# SHARE THE WEALTH OF KNOWLEDGE

**Alternatives for optimizing knowledge practice in your contact center.**

**By Matt Morey,** Strategic Contact Inc.

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**Matt Morey**
Strategic Contact

**D**o your customers and agents sometimes feel like research analysts? Are they spending too much time searching for answers? Does the trail usually lead to a few people whose knowledge isn't shared systematically with others?

Technology is the great enabler for knowledge management (KM) with many options to meet the needs of your agents and customers. The question is: Which tool provides the capabilities you need while being sensitive to your resource and budget constraints?

## Knowledge Management Is a Common Challenge

Most centers struggle with KM, and it's not hard to understand why. There is a wide variety of information to structure, review and manage—on products, processes, policies, current issues, etc. Many different players produce and distribute information without a mandate to coordinate their efforts with others. A lot of information is hard to access after the initial delivery, regardless of form. Many times the information is not well-organized and agents must look in a number of different places to find it (see Table 1, page 4).

Many centers try to solve their knowledge management challenges by utilizing search engines, but this "solution" falls short of the promised land. The search returns too many results, making it difficult and time-consuming to find the right answer amid all the irrelevant and/or wrong ones. If the right answer is buried within a lengthy source document, the search process will continue as time ticks away. And, of course, if the right answer isn't accessible in electronic form, a search engine will never find it.

Some centers made attempts with technology to bring all the disparate sources of information together but failed to institute and enforce the processes to add new content or review existing content. After a few rounds with stale information, frustrated agents stop using the tool. They resort to using their neighbors, cheat sheets or other flawed alternatives.

## You and Your Agents Need an Effective Solution

New agents struggle with the vast amounts of information on which they must become proficient. Their ramp-up time has a direct impact on the expense of running your center. This problem seems to keep growing as products and services become more complex, more regulations are imposed (e.g., HIPAA, PCI), competition becomes more diverse, and customers become more informed (because of web, social media, etc.). If you are experiencing high turnover, a contributing factor could be agent frustration with information access.

If your subject-matter experts (SMEs)—whether supervisors, leads or some sort of escalation skill—become the stopgaps for poorly architected information resources, service costs will rise. If you're fortunate to have enough help to handle your less seasoned agents' needs, you'll needlessly boost transfers and average handle time to resolve customer issues. If those valuable resources are too few and too much in demand—tied up in meetings, coaching and other projects or tasks—then you'll suffer low first-contact resolution (FCR) and diminish the customer experience. It's all because your agents can't find answers—or more importantly, the right answers—quickly and efficiently.

## Options Abound!

Knowledge management, in a variety of forms, can save the day. It can focus on content only (think of a set of folders and files), or progress to managing that content so that specific questions can be answered. It can include some things you know about your customers (tying in with customer relationship management), or provide relief to those who are desperately seeking an effective search function. It can be all of these things, and more, tied in with an
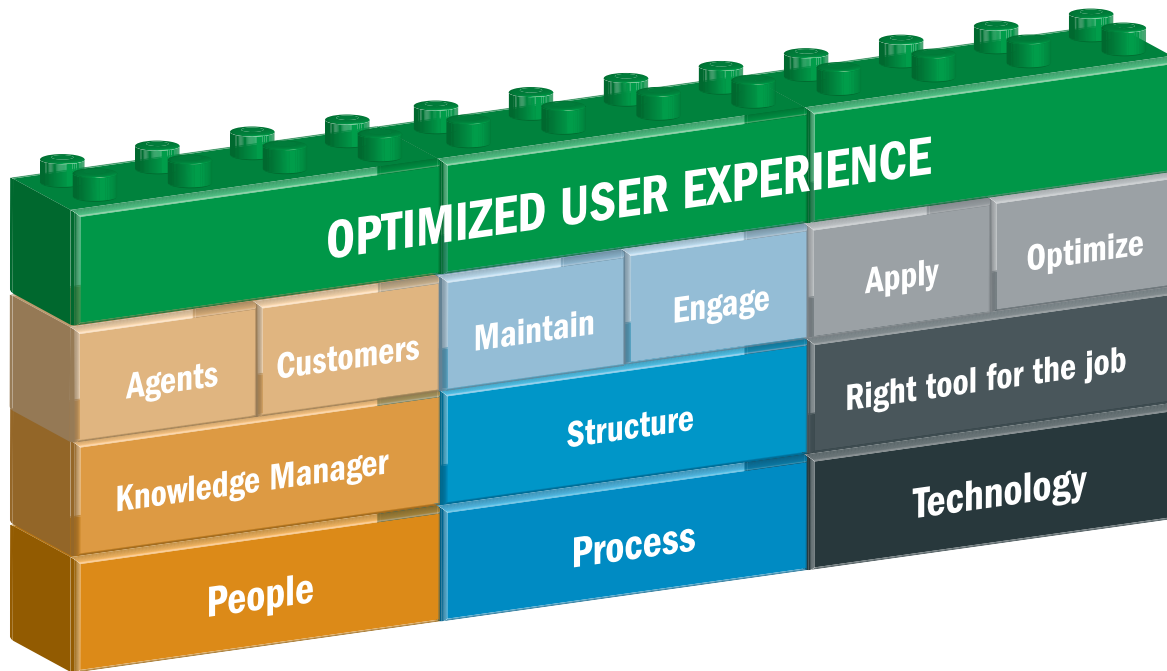
*Use All the Knowledge Building Blocks to Optimize the User Experience,* **Figure 1,** *above*

