The Power of a Knowledge Management Platform to Transform the Customer Journey

The Solution to Your—and Your Customers'—Challenges Starts at the Very Beginning

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"*Let's start at the very beginning, a very good place to start…*"

You're racking your brain trying to recall where you've heard that line, and you can't get it out of your head. You finally relent and Google it or ask Siri or Alexa to relieve your suffering. "Do Re Mi from The Sound of Music." Problem solved.

Most of us rely on Google (or Bing, Siri, Alexa, etc.) as a research assistant when we want quick answers and it's no different when we explore products that intrigue us or when we need to fix something, resolve an issue, or get "how to" help with products we already have. We like having access to a broad resource pool on the web, including videos, other user experiences and input, and the manufacturers' or vendors' expert resources. And we want to handle inquiries on our own.

As contact center professionals, we need to translate this personal insight into a professional call to action. Much as we like to focus on those aspects of the customer journey that land on our turf, we need to face reality. The trailhead for customers' treks may be situated far afield of contact centers and self-service tools. So, we need to ask: how do companies define and deliver service excellence and sales success *at every stage of the journey*?

The Journey Begins Where the Customer Starts

Companies have been getting better at taking the customer experience into account when architecting their contact center interactions and self-service offerings. "Customer journey maps" have become popular tools to capture the customers' current and future walk across multiple touchpoints and narrate their perceptions in terms of needs, expectations, and goals. Done properly, these maps deliver insights that benefit customers, the corporation, and the bottom line. Unfortunately, our natural tendency toward an internal focus can thwart the effectiveness of these efforts.

For example, if you focus on contacts heading down to the agent level—perhaps with the objective of reducing average handle time (AHT)—**you're too late in the journey**. According to Harvard Business Review, "fully 81% of all customers attempt to take care of matters themselves before reaching out to a live representative."[1] At best, focusing on the agent desktop limits the scope of inquiry

to a small subset of the overall population. At worst, it takes inadequate account of the frustrating path that landed them at your agents' feet and the higher cost incurred as a result.

Or, if you are jumping on the bot bandwagon and want to envision a new customer experience that starts with your customers talking, chatting, or texting with a bot, you need to challenge yourself to address whether that is what *they* want, or what *you think* they want. Crank it up a notch and think about what their first step really is, and how they are going to get to the information and answers they seek.

If you really want to improve the customer experience or optimize the customer journey, you need to start where customers start (see Figure 1). "Self-service" may begin at Google (or other search engines), or with a command thrown out to a mobile device or smart speaker, or using the help feature of a device or program. It may avail itself of outside search and navigation tools and progress through a variety of channels and contact types—for example, online/web, mobile app/mobile web, web chat, text, call, etc. And if your product is embedded in a network of objects that routinely collect and exchange data (a.k.a., the Internet of Things), there may be status codes, errors, messages, and updates that factor into the equation.

