

CrushBank Application Best Practices

Actions to engage more successfully with the CrushBank AI Engine

| Admin/Manager | |
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| No escalation without using CrushBank | All Level 1 technicians need to make sure that they search and review historical documentation related to the ticket they are working on before escalating the issue. |
| Analysis of 20 tickets over 60 minutes | This exercise conducted with a CrushBank professional will show you how CrushBank can help identify documents that would have helped resolve the ticket in under 60 minutes. |
| Use of synonyms and synonym expansion | Work with the CrushBank team to come up with a list of synonym expansions particular to your organization. This will optimize your search results ensuring your techs receive the most accurate and relevant information for each search. For example, if your team called SharePoint "SP", we want to capture that through a synonym |
| Reverse lookup – type in an IP address, phone number or license key | Any concrete data such as IP, phone number, and license key should serve as an initial starting point to any investigation. This will bring back all related historical information related to the specific entity. |
| Make sure all successful Google searches go into CrushBank | Ensure that technicians are leveraging the CrushBank custom upload feature to quickly add links to the CrushBank library when finding information across the web that helps them resolve tickets. |
| Use a client portal where possible | Avoid using emails for the creation of new tickets as they add considerable noise (email signature, disclaimer, etc.) to the ticket data that interferes with the AI classifications and relevancy confidence when conducting searches in CrushBank. Using a portal for clients ensures the data is clean with minimal noise. |
| Encourage use of: | <p>"No good data" button - Ensures that management stays on top of missing data requests to ensure that technicians always have up to date data to solve the issues they are encountering.</p> <p>Use the "Was this helpful" button and Solved functionality - Quicker visibility for other technicians to beneficial documents. Allows tracking of which CrushBank documents resolved ticket issues.</p> |

| Technician | |
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| If no good results, switch filter to Company All | Sometimes a particular company will not have enough historical information to draw on, so removing the filter allows a broader search for relevant content across all of your customers. |
| Use "Tile View" | Recommended view, as it breaks down your top results by document type. Using List View will generally be very ticket heavy as tickets tend to represent the majority of documents in your CrushBank system. Once you switch to it, it stays as your default |
| In Resolve, ask a further question | Allows you to drill down further into your original Resolve query. |
| Keyword search | The original search conducted by CrushBank does not consider keyword phrases. For example, if you have an issue particular to Windows 2016 Server and type that in for a search, it will treat each word separately and find related results. To focus in on "Windows 2016 Server" specifically, you can add a keyword search by including the double quotes around the term. You can also use Boolean terms (AND, OR) |