MIGRATING SUPPORT

Helen Meyers

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"SOUND STRATEGY STARTS WITH HAVING THE RIGHT GOAL"

Michael Porter, Harvard Business school

OVERVIEW

Due to the "sunsetting" of an enterprise billing application, the functionality needed to migrate to a new system. This included moving support and training content. Strategic planning was necessary to:

- Ensure the migration happened in a timely fashion
- Switch existing customers over to new experience smoothly
- Onboard new customers to migrated experience only
- Simplify content to align with new navigation and templates

CREATING A PLAN

The scope of the migration project was larger than one release since releases occurred monthly. Creating a plan, splitting the work up logically, and ensuring quick turnaround for reviews was imperative.

- Colleagues from multiple functional areas (development, test, UX, program management) came together in a series of working sessions
- The work was split between 3 releases, with the first release focused on new customers
- A schedule for reviews and identification of “accountable” resources drove quick turnaround

Photo by Max van den Oetelaar on Unsplash

"THE ESSENCE OF STRATEGY IS CHOOSING WHAT NOT TO DO"

Michael Porter, Harvard Business school

SIMPLIFYING SUPPORT AND TRAINING CONTENT

The support and training content for the billing application had been added to in a haphazard fashion over 4 years. Much of the material was outdated, inconsistent, and didn't use the same templates. One of the early topics the working group tackled was simplifying and modernizing the support and training content.

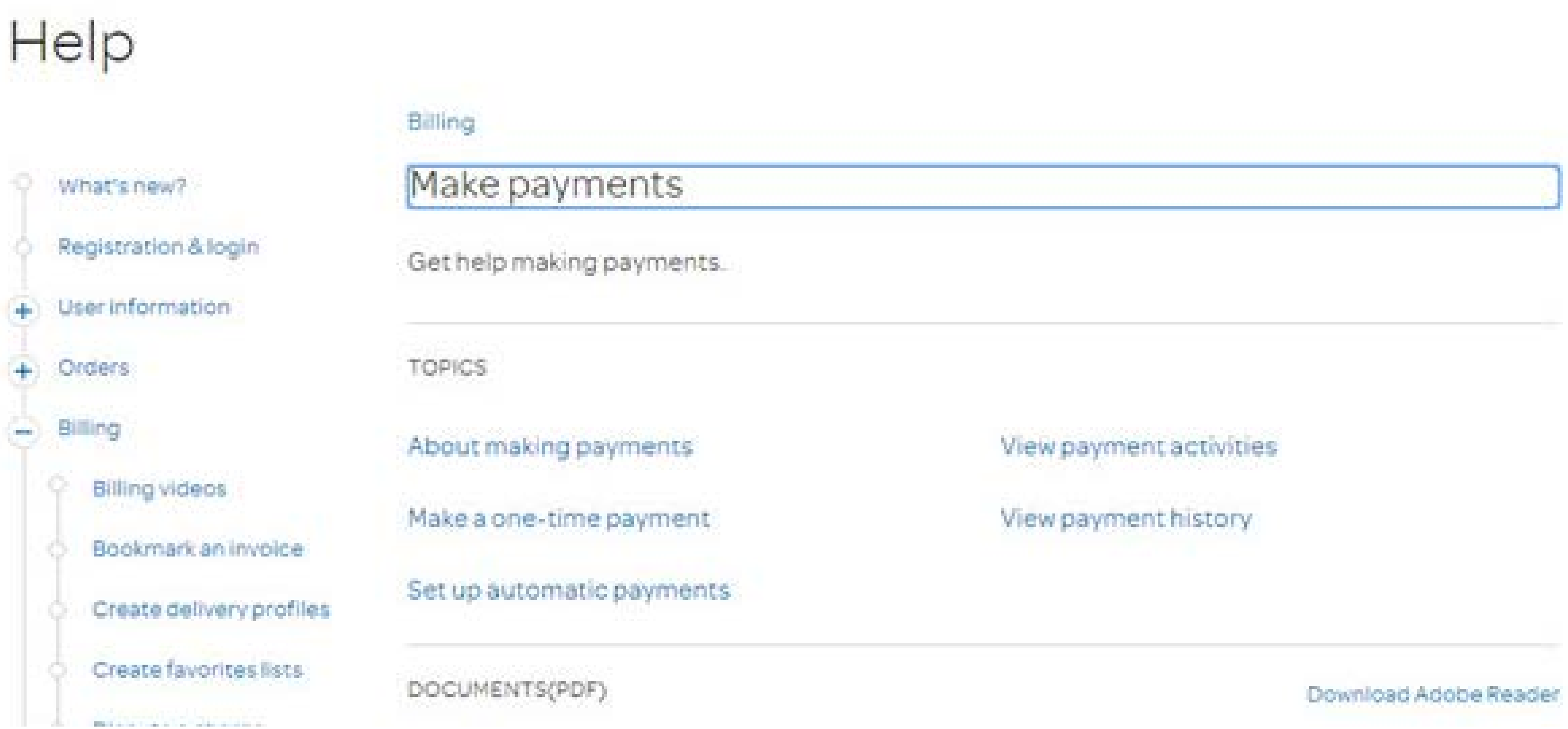
- An inventory of every single topic available across several modalities was created
- Out of date topics were eliminated and similar topics were combined
- A new support and training template and style guidelines were created