ongoing process.

The great news is there are many technology options available to address all those forms effectively. To get started, you should first look to see what you already own that you can leverage. You may have to start with a couple of different technologies for content and search until you get your full end-state strategy realized. Some options to consider are outlined in Table 2, *page 4.* The table includes a rating on cost, which can include hardware, software and labor (IT, vendor professional services and/or knowledge managers).

### Leverage Technology with Knowledge Practices

While you consider your technology options, you need to address the process of establishing a core competency in knowledge sharing. Doing it well takes people following a well-defined process that technology enables (see Figure 1).

Ready to get started or want to reenergize what you already have in place? Take inventory of your information sources—anything that agents might use. How is information created and shared? By whom? Are there any processes to manage it or reinforce its use? Check out what agents keep on their desktops or cubes. Monitor some calls; focus on what resources agents actually tap, whether electronic, paper or people. Determine how and when information is accessed and by whom. Conduct focus groups with agents, supervisors and SMEs to find out what they use and why, and to what or whom they turn for answers. Also, find out what they don't use and why. You may find something very telling; often much effort has gone into creating knowledge sources that no one really uses.

Once you've completed your research, you will want to define the appropriate structure to access your information. When designing the structure, there are two basic buckets to consider (which the observations steps should reveal). One contains information that agents need to

*Common Knowledge Access Methods Present Challenges,* **Table 1,** *below*

| Common Knowledge Access Methods | Issues and Challenges |
|---|---|
| Cheat sheets and Post-it Notes | ▶ No control over content accuracy or relevance |
| Emails and archived emails | ▶ Time-consuming to search<br>▶ Not always read and/or retained |
| Multiple SharePoint or Intranet sites | ▶ Too many places to look so just don't use<br>▶ Not updated often enough or at all<br>▶ May be difficult to search<br>▶ May house a lot of information not relevant to contact handling |
| Manuals and Binders (desktop and/or shared) | ▶ Very time-consuming to search<br>▶ May have to leave desk to retrieve, adding to handle time<br>▶ Can be out-of-date; difficult and time-consuming to keep up to date<br>▶ Can't find it because someone else has it if shared<br>▶ Inaccessible to home agents<br>▶ Not searchable<br>▶ Poor use of desktop space |
| Ask a Neighbor! | ▶ No control over content accuracy<br>▶ Results in perpetuation of "tribal knowledge"<br>▶ Few become the keepers of answers, risking loss of knowledge |

*Technology Options for Knowledge Management,* **Table 2,** *below*

| Technology | Notes and Considerations | Costs |
|---|---|---|
| Wiki | ▶ Cloud-based and open source options available<br>▶ SharePoint now has Wiki functionality<br>▶ Little IT support required<br>▶ Can build process around content contribution and maintenance that involves users<br>▶ Easy to use | $ |
| Open source Wiki | ▶ "Free" tools like MediaWiki (technology behind Wikipedia)<br>▶ User communities to develop application | $ |
| SharePoint | ▶ Often already in the enterprise<br>▶ May be in use today, but in need of better organization<br>▶ Current versions have a solid Wiki option to leverage | $ |
| CRM Knowledge Base | ▶ Basic knowledge tools often included in CRM licensing<br>▶ May require add-on licenses for more robust options<br>▶ Already integrated with CRM<br>▶ Can use for multimedia response | $$ |
| Learning Management System | ▶ Common content with what training uses<br>▶ May require additional licensing<br>▶ Needed content may reside in other repositories<br>▶ Search engine may not be ideal | $$ |
| Chat and/or Email Response Application | ▶ Basic knowledge tools often included in chat or email response application<br>▶ Usually self-contained in the application and targeted for text-based responses so may not help for handling phone calls<br>▶ Provides a process for content development and management | $$ |
| Full KM System | ▶ Most robust option that covers full functionality so best fit for large, complex, dynamic knowledge needs<br>▶ Integrates with your web site to support self-service<br>▶ Larger project (time and resources for design, development, integration, testing, etc.) for both contact center and IT<br>▶ Most costly | $$$ |

know to execute a transaction or follow a process. The other contains answers to questions that callers are asking. The presentation and location of these two types of information may differ.

