

Ten Principles for Knowledge Management Success

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Introduction

What is Knowledge Management?

Knowledge Management (KM) can mean different things to an organization depending upon the nature of the initiative. KM, as we all know, is not a technology or a set of methodologies... it's truly a practice or discipline that involves people, processes and technology. And, if implemented correctly with cultural buy-in from users and management, plus clearly defined goals, a KM initiative can improve the productivity and efficiency of an entire organization.

Although KM is as an enterprise-wide goal, many companies find success if they kickoff an initiative in one department and then extend the practices throughout other parts of the organization. This paper will outline those practices that help ensure a successful KM initiative within the IT help desk or customer contact center. Often KM practices relating to service and support can be defined as knowledge-powered problem resolution - using a knowledge base, knowledge sharing, collaboration and knowledge reuse to efficiently solve customer questions.

Knowledge Management for Service and Support

A successful knowledge management initiative within a help desk or call center can reduce agent training time and speed new employee ramp up. Knowledge-powered problem resolution enables agents to become more confident and competent sooner than they otherwise would without a KM practice. By having access to a knowledge base, new help desk and customer service agents can get answers to common questions without having to constantly ask other more experienced agents. Customers and end-users benefit from faster problem resolution, and experienced agents can focus on solving more challenging problems.

Customers and end-users also benefit when they have direct access to a knowledge base to solve their own issues without ever contacting an agent. A growing number of people now prefer self-service to live interaction, at least for certain problem types. For some people, self-service fits perfectly into their lifestyle. They are in a hurry and they need a specific piece of information and that's all they want. Say, for example, in a corporate environment, an employee needs to know if there is a Windows 2000 driver for a USB Zip drive. She doesn't want to wait in a queue. She doesn't want to talk to an agent. She just wants to know if there is a driver available and where to find it. In this case, self-service can be superior to agent-assisted service.

Knowledge Management is an evolving discipline that can be affected by new technologies and best practices, but there are some things that we do know for sure. There is a systematic approach to successfully implementing knowledge management and if you analyze what you are trying to accomplish, map out a strategy, garner support from the organization and have a way to measure it, then you are much more likely to be successful.

Although conducting a successful KM practice requires more than simply reading this white paper, I have outlined 10 principles that will serve as a primer to help your organization understand what it takes to have a successful Knowledge Management initiative.

KM and the Economy

The practice of knowledge management can be useful during tough economic times and in times of rapid growth. When an organization downsizes, critical knowledge and intellectual capital are lost. When business picks up it often picks up quickly. You can't hire and train fast enough to maintain a satisfactory level of performance using traditional methods. Even if you could, at some point it becomes cost-prohibitive to keep hiring. You can't hire your way out of growth. Instead, you need a more efficient way to deal with growth. Knowledge Management and a system for capturing and reusing knowledge can help businesses deal with the economic fluctuations.

The Principles

Principle 1: Knowledge Management is a discipline

A lot of people think knowledge management is a technology or software solution but it is much more than that; knowledge management is a discipline. Obviously, you have to have a good piece of software or a good system to capture knowledge – but that's not the whole equation. Underestimating what it takes just to capture the knowledge correctly is a big risk, as is underestimating the integration task into your already complex environment.

There are some providers of pre-packaged knowledge out there, but my experience is that while they can be useful to the help desk they are not relevant to customer service centers which have business-specific content needs. In either case, you must ensure you have the adequate resources to create and maintain the content you promise. Creating content is not a one-time project. Also, over time the content must be updated and supplemented as new products or services are supported. Empowering agents to add new content as resolutions are discovered is key to maintaining a robust system.

Principle 2: One champion is not enough

To be successful, your project must have several champions within the organization. These are individuals that believe in the project, enthusiastically advocate it and have the clout to "make things happen." Projects that lack a champion generally don't get off the ground. Those with only one champion are also at serious risk.

Losing your champion can spell disaster for your project. This is a real problem for knowledge management projects, due to their continuous duration. If the project champion transfers, retires or leaves the company, the project often loses its momentum and the project may falter as someone else takes it over.

What I like to see when I work with clients is a dual-mentorship: one at the operational level and one at the executive level. So if an operations manager decides the company really needs knowledge management, that manager should find somebody on the executive staff that will agree to support the vision. By having that dual track of vision the project is more likely to succeed.

Principle 3: Cultural change isn't automatic

Buy-in is needed at all levels, and this may require cultural change. The people that are going to use the tools have to be part of the design unless you plan on strong-arming them (and that doesn't work very well). Don't make this management decision in a vacuum. Include some people from the various groups that would directly or indirectly use the system.

Sometimes there is a fear that knowledge management will be used to replace people. If your staff thinks that is what you are trying to do, then you really need to address that head-on. If that is not your intention, you should convince your team that current head count reduction is not the goal. Therefore, you need to look for and plan the motivation for each party. After all, you are asking people to shift from a system where being a tower of knowledge is rewarded to a system where they share their expertise with everybody on the team.