Figure 1: **Where Do Your Customers Start—and End—Their Journey?**
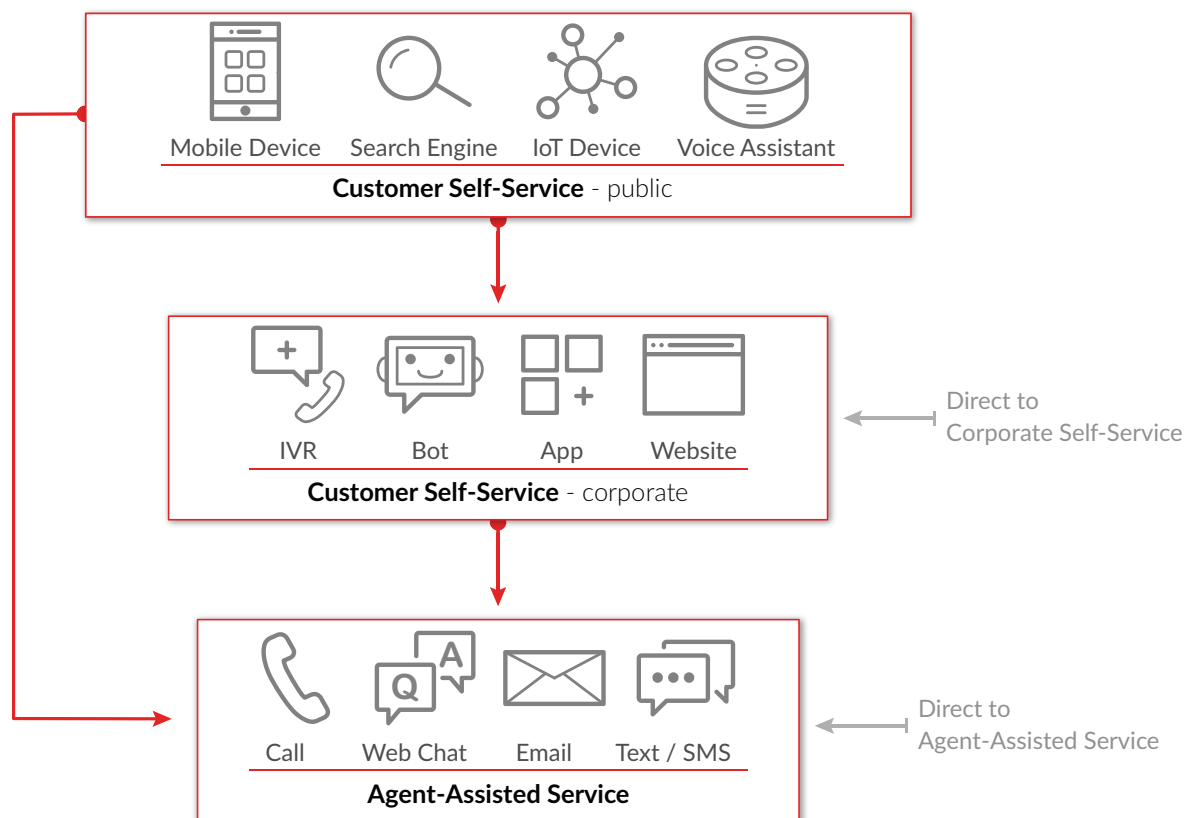
Starting where the customer starts ensures you address the largest population of user types, scenarios, and approaches, whether your users are shopping or problem-solving. That requires thinking broadly about the sales and service scenarios (or use cases) that apply to your customers and products. It demands walking in their shoes and following the steps that they take, rather than the steps you want them to take.

Most companies don't really start at the very beginning and completely miss out on the chance to influence their customer's successful journey with them. To that end, don't be afraid to go to the source. Put a focus group together and ask your customers where they start their journeys and how they proceed from there!

Once you've mapped out the full journey, you'll have a better sense of which tools, search, navigation, and content can satisfy customers' needs. You'll gain clarity on who winds up in the contact center, why they landed there, and what they'll need from you. And, you'll be able to optimize their journey and your overall cost to assist them on that journey.

REDEFINE SELF-SERVICE IN CUSTOMER TERMS

Customers don't think about "self-service" or "channels," and they certainly don't think about who owns each channel within your company. They just think about getting the information they need quickly and conveniently. Moreover, they expect the same content no matter what their point of entry; they're disappointed (and frustrated) when reality falls short of this expectation.

We've always pushed for consistency across self-service tools—for example, IVR, website, mobile app, and now bots of various sorts. Customer expectations cannot be met when these applications are addressed as silos, each with their own source(s) of information. And since your customers (and prospective customers) regularly seek information and answers outside of your realm, you need to help them get the right story—ideally one that suits your mutual interests.

