



Client Z

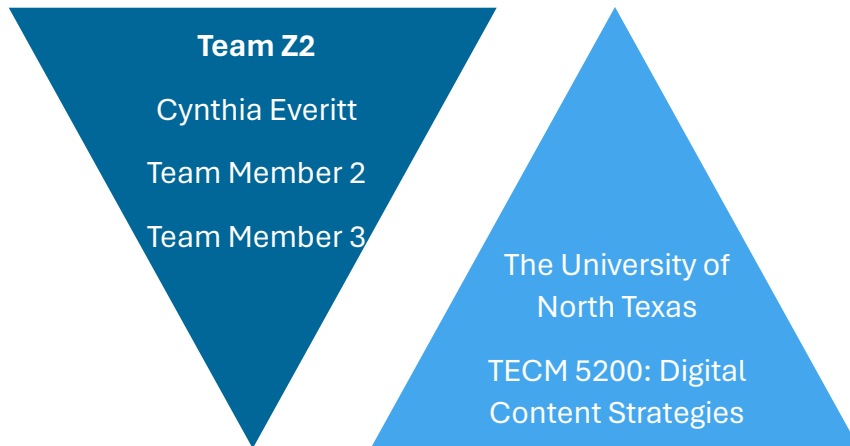


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EXECUTIVE SUMMARY

As the Manager for Client Z, you noted consistent lag between the January 2024 Release Notes (referred to as ‘Release Notes’) produced by your internal team and the Help Center produced by a third party. After receiving your documentation resources and talking with you in client interviews, our team identified three themes in our research from which our recommendations originated: organization, prioritization, and style. Within those three themes, we expanded upon six audit criteria that were most prevalent and noted as imperative by you.

Our recommendations from each theme are outlined below.

1. **Organization.** We recommend your team review the Help Center’s organizational structure to enhance findability between it and the Release Notes. We then suggest consolidating similar information, expanding use of reusable content featured in Client Z’s Component Content Management System (CCMS), and increasing use of topic links.
2. **Prioritization.** We then recommend your team create topics for missing Help center topics that are included in the Release Notes to eliminate content gaps between the two resources. Next, we suggest updating workflow task-based content, because our statistics and Client Z’s resources show they are ranked by users as important and appear frequently.
3. **Style.** Lastly, we recommend your team audit your newly created and/or updated content to ensure compliance with your style guide.

The value in implementing these recommendations may include greater findability for your users, increased cohesion between documentation types in the company, better clarity of expectations for your users, and reduced support call volumes.



INTRODUCTION

The purpose of this report is to show your team our research behind the Help Center content audit and consider our recommendations for improvement. The Help Center is a resource for information to provide the most current support information to your users of this information management software. This content audit assesses if the Help Center is updated with content from the Release Notes. Your audit guidelines include identifying information gaps in the Help Center to inform your team in making updates. Because Client Z introduces new or updated fields, permissions, settings, and buttons biweekly and quarterly in Release Notes, it is essential that the Help Center is kept current and the information in the Help Center is accessible to your users. This will help your team reach your desired goal of reducing the number of support calls from your users.

In this audit, our team conducted an inventory of topics in the Release Notes and searched for corresponding information in the Help Center or a logical place for the Release Note information within the Help Center. We checked the Help Center pages for Information Design classification and Style Guide compliance. Finally, based on our findings, we identified areas that your team may consider for content reorganization within the Help Center.

This report outlines the information we collected during the inventory and how we analyzed the inventory for the Help Center update process. First, we detail the methods used in the audit process and how we set the criteria from discussions with you. Then, we state the results of our analysis. Finally, we discuss our recommendations for organization, prioritization, and style to help your team complete your goals of updating the Help Center by year-end and reducing the number of support calls from your users.



METHODOLOGY

The goal of performing the audit was to identify information from the Release Notes that is missing in the Help Center. After receiving the inventory list of Client Z’s Help Center and being assigned a section of the Release Notes, we further divided our assigned section. Each team member had roughly 12 pages to audit with the criteria outlined in **Table 1**.

