

# Share the Wealth of Knowledge in Your Center

Leverage technology to take control of your information resources and provide timely access for agents and customers.

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**K**nowledge is power. For contact center representatives, it's the power to access the right information, the right resources, and/or the right processes to serve customer needs. It's the power to resolve issues on the first contact in a timely manner. And it's the power to feel competent and confident on every interaction. For customers, it's the power to get consistent information no matter which channels they use to retrieve it. And it's the power to expand the breadth of interactions with which they can self-serve.

There are many different forms of knowledge and job aids across the center and the corporation. They're spread across systems, documents, handwritten notes and people. Some are generated through formal organizational roles, processes and systems; others are home-grown on the front line. Procedures may not exist to ensure that the material remains current, accurate and uniform across departments. And subject-matter experts may be in short supply to bridge the gaps or broker disparities when agents and customers need help.

Numerous studies have shown the "bang for the buck" from knowledge solutions. It's time to leverage technology—and the associated people and processes—to get control of your information resources and provide a convenient way for agents and customers to gain access and contribute. And it's time to develop processes to monitor relevance and validity.

### Technology Can Bring Order to Chaos

The issues associated with managing information resources are not new. Fortunately, there are some excellent tools to help you rise to the challenge and make a real difference for your company, your agents and your customers.

**Knowledge management (KM) systems** leverage existing resources and newly created content to provide answers to user queries via a natural language interface. Their search engines pull and assemble information directly from the root sources, including databases, data directories with specific files (e.g., .PDF, .DOC, .TXT, etc.), CRM systems, intranets, extranets or websites. By allowing agents to enter questions in the customers' own words, companies develop a sense for how customers understand and use their offerings. On the self-service side of the equation, customers on the web are more likely to find what they need using KM's natural language and search capabilities, accessing information made available to the outside world.

KM systems also support scripted responses to questions that can drive cross-sell/upsell activities. For the multimedia center, KM can be used to populate text for automated or manual processing of email inquiries. Knowledge can be added to the system and updated through use of templates and automated workflow processes that secure the appropriate reviews and approvals.

While KM technology avoids the burden of duplicating and synchronizing information in a central repository, it takes a bit of investment in time and money to implement. With today's pressure to do things fast and the proliferation of the web and social media tools, the challenges of KM open the opportunity for another alternative to knowledge sources: Wikis.

**Wikis** are special-purpose websites that give nontechnical users the wherewithal to create and edit any number of interlinked web pages using a simplified markup language or text editor. Pages can be associated with a table of contents, an index or other form of categorization. An integrated search engine delivers content by titles, keywords and phrases. (Think Wikipedia.) For most users, the price of admission is Internet or intranet access and a browser. For organizations, it includes a web host (third-party or premise-based), some applications software, and a community of users who are ready, willing and able to contribute. Unlike KM

systems that often take a year or more before users reap benefits, wikis can reach a critical mass of knowledge within a few months. (See the table below for a high-level comparison between KM and wikis.)

Microsoft's **SharePoint** is a file-sharing tool for which a great many organizations already have licenses. In its simplest form, it provides access to a library of electronic documents that authorized users can view, share and/or update. With the addition of wiki functionality in the latest release, companies have the means to launch a knowledge management project without going through a budgeting and vendor selection process, or troubling IT with implementation. The center simply needs to build an organizational infrastructure to support it and "rules of engagement" for the community to follow.

### Which Technology Fits Where

KM systems tend to be associated with applications for which the search-and-find operation must access multiple, pre-existing repositories of data. Governance is already in place to administer the data at the source and maintain its accuracy and completeness. It would be difficult at best to duplicate and maintain this information in a central repository. Roles that might leverage this capability include financial advisors or brokers given the breadth of services and systems that their clientele might engage and the frequency with which that information is updated.

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## Comparison of Typical Knowledge Management Systems and Wikis

<b>Knowledge Management</b>	<b>Wiki</b>
Structured, process-driven	Loosely structured
Hierarchical governing construct	Self-governance within community
User controls	More open user community
Presents content from existing systems/databases with new material in a unified frame	Populates new content on a wiki-based website
Documents and text	Text and attachments
Generally requires submission, editing and approval of content before adding to knowledge base	Generally incorporates new content when written and lets the user community serve as editors
Provides detailed metrics and reports	Provides an edit history on each page plus listings of pages to which it is connected

A KM system would be the preferred choice for operations in which cross-selling and upselling generate a significant amount of revenue. Business logic in the KM system could link inquiries to product and service recommendations, or provide other insights that might prove useful. For example, a customer seeking information on different health plans might also have interest in compatible dental, vision or other ancillary coverage. Whether accessing it online or through a contact center agent, the KM could provide the right options to consider while responding to the customer's primary concern.

