

Implementing KM

Practitioners Share Best Practices

By InQuira

Most customer service organizations today will admit that effective knowledge transfer is the most crucial element to resolving customer problems. When done correctly, knowledge transfer accelerates problem resolution processes, fuels customer satisfaction and leads to greater organizational efficiency. Organizations invest in processes and technologies that enable them to create, manage and publish knowledge, and that allow them to find, retrieve and share the enterprise's knowledge across all support channels. Without formal knowledge management processes, companies would be unable to share knowledge with their customers, partners and employees.

When organizations consider investing in an enterprise-level knowledge management (KM) initiative, they generally conduct a detailed analysis of how to effectively tackle a project of such magnitude. Companies want to know how to best prepare for such projects, what pitfalls to avoid, and how to measure results that are generated from their KM implementation. They scrutinize internal short-term and long-term needs, organizational objectives and resources, customer needs, system requirements and technology implications. Companies conduct knowledge assessments, system assessments and develop a roadmap by which to guide the initiative. They consider the role of and impact on stakeholders, end users, partners, internal teams, customers and outside vendors. They try to anticipate and quantify the impact of the knowledge management project in their business processes, operations and ROI.

No amount of analysis and planning, however, will uncover every potential challenge or roadblock. Here, practitioners who have been through successful large-scale knowledge management initiatives share their insights and lessons learned.

Best Practices

1. Over-communicate. "You can never underestimate the change management requirements that go along with projects like these," according to Jodi McBride, director of knowledge and training services at Pitney Bowes. "You need a shared vision, supported and driven throughout the company from the highest levels of the organization." Communicate regularly throughout all the phases of the project with business

stakeholders and end-users. Follow a communication plan that keeps all parties included and responding. "You are going to be taking people outside of their comfort zone and they need to understand what you are doing. You can never over-communicate with a project like this," said McBride.

2. Recruit the right people for the project. Identify and recruit the right people with the right skill sets from the start, making sure their skill sets align with the assigned tasks and responsibilities. Maintain a consistent vision throughout the implementation project. A knowledge manager at a leading mobile communications company suggests that practitioners ask themselves "whether the people who defined the specifications have been involved all the way through the implementation. Sometimes as people change in a project, it is easy to lose sight of what you originally thought versus what the new folks thought as they were introduced into the project."

3. Solicit end-user input in the solution design. Involve end users in content identification, design and testing. Consider involving different representatives from different departments. "At Pitney Bowes, we created a role called 'content ambassadors,' which included representatives from different departments within the contact centers. A content ambassador's job was to help identify sources of content; validate, enter and test content; help design the user experience; and provide feedback on which information should be made public for employees and customers. Without a doubt, their contributions led to greater user adoption," said Pitney Bowes' McBride.

4. Encourage user adoption with incentives. Employees may be reluctant to move out of their comfort zones or embrace new processes. Help employees understand the desired results and how they will be measured. Then, develop ways to recognize and reward individuals who adapt to the changes in the system to encourage its use.

"Rewarding and recognizing employee efforts to share knowledge is a powerful way to encourage this activity. Consider periodic bonuses to individuals with exemplary efforts, peer recognition combined with cash, and project work available to individuals who actively share knowledge as three incentive strategies," suggests Ladd Bodem, principal and co-founder of market research firm ServiceXRG.

5. Identify content gaps and duplicates, and scrub your content early. Eliminate redundancy and pieces of content that overlap. Although content scrubbing is an ongoing process, more scrubbing in the early phases of the KM project can help make content more usable and help improve user adoption since users are able to quickly locate the right content and do not have to go through duplicate content.

"Our content had always been organized by department," commented McBride. "For the first time, a centralized knowledgebase provided visibility to content overlaps between teams. Additional time to test and scrub responses that overlapped would have been beneficial in reducing the amount of redundant or conflicting content."

6. Define ROI measurement and reporting requirements early in the process. McBride emphasizes, "Make sure you understand exactly what you are going to look for to get to your ROI and define those reporting requirements as early as you possibly can." Once live with the new system and process, expect business stakeholders to ask for reports comparing performance to expected ROI from the project.

According to a recently published report by ServiceXRG titled "Knowledge Management—Strategies, Benchmarks and Best Practice," "there are two distinct types of knowledge management measurements; one type is focused on measuring the efficiency of the KM processes such as content coverage and quality content, while the other looks at the impact from knowledge management. Some impact metrics to consider include: measuring deflection, staffing, change in first contact resolution rates, resolution times, agent productivity and overall success rate."

7. Don't underestimate the impact of tangential benefits. For example, Jodi McBride explains how at Pitney Bowes, "we didn't anticipate how, having information available from a single source, was going to change how we trained. Our focus this year has been on redesigning the classroom experience to incorporate the use of KIP (Pitney Bowes' knowledgebase) and create more interactive training materials that better engage the learner across multiple dimensions. This is a dramatic shift away from typical lecture-based training programs. This shift in the classroom is not something we anticipated when we went live, but has been a positive experience nonetheless."