A5 | [illegible]

	Topic	Format	Type	File location	Delivered by	Dispensation	New/iFrame
23	[illegible]	Customer Presentations - Training	PDF		eKnowledge		
24	[illegible]	Customer Presentations - Training	PDF		eKnowledge		
25	[illegible]	Customer Presentations - Training	PDF		eKnowledge		
26	[illegible]	Customer Presentations - Training	PDF		eKnowledge		
27	[illegible]	Quick Guides	PDF		eKnowledge		
28	[illegible]	Quick Guides	PDF		eKnowledge		
29	[illegible]	Quick Guides	PDF		eKnowledge		
30	[illegible]	Quick Guides	PDF		eKnowledge		
31	[illegible]	Quick Guides	PDF		eKnowledge		
32	[illegible]	Quick Guides	PDF		eKnowledge		
33	[illegible]	Quick Guides	PDF		eKnowledge		
34	[illegible]	Quick Guides	PDF		eKnowledge		
35	[illegible]	Quick Guides	PDF		eKnowledge		
36	[illegible]	Demonstrations	launches in video player		Video solutions/B2B Content	remove	
37	[illegible]	Demonstrations	launches in video player		Video solutions/B2B Content	remove	
38	[illegible]	Tutorial	launches tutorial website		B2B Content	no tutorial, if topic still needed, will re-write and move into support topic instead.	
39	Introduction	Tutorial	Menu on tutorial website		B2B Content	no tutorial, if topic still needed, will re-write and move into support topic instead.	
	Objectives	Tutorial	opens corresponding page on tutorial website		B2B Content	no tutorial, if topic still needed, will re-write and move into	

EXCEL INVENTORY OF TOPICS

This sample shows the inventory I created. Due to NDA the topic names are blurred.



NEW HELP MODEL

This sample shows the new organization structure. The topics are grouped and customers can see at a glance what type of topic it is (video, PDF, procedure)

Photo by Yury Nam on Unsplash

"HOWEVER BEAUTIFUL THE STRATEGY, YOU SHOULD OCCASIONALLY LOOK AT THE RESULTS."

Winston Churchill

RESULTS

This presentation is a snapshot of the migration project. Evaluating the strategy and execution of the subset of the project focused on support and training content the team:

- Delivered all the updated materials ahead of schedule in the first of 3 scheduled releases
- Reduced content from 300+ topics to 90
- Created a new, easier to use, structure for help topics, which increased customer satisfaction scores (CSAT) by 10%

Thank you!