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▶ OPERATIONS

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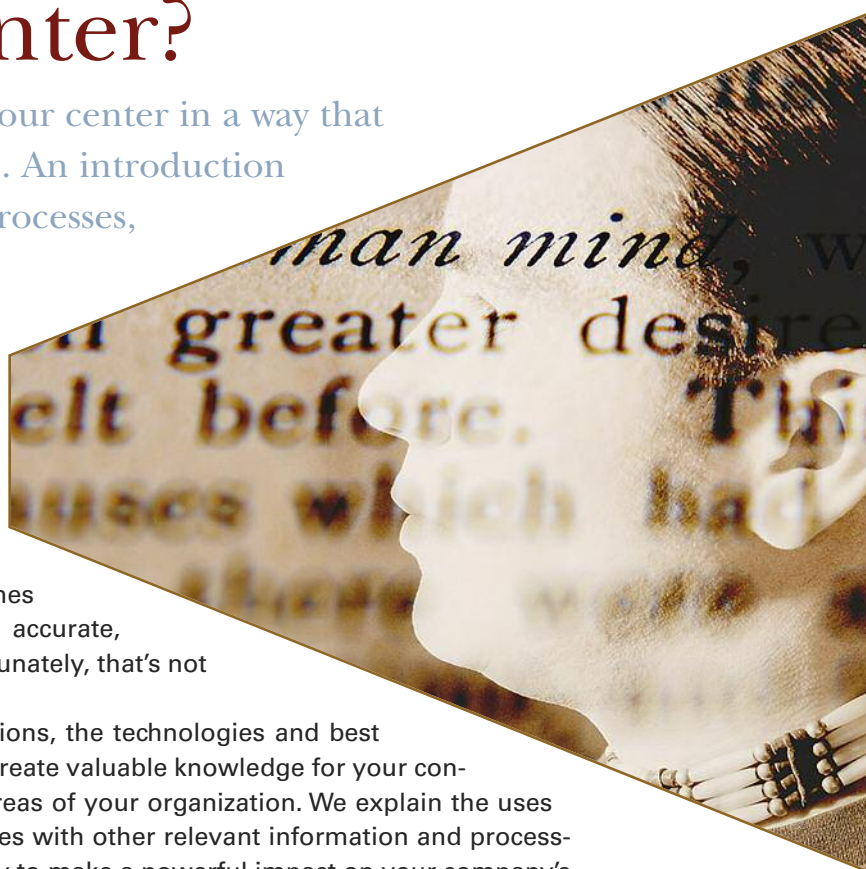
for directors, managers,
analysts and supervisors

Got Knowledge in Your Contact Center?

Leverage the intelligence in your center in a way that adds value for your customers. An introduction to Knowledge Management processes, tools and practices.

Most people use the terms “information” and “knowledge” interchangeably. If information is the data, facts or intelligence one can gather, knowledge is what is gained when it is acquired and interpreted. In today’s business landscape, many of us assume that the knowledge that comes from information is — or should be — accurate, readily accessible and up to date. Unfortunately, that’s not often the case.

In this article, we address the definitions, the technologies and best practices for harnessing information to create valuable knowledge for your contact center, your customers and other areas of your organization. We explain the uses for data and information, how it combines with other relevant information and processes, and how it is enabled with technology to make a powerful impact on your company’s ability to efficiently and effectively address customer needs.



OPPORTUNITY AT HAND

Knowledge, like many other information-based assets within an organization, is something that evolves over time and is dependent on people. As a result of that dependency, there are benefits and there are risks.

The essence of an organization is its people. People possess knowledge. When they carry knowledge around in their heads, store it away in personal files, or bury it deep inside systems, it becomes “tribal knowledge” and largely inaccessible by others. To capture it and make it widely accessible is a benefit. Allowing it to remain hidden or protected is a significant risk.