Each party will have a unique motivation to embrace knowledge management. For example, in a technical support environment, a frontline tech will have a different motivational schema than a 3rd level technician. The frontline tech is not going to have to ask the 2nd line tech as many questions, and can resolve more problems faster. The 2nd level tech is not going to get as many of the common questions. Level 3 researchers won't have to start at ground zero when handed a problem by level 2, because they know that all the intermediate steps have been covered. So as you look across the organization everybody has a different interest and you have to protect all of them.

Failing to see how knowledge management is going to fit into the rest of the organization is a mistake. You must invest the time and energy to understand the culture, identify motivations and ensure change happens where needed.

Principle 4: Create a change management plan

If your employees are not already sharing information, you will need a change management plan because you are asking people to do their jobs differently. The change management plan specifies how you will gain acceptance of knowledge management within the organization. Let's say you are a call center manager and you measure your employees' performance by call handle time and number of cases closed. Now you are going to be asking them to use a knowledge base on every call or e-mail interaction – thus asking them to change the way they perform their job on a daily basis.

Also, if you don't make changes to their performance reviews and compensation, there may be friction because you're asking them to do one thing but you are judging them by another set of rules. As part of the overall change management plan you need to update job descriptions, feedback sessions and performance reviews to reflect the new workflow. Neglecting to make these changes may foster acceptance issues with your team members.

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Principle 5: Stay strategic

Knowledge management is a strategic endeavor, not just a project. I prefer to call it a strategic initiative as opposed to a project because a project implies a finite timeline. With KM you are never really done; you initiate it and you build it and then its online and you maintain it.

In my practice we look for our clients to have a strategic goal for the project rather than a tactical goal. If you are looking to shorten handle time that's a tactical motivation and you're not as likely to be willing to go through the steps that a successful enterprise rollout would take. But if it is a strategic initiative, especially something that is top-down motivated (for instance improving customer service or improving employee satisfaction) then there is a better value statement involved and you are not relying on changing one metric. So you might see improvement in individual metrics like handle time and resolution rates but their value is limited compared to the return from becoming a collaborative knowledge sharing organization.

To get going, decide what goals you are trying to accomplish and why. Then try to identify a solution and methodology that will help you attain those goals in your environment. Sometimes people within an organization may say that a KM initiative is nice-to-have, but an economic downturn might slow the process down or defer it - thus being counterproductive when resources are scarce. But I think it's counterproductive to consider KM a nice-to-have because the rewards are equally beneficial during both a downturn and the inevitable upturn. If you wait until the upturn then you will be forced to play catch up as your call volumes increase and your e-mail volume doubles; that's not the time to introduce a knowledge-powered system or build a knowledge base. It's not necessary to hire more employees if you have resources that are not 100% utilized or if you encourage your agents to contribute knowledge during their daily workflow.

Principle 6: Pick a topic, go in-depth, keep it current

I advise that you pick one area that needs improvement or has limited resources, and then build a robust knowledge base for that subject matter. Use that experience to learn about implementing knowledge in your organization; do one call center or one product group and learn from there. It is much better to be comprehensive for a narrow topic than fail to get enough depth. Sometimes an enterprise initiative is needed right away, and it can be done successfully, but it can involve a larger resource commitment to do a full-scale project all at once. Remember, the depth of your knowledge base truly depends upon your customers' needs.

Today's systems should enable agents to contribute new knowledge during their natural workflow. This is critical to ensure that solutions that are not currently in the system can be quickly added once the resolution has been determined. It's also important to remember that regular and timely maintenance of the knowledge base is key to success. You should also consider appointing resources to maintain the knowledge. Be sure to build in a mechanism that identifies gaps in content (information sought but not found), and a process for filling those gaps. If people repeatedly fail to find what they are looking for they will stop using the system.

Principle 7: Don't get hung up on the limitations

Certain types of knowledge are very well suited to quickly harvesting into a knowledge base. Company processes or technical procedures are well suited for knowledge management. By populating a knowledge base with this type of information and making it available to employees and customers, an organization can shorten or even avoid many calls. Organizations can also use a KM system to access existing unstructured sources of information that may already exist on a corporate network, intranet or within an existing call center or help desk system. It's important to note that experienced agents can certainly benefit from access to both structured knowledge and unstructured information because they're more likely to be able to pinpoint a solution within an unstructured document. However, level 1 agents or end-users accessing the knowledge base through self-service, may not find these sources of unstructured information helpful because they don't have the expertise to decipher the information quickly.

In addition to sources of knowledge, the specific type of information is also important to consider. The craftsmanship or expertise that a true expert has is much more difficult to capture. A master craftsman has a huge body of knowledge. They tend to "chunk" their knowledge and can't tell you the steps they use when they make a decision in their field; they just do it. Much like tying your shoe, you do it everyday but when you have to explain it its tough because you have internalized the process. I think that is where the breakdown is for harvesting expertise. I think a KM initiative could be somewhat limited because of the nature of complex knowledge, and thankfully we will always need human expertise. However, when it comes to a successful initiative, it's important to first determine what knowledge can be easily added to the system and then provide agents or a knowledge manager with the tools to add this step-by-step complex information to the system, ensuring that even difficult questions can be answered accurately.

