existing metadata and authoring processes into taxonomies and content models that could be leveraged by the CCMS and knowledge graph. Our technical expertise guided the organization to build a flexible, knowledge graph foundation that could be leveraged through a bespoke API layer to power their vision of content curation, delivery, and search through their user-facing platforms.

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THE RESULTS

The combination of a CCMS platform and a knowledge graph allows for dynamic assembly of content components and data elements to produce a flexible, adaptive, and customized client experience for the financial solutions provider. The new solution connects clients to the content and data they need to perform their work in a vastly more efficient manner that saves time for both the financial solutions provider as well as their clients. The CCMS platform is providing the organization with the ability to create individual content segments, tag them with a consistent taxonomy, and produce personalized views for end-users. With personalized content and connected data, users are provided only the documentation relevant to the version and tier of service they have purchased. Additionally, we can ensure that product information is described with a consistent vocabulary across all documentation. This removes the previous need to comb through irrelevant and inconsistent information to find the relevant documentation. Leveraging a knowledge graph allows us to connect content with relevant data elements to produce richer and more detailed documentation.

Enterprise Knowledge (EK) is a services firm that integrates Knowledge Management, Information Management, Information Technology, and Agile Approaches to deliver comprehensive solutions. Our mission is to form true partnerships with our clients, listening and collaborating to create tailored, practical, and results-oriented solutions that enable them to thrive and adapt to changing needs.

Our core services include strategy, design, and development of Knowledge and Information Management systems, with proven approaches for Data and Information Management, Knowledge Graph Implementation in support of NLP, ML, and AI initiatives, Taxonomy Design, Project Strategy and Road Mapping, Brand and Content Strategy, Change Management and Communication, and Agile Transformation and Facilitation. At the heart of these services, we always focus on working alongside our clients to understand their needs, ensuring we can provide practical and achievable solutions on an iterative, ongoing basis.