



## Getting Started Guide

AnswerDash is committed to helping you achieve your larger business goals. The outlined pre-launch considerations are key to setting up your implementation so you can make powerful improvements to your website or web application and help your visitors have better, more productive and profitable experiences. Use this as a reference guide for getting started with AnswerDash.

### Initial Setup Process

After you get your login email to verify your credentials in your account, you'll login to your account and be guided through the initial setup steps in the Welcome to Setup process. In the initial Welcome to Setup process, we recommend you start with the following:

1. Enter your site's URL.
  - You will use this to preview and setup AnswerDash on your site.
2. Install the [AnswerDash Chrome Extension](#).
  - The extension injects our JavaScript snippet in every page you view in your browser. It does not affect how others see your site. Instead, it allows you (or anyone you share it with) to play with AnswerDash live on your site (NOTE: you'll need to specify your AnswerDash site ID in the extension settings.)
  - You can use the same Chrome browser extension to configure AnswerDash to your liking without your engineering team even getting involved. Later, you can have your dev team drop in the one line of JavaScript so everyone, even without the browser extension, can see AnswerDash on your site.
3. Enter your support email address.

You can continue to choose *Next* through the Style and Contact Info settings, as you will be able to go back through those options later.

You will have an opportunity to set up Live Chat, Knowledge Base integrations, Page settings and Question groups, Users (moderators and admins), as well as Install the Snippet after working through the pre-launch considerations.

### Pre-launch Considerations

After you have completed the initial setup process, developing answers to the pre-launch questions below will aid your efforts during the implementation process:

1. Which pages on your site will you be putting the AnswerDash Tab? *TIP: A best practice for determining this is to put AnswerDash on the pages most questions arise on your site.*
2. Which ticketing tool and/or other assisted support tools (such as Zendesk and Live Chat) will you integrate with AnswerDash? *TIP: AnswerDash currently integrates with Zendesk, Desk.com and Freshdesk, as well as live chat assisted-service tools such as Zopim, LiveChat, Olark, SnapEngage, and BoldChat.*



3. What types of questions are your visitors asking? Are they more pre-sales or post-sales? Are they billing questions? Are they troubleshooting questions? *TIP: What are the types of common questions that your visitors are asking to your customer support team?*
4. Who has been assigned the role of moderator for questions asked thru AnswerDash? *TIP: Moderators are the individuals who you will task with writing answers to questions that come in through AnswerDash for future visitors to see. For more information on Resources, Roles and Stakeholders please see Appendix A.*
5. Determine your primary goals and how you will measure success or failure?
  - Is your main goal ticket deflection?
  - Is your primary objective conversion or adoption?
  - Is your goal to improve user experience (usability, learnability, customer satisfaction, NPS, etc.)
  - Do you want to gain more insight into your user's behavior via analytics?
  - For each goal, what would be a minimum result? A stellar result?

## Tab Visibility, Pages and Question Groups

First, you'll want to decide where you are going to put AnswerDash on your site. Where on your site is the primary source of your support tickets? Knowing where your visitors have questions and what types of questions they are asking will help you determine where you should put the AnswerDash Tab.

You'll then define the "Pages" (wildcarded URLs where customers use pages to control where the tab is visible, whether new questions are allowed on a page, and whether visitors can minimize the tab), as well as the "Question groups" (used to organize Q&A into meaningful groups that customers can then use to specify exactly which question groups should appear on each of the pages they have defined). You'll often refer back to Page settings and Question groups throughout the setup as you begin to write and publish common questions and answers. For more information on Pages, please refer to the [Using "Pages" in AnswerDash](#) resource guide on our site.

Here are a few best practices to consider to ensure proper placement and visibility of questions on pages:

- In Question Groups settings review your questions and think about the categories you'd like to break them into based on topic. Ensure the names are good for user consumption if you plan to use the AnswerBase – a feature that enables your users to browse all of your Q&A in one convenient on-page knowledge base.
  - For example, you may want a Question group called *Installation*, and others called *Delivery and Shipping*, *Promotions*, and *About ABC Company*.
- You'll want to designate the Page URL(s) for the Question Group. All the Pages (URLs) you create will be available to choose from but you have to move them to *On* status for the questions to be included on the specific Pages.
- Remember: If you create new Pages, you'll want to go to the Pages settings in your account and add a new URL, as well as go to your Question Groups settings and assign the Question Groups that you want displayed on those particular Pages.