We identified top audit criteria based on resources provided by you that included Client Z’s Information Design document, Style Guide, and client interviews. The table below illustrates how our team divided and categorized criteria to perform the audit.

Help Center Content	Information Design	Adherence to Style Guide
<ul style="list-style-type: none">Proposed Placement	<ul style="list-style-type: none">Content Type	<ul style="list-style-type: none">Passive Terms Used
<ul style="list-style-type: none">Includes Screenshot	<ul style="list-style-type: none">High-Priority Information Needs	<ul style="list-style-type: none">Banned Terms Used

Table 1: Team Z2 Audit Criteria

Upon starting our audit, we searched the Help Center with Heading Two (H2) titles found in the Release Notes. When we were unsuccessful in yielding results, we asked you how to search more efficiently. You recommended finding keywords within each topic of the Release Notes for our Help Center search. This prompted our second audit based on the new search method recommendation.

The “Proposed Placement” column within the Help Center Content section of our spreadsheet allowed each team member to suggest where the Release Note information may fit within the Help Center. Suggestions ranged from creating another topic due to lack of findability to incorporating into a Help Center topic as a new task. We added the “Includes Screenshot Y/N” column to our spreadsheet during our second audit because of your desire to avoid using them if possible. By identifying which topics included screenshots, this allows you to decide if the screenshots are up to date and useful, and if they are, to make note when or if a user interface (UI) is ever updated.

The Information Design document noted two important types of information: “Content Types” and “High-Priority Information Needs”. Each team member identified the “Content Type” (“About”, “Task”, “Concept”, and “UI reference”) from the Help Center result pages. Next, we identified which “High-Priority Information Need” the Help Center result could fall under. These areas were ranked based on user surveys for which were most important to least important.

Lastly, you also mentioned during client interviews that the use of “Passive Voice” and “Banned Terms” were a priority to identify and replace. Each team member examined relevant Help Center results based on the keywords searched to identify the use of “Passive Voice” and “Banned Terms”.



RESULTS

We were assigned 29 Release Note sections and mapped 22 of them to 40 Help Center topics. We did not find relevant Help Center topics for seven of the Release Note sections outlined below. You can find more information about these topics in the “Release Note Name” column of the spreadsheet.

- *Use an existing document control record as a template*
- *Transfer payment from one billing account to another*
- *Configure email notification recipients for asynchronously generated forms*
- *Create user assignments and user assignment data entry for any domain*
- *Define a tag for user assignment schedules*
- *Configure the user assignment status description*
- *Create different review workflows and configurations by domain*

Criteria were split into three sections: Help Center Content, Information Design, and Adherence to Style Guide.

Help Center Content

Help Center Topic Modules. Most of the 40 topics audited were found in the “Policies & Billing” or “Administration” modules of the Help Center illustrated in **Figure 1** below.