Coupled with that risk, many organizations experience turnover in their workforce due to retirement or attrition. These events threaten an organization’s ability to provide customer value, create competitive advantage and strengthen brand simply by not focusing on the value and importance of managing knowledge. Add to this the challenge of increasingly complex and diverse products and services, and it becomes clear that the information can’t be stored in “personal” data stores.

Finally, the information that is available is widespread across internal and external systems, with varying degrees of structure and accessibility. The challenges, and the opportunity, to effectively manage knowledge are clear.

There are very important technologies and processes available today to enable knowledge management. Knowledge Management (KM) systems and Knowledge-Centered Support (KCS) are becoming vital tools for successful contact centers and support functions.

DEFINE AND DIFFERENTIATE

KM systems are often referred to as data repositories, content management systems or business intelligence systems. Some consider FAQ tools as part of the KM system, as well. All of these systems support organizations as they pursue a complete knowledge management approach.

There are a few key differences between these data repository technologies and a full KM system.

> First, KM is defined as a concept, practice or process that organizations follow to actively capture, organize, manage, and share information.

> A KM system couples KM technology with a thoughtful, defined management process — described later as KCS. In fact, the KM technology enables the process.

> This KM process positions the enterprise to generate value from their intellectual property and knowledge assets — both system- and human-based.

> The KM system leverages existing information sources and enables the creation of new knowledge through automated workflow

tools and performance metrics.

To further illustrate the point, a KM system in the contact center enables the agent to quickly and accurately access answers to questions. It also allows agents to create answers and solutions which otherwise did not exist. Comprehensive KM systems on the market today support a variety of features enabling them to function as stand-alone systems and/or integrate with Web sites and CRM applications, all of which can be used not only to create and manage “tribal knowledge,” but to enhance productivity, self-service and resolution rates, and reduce interaction costs.

SEEK, FIND AND DRIVE RESULTS

A key feature of a KM system is its ability to find the information required to answer a question. While many search engines look for information across enterprise intranets or search a single content repository, KM systems provide the ability to seek content from many sources. Information is pulled and assembled, in context, from where it resides, including databases, data directories with specific files (e.g.,

▶ Key KM Features and Functions

- > Intelligent search
- > Industry standard synonym dictionaries
- > Guided answers
- > Process wizards
- > Content rating
- > Authoring, editing and publishing tool
- > Archive capabilities
- > Workflow tools
- > User profile definition tool with security level assignments
- > Reporting and analytics tool
- > Standard integration APIs to CRM
- > Web integration tool
- > Email integration
- > Easy-to-use application user interfaces

► KM Vendors

Here are some of the vendors making an impact on call centers with KM tools:

ATG	www.atg.com
AUTONOMY	www.autonomy.com
INQUIRA	www.inquiria.com
KANA	www.kana.com
KNOVA	www.knova.com
THE BRAIN TECHNOLOGIES	www.thebrain.com
RIGHTNOW TECHNOLOGIES	www.rightnow.com

There are many other vendors offering products that provide KM-like capabilities, products that combine CRM and KM, and tools that consolidate desktop applications while providing KM functions. The market is rich with products but not all are full-featured KM.

.PDF, .DOC, .TXT, etc.), CRM systems, intranets, extranets or any Web site. KM can leverage existing content where it resides, avoiding the burden of duplicating and maintaining synchronization of diverse information in a single content repository.

The search engines behind KM are known for their ability to search using natural language; you ask a question the way you naturally think about it. For example: "Will my new sedan run E85 gasoline?" These search tools focus on the intent of the question and quickly return the best possible answers, thus improving agent efficiency, resolution rates and customer satisfaction.

Also, by allowing agents to enter a question as the customer states it, companies build a base of knowledge regarding how customers understand products. Another key feature is the ability to develop pre-defined or scripted answers, which are used to drive specific responses to specific questions. Scripted answers can provide recommended alternatives or content to conduct

cross-sell/upsell activities in a contact center.

