

## **YOU CAN'T AFFORD *NOT* TO PURSUE KNOWLEDGE MANAGEMENT**

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# YOU CAN'T AFFORD NOT TO PURSUE KNOWLEDGE MANAGEMENT

## New Technology Solves an Old Problem

BY LORI BOCKLUND, PRESIDENT, STRATEGIC CONTACT INC.

**K**nowledge Management (KM) may be the single most impactful technology to help centers address key goals:

- **Reduce workload** through greater self-service and shorter handle times
- **Improve First-Contact Resolution (FCR) rate**, and with it, the customer experience
- Enable agents to **handle increasingly diverse and complex contacts** without extensive training and specialization

Contact center leadership understands the potential, but there's an elephant in the room. Many fear that the KM challenge is too big to tackle. So, companies tiptoe around it, to the detriment of their customers and their contact center. It's time to acknowledge the problem and solve it, embracing the evolution of technology and the *new* things that can be used to solve this *old* problem.

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With the cloud and modern software development approaches and architectures, centers can pursue KM without the inertia that prevents knowledge cleanup, development, maintenance, integration into the desktop, and user adoption. The result will be a well-organized and highly searchable knowledge base that transforms agent-assisted service and creates a new opportunity for self-service.

### KM Addresses Issues Your Center Faces

I'm guessing the scenarios I'm about to describe will sound familiar. We see these situations in centers of all sizes, across many verticals.

#### THE FRONTLINE PROBLEM

What do agents do when they can't find information? They transfer the call (hot potato!). Or, they put the caller on hold, while they dig through documents, ask their neighbor, consult with the "subject-matter expert," or even go walkabout to find somebody who can help. Maybe they even utter those dreaded words, "Let me research this and someone will get back to you," leaving the customer wondering, "Who?" and "When?" None of these options meet business goals or customer expectations.

If Agents can find the information they need, it can take a long time, and they may not trust it. It may be out of date, unclear, in conflict, or my favorite, "not structured the way I think it should be." The result is a quick downward cycle on the use of the Knowledge Base (KB) while "cheat sheets" and tribal knowledge become the go to sources.

These scenarios were common enough before companies beefed up self-service through online and mobile applications. Now, centers struggle with what I call the "O-Factor"—agents are *overwhelmed*, trying to retain knowledge on an increasingly complex and diverse set of contact types, many of which they rarely handle. The result is high attrition (especially for new-hires) and poor performance. So, centers segment skills to train agents ("specialists") in phases to build competency but compromise economies of scale and risk more transfers when they do. (SEE

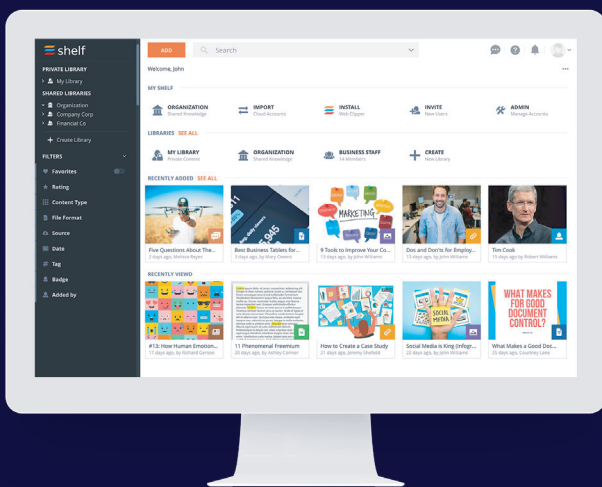
FIGURE 1.)



Knowledge Management  
For a Changing Workplace

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Solve Big Problems with a New, More Intelligent KM