8. Know the needs of your end users. Understand how language components impact search accuracy. Identify user search behaviors and consider search rules to improve the user's experience. "Understand how people use the resources they have available today. Understand the slang for key concepts, and how people from different departments may approach the same information but from different perspectives. These

About InQuira

The InQuira 8 suite of business applications improves companies' Web self-service and assisted-service resolution processes. With applications for knowledge management, Web self-service, agent-assisted service, email deflection and customer experience management and analysis, InQuira 8 delivers a complete solution for resolving customer support issues online and in the contact center—applications that can infer the user's needs and intentions and provide the right information, tools, recommendations and assistance in an efficient, orchestrated interaction that will resolve more issues and deliver greater satisfaction and higher ROI.

Knowledge management. Many customer support issues require research to resolve, either by the agent in the contact center, or by the customer in the self-service channel. A core function of support organizations is to capture enterprise knowledge to create content designed to resolve customer issues. InQuira 8 provides full knowledge management capabilities, including:

- ◆ Capturing content and content requests from within the resolution process;
- ◆ Authoring process that removes the unnecessary tagging and increases content reuse;
- ◆ Full version control, with the ability to revert back to a previous version, compare versions or view versions side-by-side;
- ◆ Robust publishing workflow to ensure content is effectively managed through user-defined stages of development and publication;
- ◆ Task management to ensure that each task is being completed by someone with the right role and skill;
- ◆ Configurable email notifications for all tasks in the system directing attention to complete work;
- ◆ Multi-lingual content and translation workflow to update and distribute content in multiple languages;
- ◆ Embedded natural language search (InQuira Intelligent Search) for more effective and useful retrieval of information from within the knowledgebase and forum content;
- ◆ Discussion forums for community-based support;

- ◆ Embedded reputation models to support performance evaluation for knowledge engineers;
- ◆ Tokenization to secure content and sections of content for specific user audiences; and
- ◆ Configurable subscriptions to categories of content and specific content items, including newsletters and content from specific authors.

Web self service. Customers and companies increasingly demand more sophisticated and effective Web self-service capabilities to resolve customer support issues. InQuira 8 delivers that. Key capabilities include:

- ◆ Unique ability to determine user intent from search and navigation behavior, and use that insight to manage the customer experience intent-by-intent, empowering companies to deliver a personalized resolution experience based on an understanding of what the customer is trying to accomplish;
- ◆ Packaged horizontal and verticalized Web applications to accelerate implementation;
- ◆ Industry-specific "intent libraries" to map the resolution experience to pre-defined customer needs;
- ◆ Intelligent search and retrieval capabilities based on patented natural language processing technology;
- ◆ Industry dictionaries to improve search effectiveness; and
- ◆ Diagnostic process wizards to troubleshoot and resolve customer problems.

Agent-assisted service. Contact center managers are under constant pressure to deliver effective, loyalty-inducing customer service at reasonable cost. InQuira 8 for agent-assisted service includes the following productivity-enhancing capabilities:

- ◆ Embedded intelligent search, retrieval and navigation from within the agent cockpit;
- ◆ Integration into leading CRM packages, including Siebel and Clarify;
- ◆ Ability to associate retrieved content to case resolution;
- ◆ Web self-service session history captured on service requests escalated to agents via email;
- ◆ Integrated links to trigger knowledge creation workflows from specific cases; and

- ◆ Collaboration.

Email deflection. When customers are unable to resolve their own problems from a company's website, they will often submit their questions to the company through email. InQuira 8 for email deflection:

- ◆ Intercepts Web-submitted emails and uses the subject line to search and retrieve appropriate information to resolve the customer issue;
- ◆ Deflects inbound service requests when a customer clicks through the offered solutions and abandons the submission process;
- ◆ Passes service requests directly into the ERMS when an appropriate solution is not found; and
- ◆ Captures Web self-service session history and passes it with the service request to the agent in the contact center, allowing the agent to pick up where the customer left off.

Experience management and analysis. Companies recognize that customer service is an iterative business process based on continuous analysis and refinement. InQuira 8 offers several capabilities to manage the customer experience and measure the effectiveness of the resolution process and the creation and use of knowledge assets. Capabilities include:

- ◆ Intent libraries for retail banking, telecom and automotive industries that automate the mapping of searches and navigation behavior to industry intents. InQuira enables targeted and managed responses at the intent level, resulting in a 10:1 reduction in the number of managed responses users would have to define;
- ◆ The ability to guide an interaction and present additional content and offers that result in higher resolution rates; and
- ◆ Out-of-the-box data warehouse, star schema and reports to analyze user interactions. InQuira Analytics includes full ability to drill into reports to look at relationships of data for in-depth analysis of results. The analysis that can be performed using InQuira analytics includes conversion analysis, case escalation and email ROI, navigation usage, content gap analysis, content usage, content authoring, customer feedback, surveys and process wizard usage.

observations will provide excellent input for creating the first round of search rules for accuracy and efficiency," said McBride.

9. Keep the end goal clearly in mind. Periodically evaluate how well you are adhering to your original specifications. It is important to make sure that decisions on

whether to expand the effort or to maintain the effort are based on your business needs and the timing you are trying to achieve.

10. Consider the impact on existing business processes. Identify and understand all the existing processes that will no longer work with the new system so that

these can be addressed. A knowledge manager of a leading mobile communications company notes that, "you need to understand the processes that will change and what is going to break or be different as you go into the implementation phase of your investigation." ■