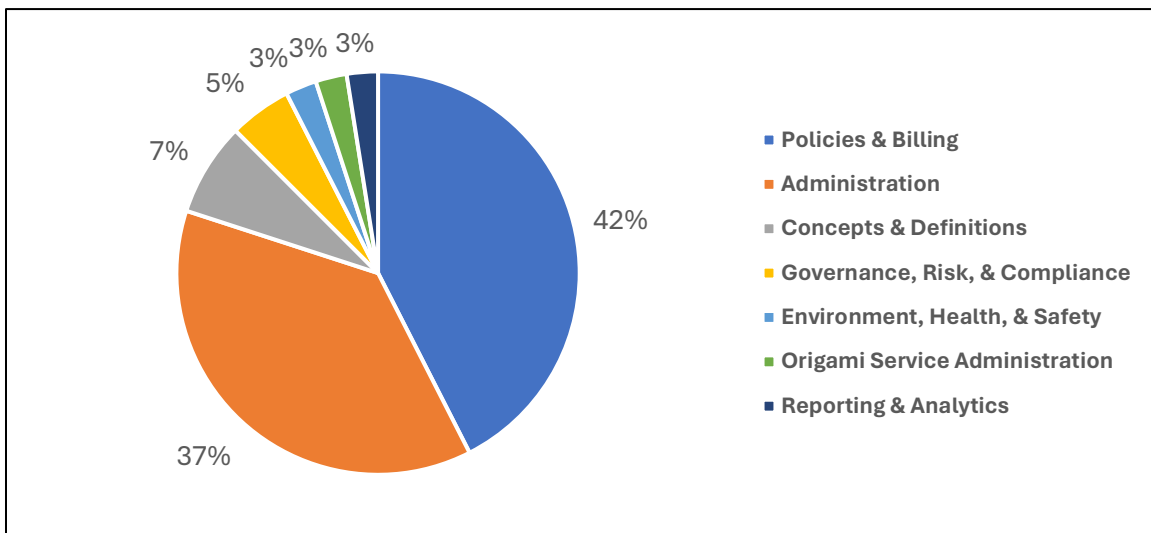


Figure 1: Help Center Topic Module



Proposed Placement. While we located 40 Help Center topics that can be updated with the assigned Release Notes content, we could not identify existing sections within 22 (55%) of those topic pages that can accommodate all related Release Note information. We provided placement recommendations in the “Proposed Placement” column in the spreadsheet.

Includes Screenshots. Twenty-seven (68%) of the audited Help Center pages contain at least one screenshot. Of those, 16 (60%) are mapped to Release Notes with new or updated features. This includes new or updated fields, new role permissions, and new buttons. We identified use of screenshots in the “Includes Screenshot Y/N” column in the spreadsheet.

Information Design

Content Type. Most of the Help Center pages we audited are “Task” or “UI reference” pages, as defined in the Information Design document and illustrated in

Figure 2 below. We recorded content types in the “Content Type” column in the spreadsheet.

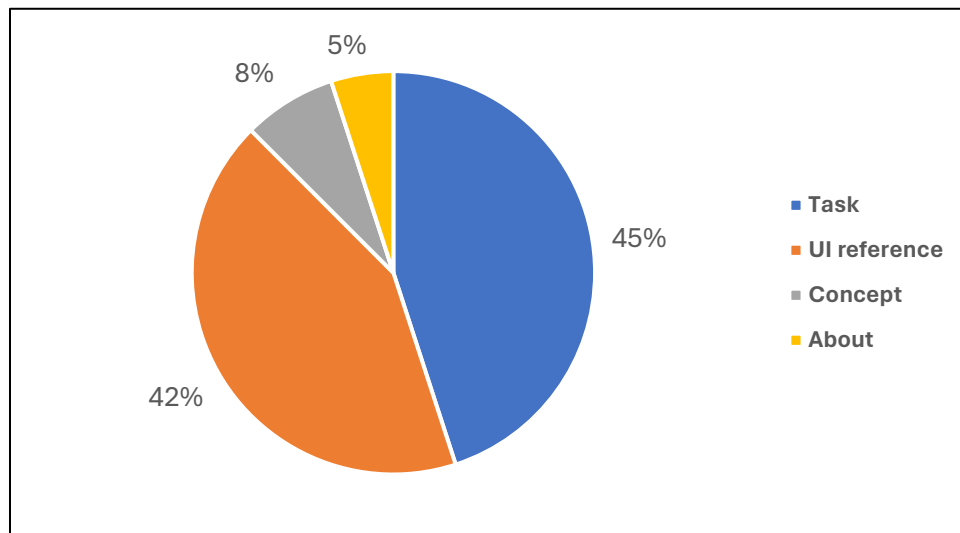


Figure 2: Content Type

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High-Priority Information Needs. We assigned at least one High-Priority Information Need listed on the Information Design document to each of the audited Help Center pages. We assigned “Workflow” to 30 of the pages (75%), by far the most. This is followed by “Forms, Fields, Data Entry Events” and “Policies & Programs”, with 12 pages (30%) each as illustrated in **Figure 3** below. We noted these priorities in the “High-Priority Information Needs” column in the spreadsheet.