In this new paradigm, self-service may happen in an implicit partnership. The user interface (or front-end of the interaction) may be provided by someone else to determine the customers' intent and guide them on their paths. Your knowledge resources (or back-end of the interaction) may provide the content that users seek.
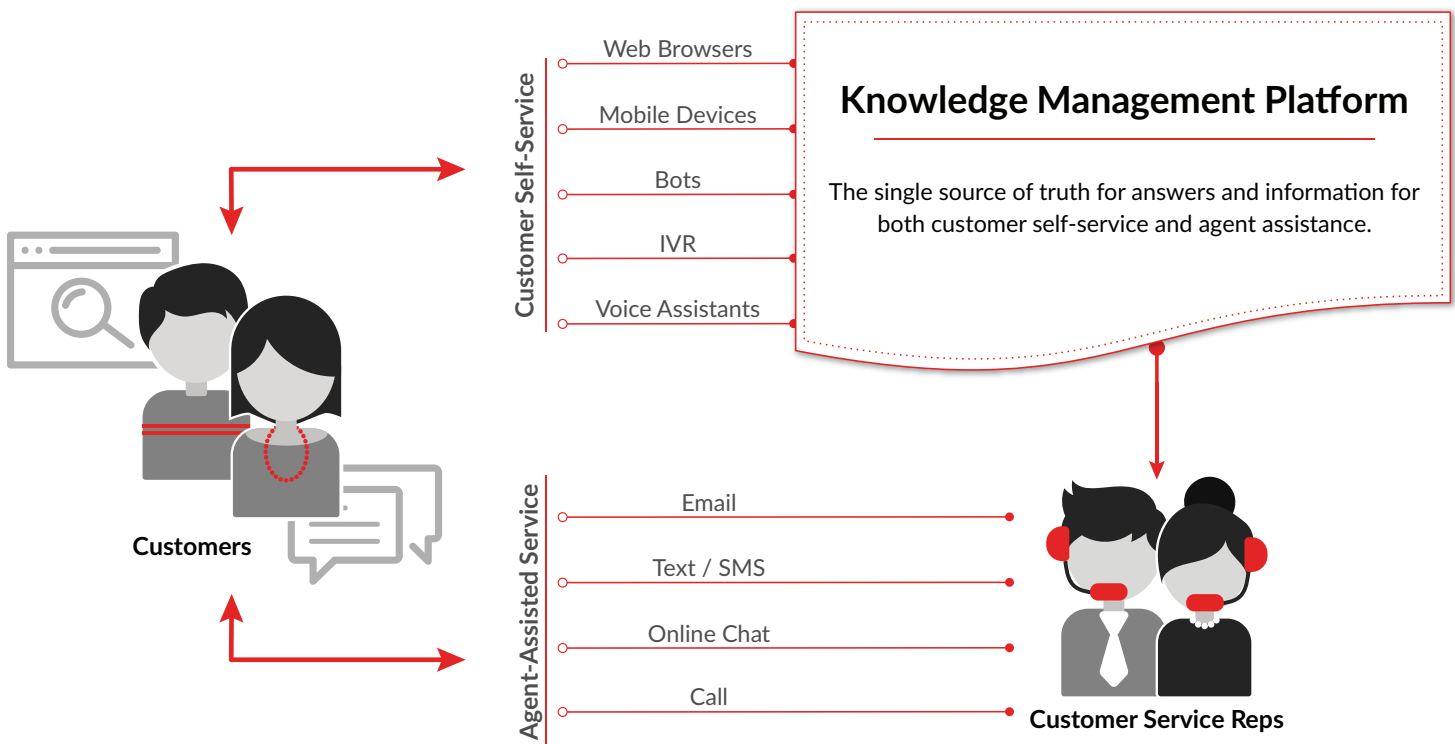
As such, you need to think about where third-party tools like Google get their information to meet customers' needs. Look for opportunities to ensure that the answers they serve up are consistent, accurate, and effective. Your participation in this process can transform a potentially frustrating user experience into a satisfying one that proves a magnet for new customers and loyalty-booster for existing ones.

A Single Source of Truth for All Interactions

As you consider the customer journey across the various scenarios, you want to provide a good road map that leads to a single source of truth *no matter which path customers travel*. You do that with a good knowledge management (KM) platform, which makes content accessible where it needs to be (which is wherever the customer is!). KM serves as the trustworthy source that delivers answers that rise above all the noise—including the noise created outside your control (see Figure 2)!

The kind of KM we're talking about is not a big pile of folders and documents hastily assembled in SharePoint. And it's not a repository designed specifically to assist agents with the intention of lowering AHT and increasing first call resolution (FCR). While these are worthy use cases and performance indicators, the resulting increase in efficiency only helps that percentage of customers who have opted (or resorted) to speak with someone. What we want is a KM solution that's hospitable toward that large population of self-servers, especially one that seamlessly works with search engines.

