MAINTAINING YOUR KNOWLEDGE BASE: LEVERAGE'S TICKETING SYSTEM

A detailed look into Leverage's internal ticketing system as shown in *Chapter 9: The Knowledge Base*

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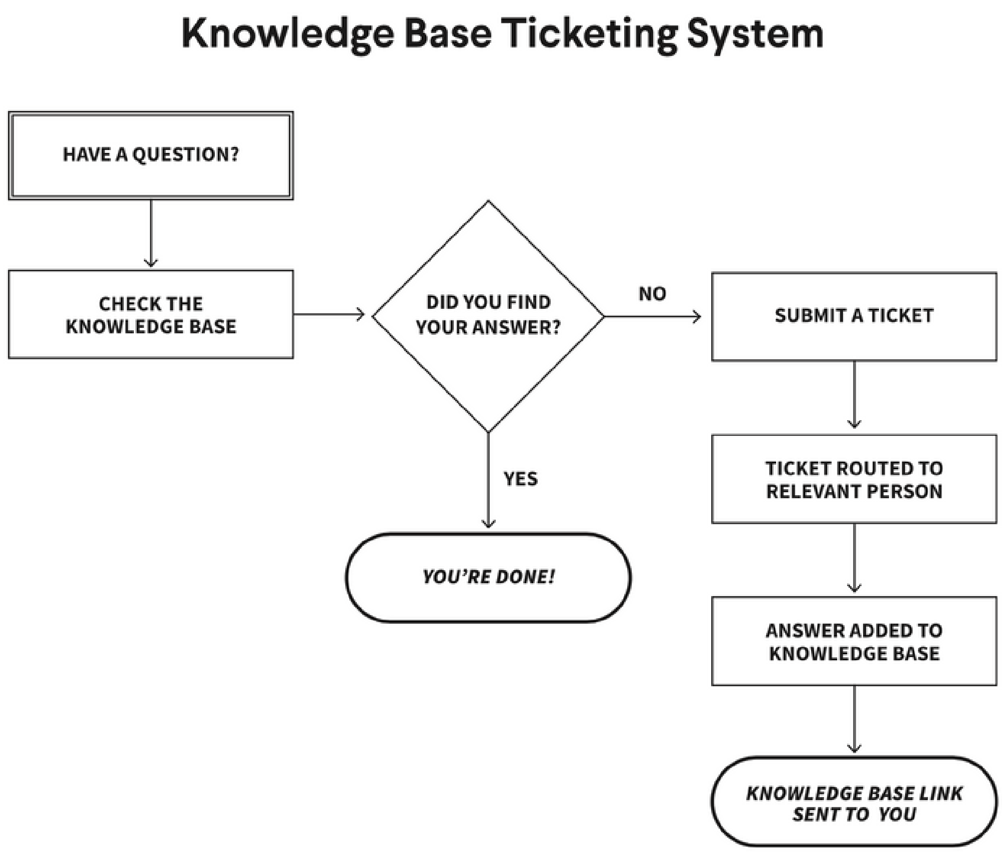
INTERNAL TICKETING SYSTEM

At Leverage, we use an internal ticketing system to keep our knowledge base up to date. As we covered in chapter 9 of the book, we use this process when someone on the team doesn't find an answer to their question in the current knowledge base. They use this internal ticketing system to submit their question and get the appropriate person to provide an answer and in the process, update the knowledge base.