NOTE: Needs are listed left to right in order of priority based on the Information Design document.

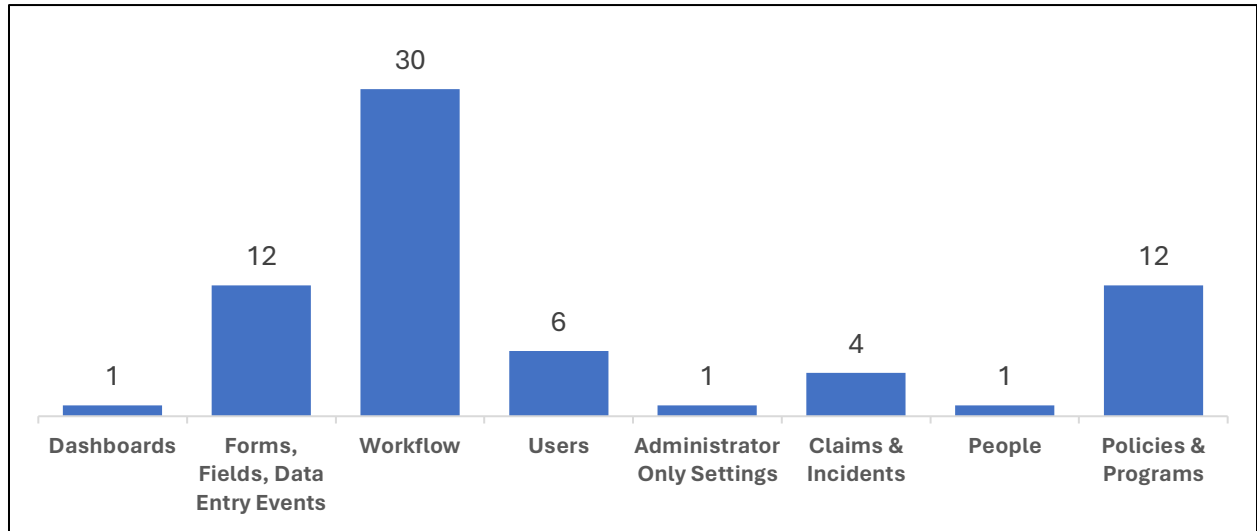


Figure 3: High-Priority Information Needs

Adherence to Style Guide

Use of passive voice. The Style Guide for the Help Center advises against the use of passive voice unless where necessary, and of particular concern is the phrase “is displayed” rather than “displays” when referring to a screen. We found only two pages in the Help Center that do not use the passive voice at least once. Eight pages use the phrase “is displayed” or “are displayed” when referring to screens. We listed all uses of passive voice in the “Passive Terms Used” column in the spreadsheet.

Use of banned terms. The Style Guide contains a list of banned terms, and 31 of the Help Center pages audited contained at least one banned term. The most heavily used banned terms are *remove* (five pages), *done* (four pages), *perform* (four pages), and *later* (three pages). We listed all uses of banned terms in the “Banned Terms Used” column in the spreadsheet.



RECOMMENDATIONS

Our team quickly identified Client Z has useful content, and we have three suggestions for improvement regarding the Help Center as outlined below.

1. Improve content structure so information is more findable and there are places for more detailed instructions, like those in the Release Notes.
2. Prioritize creating new topics and updating pages that include “High-Priority Information Needs” and screenshots.
3. After the Help Center has been updated with the latest content, review for adherence to the style guide.

Organization

Before updating the Help Center, we believe your team should first review the Help Center’s organizational structure and consider changes that could make information more findable and pages better able to accommodate the detailed information found in the Release Notes. Our team was not able to determine where Release Note content could be placed in 22 of 40 Help Center pages. While we have made placement recommendations, we do not believe all mapped Release Note content will fit without changes to page structure.