Figure 2: **The Interfaces are the "Means" and the KM is the "End"**

Customers

Customer Self-Service
- Web Browsers
- Mobile Devices
- Bots
- IVR
- Voice Assistants

Knowledge Management Platform

The single source of truth for answers and information for both customer self-service and agent assistance.

Agent-Assisted Service
- Email
- Text / SMS
- Online Chat
- Call

Customer Service Reps

Speaking of search engines, Google is the "poster child" for a great user experience. It's the perfect blend of simplicity, adaptability, and power. It lets us search with short phrases or long sentences. It provides helpful suggestions when we don't quite know what we're looking for or we're stumped on where to look. It lets us drill down into related terms and phrases to assist our exploration. And with each bit of input, it gets smarter about where we might be headed based on where we've been.

A genuinely hospitable KM environment delivers bite-sized content all along the route. It lets users assess whether they've reached the end of their journey or need to continue. If the latter, it helps them course correct and move forward in a productive search.

Think of useful information and answers as stepping stones along a path. With success on each footfall, people keep moving forward in confidence to reach a good outcome. The astute KM architect recognizes that each of these stepping stones intersects with multiple paths, because people do not look for information in the same way. In fact, KM success (or failure) hinges on its capacity to adapt to the different ways people pursue their searches or navigation!

So, if you set your sights on a KM solution that helps your agents AND accommodates your customers no matter where their journeys begin, you'll look for a platform that:

- **Creates and maintains content**, leveraging what you have but readily optimizing it to be accessible and consumable

- **Packages content in easily digestible "tidbits"** (aka "microcontent") to draw customers in, instill confidence, and empower them on their journey

- **Captures data, actions, and outcomes** and uses them to optimize current needs (personalization!) and prepare for the next ones (for that customer or the one who follows a similar path)

- **Adapts to various users**—whether searching or navigating—to deliver bite-sized info quickly, easily, no matter how varied the input or implied goals

- **Operates harmoniously with third-party search engines**, personal assistants, bots, etc. to feed content to their interfaces

You'll also want to consider how your KM solution fits within the overall ecosystem into which it will be introduced. That system includes all the channels and access paths (user interfaces)—whether self-service or assisted service, customer relationship management (CRM), existing knowledge sources, channel management (routing, reporting), etc. And if you are on the bot bandwagon, don't forget the role of KM in your project!

Laying the Foundation for KM

Since most companies assign responsibility for their customer interaction channels to different departments, planning for the ideal customer journey, across channels, isn't a breeze. In fact, it can be a struggle getting everyone on the same page, especially when the various groups—digital channels, marketing, IT, the contact center—have competing goals, priorities, and pressures. Not surprisingly, cross-departmental collaboration has figured prominently as a challenge every year that we've administered our Challenges and Priorities Survey. But the 2019 edition provides the impetus for tackling this challenge:

- Nearly 22% prioritize implementing and improving self-service, whether via IVR, web, or mobile

- Nearly 20% identify improving knowledge management access, content, and processes as one of their top priorities

Both initiatives call for an effective KM solution to make good use of the invested resources. Both require cross-departmental collaboration to achieve an optimal result.

KM can become the rallying cry around which all the departments congregate. Each channel owner has a vested interest in ensuring that customers receive the right information, in the right format, at the right time to answer their questions or resolve their issues. The channel owners may also be keenly aware of how their offerings suffer due to a lack of available (bite-sized) content and/or inconsistencies in content delivery across channels. Getting it "right" serves each of their interests, improves the customer experience, and contributes positively to the bottom line.

As you envision your high-level KM architecture, think about where your customers start their journeys and consider the resources that they may tap before finding their way to you. This point of entry holds the promise of a wider reach, lower customer effort, better customer experiences, and greater value for the business. It leverages tools and technologies that are beyond your direct control but add efficiency and effectiveness to the overall equation. It also confers benefits for all concerned when customers move further into (or directly access) corporate self-service or agent-assisted service.

