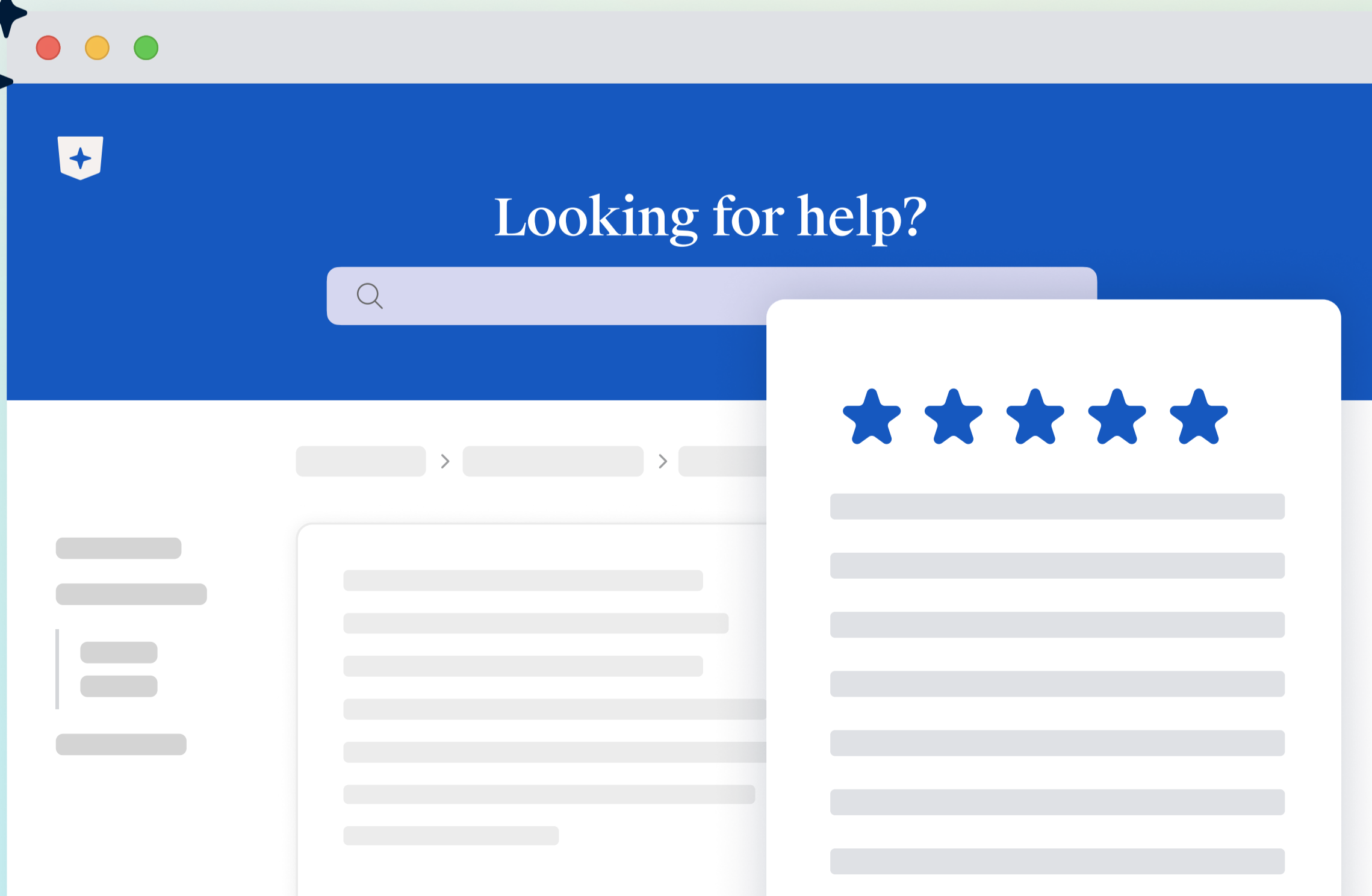
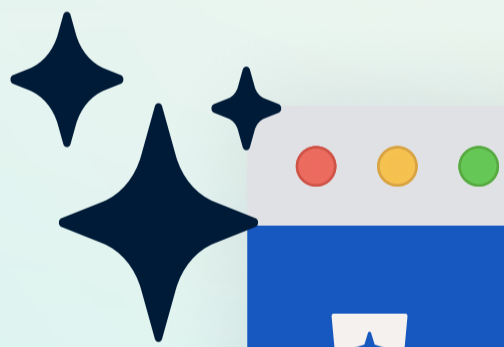




# Creating AI-friendly help center articles

Templates and tips for training AI  
to deliver 5-star customer service



## FOREWORD

# Trustworthy AI starts with strong knowledge management

52% of customers are interested in AI helping them through a product, website, or feature experience.<sup>1</sup> But the customer experience AI provides can only be as robust as the data source it learns from: your help center.

A help center has long been a support teams' number-one source of truth, but its importance is only growing in the age of AI. For AI to provide your customers accurate answers, knowledge management needs to be a top priority.