## Integration with your Existing Assisted Support Process

AnswerDash integrates seamlessly with your normal support ticketing system or process, including live chat and knowledge base help centers. If you provide AnswerDash a support email address, AnswerDash will send new questions to your support ticketing system so you can respond to your customers through your normal support process. We recommend responding ASAP through your normal process to customers who ask questions through AnswerDash, then editing questions and publishing generalized answers daily to reduce support escalations to you over time. The more Q&A you publish in AnswerDash, the fewer support tickets you'll get.

- *Integrating Live Chat:*  
Integrate AnswerDash with your live chat and we'll escalate customers to your live chat only after we're sure AnswerDash can't answer their question.
- *Integrating with your Help Center and Support Ticketing System:*  
If you use a help center, such as Zendesk, Freshdesk or Desk.com, you can quickly mirror all of your articles as AnswerDash Q&A. To set this up, login to your account and go to Tools/Settings/Integrations and select either Zendesk, Freshdesk or Desk.com and turn it on. The articles will automatically convert to Q&A, ready for you to easily publish with a few clicks.

## Setting up administrator and moderators

Next, you'll want to identify your users and who will be responsible for publishing generalized Q&A to continually grow the AnswerDash layer. Users are comprised of moderators, administrators (admins) and an owner.

- A moderator's job is to write useful, concise, generalized answers to incoming questions for future visitors to see. Think about who would be best at this task, as it is key to deflecting frequently asked questions through self-service.
- Admins are moderators that can configure a site's settings.
- The owner (there can only be one) is an admin that can also update payment information.

Think about who on your team would be best at these tasks, as it is key to deflecting frequently asked questions through self-service.

We recommend your moderator logs in daily to review new questions and editing them to publish at least 5 twitter-sized generalized answers (general answers that pertain to the broader audience) for all of your future visitors.

## Publishing your first Q&A

Now it is time to begin writing and publishing some common Q&A. We recommend you publish 12-24 questions to begin with. Then, turn AnswerDash on and let your visitors and customers "ask a question". You might discover some surprising questions. We have found it works best to write concise Twitter-sized answers in AnswerDash. The shorter an answer is, the more likely they are to read it and stay on your site. It's also good practice to link your answers to other pages, such as other parts of your site or more extensive knowledge base articles.



AnswerDash makes it easy for your customers to ask questions because it is visible and easy to use. That's a good thing because you want your "answer layer" to build up quickly at the start, capturing the questions that your visitors actually have. Then after answers build up, future visitors don't need to ask the same questions because they'll find them in AnswerDash, and your escalations will go down by as much as 50% or more.

## Snippet Placement

For AnswerDash to load successfully on a page in your site, you need to inject a script tag into the page(s). This is what we call "snippet". AnswerDash generates the Java script for you, which you can find in the Install Snippet step in the AnswerDash management console. We recommend installing the snippet on every page you will be deploying AnswerDash on your site, even if you don't enable them all at the start. Most of our customers add the snippet at the end of the page so that it loads after your page loads. This allows you to quickly enable any page by turning "on" the Page of the URL when you are ready, without having to involve development resources.

## Goals and Defining Success

To increase the likelihood of seeing measurable value for customers and users, it is important to consider each of your goals, how they are being measured now, and what results you'd like to achieve. Do you want to reduce support tickets, increase sales, improve user experience, increase/decrease time on site or page views or uncover better analytics? Here are a few considerations as you are getting started:

- *Deflection and Ticketing:*  
If your goal is to reduce support tickets (emails, live chats, phone calls, etc.), it is important to note that sometimes customers can see an increase in tickets after launching AnswerDash. This can be due to several reasons:
  - The tab is newly launched and visible for users to submit questions.
  - The content you have published or is in your synced knowledge base articles is not the right content for a specific area on your site and/or users are not finding the answers they need to meet their end goal(s).
  - AnswerDash isn't placed in front of all other escalation channels and therefore tickets are coming in through those other channels as well as AnswerDash.

