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DOING MORE WITH KNOWLEDGE MANAGEMENT

TO REAP THE BENEFITS OF KM, CENTERS NEED THE RIGHT STRATEGY, THE RIGHT TOOL AND THE RIGHT PROCESSES TO MANAGE AND MAINTAIN IT.

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CONTACT CENTER PIPELINE

SMART INSIGHTS AND PRACTICAL ADVICE FOR THE CONTACT CENTER
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KNOWLEDGE MANAGEMENT (KM) IS AN ACHILLES' HEEL FOR MANY CONTACT CENTERS. Some have an abundance of "tribal knowledge" scattered among a core of seasoned customer service representatives yet struggle to find ways to disseminate, update and use that knowledge effectively. Others have made investments in KM technologies but failed to make the tools appropriately accessible, relevant and time-sensitive.

KM technology has the capacity to establish order out of informational chaos. It's an invaluable tool to address questions and issues that arise during agent interaction handling and customer self-service transactions. KM technology provides critical capabilities most centers need:

- **Content management:** A database of knowledge items with targeted content to resolve customer questions and issues.
- **Workflow:** A configurable work process to add contributions and review existing ones for accuracy and relevance.
- **Search:** A reliable means to produce the right content in response to agent or customer input.

When implemented properly, KM technology can reduce average handle times and increase first-contact resolution, improve customer service, bolster agent morale and stimulate use of self-service channels. To reap these benefits, the center needs to hit the mark on three key elements: the right strategy, the right tool, and the right processes to manage and maintain it.
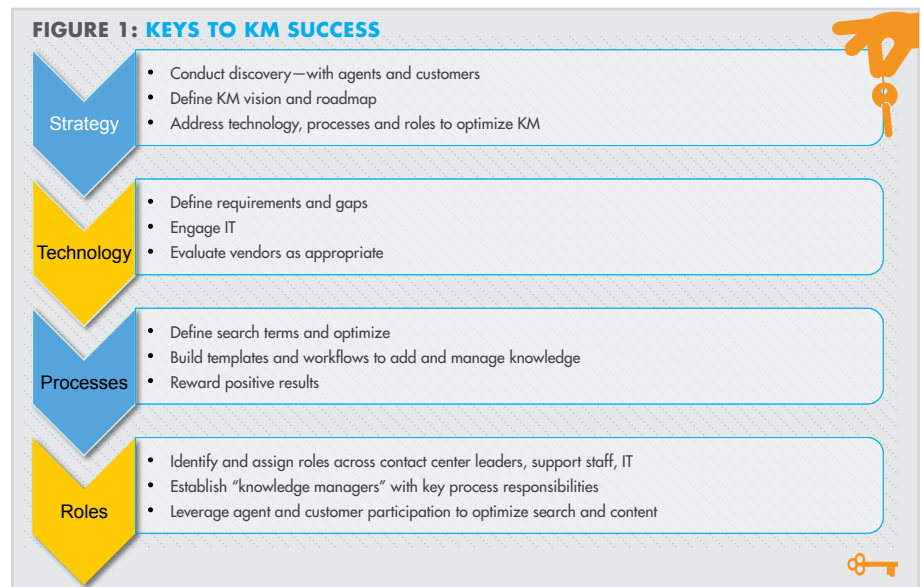
Build the Right KM Strategy

The concept of "Ready, Aim, Fire" applies as much to the challenge of KM as it does to hitting the bull's-eye with a bow-and-arrow or nailing a free throw in basketball. If you are serious about making a quantum improvement in your center's knowledge management while spending resources wisely, you need to invest the time to do it right.

The "Ready" part of the equation calls for taking stock of where you stand with KM. It means identifying all of the repositories where you maintain relevant content as well as all of the available technologies to access them. You may be surprised by the number and diversity of resources—e.g., cheat sheets, binders, files in individual personal computers, file folders on the internal network, SharePoint directories, wikis, Customer Relationship Management (CRM) solutions, and (*underutilized*) KM applications.

Taking stock requires walking a mile in your reps' shoes to see what resources they actually use, when they use them, and the processes through which they access the information. Observations, interviews and focus groups are all good methods to use. In our client work, we've identified a number of KM challenges:

- The desired information may be buried in a big document or "hidden" among a seemingly endless list of files on the center's intranet.
- Stored documents use keywords and phrases that are unfamiliar to the people who are trying to access the information. As a result, the words they enter into the search fields don't produce any (good) matches.