A knowledge base with outdated help articles increases the risk of AI hallucinations, where AI shares false information as the truth. This can damage your brand's reputation, and unhappy customers may take their dissatisfaction to court, like honoring a refund policy made up by a chatbot.<sup>2</sup>

In this guide, we'll cover what it takes to prepare AI to deliver exceptional customer service, including:

- \* Best practices for structuring help center articles optimal for AI learning
- \* Tips for successful knowledge management
- \* Best-in-class help articles and why they're effective at powering AI-assisted service

As customer service teams explore how AI can enhance their service, I'm excited to share this resource to help them lay the groundwork for reliable AI-assisted support.



*Kenji Hayward*

**Kenji Hayward**

Head of Support, Front

<sup>1</sup> [AI in the customer experience: The ups, downs, and up-and-coming opportunities](#). SurveyMonkey

<sup>2</sup> [Air Canada must honor refund policy invented by airline's chatbot](#). Arstechnica

# How to format help center articles

A well-structured help center article guides AI to offer accurate solutions to customers to resolve their issue. Keep your articles simple, straightforward, and easy to understand. Think of it like a recipe: Provide clear, step-by-step instructions that can be universally followed by all walks of life, novice or veteran, human or AI.

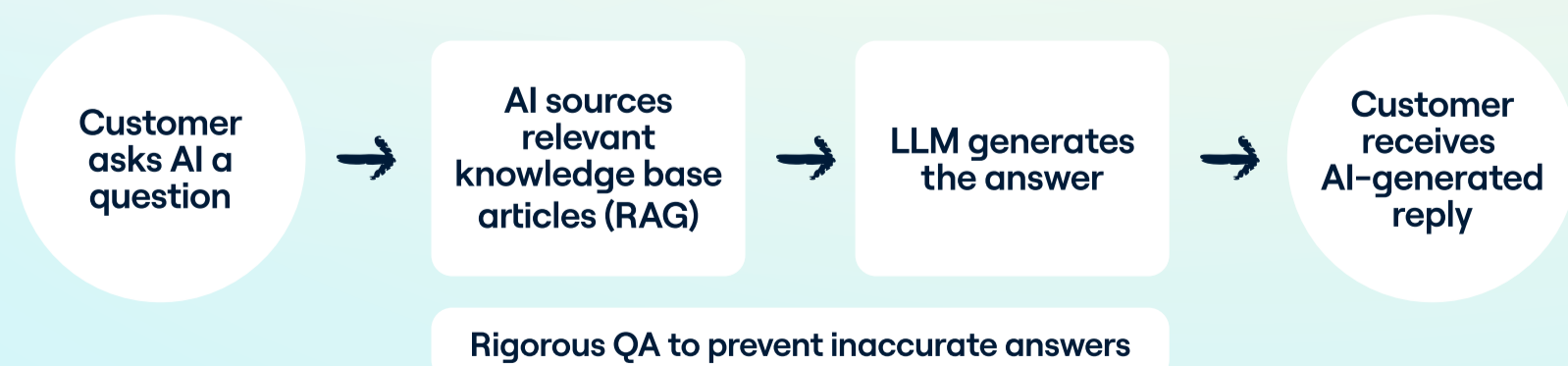
How you format a help center article will vary greatly depending on your industry, customer base, and complexity of your product or service, so you'll need to see what works best for your customers. For example, Airbnb's help article might be able to resolve guest issues simply with text, whereas Microsoft's help article might need more images to help explain a software issue.

## How does AI learn from a knowledge base?

But first, a couple of key terms you should know:

- \* **RAG:** Retrieval-augmented generation is the mechanism for AI to index your knowledge base and retrieve relevant information
- \* **LLM:** A large language model (LLM) is trained on large datasets to recognize and generate human language

After your knowledge base is uploaded to the AI generator, correctly identifying relevant info to communicate to the customer is like a baton pass from RAG to LLM. Here's what that looks like when your customers engage with your AI-powered chatbots:



# The makeup of an A+ help center article

Standardizing help center articles keeps the experience consistent for customers, makes it easier for AI to learn from structured content, and saves human agents a ton of time when creating new help content.

Here are a few best practices worth following across all of your content:

DO

## Break up sections with headers and subheaders

Well-structured content is easier to interpret and faster to read context – for humans and AI alike

DO

## Incorporate bulleted or numbered lists

They're a lot easier to read than long paragraphs, and AI can serve the content that way too

DO

## Use the same vocab your customers do

Include familiar keywords, so AI can recognize and relay those same search terms when customers need help

DO

## Prioritize essential information at the top of the article

Cover any prerequisites or limitations upfront for AI to include in its answer and not waste anyone's time

---

DON'T

## Overexplain or use jargon

Only include the info the customer needs to know in plain language, so AI can also provide a more accessible answer

DON'T

## Repeat solutions across multiple articles

Each article needs to contain a unique, exhaustive answer. If AI has to cite more than three sources, consider consolidating.