To avoid possible deflection inconsistencies, we recommend the following best practices when thinking about where you want to put AnswerDash on your site:

- Ensure your customers see AnswerDash before they see your support email address and/or contact information so they find self-service answers before contacting you.
- Consider limiting the number of new questions that can be submitted, turn off the ability for visitors to ask new questions, OR enable "suggest a question" as another option to set expectations with users initially as you work through the support and content process. This provides opportunities to gather questions and content gaps that then can be published for all visitors for future deflection.



- Consider adding new “Pages” (additional URLs where you’d like the tab to appear) or “Question groups” (used to organize Q&A into meaningful groups that customers can then use to specify exactly which question groups should appear on each of the pages they have defined) for targeted delivery of pre-sales, post-sales and more technical Q&A in the areas on your site that correspond with what people are asking in your tickets.
  - Receive a lot of pre-sales questions? Publish them through AnswerDash on your pre-sales website.
  - Receive a lot of post-sales questions? Determine where customers come for help (a support page, a contact us page, behind the login, etc.) and put AnswerDash there with the most frequent post-sales questions.
- *Conversion and A/B Testing:*

If your goal is conversation, using our A/B testing tools, we’ve shown that AnswerDash can reliably cause double-digit, statistically significant conversion rate uplifts. If you’d like to run your own test, provide a success definition and click the “A/B test” settings to measure the impact of AnswerDash on your business. The success/failure event functionality is an optional tool for you to use with A/B testing to measure a positive action (e.g., a sale, signup, or registration) or the absence of a negative action (e.g., a return, support request, or cancelation). Events can either be a visit to a URL or a click on a page element. We can track these in your analytics and use them in A/B tests that you run.
- *Reviewing Dashboard Analytics*

AnswerDash’s analytics will help you identify key issues in your products and services, helping you to gather hard data on questions your customers have most frequently. AnswerDash analytics makes it easier to see the value you get each day from using the AnswerDash Tab. We recommend logging in regularly and viewing the dashboard for the latest engagement analytics.



## Common Questions

### ***Will there be a lot of work upfront to set up and launch AnswerDash?***

There will be some upfront work for you, as outlined above. However, it won't require much of developments/IT's time because you just need to inject one line of our Javascript into each page that you want to display AnswerDash, and then turn AnswerDash on. For more information, please refer to our [snippet FAQ](#).

### ***Will there be a lot of extra work to respond to customers and publish new Q&A?***

Initially there will be additional work to moderate and publish Q&A. Over a couple of weeks, as you continue to grow your Q&A self-service answer layer, the support deflections will reduce your workload.

### ***Does this replace my current support system and change my business processes?***

No, AnswerDash was designed to integrate with your existing ticketing system, but can also be used as a standalone self-service support system, helping customers self-serve on answers before emailing or calling your assisted support.

### ***When I decide to make changes to my website, won't I have to start all over with setting up AnswerDash content?***

No, by default, AnswerDash looks at your page just at the moment the user clicks a UI element. As content of your site changes, AnswerDash continues to bring up relevant Q&A based on the content of your page, and AnswerDash's proprietary object-search algorithm. No extra work is required.

### ***How do I make use of my existing knowledge base articles, FAQs and information repositories? Do I have to redo all of that?***

AnswerDash aligns with existing repositories! No extra work is required to change it. We also have integrations with knowledge bases such as Zendesk, Freshdesk and Desk.com that allow you to sync your articles directly in AnswerDash. Please refer to the [Integrations](#) section on our website for more detailed information.



## APPENDIX A

### Resources, Roles and Stakeholders

While AnswerDash seamlessly integrates with your existing assisted support process, initially there will be some additional work to moderate and publish Q&A, organize your content, setup the design, style and placement of the tab on your site, as well as any testing you may require and the ongoing monitoring of the results from AnswerDash.

The following diagram illustrates the possible resources, roles and responsibilities of the various stakeholders in the AnswerDash implementation ecosystem. Some of these may or may not apply to you specifically. However, as you continue to expand the use of AnswerDash, you may at different periods want to consider including additional stakeholders in your organization.