We have found that this system saves everyones' time, eliminates distractions, and ensures that requests never fall through the cracks. Here's a quick refresher of how the process works:

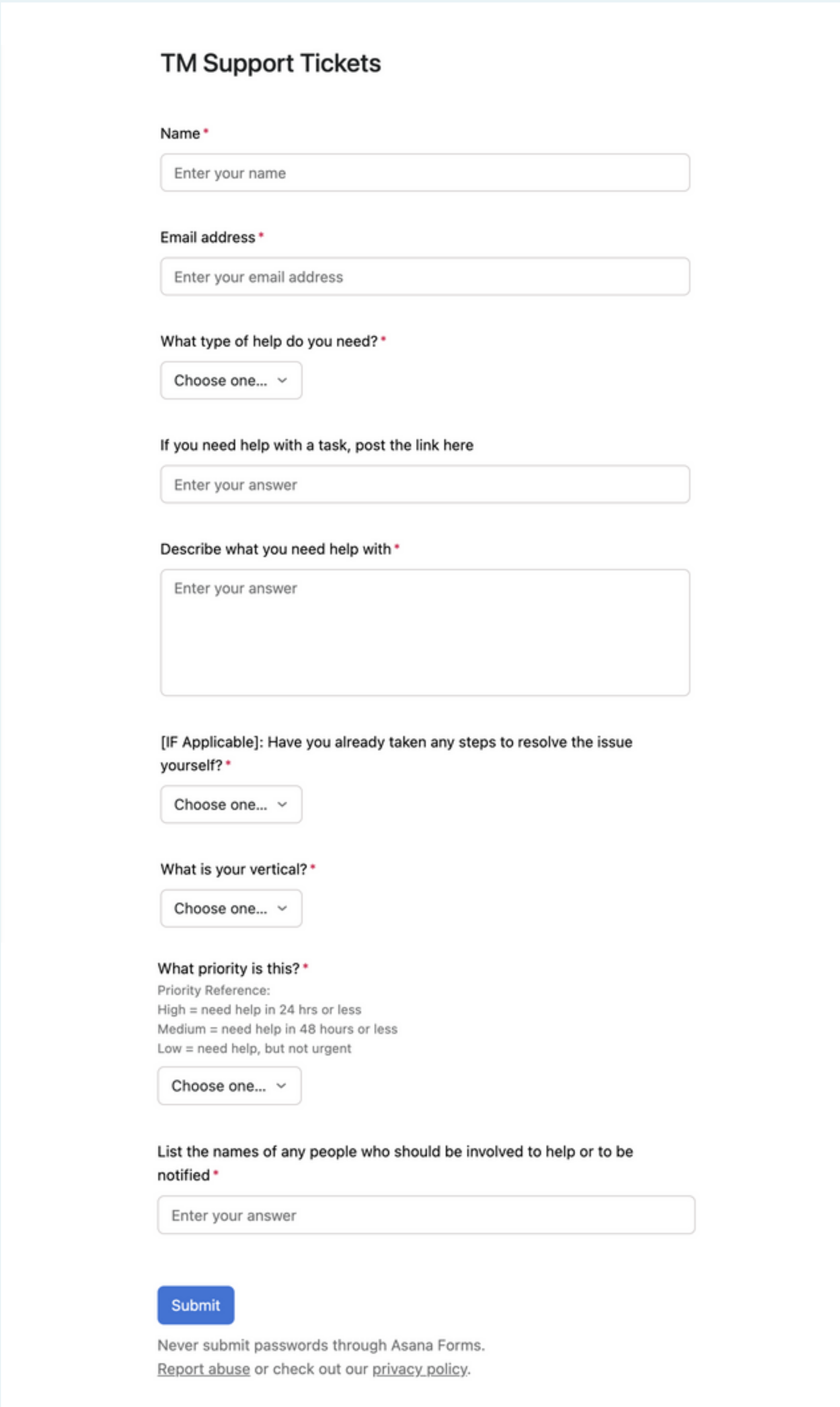


If you're interested in adopting a similar system, here's a detailed explanation of how we set up our internal ticketing system at Leverage using Asana.

Step 1: Create a form

We started by creating a simple form on Asana for the team to submit their questions. To do that, we created an entire project on Asana dedicated to updating the knowledge base. We then selected the **Forms** tab and created basic questions to solicit the responses needed to route the inquiry to the right person for an accurate solution. Each question field in this form is connected to a custom field in that Asana project. This will come in handy in step 2.