DON'T

## Forget to pair multimedia with step-by-step instructions

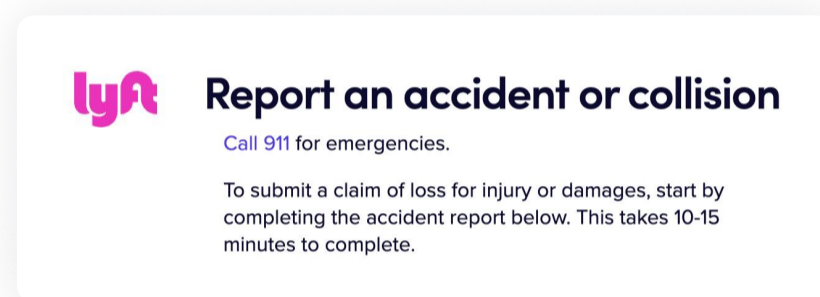
AI still relies primarily on the context provided by text to craft an answer

# A clear blueprint for humans or AI

There's no one-fits-all template, but here's a general framework that can be fitted according to your business needs:

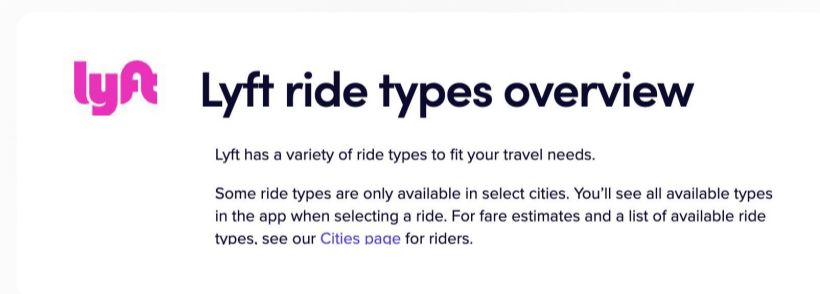
**1 Table of contents**  
Helps customers preview article content or skip to the relevant section

**2 Title**  
The title needs to be concise to show relevance right off the bat. For example:



Lyft's help article **"Report an accident or collision"** - in just five words, the end user can confirm this is the help they need.

**3 Overview**  
A short intro that further describes the issue presented from the title, including any critical information that the user would need to know at the start. For example:



**"Lyft's ride types overview"** flags that not all ride types are available in certain cities.

**4 Instructions**  
Step-by-step guidance to use the product or service effectively

**5 Multimedia**  
Supplementary visuals like GIFs, video, or static images help give additional clarity. Some helpful tools to quickly create these assets include:



**6 FAQs**  
Answers common follow-up or troubleshooting questions

**7 Related links**  
Include a list of related articles or resources

# Help center article structure 101

Let's walk through each component of a help center article:

In this article

- 1 Overview
- Instructions
- FAQ
  - Why isn't my auto-responder working?
- Pricing

Home > Browse knowledge base > Getting started > For you > Individual inboxes > Working in your inbox >

## 2 Time off

Edited 22 days ago

### 3 Overview

Planning a vacation or time away from work? Schedule time off in Front to automatically set yourself as out of office, update your shifts, and reply to your personal emails while you're away.

### 4 Instructions

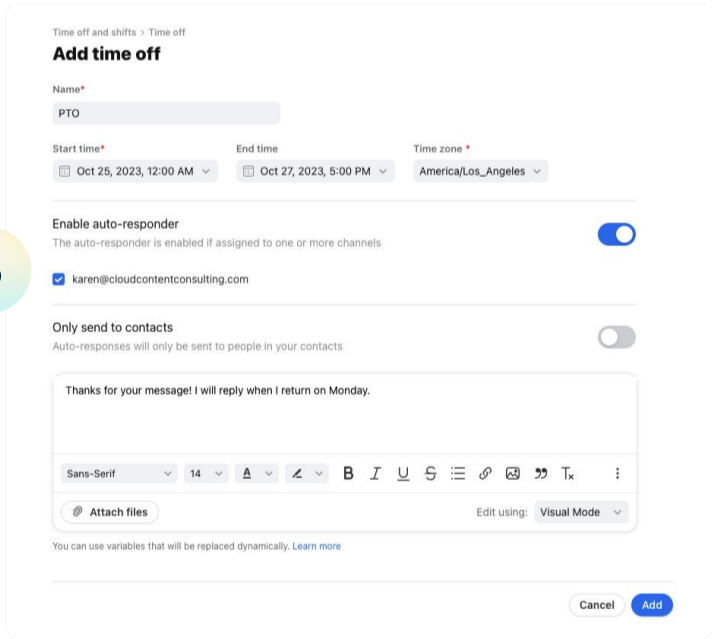
**Step 1**

Click the gear icon on the top right of Front and into the Personal settings tab. Select *Time off* in the sidebar (or *Time off and shifts*), then click *Add time off*.