FIGURE 1: **KEYS TO KM SUCCESS**

Strategy
- Conduct discovery—with agents and customers
- Define KM vision and roadmap
- Address technology, processes and roles to optimize KM

Technology
- Define requirements and gaps
- Engage IT
- Evaluate vendors as appropriate

Processes
- Define search terms and optimize
- Build templates and workflows to add and manage knowledge
- Reward positive results

Roles
- Identify and assign roles across contact center leaders, support staff, IT
- Establish "knowledge managers" with key process responsibilities
- Leverage agent and customer participation to optimize search and content

- Agents are under the mistaken impression that the customer information system (CIS) has all the answers. They lose time (and patience) exploring this tool rather than accessing other resources to find what they need.

- Either agents are unaware of the range of technologies to which they have access, or they are not trained to use them.

- Agents think it will take too much time to use the available tools to find answers and simply escalate the matter to their supervisors or SMEs, or more informally tap their neighbors for input.

Knowing what issues your agents face helps you to get a sense for the scope and complexity of your total knowledge requirements. If your customers tap knowledge through self-service (IVR, web or other), you'll want to do a similar discovery process walking in *their* shoes. These efforts identify hurdles that may crop up as you tackle knowledge-based initiatives. The better informed about your KM past and present, the more likely you'll make intelligent decisions for its future.

Your strategy should contemplate the future state that you endeavor to create—i.e., the target toward which you'll "Aim." Ideally, your end state should support KM for all assisted-service channels and customer self-service options. It should define the breadth and depth of content needed to support each role and channel as well as how each knowledge element will be accessed. It should contemplate a search function that delivers the proper content on every use, based on words and phrases the user would actually enter. And it should limit the number of content repositories to simplify knowledge administration and ensure consistent information delivery across all points of access.

When defining your strategy, consider how agents use knowledge aids when assisting customers as well as their role in managing and maintaining the knowledge resource(s), in addition to the resources that will be assigned direct "knowledge management" responsibilities. For example, you need to provide a means for agents to rate existing content, contribute new content, and send up a

KM IS A TEAM SPORT, *TABLE 1 BELOW*

It takes a village to build and maintain an effective knowledge management solution. The following table outlines roles and responsibilities that should be factored into the overall implementation.

ROLE	DESCRIPTION	OTHER POSSIBLE ROLES (IF NOT A DEDICATED INDIVIDUAL)
KNOWLEDGE MANAGER	The primary strategist and decision maker who approves processes for managing knowledge.	▶ Manager of Training ▶ Contact Center Manager
CONTENT OWNERS	The individuals who review, edit and publish content. This role may be spread across multiple SMEs and may include individuals who are not part of the contact center. Smaller centers may have one person (and a back-up) assigned to the task who utilizes SMEs for content generation and approval.	▶ Product Manager ▶ Trainer ▶ Engineer ▶ CC Lead ▶ CC Supervisor ▶ CC SME
PROCESS MANAGER OR ANALYST	Defines processes for adding knowledge items and reviewing existing content. This individual provides oversight of content owners to ensure they are following consistent processes.	▶ Knowledge Manager ▶ CC Lead ▶ CC SME ▶ Process Optimization Analyst
TECHNOLOGY ANALYST	Assists in configuring the technology to support the center and its KM processes. Ideally, this role is staffed by someone in the CC to avoid delays caused by competing IT priorities. Utilize this resource to assist with fine tuning your search function.	▶ IT Analyst ▶ Application Programmer ▶ CC Lead ▶ CC SME ▶ Process Optimization Analyst
KM ANALYST	Examines reports on the search function and the value of the content surfaced during searches. This analyst assumes responsibility for fine-tuning searches in cooperation with management and the front line.	▶ Reporting Analyst ▶ Process Optimization Analyst ▶ IT Analyst

flare when important content is missing or out-of-date. Similarly, you'll need to assess the customer experience with KM via self-service and incorporate their feedback into your continuous improvement efforts as well. The processes you define and resources and time you assign to leverage KM technology will be critical to success (more on these below).