Here's what our form looks like:



TM Support Tickets

Name *

Enter your name

Email address *

Enter your email address

What type of help do you need? *

Choose one...

If you need help with a task, post the link here

Enter your answer

Describe what you need help with *

Enter your answer

[IF Applicable]: Have you already taken any steps to resolve the issue yourself? *

Choose one...

What is your vertical? *

Choose one...

What priority is this? *

Priority Reference:
High = need help in 24 hrs or less
Medium = need help in 48 hours or less
Low = need help, but not urgent

Choose one...

List the names of any people who should be involved to help or to be notified *

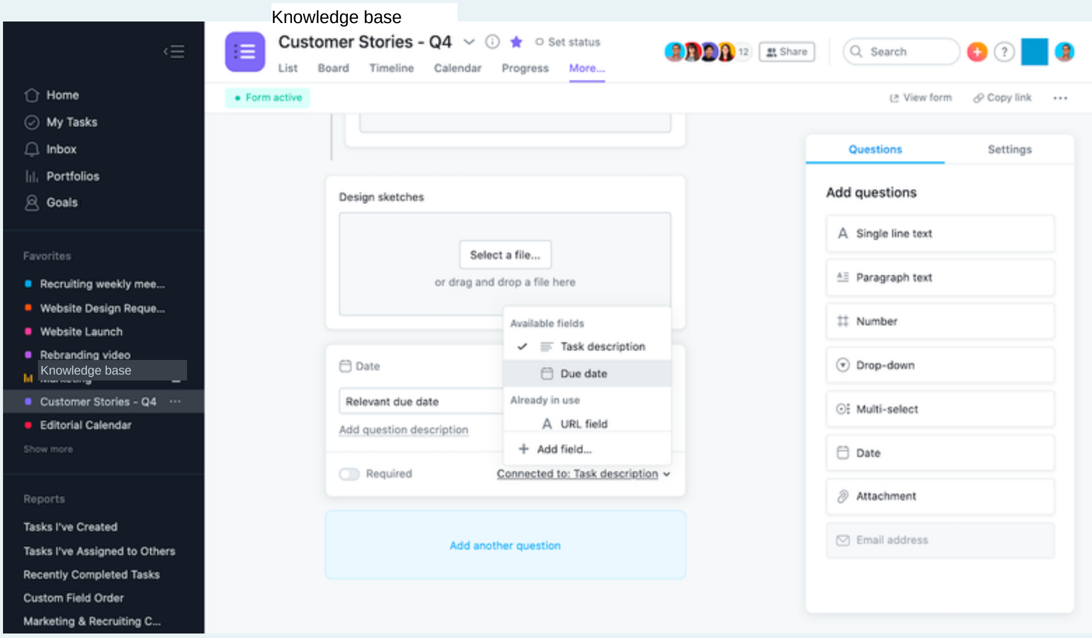
Enter your answer

Submit

Never submit passwords through Asana Forms.
Report abuse or check out our privacy policy.

Step 2: Employ Automations

Once the form is filled and submitted, a task is created in Asana. Based on the type of submission, the task is automatically assigned to the appropriate person. Because the fields of our forms are connected to an Asana project, custom fields are automatically populated and the right person is assigned this task.



Step 3: Update the Knowledge Base

Finally, the person assigned to the task can get to it on their own time and answer that inquiry. They can do that by directly commenting on the task itself. Most importantly, they go back to the knowledge base and add the question and answer in the appropriate section. Once all of this is done, the assignee can close the ticket by marking the task as complete.

In a nutshell, this is how we always keep our knowledge base efficiently updated. We encourage everyone on the team to always refer to the knowledge base for answers or submit their questions via the Asana Form if the information they're looking for is not available in the knowledge base. That way, nobody on the team is interrupted or wastes their time looking for answers.

Book a call to learn how we can help you build and maintain your organization's knowledge base.