**Step 2**

Fill out the fields:

- **Name:** The name will not appear anywhere on the recipient's end.
- **Start time:** Select the date and time you'd like your time off to start.
- **End time:** Select the date and time for the last day of your time off. If left blank, the time off auto-responder will run indefinitely.
- **Enable auto-responder (optional):** Select if you want auto-responses to be sent during your time off. If enabled, select the individual channels the auto-responder should apply to.



### 6 FAQ

#### Why isn't my auto-responder working?

An auto-responder may fail to reply to messages. There are some reasons why this might happen:

- **The inbound message was auto-generated.** Front will not send any auto-responses to auto-generated messages.
- **That recipient received your auto-response within the last 4 days.** Front will only send your auto-response to a recipient at most once every 4 days.

### 7 Pricing

Time off is available on [all plans](#). Shifts is available on the Scale plan or above.

- 1 Table of contents
- 2 Title
- 3 Overview
- 4 Instructions
- 5 Multimedia
- 6 FAQs
- 7 Related links

# Putting templates into practice

Best-in-class article examples from  
leading brands





# Show and tell to make learning a breeze

Jebbit, an interactive experience platform collecting first-party data, describes how to use their platform to make product-match quizzes.

[Jebbit Help Center](#)

[Full article](#)

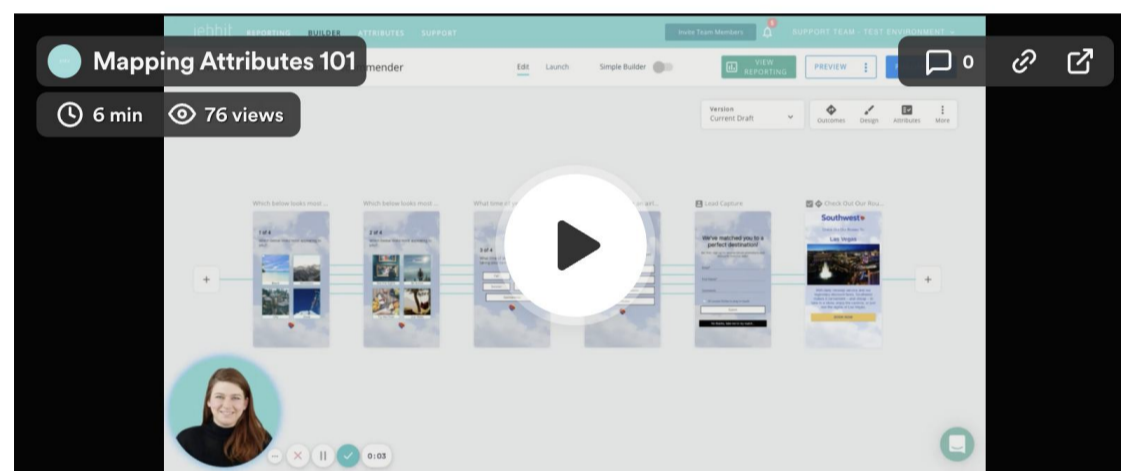
## Attributes 101

Edited 14 days ago

Attributes are the value pairs that you map to the questions and responses in your experiences that are important to your data strategy and retargeting plans. Attributes allow you to build customer profiles, audience segments, and pass data from Jebbit to other systems.

★ Video tutorial? Yes, please 🥰 Even a quick Loom brings so much more clarity

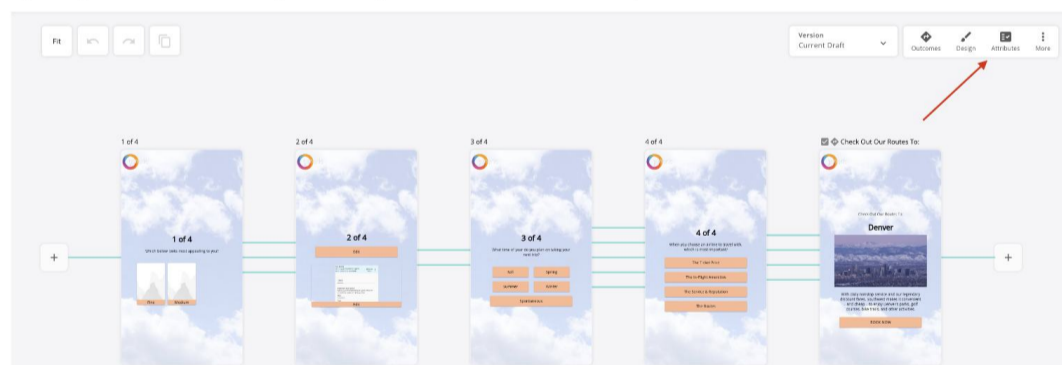
### Video Tutorial



★ Detailed walkthrough with screenshots

### Step by Step

1. Select the "Attributes" option from the toolbar in the upper right corner of the builder map. This will open up a modal to allow you to map attributes across all of your screens.