KM can also be used to drive the agent to specific content in scenarios where an organization has multiple product lines. This ability to narrow in on the relevant content can be useful when trying to create larger skill groups and reduce the number of specialized agents. Not only can the question be answered, but the system can present other related information (more context) to drive additional value to the customer.

CREATE AND MANAGE KNOWLEDGE

An important aspect of KM is capturing and authoring knowledge, also known as "creating solutions." In the contact center, an agent can be presented with a challenging question that may not have an answer readily available. In this instance, the problem requires a deeper level of research to find the answer. Finding the answer presents the opportunity for others to benefit from the research or the opportunity to formally document

the solution, whether from other agents or customers.

Many KM systems contain automated workflow tools that allow someone to author a new solution. The system can be designed for agents to complete a template in which they present the original question and the answer or solution identified through the research. The initial draft of the solution can then be assigned to subject-matter experts, or "knowledge managers," to validate and edit the solution.

Some systems include escalation and expiration settings so items are not left idle in the workflow. The workflow tool can assign multiple points of approval and editing (e.g., legal, corporate communications, marketing, etc.) depending on where the information will be published: internally or externally on a Web site. Most systems include the ability to set variables within the tool to define who has access to the new solution. Best practices include:

> When creating solutions, document questions in the context in which the customer presented the question. Use the terminology the customer uses to reflect the way other customers will likely present

KCS Best Practices and Standards

Leaders and interested parties from many large organizations formed the Consortium for Service Innovation (www.servicinnovation.org) to develop best practices and industry standards focused on KCS. The Web site provides a more complete view of the benefits of implementing KCS.

questions.

> Avoid documenting the question in agent vernacular or internal company lingo. It is very easy to pose questions using terms and acronyms the business understands instead of documenting them in language the customer understands.

> Many KM systems allow the users to build synonym databases or add vocabulary that improves the search process. For example, a company can build industry specific vocabularies (e.g., automotive, healthcare, or financial).

These features make the connection between how a customer poses questions and the way the company uses specific terms and acronyms. The importance of examining customer behavior and the way they ask questions becomes critical when it's time to consider extending the KM to customers for self-help.

GIVE CREDIT WHERE CREDIT IS DUE

A feature that engages internal users and helps with system adoption is the ability to track who contributes and authors content. The KM system contains reports that not only identify who suggests and authors content, but also report on which content is used most often to resolve questions. The reports are a valuable tool that organizations can use to encourage employees to contribute their knowledge before it walks out the door. The reports identify contributions and how often solutions are used to resolve questions, enabling solution fine-tuning for relevance and usefulness. However, be cautious of deleting solutions that are not often used; these may be valuable and useful, although infrequently accessed, solutions.

▶ Key Implementation Steps for KM

1. Identify a KM program sponsor
2. Define the project goals and scope
3. Initiate your program with change management, starting with education and awareness building
4. Define vision and requirements
 - a. Explore customer behavior and define requirements
 - b. Identify and document current state business processes
 - c. Identify and document information sources and related processes
 - d. Identify and document end-state business processes
 - e. Identify business-specific language and vocabulary requirements
5. Select a KM vendor and solution
6. Develop KM processes based on KCS (extendable to the enterprise)
7. Develop KM system and design requirements to initiate implementation
8. Develop and integrate
9. Test thoroughly
10. Conduct a pilot with a defined group of users
11. Roll out to broad user base (internal and external)
12. Continuously manage and optimize

Reports also identify questions or problems that are not being answered or gaps in the knowledge bases. A knowledge manager can use the reports to proactively develop content or solutions to fill the gaps. Many systems include a rating option that allows agents to look at solutions returned from a search and provide feedback on how useful the item is in resolving their question, which is valuable for fine-tuning the system.

