

## Putting Knowledge Management to Work

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Have you heard? Knowledge Management (KM) is the cure for all your informational nightmares. With KM, your customer service reps won't frustrate callers while searching through multiple databases, intranet sites, email alerts, memos, and manuals to find answers to gnarly problems. They won't have to hunt for their "go to" colleagues to bail them out. And management won't worry about losing "tribal knowledge" when employees resign. Better yet, customers will access appropriate information through self service, avoiding CSR contacts altogether. Sounds great, doesn't it?

Chances are you have heard it all before. Technology often promises big returns but falls short of expectations. Here's the real deal: *Technology is only as good as the designs, processes, and practices that support it.* KM can make your informational dreams come true, but only if you invest the time and energy to use it wisely.

### Start by Assembling the Right Team

Let's begin with some good news: KM is *not* a separate repository that collects, stores, and presents information. It responds to queries by communicating with *existing* data sources. Just like KM, you need a means of communicating with the associated data owners and the system owners. Put out the welcome mat and invite them to the planning table. Organizations typically tapped for this effort include the contact center, IT, back-office, product management, marketing, help desks, engineering, manufacturing, and more.

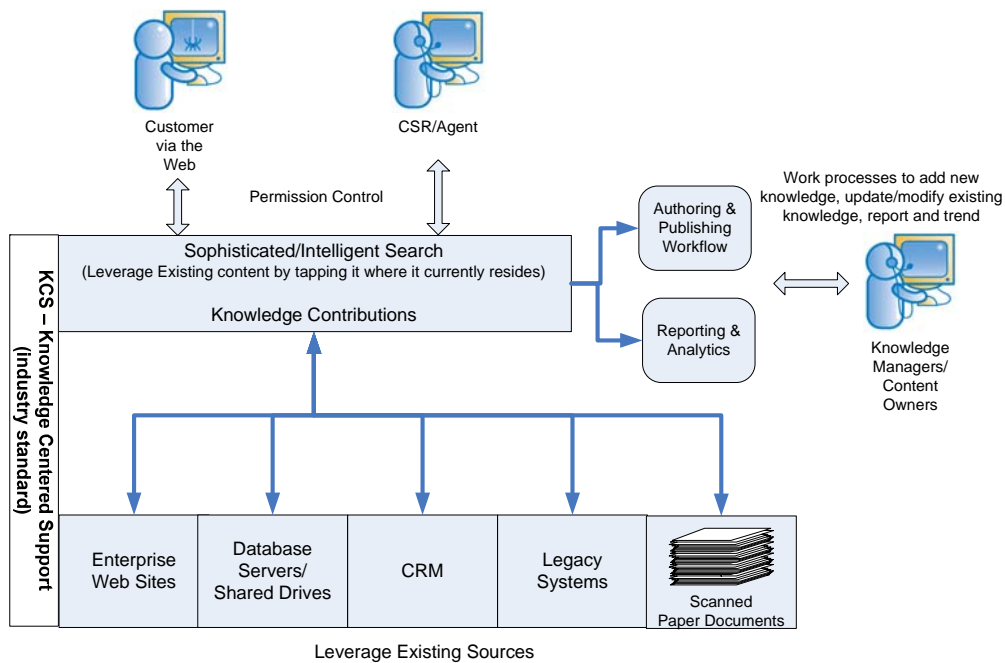


Figure 1: KM Systems, processes, and users

The contact center team members should include new and seasoned CSRs as well as subject matter experts (SMEs.) Don't assume you know all the business flows even if you designed them yourself. See through the eyes of fresh recruits to understand how their training directs them to find information. Let your experienced agents flex their problem solving muscles using skills acquired on the front lines. You may discover creative approaches to searching for and validating information that will serve the project well.

Make sure your team members understand how KM works and the business benefits for stakeholders and project team members. Work with your vendors to schedule demonstrations and review system requirements. Take time to gain agreement on the project goals and scope. Get people excited about the possibilities so that they'll embrace operational changes as the need arises.

### ***Institute A Change Management Process***

KM implementations are different from most other technologies with which you might be familiar. They involve interaction with a lot of different systems and the persons who watch over them. They make improved information flow possible – for up-selling and cross-selling, for enriching communication with customers, for analysis of business results and processes, and more. They transform static pools of data into dynamic informational streams. In short, KM is an agent of change. If your employees are used to living in their own safe harbors, KM might feel like white water rafting. And those feelings can thwart effective design and implementation.

A word to the wise: Work with seasoned change management professionals to help you anticipate challenges and issues. Be prepared to “sell” the system as often as necessary to keep all of the affected organizations on board. Focus on the business benefits for your organization and the stakeholders. Encourage behavioral changes that are consistent with system changes. Keep an ear to the ground before, during, and after implementation to surface and address concerns as they arise.

### ***Establish the Current State and Develop the End State***

When you're ready to get down to business, make a list of up to 100 real-world questions and document the correct answers. Cover all products and services and all frequent user intents. Typical sources include search logs, the call center's top requests or dialogue subjects, and suggestions from subject matter experts. For each question, list all information sources that could provide the correct answer. Determine the “right” content to access when there are redundant systems and repositories. Consider alternative ways to access information. Related or peripheral information could add context to the requested information and improve the relevance and richness of the response. Look for opportunities to optimize systems and resources. You may be able to retire duplicated systems, databases, or directories as an additional benefit of the project.