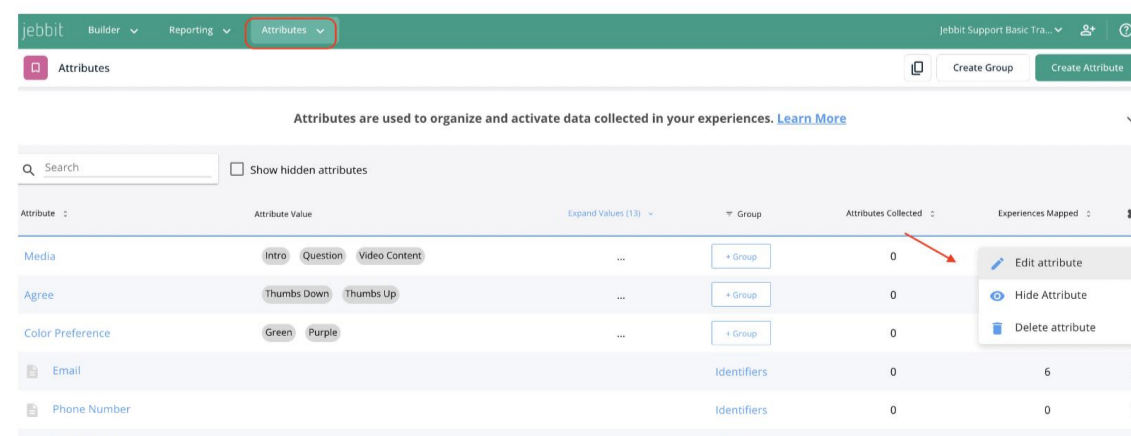


★ All the common questions are covered in the FAQ section

### Frequently Asked Questions

**Q:** Can I edit attribute labels later on?

**A:** Yes, you can edit attributes after creating them! Dive into the Attributes menu where you can edit or delete unless the attribute has collected data. In that case you can "hide" the attribute.





“

We realized explaining the use or purpose of a certain feature within an article was only one part of the equation in helping customers.

Including FAQs not only helps answer the majority of our users' common questions, but also serves as canned responses for AI.



**Saumya Trivedi**

Customer Support Manager

jebbit



# Answers clearly mapped out

Structured, a digital planning mobile app, shows its users the lay of the land of the app so they can quickly start tracking and organizing their tasks.

[Structured Help Center ↗](#)

[Full article ↗](#)

★ Table of contents gives a quick overview of the app's functions

A screenshot of a help article page. On the left is a table of contents with links like "Where is What?", "Your First Daily Schedule", etc. The main content area has a title "Getting Started With Structured" and a sub-section "Where is What?". Below this, there are three items, each with a red icon: "Structured AI" (with a star icon), "Calendar" (with a calendar icon), and another item (with a folder icon).

Home > Getting Started >

**Getting Started With Structured**  
Edited 22 days ago

Structured is a simple day planner that brings your to-do's and events to one place. Here is a **quick guide** to help you get started with the most essential functions of Structured.


---

**Where is What?**


When opening Structured, the first thing you will see is the **timeline**. Here, you can plan your day by **filling it with tasks**. On the left side you can see the time of day and by tapping one of the dates at the top you can jump to any day of the week.

Swipe the line of dates horizontally to switch to the next or previous week. At the very top of your screen, you can see the feature bar, including the following **symbols**:


---

 **Structured AI:** The Structured AI is an AI-based tool, which can help you in organizing your day by creating tasks for you. If you want to learn how to use this feature, check out: [How to Use The Structured Assistant](#).

---

 **Calendar:** Tap here to open the calendar view, in order to jump to any day in the future or past.

---



★ Icons are defined to familiarize the user with the app's user interface

“

Know your customers when writing help content and ask for their feedback regularly.

For example, we set up our AI-powered chatbot to ask if the content was helpful during a chat conversation. It keeps our knowledge base relevant and our self-service on point.



**Kevin Kimmig**  
Director of Communications

 **Structured**

# Breaking down complex topics

Boundless Immigration, an immigration services platform, helps their customers navigate through a complex system of immigration rules and regulations.

[Boundless Immigration Help Center ↗](#)

[Article 1 ↗](#)

[Article 2 ↗](#)



Chat conversation with Mario COMPANY-W... > AI RESOLVED

Mario (via chatbot)

Welcome to Boundless Immigration Customer Support! To better serve you, please provide your contact details and we will connect you with a live agent.

**Name**  
Mario

**Email**  
mario@email.com

**Phone number**  
123-456-7890

**Have you already paid your fees or setup your payment plan?**

It's okay to answer "no", we have a special team to welcome you!  
Yes

**What type of assistance do you need?**  
Question about USCIS or Visa Processing

**What is your specific U.S. immigration question? Please specify the type of visa or form you are inquiring about in your question.**

**Example: "What is the processing time for the I-129F form at USCIS?"**  
What is the processing time to attain a green card for my spouse?

**Let me look that up for you.**  
The processing time to attain a green card for your spouse varies based on several factors, including whether you are a U.S. citizen or a green card holder, and whether your spouse is applying from within the United States or abroad. Here are some details:

- \*\*For spouses of U.S. citizens applying from within the United States (Adjustment of Status - Form I-485)\*\*:  
- The median processing time is approximately 9.4 months.

