

# HOW TO: SERVICE CLOUD

## Plan “Salesforce Knowledge”

### Help your service agents find answers faster.

Want to give your service agents and customers at-a-glance access to the information they need? Get started with Service Cloud Knowledge, with this Accelerator. A Salesforce expert will teach you about key components, how to set up Knowledge, and best practices for planning your implementation.

### What it can do for you.

- Improve customer experience
- Enable your customer service agents to find the right answers (articles) fast
- Reduce costs in reduced resolution time and improve customer satisfaction
- Enhance and improve your organizational knowledge with controlled approval and publishing process

### How it works.

A Certified Specialist will guide you through the process via four calls totaling 5-6 hours over 2 to 3 weeks:

#### Discovery

- An overview of the Accelerator
- Assess and understand key challenges and use cases

#### Analysis

- Provide an overview of Knowledge, article types, data category groups and custom article type page layouts
- Overview of Knowledge article management including but not limited to article lifecycle and publishing processes, roles and permissions, and knowledge apps
- Overview of Knowledge setup (optional) including but not limited to article types, data category groups, user roles and knowledge article visibility settings

#### Outcomes

- Overview of Salesforce Knowledge
- Best practices for planning an implementation
- Learn about the fundamental components of Knowledge such as:
  - Article types, and data category groups
  - Article type page layouts and custom fields
  - Search optimization strategies
  - User permissions and article management
- Learn how to set up Knowledge in a sandbox environment

### ADDITIONAL INFORMATION

#### PREMIER OR SIGNATURE

Time you will spend on this Accelerator: 5-6 hours

#### GOAL

Achieve faster ROI.

#### INTENDED USER

You want to leverage the Salesforce Knowledge functionality to easily create and manage content known as articles to help agents quickly find and view the articles they need.

#### PREREQUISITES

- Must have Premier or Signature Success Plan.
- Must have Service Cloud licenses in use Service agents need access to support documentation in addition to customer facing documentation to services cases
- Not currently using knowledge in production environment
- Case management and console for Service Cloud currently in use
- A Service Leader/Executive who is engaged and committed to the session and outcome

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To schedule your 1-on-1 Accelerator, [visit our Help Portal](#), or contact your account executive or success team today!

#### Corporate Headquarters

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