#### **Critical Success Factors & Key Project Start Activities**

- ▲ Establish a cross-organizational governance team
- ▲ Identify and engage source data owners
- ▲ Identify and engage system owners
- ▲ Integrate a comprehensive change management effort with the project plan, addressing all impacted staff and external users
- ▲ Identify questions to which customers seek answers
- ▲ Define your call handling process end state
- ▲ Ensure internal systems can be tapped by your search engine
- ▲ Identify key enterprise systems initiatives that may impact or be impacted by this project
- ▲ Identify company terms, jargon and vocabularies



Don't stop there. Challenge the team to think through what they'd *really* like the new system to do. Where are the opportunities to improve customer satisfaction? Enhance revenue? Augment self-service? Speed business processes? Where are the gaps between how you're doing things today and where you'd like to go? What informational connections do you need to make? What processes need to be developed to support those connections?

### ***Ensure Accessibility***

Once you've determined where information resides and how the search engine finds it, you'll need to make sure that your KM system can actually retrieve it. Your IT team members will know the particulars of the various databases and the associated security access requirements. They'll need to work with your KM vendor to develop appropriate access protocols and ensure that the relevant data can be extracted. Schedule this activity early in the design phase. Access and security issues often contribute to project delays.

### ***Construct Your Vocabulary***

KM uses an intelligent search engine to find the best data resource to respond to user queries. In order to do its job, KM needs to speak your language. In fact, KM needs to be sufficiently "fluent" that it can be responsive to several different ways of asking the same question. You'll want to engage a cross-functional customer support team in this exercise. Make a comprehensive list of your internal terms, phrases, and jargon. Check out quality monitoring recordings and customer emails to identify how *they* reference your products and services. Identify connections between your internal "dialect" and the language your customers use.

Vocabulary development is a critical success factor for KM implementations. Most KM vendors offer a basic vocabulary to get you started; some have industry-specific add-ons. Nonetheless, you'll spend a fair amount of time creating a custom dictionary. Fortunately, it won't have to be perfect on Day 1. KM has the smarts to monitor its search results and refine its vocabulary over time.

### ***Make Critical Design and Configuration Decisions***

Once you've completed some content, process, and technical homework, you'll define a system architecture to access the information based on your user community and business processes. You may choose to tailor views and search options for different user communities. You might investigate revenue enhancing opportunities enabled by the KM system. For example, on-line retailers like Amazon present related purchase and product information along with customer-requested content.

Consider use of managed answers – a method of directing the search function to return specific, pre-defined answers. Managed answers can appear on top of the search results or in a side bar (information box to the left or right of information in the primary search results). This tool promotes cross-sell/up-sell opportunities or provides additional relevant information. It is also good for displaying information that is difficult to access or time sensitive.

Finally, consider use of process wizards – customized instructions that solicit information from users in a decision tree format to guide the user to an answer. KM lets you incorporate scripts with this function to help newer users find answers efficiently.



## ***Tune and Test***

As you refine your system design, go back to your real-world customer questions. Put your SMEs to work as system testers. Have them ask the same question several different ways and rate the system’s accuracy and completeness. Even with the best up-front planning and design, you’ll surface instances where KM’s language skills aren’t quite up to snuff. That’s normal! You’ll simply make the requisite changes to KM’s vocabulary and/or programming and try again.

When you’re ready, select a cross-section of end users to be the pilot group and take them on a tour of your test system. See how easily they navigate the user interface. Make sure they are satisfied with the responses they get. Tweak the system as necessary.

Armed with favorable reviews from your SMEs and pilot group, you’re ready for a controlled roll-out of the system to your internal, and then external, user communities.

## ***Manage Your KM Environment***

Managing the KM environment is an on-going process. While there are a number of activities to consider at various points in time, you’ll want to focus on how you provide support to your user community.

**Table 1: KM Management Tasks and Timeframes**

<b>Review Period</b>	<b>Tasks</b>
Weekly	<ul style="list-style-type: none"> <li>▲ Conduct spot checks on search and content results</li> <li>▲ Develop new content</li> <li>▲ Monitor work flow queues and adherence</li> </ul>
Monthly (analytics driven)	<ul style="list-style-type: none"> <li>▲ Monitor analytics for trends</li> <li>▲ Conduct a deep study of a narrow set of questions/intent categories to ensure accurate performance</li> <li>▲ Report performance and trends to the user community</li> </ul>
Quarterly	<ul style="list-style-type: none"> <li>▲ Run a tuning cycle</li> <li>▲ Review usage statistics using system reports</li> <li>▲ Identify interesting intelligence and trends</li> <li>▲ Review overall system measures</li> </ul>
Annually	<ul style="list-style-type: none"> <li>▲ Provide management with a performance and improvement assessment, and recommendations</li> </ul>

As your system goes into production, you’ll continue the change management process through ongoing communication about how to use the new system and its business purpose. Be sure to encourage utilization of key capabilities such as content contribution and content rating. Both provide valuable data and information to fine tune and evolve your system.

KM reporting and analytic capabilities offer a wealth of information on the use and performance of the system. Search analytics identify customer needs and recognize content gaps by reporting on key concepts that are missing. Analytics also provide customer ratings, feedback, and survey results. You can use analytics to track the status of content in the publishing workflow. It will also identify key content



contributors and the documents that are viewed most often to answer questions and identify the most valuable content.

Work flow queues require ongoing care and maintenance. A work flow tool facilitates review of existing content and editing/publishing new content. This task ensures that responsible parties are contributing, performing and enabling positive results.

### ***Conclusion***

KM system implementation offers unique challenges. It crosses organizational boundaries and creates a true enterprise initiative. Done properly, the enterprise will realize benefits beyond the contact center. The old cliché “knowledge is power” can become a reality – for everyone involved – with a successfully designed and implemented KM system.