...ns applying from abroad (Immigrant Visa - ... is approximately 11.4 months.

...holders\*\*:  
... and involves longer wait times. The ... and a half years before submitting the ... ce submitted, the processing time is ... hs.

Please note that these times are subject to change and can vary based on individual circumstances and USCIS processing times.

**Source**

- USCIS Processing Times - June 2024
- Changing your immigration Status from H1B to Permane...

**Did that answer your question?**  
Yes

★ AI scans headers and keywords to source content from multiple articles

USCIS Processing Times - June 2024

Home > FAQs on Immigration > USCIS Rules and Regulations >

**USCIS Processing Times - June 2024**  
Edited 27 days ago

**USCIS wait times are faster in 2024**

USCIS has made major progress in reducing processing times for many U.S. immigration applications.

**Here's the most commonly asked for USCIS processing times:**

- For fiance(e)s of U.S. citizens (Form I-129F or the "K visa") - projections currently show that those applying now may see a processing time of **3-6 months**. USCIS official data shows that this petition's median processing time in fiscal year 2024 is **8.8 months**.
- For spouses of U.S. citizens who are planning to apply for their immigrant visa abroad (Form I-130 or the "spousal visa") - USCIS official data shows that this petition's median processing time in fiscal year 2024 is **11.4 months**.

★ Answers clearly listed at the beginning of the article in a bulleted list

Changing your immigration Status from H1B to Permane...

The timeline for obtaining a marriage-based green card varies for both categories, spanning 12.5 to 20.5 months. Factors such as the spouse's citizenship status and the applicant's location within the U.S. can impact the waiting period. It's advisable to commence the green card application soon after marriage, especially for spouses of green card holders, considering the potential complexities and extended processing durations. USCIS fee increases are anticipated, potentially affecting application costs, emphasizing the importance of timely initiation and preparation for the application process.

If you'd like more in-depth information please see our article:  
<https://www.boundless.com/immigration-resources/h-1b-marriage-green-card-changing-status/>

H-1B green card timeline green card holder marriage-based green card green card processing time

★ Article keywords match customer search terms

“

Our customers' questions often involve complex topics, like immigration application processing. By incorporating keywords, bulleted lists, and tables into our help articles, our AI is able to quickly source and summarize solutions across our knowledge base.



**Erik Finch**  
Director of Operations

**BOUNDLESS**



# Resonate with example scenarios

Front, a customer service platform, illustrates the value of a feature through common use cases.

[Front Help Center ↗](#)

[Full article ↗](#)

★ Example use cases show different ways the feature can be applied to benefit workflows

★ Screenshots help the customer visualize the supportive text for quicker understanding

★ Table of contents allows the customer to jump to the section they need

★ Prerequisites listed early on to level set expectations

In this article

- Overview
- When to use views
  - Creating custom work queues
  - Monitoring team workloads
- Prerequisites
- Private views
  - Creating private views
  - Editing or deleting private views
- Shared views
  - Creating shared views
  - Editing shared views
  - Deleting shared views
- FAQ
  - Can I add and hide views from my sidebar?
  - Can I select my personal inbox or tags when creating a view?
  - Can I select more than one workspace?
  - How many inboxes, tags, or teammates can I select in a view?
  - Can I see which teammates have access to a view?
  - Can I use teammate groups with views?
- Pricing

## When to use views

### Creating custom work queues

You can use views to focus on conversations in specific shared inboxes and tags. Examples:

- Focus on one topic at a time, by selecting one tag and multiple inboxes. E.g. Select the Urgent tag and the Tier 1 and Tier 2 inboxes.
- Aggregate high-priority conversations across multiple sources, multiple inboxes and tags. E.g. Select 3 inboxes and 5 critical tags. E.g. Select 3 inboxes and 5 critical tags: breach, SLA risk, Urgent, Angry customer, and Escalation.

### Monitoring team workloads

As a manager, you can use views to monitor a team member's or team's workload. Examples:

- View conversations assigned to specific teammates, by creating a view per teammate. E.g. Anthony's queue, Patrick's queue.
- View conversations assigned amongst a team, by creating a view with multiple teammates selected. E.g. Team A queue, Team B queue.

## Prerequisites

- Individual views: None
- Shared views: You must have the *Shared inboxes - create / edit / delete / manage access* permission to create shared views. By default, workspace admins have this permission.

“

Keep your help content simple but complete. Articles should provide just the right amount of information without skipping steps and overloading users with details. Sometimes I ask myself, ‘would this article help customers learning this for the first time without overwhelming them?’

If the information is easy to find and understand, that’s one less ticket to Support or one more resolution for AI.



**Karen Nguyen**

Sr. Support Program Specialist

**Front**

# Help center article template

Ready to start drafting? Duplicate this [Google Doc template](#) and make it your own.

