

Customer support knowledge template

Create one record for each answer your team is willing to stand behind. Include where it came from and when the assistant must stop and involve a person.

Business / project: _____ Date: _____

Field	What to record	Your notes
Customer question	A typical question, plus common variations.	
Approved answer	The precise answer the business has approved for the stated situation.	
Source and scope	Source document, revision and the products or customers it applies to.	
Exceptions and unknowns	What is outside the answer; do not guess unpublished policies.	
Human handoff	Team, destination and details needed to take over.	
Review and test	Owner, review date and test result; record changes before release.	

Filled example

Customer question	Can I change the delivery address after ordering?
Approved answer	For orders not yet dispatched, the support team can check whether an address change is possible.
Source and scope	Demonstration delivery policy v1; domestic orders only
Exceptions and unknowns	Do not promise a change after dispatch or an exact arrival time
Human handoff	Support team; order reference and requested location; use approved secure channel for personal details
Review and test	Support lead; review before release; test pending — no result claimed

How to use this

1. Begin with questions the team repeatedly answers.
2. Have the responsible owner approve the answer and its source.
3. Write the exception and handoff at the same time as the normal answer.
4. Test an ordinary question, an exception and a missing-source question before release.

The filled record uses a fictional policy. Replace it with approved business information; this worksheet is not evidence that an assistant has passed testing.

Editable versions and guidance: <https://1968labs.com/resources/customer-support-knowledge-template>
Implementation questions: hello@1968labs.com