Now you will want to get the right resources in place (people). This is a really important piece of the puzzle. Ideally, centers establish a dedicated knowledge manager role. If the size of your center won't justify that, tie this role in with related support functions such as process optimization or training. Alternately, consider a respected supervisor or team lead, or perhaps an analyst who works in or with the center. It is important to find the right skills, experience and personality regardless of where the role resides. Seek someone who is good at organizing, communicating and collaborating. If that person does not work closely with the people who use the knowledge and tools, he or she is unlikely to succeed.

After addressing the people and technology, you will need to focus on the processes. All stages of a project—planning, design, development, data integration, testing, tuning and ongoing management—come into play. You will need to establish and manage the processes to ensure ongoing, effective use, and keep knowledge comprehensive, up to date and relevant.

Here are the some key processes to address:

- **Content Development and Structure:** Typically, the knowledge manager will be responsible for publishing new knowledge items tied to process changes, new products or services, training and system updates. As the amount of information can be overwhelming, structure "bite-sized" pieces that agents can readily digest. Your tool(s) will influence how you structure information and optimize search and retrieval. Keep in mind that it is not just about documents; it is about getting to the right information for the issue, wherever it resides. When you have multiple content repositories to organize, you can start with links to exact pages or locations of the answer or process steps agents need to follow.

- **Content Submission:** Define who can provide content and how. In a dynamic environment where agents are big contributors, you want real-time submission to become routine. Just solved a problem? Create some knowledge.

- **Content Approval:** Many tools provide a work process to review submission for editing prior to making the item available to the user community. This gives knowledge managers the chance to review and edit submissions for accuracy and ensure consistent structure for optimal results.

- **Content Expiration and Refresh:** Not all information should live forever. Some tools allow you to define business rules for information to expire or require a review and refresh. Establish routines early to ensure that the information does not quickly get out of control.

Content optimization includes leveraging your search engine to identify key words and phrases to return the "right" answer. Some tools offer ratings so you can move the most valuable information to the top. When possible, use your tool to provide reporting on the use of information and who is using the tool in what ways. The combination of reports and regular user feedback should help to optimize the tool and outcomes.

Finally, reward the contributors, using those ratings and reports. Establish a program that will continue to motivate the users who share knowledge. You can build a reward program in any number of ways depending on the resources and budget available (e.g., gift cards, reward points, day off, simple visual recognition).

## Partner with IT and Agents on Implementation

As you establish processes and begin to work with the technology available to you, plan on involving and working with IT, training and other departments to assist in the project and processes. IT will assist you in optimizing the technology and integration of the tool with other systems for quick information access (noting it varies tremendously depending on which type of solution you are pursuing). A key part of the tool's success is usability and integration with your customer information systems, CRM or primary desktop interface.

For best results, build a prototype before you roll it out to the center. Define test cases with actual live data and content. Use your agents to pilot the systems to ensure that you are returning the right information and application usability. Select experienced as well as new agents to test-drive the system and use their feedback to fine-tune the tool, processes and their management.

## Reap the Rewards

The broad range of available KM tools should be an inspiration to reenergize an existing initiative or starting something new. Secure the resources and apply the technology that is the best fit for the current environment, the pain points you need to address, and your goals and requirements for the future as your business and operations evolve.

KM can reduce training time and have a positive impact on KPIs such as FCR, AHT and customer satisfaction. With a knowledge-sharing strategy that encourages and rewards contributions, you'll improve content reliability, relevancy, consistency and accuracy. And last, but not least—you'll make your agents and customers happy!

**Matt Morey** is a Senior Consultant at Strategic Contact.

✉ matt@strategiccontact.com
☎ (913) 681-5133

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Contact Center Pipeline is a monthly instructional journal focused on driving business success through effective contact center direction and decisions. Each issue contains informative articles, case studies, best practices, research and coverage of trends that impact the customer experience.  Our writers and contributors are well-known industry experts with a unique understanding of how to optimize resources and maximize the value the organization provides to its customers.

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