



Brief Template For Designing Your Help Center

Overview: What kind of Help Center are you creating, and why? Describe your vision of the Help Center in a few words. E.g., robust, simple, comprehensive, fun, etc.

Objective(s): What is the primary goal driving this Help Center launch? What are the top three objectives the Help Center will help to achieve? [E.g., To offer self-service for the first time, to increase customer satisfaction, to reduce costs, to deflect tickets, to grow your community, etc.]

Goal:

Objectives:

1

2

3

Who are your customers? Will your Help Center be used by more than one customer base?

Primary audience:

Other target audience(s) to consider:



Perception: How do you think your customers currently view your support organization? How do you want them to view your organization? What are some challenges you face in bridging any gaps?

Reference materials: Are there any Help Centers or self-service models the web design team should reference? What do you like/dislike about these examples? How are they similar or dissimilar from your brand's competition? If working with freelance designers, is there a brand style guide to follow?

Content architecture at the site level: How will customers access the Help Center from your company's main site? Will it be a top level navigation item?

Content architecture within Help Center: How much content do you have now? How much do you anticipate having a year from now? If migrating from another system or web portal, would you like to retain the current organization, or redesign the way the content is structured? What analytics have you used to surface the most important or most popular content?

Measurement of success: What metric(s) will you use to measure the success of the Help Center? Do you plan to use any analytics to revisit or refine the Help Center once it is live?



Details: What are the deliverables for this launch? Are there any format parameters or special requests (e.g., Help Center requires sign in, co-branding, use of unsafe HTML, etc.)? Are there any limitations or restrictions (i.e., Legal)?

Deliverables:

Parameters:

Restrictions:

Project scope - timeline and budget: What is the timeline for this project? Are there any known dependencies that may affect the timeline? What is the budget for this launch?

Known dependencies:

Budget:

Communication: What shared tool will everyone use to communicate progress and current status during each project phase?



Timeline/Milestones:

Task	Complete by (date)	Owner
Brief complete		
Content gathering/ planning complete		
Initial design meeting		
Design/theme decided		
Design assets secured/completed		
Customized theme ready for review		
Content migrated/uploaded		
Help Center live		

Team: Who is responsible for driving and signing off on each phase?

Phase	Responsible	Signs off
Design strategy		
Design deliverables		
Help Center content		
Help Center copy		
Quality assurance		