The task at hand seems daunting, especially for those who've had a difficult time getting KM off the ground within their own spheres of influence. Extending the scope of inquiry to include third-party search engines, navigation, bots, and the like may seem like a bridge too far. But it's a road that does not need to be traveled alone, and it is one that can be less intimidating than it appears. Chances are, the 80/20 rule (or better!) applies to your knowledge: most of the questions customers ask can be answered with a small percentage of the content you think you need to create. Start with the "big hitters" and you will likely get some quick home runs.

KNOWLEDGE MANAGEMENT SOLUTION
Starter List

☑ Platforms that work with all channels—those you control, and those you don't

☑ Services to help you identify, organize, prioritize, import and build target content, in the right format

☑ A vendor that "gets it" and starts at the very beginning of the customer journey

In addition, just as the vendor landscape has proven transformative with the introduction of cloud-based solutions, so too has the KM space evolved with *platforms and services* that smooth the transition from KM "wish list" to reality. Vendors build the platforms and interfaces to serve the company's internal requirements while creating the means to share content with third parties. They can help you implement a solution that helps customers regardless of channel and associated user interface. In short, they can help you put a tool in place that delivers the best Return on Investment (ROI), while having the greatest potential impact on *every* customer journey, *at every step* of each journey, no matter where they start.

ARE YOUR PROJECTS SET UP FOR SUCCESS?

If the top projects on your "to do" list are bots, AI, and/or improvements to individual self-service channels (IVR, website, mobile), pause for a moment and consider how effective those isolated projects will be. How will they guide a customer to the right answers and information? You need a robust KM platform for all channels so those projects reap the results you expect!

Make Your Next Big Initiative About KM

We are in an era where people are excited to pursue new and improved self-service tools, and to implement bots. We applaud their enthusiasm and acknowledge the allure of these enticing solutions that might deliver big benefits. But it's important to think about what it will take for those projects to succeed.

Don't make your projects just about bots or individual self-service channel improvements. Don't get bedazzled by the all-encompassing "Artificial Intelligence." Find the right vendor partner to help you pursue a KM platform that can serve as a unifying tool to improve all points of access and, more importantly, the customer experience and corporate outcomes.

ARE BOTS THE "SILVER BULLET"?

Our recent Future of the Contact Center Survey shed light on participants' expectations of technology and its impact on the center and the customer experience. Sixty-five percent of respondents chose bots as the technology most likely to move the needle on contact center performance. However, that hope can only be realized if the bots tap the knowledge resources they need to address customer inquiries.

Keep in mind that perhaps the most popular, effective bots are ones on which you don't have to spend money and are already used by the vast majority of your customers and prospects. Google, Alexa, Siri, and others are all bots of a sort and will continue to gain strength in user interface and artificial intelligence as the means to help people find information and answers. Your strategic advantage will be leveraging a KM platform as the "go to" resource that bots tap to provide high-quality answers.

Endnotes

1. Matt Dixon, Lara Ponomareff, Scott Turner, and Rick Delisi, "Kick-Ass Customer Service," Harvard Business Review, January-February 2017 issue

ABOUT THE AUTHOR

Lori Bocklund is President of Strategic Contact and a widely recognized and respected expert with over 30 years of experience in contact center strategy, technology and operations. Lori has written dozens of articles for industry publications and has presented at conferences around the globe. In 2015, she received ICMI's Lifetime Achievement Award for her contributions to the contact center industry.

ABOUT STRATEGIC CONTACT

Strategic Contact is an independent consulting firm that helps companies optimize the value of their customer contact technology and operations. Strategic Contact helps companies develop and execute plans tied to business goals, conduct assessments and build roadmaps, develop technology requirements, select appropriate solutions, and manage projects to successful implementation.

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ABOUT MINDTOUCH

MindTouch offers an enterprise-grade, AI-powered knowledge management platform that includes functionality for customer self-service, agent assistance and departmental knowledge for organizations of all sizes and industries. Focused on the customer experience, MindTouch is trusted by more than 340 companies worldwide to deliver knowledge when it's needed, where it's needed and how it's needed. The result is faster, more consistent and more personalized customer service, along with increased operational efficiencies. MindTouch was founded in 2005 and is headquartered in San Diego, California.

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