

10 Knowledge Management Mistakes Others Have Made... So You Don't Have To

In applying knowledge management to customer service, organizations often encounter a number of common roadblocks. Written by seasoned practitioners, this e-book details these obstacles—and provides practical techniques to ensure these mistakes aren't repeated in your organization.

Introduction

Knowledge management has truly transformed many enterprises, enabling them to better harness information to improve service, cut costs, and boost customer satisfaction and revenues. For other organizations, knowledge management initiatives have been plagued with costly setbacks and obstacles. What can be done to avoid these miscues and ensure knowledge management success?

While the specific goals and implementation requirements of knowledge management vary significantly for each organization, there are some mistakes that have been proven to be common across industries and organization types. Knowledge management initiatives, even when led by smart and well-intentioned teams, can fall into many of the same traps. Often, the most sensible-seeming measures can have severe unintended consequences, and prove very costly to organizations.

It is by identifying and avoiding these mistakes that organizations can set the stage for long-term success in knowledge management. In the following pages, we'll describe the ten most common mistakes—and reveal how you can avoid them.

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#1 Rely on the Tool to Do It All

Often, organizations approach knowledge management as if it is simply a matter of rolling out a knowledge management tool or platform. Make no mistake: having the right knowledge management technologies in place is the only way to establish a scalable, successful knowledge management initiative. But the tools and technologies are only a mechanism that supports underlying processes.

The phrase “people, process, and technology” has been used so often it has become a cliché, but that doesn't mean it's not true. How will we capture, reuse, maintain, and improve knowledge? These processes are at the core of knowledge management. Similarly, these processes are only as effective and successful as the people employing them. In fact, the whole area of change leadership—getting people aligned with the initiative, getting them trained, and coaching their progress—is probably where executives need to place most of their focus.

Ultimately, the tool is the thing that supports the process, nothing more. If that's not clear, organizations can invest a lot of time and money in technologies and, when all is said and done, have little to show for it.

The Upshot

It is a mistake to view knowledge management simply as a technology deployment. Successful knowledge management requires people, processes, and technologies to work together in concert.

#2 Put Lipstick on a Pig (Fix Inferior Content with Search)

Unless an organization only has a few hundred documents, having effective search capabilities is vital. However, organizations can't rely on search alone.

For example, some organizations will have tens of thousands or even millions of support incidents in a repository. Some will think, “We can't find anything in here, let's implement a search mechanism.” These support incidents, while important, are a poor substitute for true solutions-oriented content. Instead of simply using search to provide a window on sub-par content, it is far better to develop quality content during the course of solving cases. It is vital that this content development is made part of the resolution workflow.

Rather than relying on the base support incident, which may have a lot of extraneous information, such as lengthy back-and-forth exchanges between the agent and customer, agents should be able to gain access to useful solutions—content that is structured for access and reuse. It is vital that this content is concise, and that it provides a clear picture of the customer context.

The Upshot

Search is critical, but it can't compensate for poor content. Content needs to be developed as part of the case resolution workflow, and it needs to provide concise, fact-based answers.

#3 Build It and They Will Come

All too often, implementation teams and management will be focused on one of the fundamental steps of knowledge management: implementing the underlying tools and technologies. But once that step is done, the real work is just beginning.

As mentioned above, knowledge management is driven by a combination of people, process, and technology. Getting users involved in using and improving the systems implemented is clearly vital.

For internal audiences, this means that from the top of the organization on down, everyone understands and buys into the vision of knowledge management. Customer support isn't simply about being on a case-closing treadmill: it's about sharing and improving knowledge and getting better at delivering service. In addition, staff members' involvement in knowledge management needs to be formalized as part of their job descriptions and performance evaluations.

For external audiences, this means that systems can't be rolled out prematurely. Support portals need to deliver a great experience up front and provide quality, meaningful content from the initial rollout. Further, customers need to be actively engaged, perhaps through phased rollouts in which

feedback is gained, and once ready, the system needs to be actively and thoughtfully marketed.

For both audiences, representatives have to be able to answer the question, “What’s in it for me?” and they need to be able to answer that question for everyone who’s expected to interact with the knowledge management system. This value needs to be clearly understood—and articulated—if it is to be realized.

The Upshot

An initial knowledge management roll out is only the beginning of the process. To succeed, organizations need to get users involved. To foster participation, representatives need to articulate the value for end users.