Principle 8: Set expectations or risk extinction

A big pitfall is the failure of knowledge management proponents in helping executive management set appropriate expectations. Customers, employees and management alike must know what they are going to get out of knowledge management, what it will take to get those results and how success will be measured. Measurement is where most organizations fail because they are doing things that were not measured before. So a year from now, you've built this thing, it's up and running and everyone loves it and your boss says "where's my return?" If you don't have a measurement system in place then you will have a hard time answering his or her question – especially for the new metrics that didn't exist before. You probably measured handle time, abandon rates, and similar operational metrics. But you may not be measuring call avoidance or knowledge usage, which affects ultimately the ability to measure resolution rates.

In addition to setting management expectations you have to set customer and end-user expectations. For example, if you are going to provide customers with Web self-service for one specific product then you must include the known problems that they are going to encounter in the knowledge base. In that situation you are better off to set their expectations that the knowledge base covers only that product and no other. Customers pose the same extinction risk that your employees do. If they visit the site a few times and they can't find an accurate or appropriate answer they will probably not return again.

Principle 9: Integrate KM into existing systems

Typically, organizations that are implementing knowledge management already have an established data center, so they are not only building a knowledge base – they must also integrate it into their existing environment – their call tracking system, IVR system, e-mail, remote diagnostics and other support systems.

When selecting a KM system, consider systems that have open architectures and proven integrations into existing call center and help desk tools to ensure a successful implementation. Also, processes will be affected, requiring change to reporting and measurement systems as well. Integrate reporting capabilities where possible to best understand how the combined systems are affecting the effectiveness of your support operations.

Principle 10: Educate your self-service users

You've created your KM plan, determined the critical knowledge to include, initiated a plan to garner cultural acceptance, trained your agents and pinpointed key sources of knowledge – finally you need to educate your self-service users on how to find and access support information online to ensure a satisfying experience.

There are many ways to "push" your self-service capabilities out to your end-user audience. Traditional marketing techniques should be employed to promote this valuable service, such as e-mail, online newsletters or direct mail. Encourage users to visit your online support site by making it easy find and access the knowledge base. Be sure to include the site URL and directions for obtaining a login, if needed, in your marketing communications.

Another method is to encourage your agents to end support calls by informing the user of the support site. "Thanks for calling today, I'm glad that I could help you solve your problem. By the way, we now have a Web self-service site if you'd like to search the knowledge base. You can find it at www.ABC-Support.com and you can obtain a login by clicking the request login button on that page."

Finally, make sure your Internet or intranet site includes an easy-to-find link to your Web self-service site. A twist on the old saying, "If they can't find it, they won't come." So make it easy to find, easy to access and easy to use.

Become a knowledge-enabled organization

I think it is inevitable that knowledge management will have a high adoption rate in the next few years. Over time to remain competitive it will be essential to be "knowledge-enabled." Just a few years ago e-mail was not a common method for seeking customer service; now customers demand the ability to contact you through channels other than the phone. Going forward, as customers deal with companies that are knowledge-enabled and can quickly and efficiently answer their questions, they are going to expect a greater level of service in all of their support interactions.

The bottom line can be summarized with a quote from Gartner, Inc. – "Those enterprises that include KM processes as part of their customer relationship management initiatives have a higher probability of success than those that don't."¹

1 - Source: "The Case for Knowledge Management in CRM," Gartner Inc., April 2003

About the Author

Tom Tobin is the Senior Business Analyst with ServiceWare's Decision Integrity Team. Tom has authored technical training videos and computer-based training for General Physics. He has also served as the business applications manager at Canon ITS, where he managed a variety of technical application projects including: knowledge management, IVR, and Intranet/Internet strategy consulting. Tom has an MBA from the College of William & Mary, and a BS from the State University of New York. He is currently working on an advanced degree in Knowledge Management at George Washington University.

About ServiceWare Technologies

ServiceWare is a leading provider of knowledge-powered applications for customer service and IT support -- empowering organizations to deliver superior service while reducing costs. ServiceWare's problem resolution software, ServiceWare Enterprise™, enables agents and end-users to quickly find accurate and consistent answers to even the most complex problems – in the call center, help desk or via Web self-service. ServiceWare's self-learning and organizing search technology, the Cognitive Processor®, adapts based on usage and its easy-to-use knowledge management tools allow agents to access both structured and unstructured knowledge sources and contribute new solutions in the workflow, ensuring a robust knowledge base solution.

Leading organizations have implemented ServiceWare software including EDS, H&R Block, AT&T Wireless, Cingular Wireless, Fifth Third Bancorp, Green Mountain Energy, Reuters, and QUALCOMM. Learn more today by visiting www.serviceware.com or call 1.800.572.5748. Outside North America, call our international office at +(44)(0)1280.826345.