EXTEND TO SELF-HELP

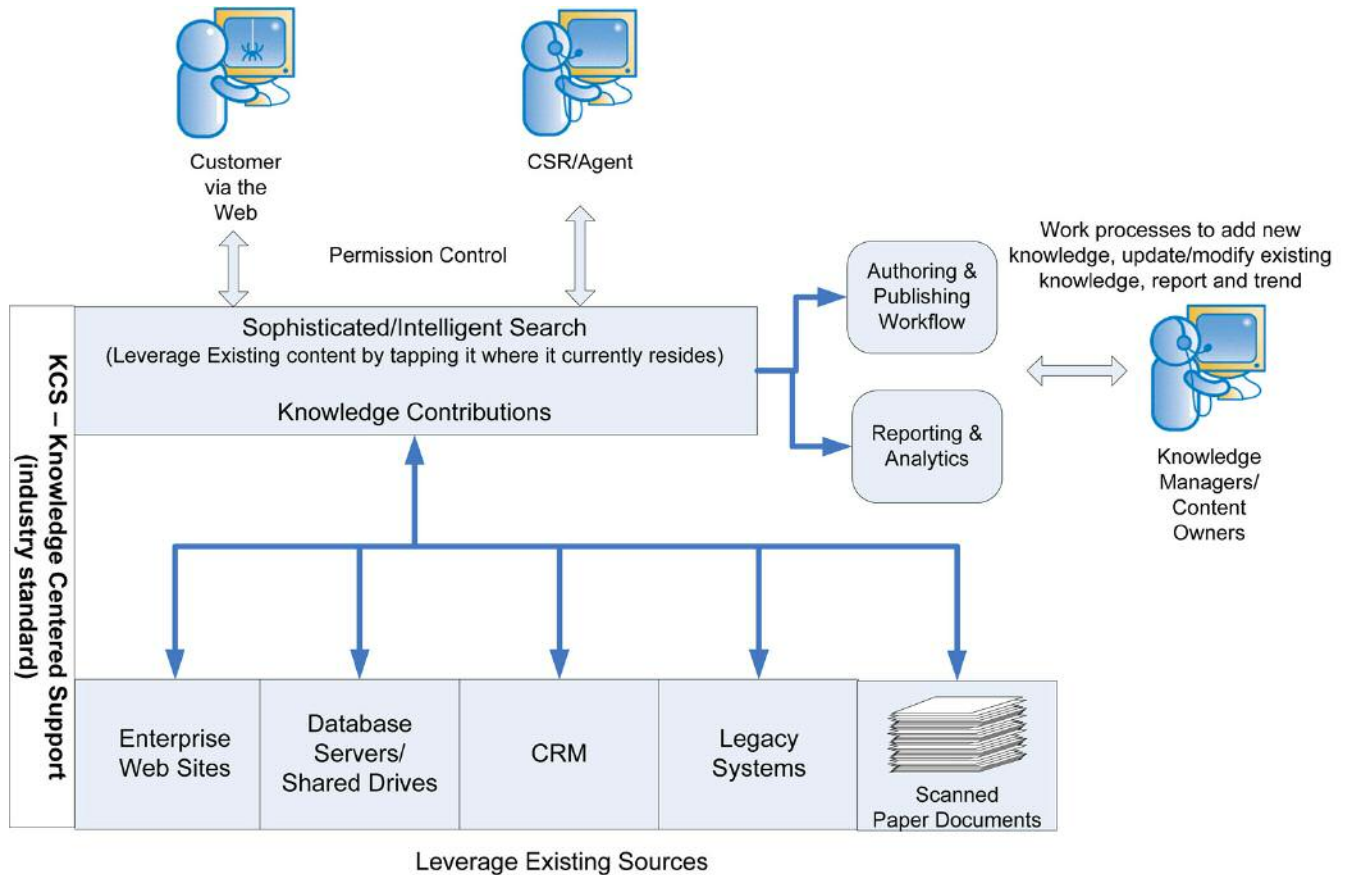
After you engage your internal teams, KM systems can be extended directly to customers for self-help. This improves agent productivity (and potentially lowers cost) by reducing the quantity of agent-handled interactions. Many systems will integrate with the Web site to promote self-help as a search

function or by providing FAQs. Web site design can enable customers to find answers to questions by searching the same content resources that agents use. The KM system protects information by restricting access based on user type.