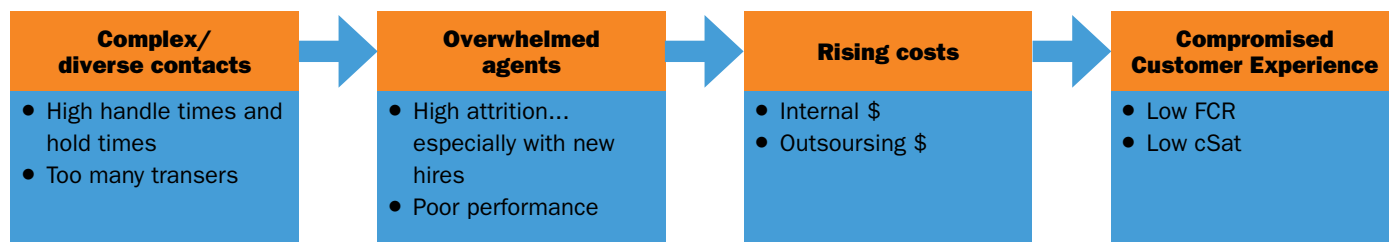
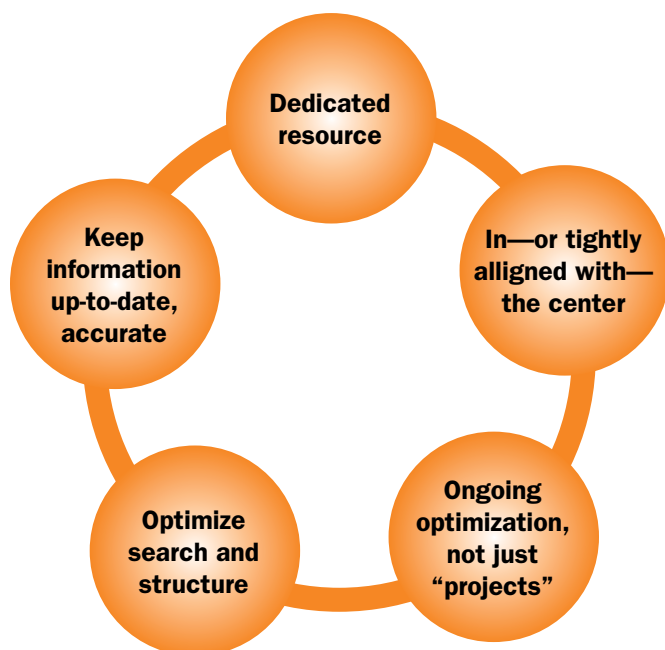


Shelf is an award winning contact center knowledge management platform. Shelf offers advanced AI automation and the best search in the industry to help agents quickly find, manage and solve customer issues on the first call. Some highlights;

- Search inside of documents, audio and video files to the exact location of keywords
- Rated "Top 5" in usability out of over 500 companies by Gartner's Capterra
- Leverage advanced analytics & AI to gain new insights into user behavior
- Work with a certified KM expert to setup your account for long term success

Used by organizations like Slalom, Amazon and Nielson, Shelf was designed by a Harvard knowledge management expert and data scientist to make managing and finding information easier than ever before.

**Contact us to learn more:**  
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**FIGURE 1:** The Frontline Problems Have Real Impacts**FIGURE 2:** Characteristics of a Good Support Scenario

*Agents are overwhelmed, trying to retain knowledge on an increasingly complex and diverse set of contact types, many of which they rarely handle. The result is high attrition (especially for new hires) and poor performance.*

These scenarios can be even worse in environments with an outsourcer as “tier 1” where the frontline agents compound cost by transferring calls back to in-house resources, further degrading the customer experience.

#### THE SUPPORT PROBLEM

Many centers don’t have an analyst or full-time knowledge manager role. Someone is expected to manage the knowledge “in their spare time.” Those centers lucky enough to have an analyst often rely on someone with broader responsibilities (potentially in another department), making it hard for them to focus on the

“in the trenches” situations the contact center faces. Without someone focused on optimizing knowledge, it can quickly grow stale and ineffective in meeting agent needs. (FIGURE 2 illustrates the characteristics of a good support scenario.)

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When contact centers don’t have budget or bandwidth to keep the knowledge base up-to-date, staff end up “dumping” documents into the knowledge base. More is not necessarily better. Agents try to find the nugget of gold within a long list of documents, some of which may be duplicates or in conflict. Marginal search functions don’t deliver targeted, “bite-sized” answers. Worse, KM built on folders and links make the agents feel like they need to understand someone else’s organizational structure. When it feels like a mismatch, they abandon use of the KB altogether and find their own way.

#### The Answer

If you are nodding your head and chuckling as you relate to these problems, it’s time to focus on this new era of KM and deal with the elephant—because that beast isn’t as big as you think! Powerful search and access to the right information in a timely fashion is possible. Here’s how you do it:

**1. Use a cloud-based solution** to ensure rapid implementation (infrastructure and application) and minimize demands on IT upfront and ongoing.