While conducting our audit, we found that Help Center pages are broad in scope, including “Task” and “UI reference” pages. Your users noted in the Information Design document Help Center content is generally “not detailed enough” (see the section titled “Content priorities / content gaps”). However, the Release Notes describe extremely specific and detailed tasks. We suggest your team revise “Task” and “UI reference” page templates so detailed instructions can be added or linked as needed.

We also observed that closely related information in the Help Center is often spread out among different topics. For different but overlapping tasks, this requires a user to read several pages to locate the information desired. Our team suggests chunking related ideas together, such as email and document templates, and always including links to closely related information. We also suggest reuse of information where different topics overlap, such as instructions on managing user roles for vastly different tasks that warrant separate pages.

Prioritization

After reviewing the Help Center’s organizational structure, we recommend your team create topics in the Help Center for four subjects yielding no results. Subjects discovered in the Release Notes for which we did not find related keywords or topics in the Help Center include those outlined below.

- Blueprints
- Email Notification Preferences
- QR Codes
- User Assignment(s)



Next, we recommend your team update workflow task-based content before other “High-Priority Information Needs” or “Content Types”. Based on our research illustrated in

Figure 2 and **Figure 3**, 75% of the content we audited fell under the “Workflow” “High-Priority Information Needs” type and 45% fell under the “Task” “Content Type”, ranking highest in both categories.

Lastly, we recommend your team review topics containing screenshots to verify that they are necessary and up to date. Of the Help Center results we searched based on Release Note keywords, 68% of them contained screenshots. As noted in the Information Design document in the “Task” “Content Type” section, the use of screenshots should be “...avoid(ed)...unless absolutely essential”.

Style

After your team updates the Help Center to contain the Release Notes information and performs desired organizational updates, they should also improve adherence to the Style Guide to reflect the business values of Client Z. You mentioned identifying the use of passive voice in the Help Center for correction, specifically the use of “is displayed” instead of “displays”. Our team found passive voice on 38 of the 40 pages audited. These terms can easily be located within the Help Center by referring to the “Passive Terms Used” column in the spreadsheet.

Another goal of yours was the removal or replacement of banned terms from the Help Center. We found 31 pages containing banned terms; therefore, your users may encounter them often. The most used banned terms in the Help Center pages we audited are outlined below.

- Remove
- Done
- Perform
- Later

These terms can also easily be found within the Help Center by referring to the “Banned Terms Used” column in the spreadsheet.

These updates make the Help Center more consistent with the Style Guide and help users gain confidence and familiarity with Client Z by making the Help Center more accessible and easier to navigate. Consistent use of terminology and language will also strengthen the overall brand voice.



CONCLUSION

We prepared this report to help your team incorporate information from the Release Notes quickly and efficiently into the Help Center. We know your goal is to have complete information within the Help Center to serve your users and to reduce user calls to the support center. While conducting this content inventory and audit, we identified three areas for your team to address within the Help Center: organization, prioritization, and style. These changes will help your team reach your stated goals.

Organization recommendations include reviewing the Help Center and considering changes to increase findability for your users. This will also help create locations that are a better fit for the detailed information from the Release Notes and give your users access to more detailed information as stated in the Information Design document.

Prioritization recommendations include creating new topics for the four subjects needing a more logical location within the Help Center. The next priority should be to update the “Workflow” “High-Priority Information Needs” and “Task” “Content Type”, because input indicates these are user priority areas. Finally, we recommend reviewing pages with screenshots for necessity and accuracy.

Style recommendations include reviewing and updating pages with passive voice and banned terms to adhere to your Style Guide. This will improve user experience by increasing findability and usability and reinforce the brand voice of Client Z with its users.

The Client Z Help Center is a thorough source of information. With these suggested improvements, there will be room for more detailed information, priority areas will be addressed, and updates will show consistent style. Implementing our recommendations will help your team reach your goals and improve your users’ confidence in using and navigating the Client Z Help Center.