KM is also an asset for organizations with unrealized potential for self-service. The natural language interface makes it possible to uncover the intent of a question and then find the appropriate content. KM also provides the capability to render automated responses to email inquiries or provide prebuilt responses that agents tap during chat sessions.

For environments that do not have formal information repositories and/or where a community of contributors can add value to the knowledge gathering process, wikis are an ideal solution. They provide the means for users to create pages of linked text on the fly (albeit with appropriate content management controls). One obvious candidate for this treatment is technical support for hardware or software. A team of product specialists would never find the time to document all of the quirks and permutations on use of their products. But the user community can and will take on that mantle as they gain experience with the product and revel in the opportunity to share their wisdom. Wikis could also serve internal needs as agents share hints and tips on how to process certain types of transactions and/or learn the ins-and-outs of getting things done in their organization.

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## Sourcing Considerations for KM and Wikis

If you've decided to move forward with a knowledge management initiative, here are a few things to consider when choosing your platform.

- Meet with your customer relationship management (CRM) provider to understand their approach to knowledge management and its integration with their core offering. A knowledge management (KM) tab on the agent desktop could bring up the search capabilities while carrying over details about the customer and current transaction. It could pop relevant information on side panels—e.g., agent scripts, product and service recommendations. And agent training may be simplified as a function of sharing a common user interface.
- Find out about tools that support wiki functionality for which you already own licenses. The latest release of SharePoint is a good place to start. Some learning content management systems (LCMS) also provide knowledge management functionality. Either option could get you up and running quickly. However, make sure that the features it offers are what you *really* need. You don't want to jeopardize user acceptance or set yourself up for a painful transition downstream to a more robust solution.
- Check with your IT department to see what level of support they're prepared to offer. If they are thin on resources, a hosted solution might make sense. Cloud-based offerings are available for KM systems and wikis. In addition, of course, wikis are less labor-intensive to launch than KM systems.

Whichever direction you choose to go, here are some key features and functions that you should consider:

- Intelligent search
- Industry standard synonym dictionaries
- Guided answers
- Process wizards
- Content rating
- Authoring, editing and publishing tool
- Archive capabilities
- Workflow tools
- User profile definition tool with security level assignments
- Reporting and analytics tool
- Standard integration APIs to CRM
- Web integration tool
- Email integration
- Easy-to-use application user interfaces

### **People and Processes Support the Technology**

If technology alone could resolve all the challenges, every center would already be a knowledge management success story. But it takes the right business processes and people to manage them to make the investment in technology pay off. Without it, the company won't get the full benefit out of the tool. Absent supervision, the technology might not be used appropriately, or worse, the contents could become dated, inaccurate or irrelevant.


Most KM systems contain automated workflow tools that allow users to contribute content by filling out a template. This material can be assigned to subject-matter experts, or "knowledge managers," for validation and editing. Multiple points of approval can be included in the workflow (e.g., legal, corporate communications, marketing, etc.). Some systems include escalation and expiration settings so items are not left idle in the workflow. Similarly, business rules can be applied to updating or sunseting information.

Wikis generally adopt a less structured approach under the premise that it is better to post material quickly and fine-tune later than delay distribution. Authoring/editing can be open to a general population or confined to registered users. Administrators can choose to adopt a workflow prior to posting or simply provide alerts when new content has been

added. Wikis maintain edit histories that specify recent edits as well as all edits made within a defined period. And they allow users to reinstate older versions of pages should the newer content prove undesirable.

While it is important to ensure that new content meets the organization's standards for accuracy and quality, it is just as important to ensure existing content remains true and relevant. Ideally, new content would be associated with "expiration dates" that trigger internal review processes. That level of scrutiny may not be possible for large repositories, especially with prolific authorship by the user community. In those cases, make sure that you avail yourself of a user rating system to capture the relevance and accuracy of entries and contributors. Reported inaccuracies should receive prompt attention as should entries with low relevance ratings.

### Take Action

The technology is available to alleviate one of the contact center's long-standing headaches—assembling, managing and delivering relevant information to agents and customers. Both KM systems and wikis have the ability to tap diverse repositories of knowledge and provide a convenient means for the user community to tap it, share it and add to it. These solutions can drive efficiencies within the center, improve customer loyalty and satisfaction, and make substantive contributions to the company's bottom line. 

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