## Give your help article a clear title

*Last updated date*

### I. Overview

- a. Overall, this intro section should be succinct for the user to quickly see if this is the right article they're looking for.
    - i. 1-2 sentences explaining what a feature is or does.
    - ii. 1-2 sentences for when you would use the feature or what value you'd get from using it.
    - iii. (Optional) 1 sentence linking to other related resources like a training course or related article.
- 

### II. When to use X or How it works

- a. This section elaborates more on the points made in the Overview. It includes the logic of how a feature is expected to behave.
- b. Include prerequisites or limitations to help customers decide if they should continue following the instructions.

### III. Instructions

- a. Step-by-step walk through of the exact clicks to set up or use a feature. Don't forget to include multimedia content to break up the text.

### IV. FAQs

- a. Add niche knowledge content, anticipated questions from customers, and known limitations.

### V. Pricing

- a. Include for the customer to easily reference and see if the feature is available on their pricing plan.



# How to analyze help article performance

Tracking whether or not a help center article resolved a customer issue isn't always as clear cut as the number of thumbs up or down votes. There's no guarantee that customers will leave their rating, so measuring the effectiveness of the article requires a multi-view approach across a few metrics.

Assessment	Example metrics	How to use these insights
Did the article adequately resolve the problem so the customer did not need to reach out to an agent?	<ul style="list-style-type: none"><li>• Reduced ticket volume</li><li>• Deflection rate</li><li>• Unique users vs. unique visitors who submit an inquiry</li><li>• AI resolution rate</li></ul>	If there are still incoming inquiries for the issue, see what information is missing. Or the article could potentially be confusing and needs to be explained differently.
Are you covering the right topics or is your help center missing a critical article?	<ul style="list-style-type: none"><li>• Searches with no results</li><li>• Search CTR</li><li>• Customer inquiry to search ratio</li><li>• Pages per session</li></ul>	Search results can help identify the keywords your customers are using or gaps in your knowledge base content. User behavior within your help center can also show you whether or not they reach resolution.
Are the articles relevant and getting read in their entirety?	<ul style="list-style-type: none"><li>• Unique views</li><li>• Sessions</li><li>• Bounce rate</li><li>• Scroll depth</li><li>• Article rating or customer feedback</li></ul>	User behavior within an article can indicate whether or not the content is useful. Evaluate all these collected signals to see whether or not your article needs to be revised to improve these metrics.

## Closer look: Are my customers self-solving with my help content?

Track help center traffic that didn't raise a ticket over a period of time (example: 1-7 days). There are a couple of ways to calculate your help center's success, depending on your analytics:<sup>1</sup>

$\frac{\text{\% of sessions or visits without human assistance}}{\text{\% of sessions or visits without human assistance}}$

or

$\frac{\text{\# views}}{\text{estimated average \#views/issue}}$

<sup>1</sup> [Service Engagement Measures Spreadsheet](#). Consortium for Service Innovation

# Using metrics to guide your help content strategy

Regularly review article performance like views, sessions, and search results to prioritize which pieces to update, improve, or create. Ideally, this should happen on a weekly or monthly basis so your customers (and AI) have access to the most up-to-date information.

- \* If ticket volume is high, track topic trends to see if you need to create new articles for repeat questions.
- \* If there's an existing article and tickets are opening on the same topic (meaning it has a low deflection rate), revisit the article to see if it needs updating or if it's too difficult to find (article categorization is another important consideration for accessibility).
- \* If AI isn't serving the right answers in customer chats, check its sourced article(s) to see if they need to be optimized for AI indexing, e.g. proper titles, headers, subheaders, etc.

“

I look into our knowledge base analytics every month to check the top 10-20 most trafficked articles are up to date. Cross-referencing the keywords our customers are using match the keywords within the article is also important – it increases the chance they'll find what they're looking for.



**Karen Nguyen**

Sr. Support Program Specialist  
Front

# Healthy knowledge base, happy customers

Keeping your articles up to date is like watering plants regularly – it's essential for the health of your knowledge base. Whether or not you have a dedicated knowledge manager, everyone in your organization has a role to play in keeping your knowledge base up to date.

That's the customer success manager who forwards customer feedback about a confusing step in a help article. The product manager who spots a typo when linking an article in an email and flags it to the support team. Each of these inputs helps support teams improve their knowledge content.

The more you stay on top of your articles, the better your AI will be at helping customers on its own, and your agents can focus on the more complex issues. We cover how to manage your knowledge base more in depth in our [self-service guide](#), including how to structure your content hierarchy, increase article visibility, and more.

