



Document360 gives you a well-rounded view of what's happening with all facets of your content.

Nibu Thomas

Director – Information Developer Group, Whatfix



55%

Of consumers say easy access to support and information can make them fall in love with a brand.

74%

Of businesses estimate that effective knowledge management disciplines increase company productivity by up to 40%.

54%

Of companies offering web or mobile self-service have seen an increase in their website traffic.

Whatfix,

“Due to Document360’s set of features, available integrations, and customization abilities, we were able to create a documentation website which fully meets our and our customers’ needs.”

LOCATION

California, United States.

INDUSTRY

SaaS based platform

About Whatfix

Whatfix is a B2B SaaS-based digital adoption platform that provides in-app guidance that is contextual and just-in-time. This makes onboarding and training employees and customers, much more engaging and interactive. Whatfix works on web applications, mobile, and desktop software products. Among the many things that it does, Whatfix is known for helping organizations create interactive walkthroughs that appear as part of the customer application.

Problem and challenge

Nibu Thomas joined Whatfix to establish and lead their documentation team even as Whatfix was scaling up its products and services. Whatfix needed a good documentation site to help self-serve their customers and the internal support team. The help content includes ‘how to’ articles, FAQs, Best Practices and troubleshooting content. It also hosts video tutorials. When they decided to switch, Whatfix was also looking for an enterprise grade platform that would scale well to support their growing enterprise list of customers.

Before switching to Document360, Whatfix was using Confluence Server as their authoring and publishing platform. However, it soon became an issue as the server was maintained by the IT team and as that was not their core function, downtime and outages were common. Besides, Whatfix wanted to use a platform that was built for documentation (and not something like confluence which is more a collaboration tool). The requirements from Whatfix team included

- ✓ Single platform to author and publish content
- ✓ All the features of a CMS (Content Management System)
- ✓ Intuitive UI that didn't need a lot of training to use
- ✓ Reliable public knowledge base and a responsive support team

The Whatfix IDG (Information Development Group) team is the sole contributor to technical documentation, and they are dedicated in producing “how-to” guides and technical documentation. The IDG team works in an Agile methodology to produce documentation that needs to be published at regular intervals supporting in time feature releases.

The IDG team found that the existing content was written by different internal stakeholders and did not follow consistent style guides and standards. Other challenges included the limited flexibility offered by Confluence in designing the home page and the constant need to buy plugins for every other need. There was also a push back from the IT team as each release of the confluence server edition meant downtime for the support site and it was also tough to get an IT resource as there was no dedicated resource.

Given the business requirements and existing documentation platform limitations, the IDG team evaluated Paligo, Document360, and Clickhelp, among other tools. Document360 was selected as a platform as it was the best fit for their business requirements. Nibu also published his findings in his blog.

Solution

Whatfix selected Document360 as their authoring and publishing platform because of the following

- ✓ User Interface (UI) was very intuitive
- ✓ Quick learning curve to learn Document360 features and functionalities for authoring and publishing content
- ✓ Transparency in getting customer feedback for all content
- ✓ Openness in product roadmap
- ✓ Quick customer support to resolve any query
- ✓ Good analytics to measure usage and also collect Customer search phrases

Being satisfied with Document360's capabilities, some of which were still in the pipeline, the IDG team then set an ambitious timeline to migrate over 300+ articles from Confluence server to Document360. The Document360 team helped with content migration from Confluence server. It took two months to complete migration, and what was really appreciated was that the IDG team could simply stop working on confluence and start where they stopped working – on Document360. Whatfix was pretty happy with the content migration – though there was

Business impact

The Whatfix IDG team has since authored more than 600+ articles in Document360 and the content is often appreciated by customers.

At least 10 different customers (over time) have asked the IDG team about what platform they were using for Whatfix Documentation! The difference between the old and new platform was that stark. Even new customers who had not seen the old site liked the simple and easy-to-navigate design.

Customers and internal support have started using documentation and the content viewership has always been on the rise – week-on-week. Nibu says that “once the viewership is going up for our documentation site for every product release, we are sure that customers are actually using our documents to self-serve”.

The IDG team has enabled feedback on every article in their documentation site and this helps Whatfix to listen to customer feedback and exceed expectations by quickly addressing each question.

The IDG team uses Document360 analytics capabilities and has also configured Google Analytics integrations to gather data on their documentation site performance and user behaviour. The team wants to reduce the volume of support tickets in the long run and link documentation article usage to a dip in support volume to prove the value proposition of documentation.

Value proposition of Nibu’s documentation team

One of the Key Performance Indicators (KPIs) for the Whatfix support team is that each of the team members have to raise 5 to 8 content requests every quarter when they cannot find the right content in their knowledge base while supporting a customer. The IDG team gets about 5 – 8 change requests across all support reps. This means the team is doing a thorough job pre-empting content requests by creating work for themselves.

One of the ways the IDG team pre-empts content requests is by listening to recorded calls (from sales, customer service, onboarding, training, etc) all the while gleaning information, plugging gaps, and constantly validating assumptions by understanding ‘customer speak’. The Whatfix IDG team also identifies new content areas by carefully listening to what customers are talking about and what questions they are asking. The team is trained to especially listen to unspoken needs. The team then interacts with the respective Product Managers to either create new content for troubleshooting and FAQs or create a product insight – when it’s best fixed in the product.

Use of Analytics

Whatfix has configured notifications for customer feedback in Document360 so that the team can quickly respond to customer feedback as soon as a comment is left on any article. The team also discusses this feedback along with the usage analytics in every team meeting. Nibu emphasises that



empathy is paramount when it comes to creating a great impression. The faster you can respond to a question, the more keenly you are perceived as a good listener. And good listening is just the start of great customer service.

The team also reviews the “Most popular articles” and keeps refining articles that get the most views. They also try to understand article dislikes. If an article is disliked, it means that it didn’t solve the problem that it promised to address. The team looks at every article disliked and then brainstorms about all the possible reasons why that could happen. Then they identify at least one action that they can do to improve the article.

What Nibu likes about Document360

At the top of the list is how accessible the CEO is. You can write an email and he will reply – EVERYTIME. The pace of innovation in Document360 is remarkable. They try to solve real world problems – by listening to what the customer wants and doing what she needs. As soon as [new requests](#) are submitted for product development, it gets voted up by the existing customer base, and then is subsequently picked up for development. Every customer has visibility into this process – till the feature is available.

Why Nibu recommends Document360?

Nibu says this about Document360

Most tools are focussed so much on the content creation process that they end up hurting the end user experience. Document360 balances these two aspects quite nicely.

Related Case Studies

“Document360 is a great asset for us and helped us construct a customer-centric knowledge base. As a documentation tool, it is beneficial for every SaaS company.”

Kendal Walton

Support Coordination & Documentation Manager, Aspire

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Neil Buckley

Managing Director, Apexbi

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