**2. Leverage vendor expertise** to overcome the inertia of getting started. With proven implementation methods and tools, a skilled vendor can help you populate, organize, structure, and tag your information and get you on a path to production quickly.

**3. Build user confidence and proficiency** by demonstrating the ease with which they can find, consume, and rate information. With a great user interface and powerful search to access concise, well-structured content, agents succeed without excess training, specialization, or heavy reliance on others.

**4. Optimize the solution** using reports, workflows, feedback, intelligence and automation to identify changes and improve-



## INDUSTRY TRENDS HIGHLIGHT THE CLOUD KM OPPORTUNITY

In spite of rumors to the contrary, the need for agents is as strong as ever. Contact Centers are planning for growth (agents!), even as the Artificial Intelligence hype train rambles on. Strategic Contact's technology survey shows growth as a top driver for acquiring technology for 40% of participants. In addition, 58% seek to fill feature/function gaps—and KM is undoubtedly a big one ("2018 Contact Center Technology Survey Reveals Critical Needs," *Contact Center Pipeline* Special Report, July 2018).

Centers are moving to the Cloud for a variety of technology solutions. Analyst firms such as Forrester and DMG, as well as vendor surveys, show the cloud contact center technology market growing. Our survey agrees, showing very few shying away from cloud technology. In fact, about one-third have cloud solutions and a majority would consider them. Combine that eagerness to use the cloud and the top implementation challenges people are trying to address—integration and the shortage of IT/telecom resources—and the opportunity for an easily integrated, cloud-based KM is strong.

Digging deeper into KM specifically, we note it ranks high on the "Top Priorities" list but also looms as a tool to combat many of the "Top Challenges" we see in our annual survey ("Contact Center Challenges & Priorities for 2018," *Contact Center Pipeline* Special Report, January 2018). In our most recent results, 18% indicated they want to improve knowledge management access, content, and processes. Arguably, that number would be higher if more believed this "elephant" could be moved.

KM is also a top enabler to help agents succeed on target performance metrics. It can improve FCR, perhaps one of the "hottest" metrics. It can reduce Average Handle Time (AHT), something that can easily creep up with the increasingly complex and diverse contacts that agents handle and can have a huge impact on performance in other key metrics like service level. Add improved self-service based on good knowledge sources to those handle time and FCR improvements and the overall workload declines, boding well for every center under pressure to reduce its costs.

All this agent success and cost savings for the center and the company comes with a tremendous bonus: customer satisfaction. Whether your focus is the customer "journey" or "experience" or you really want the customer to give you a big thumbs up on a customer satisfaction survey, good KM optimizes the customer experience on first touch, with consistent, accurate information that is easily acquired and processed, no matter what channel they choose to use.

ments that will enhance the user experience—and customer experience—every day.

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*With a great tool and vendor partner, KM transforms from a vicious cycle into an upward spiral. The trusted source is accurate, consistent and up to date. People use it routinely and provide feedback to build a continuous improvement loop.*

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With a great tool and vendor partner, KM transforms from a vicious cycle into an upward spiral. The trusted source is accurate, consistent and up to date. People use it routinely and provide feedback to build a continuous improvement loop. Knowledge and ability spreads through technology, not proximity or affinity.

A tool that helps the support resources manage and optimize knowledge also knocks down one of the biggest hurdles: good KM reduces the maintenance burden and therefore the time demands on the knowledge manager(s). And it also ensures the KM structures suit many, not few.

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The investment will pay dividends on the bottom line that business leaders appreciate, through benefits agents and customers experience:

- Lower handle time
- Higher first contact resolution
- Fewer transfers
- Shorter training time
- Faster time to proficiency

### Your Call to Action

Your next step is to pursue a KM initiative that breaks through the inertia to fix or replace KM, and moves you beyond the "do nothing" or "stop gaps" approach. To get the full white paper on how to implement KM initiatives, future trends, and advice on selecting a vendor, please visit [www.shelf.io/km-report](http://www.shelf.io/km-report) 📄



Lori Bocklund is President of Strategic Contact, an independent consulting firm that helps companies optimize the value of their customer contact technology and operations. Lori is a recognized industry leader in contact center strategy, technology, and operations. ([www.strategiccontact.com](http://www.strategiccontact.com))

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