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Knowledge Management Models

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Is your support organization struggling with knowledge management? Does it seem that the knowledge base is always a step behind: missing some critical documents, encumbered with old ones? Perhaps what you need is to change the way you handle knowledge management. This article describes the four basic knowledge management models and when they should be used.

The Content Specialist Model

In the content specialist model, there is a dedicated team of technical writers who create new documents, push them through the publication workflow, and maintaining existing information in the knowledge base. The technical writers often work from suggestions from the support staffers, as they come up against interesting issues while resolving customer cases.

The content specialist model works well for low-complexity support environments where there are many repeated issues. It does not work as well in high-complexity environments in which advanced technical skills are required to grasp customer issues. Also, the content specialists can lose track of customer needs.

The Product Specialist Model

In the product specialist model, the second-tier support staffers are responsible for creating knowledge base documents in addition to helping customers with the more complex issues. The benefit of the product specialist model is that it ensures that the right level of technical skills is available for knowledge base work, and that new documents will match customer needs. The drawback is that second-tier staffers are in great demand for many tasks so knowledge base work can suffer.

The product specialist model works well in support environments that use outsourcers or partners to deliver tier one support, since third-parties are rarely interested or involved in improving the knowledge base.

The Batch Model

In the batch model, all support staffers are expected to contribute to the knowledge base, using issues that they encounter when resolving customer cases.

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It's called batch because while issues are identified during case resolution the knowledge base documents are typically created in batch mode, outside the case resolution time proper and during project time.

The batch model works well in high-complexity environments with a steady stream of new issues. The advantage of the batch model over the product specialist model is that there are more hands to do the work. Still, the product specialists typically handle reviews so there can be a bottleneck at that stage. The batch model is rarely used and is rarely useful in environments with lots of repeated issues since there is little material to work on.

The Knowledge-Centered Support (KCS) Model

In the Knowledge-Centered Support or KCS model, all (properly authorized) staffers create documents, as in the batch model. However, the difference is that they are expected to create the documents during the case resolution process itself. The idea is that if the customer issue they are working on is not already documented in the knowledge base they will create a document on the spot, use it to resolve the case, and make it available to others. In the same vein, if they spot an issue with an existing document they will fix it or flag it. So in KCS there is no distinction between the case resolution process and the knowledge management process: it's one and the same.

KCS is well-suited to highly complex support environments with lots of new issues, like the batch model. Because it requires a radical change in the case resolution process it needs to be implemented carefully so both staffers and managers can internalize the process changes.

What model is right for you?

Your choice of a model depends on the type of issues you are handling and the case resolution model you are using.

- With low-complexity products and lots of repeated questions, the content specialist model is usually the most efficient. The content specialists will also have the skills to polish the documents so they can be used by customers in self-service.
- With high-complexity support and many new issues, select batch or KCS. Only adopt KCS if you are willing to make the commitment to the change in the case resolution model.
- With a tiered support model the product specialist approach is often a good fit, while a touch-and-hold model would suggest batch or KCS.
- For a new product or a new release, select either a content specialist model (for low complexity) or a product specialist model (leveraging the support readiness staff).
- To capture knowledge from outside the support center, the content specialist model is best.

It's ok to mix and match

Don't be dogmatic. Many of my clients use several models at once to address

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different needs. For instance, you could use KCS for authoring documents inspired by support cases, but maintain a content specialist team for adapting non-support documents to the knowledge base. Or you could use a batch model for case-based knowledge work together with a product specialist model for creating documents about new products.

Many knowledge management problems stem from a poor choice of model. A bad fit is almost impossible to overcome. Does your model fit your needs? If not, change it.

Francoise Tourniaire is the founder and principal of FT Works, a consulting firm that helps technology companies create and grow their support operations. She's the co-author of *Transforming Support with Knowledge*, a practical guide for knowledge management in support centers, to be published in January, 2006. For more information, visit www.ftworks.com or call 650 559 9826.

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