Some systems enable integration with a "contact us" function on a Web site to drive answers to questions without agent assistance. The system can first attempt to answer the question with solutions or FAQs. If the system does not find the answer, the email is then automatically sent to the agent or a chat interaction is initiated through a multimedia contact center solution.

In addition, while providing self-help opportunities to customers can reduce the overall costs of handling inquiries, customers can also contribute knowledge. Customers

Figure 1: KCS and KM Systems, Processes and Users



can be a great source of information for others to use. Users can be prompted by the system to suggest new knowledge and use a template to enter information, data or other content. The new solution is then delivered to a knowledge manager for review as part of the knowledge creation and authoring process. The knowledge manager has the option to establish an incentive program for customers to contribute knowledge. Leveraging customers for this application is likely to be more successful in scenarios where the customer relationship is very close (e.g., exclusive distributor).

WHY KCS MATTERS

In many organizations, data and information are used as knowledge, but fail to capture the true benefits

of providing knowledge to solve problems. This means knowledge tends to be considered a relatively static commodity. The truly dynamic nature of knowledge creates an opportunity that KCS is designed to address.

KCS processes can be applied in the contact center, back office, self-service applications and many other areas where answers and solutions are required to satisfy customer needs. The structured business methodology of KCS creates a culture focused on quality, and directly influences customer interactions. Creating and using information in new solutions can provide a richer customer experience.

How many times have you heard someone in the contact cen-

ter say they found a new answer to a question? The key is leveraging KCS to help people, enabled by technology (KM systems), to search and capture the right information or new information, and make it available quickly, accurately and reliably. The days of creating bulletins, memos, alerts and hot topics are quickly becoming methods of the past.

As customers, we expect to get the right answer, right now, in one interaction and with absolute accuracy. This outcome is directly dependent on an organization realizing that knowledge is constantly evolving. KCS, KM systems and the development of a collaborative, knowledge-driven culture will help to enable success. Getting there is a journey, not an overnight implementation.

GET STARTED

Now that the opportunities and risks surrounding KM are more in focus, it's time to consider how to prepare your organization and your contact center for this knowledge-driven environment. With KCS as a foundation for a solid knowledge management program, you will embark on a journey to influence the organization, the contact center and leaders about why a structured approach to managing knowledge is important.

As prescribed in any large initiative, change management will be critical to achieving success. Because KM is not widely understood as the combination of process and technology (unlike other contact center technology implementations, such as ACDs), educating the organization is a critical step in the early stages. Start building awareness before the technology procurement process begins. Inform all stakeholders and participants in the initiative about the basic building blocks of KM. This effort starts with KCS, the underlying process that defines how knowledge is managed and applied in a contact center environment and other areas within the organization.

This structured change-management approach will enable your ini-

tiative to achieve success, especially when you encounter individuals who are struggling to protect their domain, such as owners of databases, content management, business intelligence and many others who maintain vast amounts of information in desktop files, in their heads, on file servers and in other inaccessible sources.

Most KM systems are highly configurable and can be designed to enable and complement operations, especially those which are customer-facing. A successful KM project will require advance planning and documentation of the desired state for the organization — specifically how you want your organization to run. The sidebar on page 4 provides some key steps to successful implementation, reflecting the magnitude of the work effort.

Although the steps to get there are numerous, the benefits of a KM-empowered organization are virtually endless. In short, the best practices are: start early, involve all known and potential stakeholders, and be prepared to uncover, discover and learn new things about the way your company uses information and knowledge today. That will lead to how you use knowledge to transform the organization from casually managing information to being fully knowledge-centric. ●



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