#4 Create Review Bottlenecks

It is important to start with an understanding that knowledge content is fundamentally about answering questions. It’s not documentation that will be bound in books. Further, this information is often very time-sensitive in nature. As history has shown, once an issue is detected, the bulk of inquiries into that subject arise within the first 30-40 days. Consequently, organizations with review cycles that extend into months see far less utility from their resources than those with fast publishing processes.

That’s why it’s critical that organizations strive to reduce bottlenecks, while taking the steps required to ensure the quality and usefulness of information. Ultimately, organizations have to weigh the risk of having mistakes appear vs. the value of having content available quickly.

How do you get quality content out quickly? Following are a few key points:

- **Don’t review everything.** Rather than having everything reviewed before publishing, it tends to be far more effective to provide authority to those qualified to publish directly, and then review samples of published content to ensure content meets quality standards.

- **Don't do technical reviews outside of the customer context.** A technical expert can review a solution and determine whether it sounds plausible or not, but it is very difficult to confirm whether it works or not without the specifics of the customer context. It simply isn't practical to replicate the customers' environment in a lab, recreate the issue, and verify that a given fix works. It is far better to have technical reviews happen to content in the process of actually using it. Then users can flag or fix content that needs corrections or improvement, which ensures accuracy while speeding content availability.
- **Don't set up expiration dates.** Having expiration dates that trigger reviews can create a huge flood of content into existing review bottlenecks, which is a recipe for disaster. Instead, organizations should simply archive those resources that aren't being used.

The Upshot

Knowledge content is time sensitive, and the faster it is made available, the more users will benefit. Take steps to ensure standards of quality are adhered to, without reviewing every item before publishing.

#5 Link Each Case to a Solution

For organizations that do case management, service request management, and asset management, it is very important to link solutions to knowledge content when a case is closed. This is important because it helps in reporting on those assets that have been proven to be useful. Secondly, this is important because it saves time; it's far more efficient to link to existing content than to create new content. Thirdly, it is more consistent from a case management standpoint to link to existing content.

But we've seen this carried too far. Managers may hand down an edict that says, "Every case needs to have a solution associated. Agents can't close a case without a solution attached." While this is a well-intentioned approach, the results are invariably counterproductive. The content database is corrupted, and time is wasted.

Instead, organizations should ...

- **Track participation rates.** This is the percentage of cases associated with content describing the solution. This number should be increasing over time.
- **Expose this participation rate information.** Often, by making this information generally available, users will be motivated and instinctively change their behavior.
- **Audit unlinked cases.** Managers should look at cases that don't have assets assigned and determine, if resolved, how, and whether a new asset should be created.

The Upshot

Requiring every closed case to be linked to a solution corrupts reporting and the knowledge-base. Instead, track participation rates and make it visible to motivate users.

#6 Reward (or Require) Content Creation

Just as with requiring agents to link cases to content, another well-intentioned approach with poor outcomes is the requirement that users create content. Requiring content development or giving staff incentives for creating content will virtually always result in poor content corrupting the knowledge base.

For example, if an organization provides points for each new piece

The Upshot

Creating quotas or incentives for content creation only results in more poor quality content going into the knowledgebase. Goals for content creation should be related to business outcomes, rather than simply encouraging activity.

of content published, or team members are required to produce five new pieces each month, inevitably, at the end of the month, there is a huge spike in activity, with quickly assembled, poor content ultimately being submitted.

Instead, managers should be looking at broader trends and desired business outcomes as a starting point. For example, a desired business outcome may be to reduce average handle time. Managers then need to put specific goals on activities like content creation, but map those goals to business outcomes. Similarly, participation rates need to be evaluated for each staff member. Finally, these goals need to be made part of employees' performance reviews.

#7 Treat Knowledge Management as a Project

Knowledge management can't be viewed as a project with a discrete beginning and end. While any initiative is made up of disparate projects, knowledge management needs to be viewed as something larger, and something permanent. Organizations need to be in knowledge management for the long haul, and this needs to be reinforced from the top down and across the organization. Every team member needs to understand, "Knowledge management is part of who we are and what we do."

The Upshot

Rather than being looked at as a project with a beginning and end, knowledge management needs to be understood as an ongoing process that is fundamental to an organization's core mission.