With unlimited resources, you might have the luxury of taking aim at this all-encompassing target and fire. In the real world, we have resource limitations as well as the good sense to know that we might choke if we bite off too large a piece all at once! A carefully considered strategy keeps an eye on the long-term target while crafting a roadmap that moves in the right direction sensibly and affordably. (See Figure 1.)

Identify the Right KM Technology

Having grappled with your KM present and envisioned your KM future, it's time to put the time and effort into identifying the right tool(s) to hit the mark. Use all of the information gleaned while crafting your strategy to develop a detailed list of KM requirements. Document known gaps, inconsistencies and redundant information repositories. Articulate the preferred implementation phases ("roadmap") and the rationale for the project priorities.

Share your KM vision and requirements with your IT department. They may have experience with a variety of technologies used in other parts of the enterprise, including but not limited to SharePoint, KM, CRM, content management systems (CMS) and email response solutions. One or more of these technologies may be a good fit for the contact center while helping to minimize overlapping content repositories. You may also identify knowledgeable personnel within IT who can assist with designing your KM structure or building system interfaces, CMS databases, workflows and search engines.

Should you need to look outside for a solution, your initial planning efforts and in-depth conversations with IT will empower you to take charge of your vendor interactions. The following is a partial list of key topics of conversation:

- How will the solution organize and structure content from the existing array of resources? With which internal systems will the proposed solution require integration? Which repositories can be supplanted by the new solution?

- How will outside systems interact with KM—e.g., website access, email response systems?

- What tools are available to process/edit new contributions and review existing ones periodically for accuracy and relevance? How many levels of authority does your solution support? How are these levels assigned to personnel in a typical implementation?

- Through what means do you build and optimize your solution's search capabilities to reveal context-specific knowledge at the right time? What role do we play in making that happen?

- How do you fine-tune your design and implementation to ensure that it is genuinely functional and user-friendly for our agents and customers?

These educational and thought-provoking discussions will help refine your requirements and set the stage for preparing a formal Request For Proposal (RFP).

While space limitations preclude a detailed discussion of the vendor selection process, you might consider reading a few other articles we've written for *Contact Center Pipeline*: "Technology Sourcing Decisions in a Complex Market" (September 2014), "Optimizing Technology Selection (August 2011), and "Defining an Effective Statement of Work for Technology Implementation Success" (September 2010).

Establish the Right Supporting Processes

When you get ready to "Fire" up your solution, your contact center team will participate actively in the design process. You'll work with the vendor to institute a knowledge organizing structure to optimize your search engine. As you assign search terms to each document, use words that customers use when asking about your products and services. Avoid internal jargon. Get agents to test-drive the solution and use their input to fine-tune your search engine. You'll boost their confidence in the tool and establish a feedback loop that will remain active for the life of the solution.

Search engine optimization is not a once-and-done process. Use reports from your technology (e.g., frequency of use, value of search results, etc.) to fine-tune your solution on a monthly basis. Reports combined with agent feedback help to ensure that the correct knowledge items surface based on the keywords agents enter and the terminology customers use. A well-tuned search engine is crucial for your KM solution's success.

To manage additions to your KM data base, establish a template for formatting input and a process to review new content for publishing. Use your KM solution to build the template. Use the solution workflow to route new content through the appropriate approval chain, allowing for editing along the way. Identify the appropriate keywords to optimize search, and then edit the information for a consistent look and feel.

Institute a review process for existing knowledge items to ensure that they remain accurate and relevant for interaction handling months and years after the original publication date. Configure each knowledge form with a trigger for content review or a content expiration date. Define workflows for the review process consistent with the type of information provided and requisite level of authority.

The final step for your KM processes is to establish incentives for knowledge contribution. A well-designed rewards process encourages the "front line" to participate in content development (updates, additions, identification of missing content, etc.). Consider gift cards or time off as a tangible "thank you" for providing published content that improves service, resolves issues and/or increases efficiency.

Stay the Course

With a clear vision, the right technology and consistent processes to support it, KM can transform from an organizational "pain point" to a strategic asset. By consolidating and organizing information, first-contact resolution goes up, handle times go down, customer satisfaction soars, and agents become more productive and confident in their work. While KM nirvana may not be attainable, the technology and the organizational support to go with it merit a substantive effort by all affected parties to get as close to it as possible. ◉

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