## Knowledge base checkup

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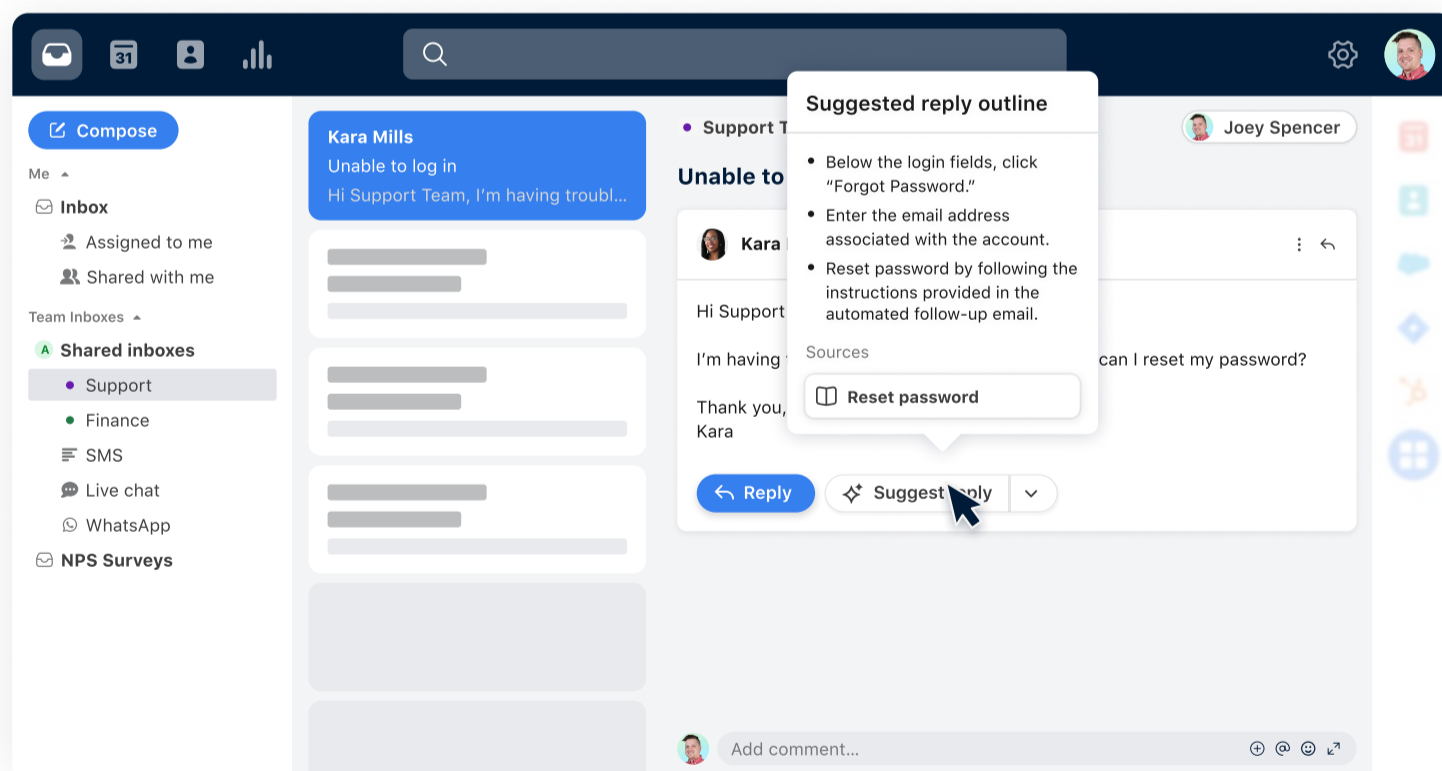
The more closely you monitor your content and its performance, the more manageable upkeep becomes. Follow these four small steps to start making improvements today:

- \* Review your highest trafficked articles for accuracy
- \* Consolidate duplicative articles to reduce confusion
- \* Analyze common questions in your support volume and map it back to the most relevant article to see if it needs to be revised or if a new article should be created
- \* Take stock of any help center searches that yield no results and how frequently that happens – these searches often represent gaps in your content

# Beyond deflection: AI empowers agents behind the scenes

So you've primed your knowledge base for AI. Where else can AI help your agents work smarter? Glad you asked! Here are four ways to leverage AI to deliver exceptional customer service:

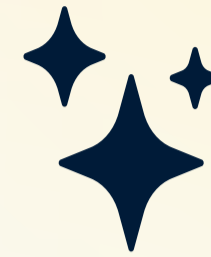
- \* Front's **AI Compose** can help draft, edit, and translate your knowledge base content. Your agents will spend less time with a blinking cursor and more time sharing the article with customers.
- \* When customers turn to chat for support, **AI Answers** can handle the simple, repetitive issues or ensure a smooth handoff to a human agent.
- \* Save time responding to customers over email with **AI-generated suggested replies** based on your knowledge base. Now in open beta.



- \* Use AI to **automatically categorize incoming customer messages** for instant context on the topic or sentiment, while tracking trends to inform your support content strategy. AI tagging is now in open beta.



# Help AI help your customers



AI can offer a helping hand when your human agents need to dedicate more of their time to higher-priority work — it's a win-win for 5-star customer service. As long as you take ownership of knowledge management, maintain your knowledge base, and document reusable, important info into structured help center articles, your customers, AI, and agents will be set up for success.

Curious to take AI for a spin in Front?  
**Try Front for free or request a demo!**