#8 We're Too Busy to Do Knowledge Management

When faced with the prospect of undertaking a new initiative, just about anyone from a front-line agent to a senior executive may feel like current workloads preclude taking anything new on; let alone something requiring fundamental change like knowledge management.

The reality is that knowledge management will require a significant investment in time and money to do right. In addition, knowledge management requires a fundamental change in most organizations' cultures, which is never a trivial endeavor. Often, however, it's these same organizations that are extremely busy that are the ones that can benefit most from knowledge management.

For knowledge management practitioners, it is important to be able to understand and address these concerns at two levels:

- **Analytical.** First, there's a huge body of evidence that knowledge management can fuel a dramatic rise in the capacity of a support organization, which can yield a significant return on investment, including improvements in customer satisfaction, cost reductions, and more. In addition, it's important to keep in mind that when knowledge management processes are structured effectively, staff members can save a lot of time. Specifically, agents do not need to spend much, if any extra time, developing content if they do so within the existing workflow of closing a case.

The Upshot

While knowledge management requires an upfront investment in time and resources, the return in productivity gains and cost savings is worth the investment.

- **Emotional.** Often, people resisting the notion of a knowledge management initiative are doing so for legitimate, emotional concerns, which need to be acknowledged. They may be feeling burnt out because of past initiatives that came and went, or simply overwhelmed by existing case load. Practitioners need to articulate that the reason knowledge management makes sense is *because* staff members are too busy. By toughing it out through this change process, the support organization can get to a better place. Fundamentally, it's the best course to take: the company can't afford to have fewer customers, it can't stop selling products, and it can't make its products or the customer environment less complex.

#9 Assume Japan Will Fit Your Model

In rolling out knowledge management, project leads can't assume that the whole world will be the same, and that a knowledge management implementation that is successful in one region can be replicated and achieve the same success in another part of the world.

Leadership should strive to strike a balance between being as consistent as possible, while meeting the true needs of users. Some fundamental questions that need to be considered:

- Can customers use a foreign-language knowledge base?
- Do you sell the same products everywhere?
- Do you use a different channel model overseas?
- Can you successfully manage solutions and how support incidents get linked to those assets?

The Upshot

Project leads can't assume that all processes and implementation approaches can be employed uniformly across geographies. It is important to strive for consistency as much as possible, but not more.

Project leads should strive to be as consistent as possible, while making modifications where needed to meet the true needs of their users.

#10 Focus Only on Internal or External Audiences

Driven by specific mandates or objectives, executives often focus almost exclusively on internal or external audiences in developing and deploying knowledge management initiatives. For example, rolling out a knowledge management initiative internally makes a lot of sense because of the easy ROI justification that can be made, as well as the improved internal measurements and controls that can be realized.

On the other hand, external deployments offer such advantages as being rolled out on a greater scale, and enjoying greater visibility, both among customers and across organizations. While these benefits can be understood and assessed separately, that doesn't mean that they should be viewed separately when it comes to implementation.

To gain the maximum benefits from knowledge management efforts, it is crucial to start collaborating and planning to address both internal and external audiences consistently. While it ultimately may make sense to phase the actual implementation, and roll out internally first, for example, it is important to plan for both audiences. If a system is architected for both audiences initially, the organization will be much better prepared to optimize the benefits of the implementation over the long term.

The Upshot

Rather than just focusing on internal or external implementations, project leads should collaborate and coordinate efforts to accommodate the needs of both audiences from the very beginning.

Conclusion

Knowledge management initiatives have been proven to deliver a range of significant benefits to support organizations, including boosting staff capacity, delivering cost savings, improving customer satisfaction, and much more. By eliminating common, preventable mistakes that have hampered many initiatives in the past, organizations can optimize the benefits they enjoy, and start enjoying those benefits sooner.

For More Information

This e-book is derived from a webinar that was given by David Kay, principal of DB Kay and Associates, and Mark Buckallew, senior director of product management with InQuira. To learn more or view this presentation, please visit <http://www.inquira.com/webcasts/2007/webinar03222007gf.asp>. To learn more about DB Kay and Associates, please visit <http://www.dbkay.com>.

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The company is headquartered in San Bruno, Calif. and can be reached at +1 (650) 246-5000 or via the Web at www.inquira.com.