



## Breakthrough Knowledge Management

By David Kay, DB Kay & Associates

### Reinventing Knowledge Management

Service and support organizations understand the value of capturing and sharing knowledge, but they're not always sure of the best way to do it. Dedicated content teams are expensive and are short on technical expertise. Product specialists in the support center lack the time or the inclination for technical writing. And neither group sees all the everyday customer issues that bulk up the caseload.

To address these challenges, industry leaders like HP, Novell, EMC, and Oracle joined together to create Knowledge-Centered Support (sm) (KCS): a better way to create findable, useable, timely content.

KCS starts with a simple premise: support organizations should capture, reuse, and improve knowledge while solving problems, rather than as an afterthought. Support jobs are hard enough without asking staffers to do additional knowledge management tasks, but when case management, problem solving and knowledge management and are all integrated into a single process, reusable knowledge comes (almost) for free.

KCS offers significant advantages compared with traditional KM approaches. KCS:

- **Reduces cost** by eliminating dedicated content teams.
- **Makes support more efficient** by reducing escalations, shortening ramp-up time, and driving web based self-service effectiveness with relevant content.
- **Drives employee loyalty** by recognizing and rewarding employees for the knowledge they share.
- **Increases customer satisfaction and loyalty** by providing faster, more accurate resolutions and driving product improvements.

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## KCS in a Nutshell

KCS makes knowledge a key asset of the service and support organization. Implementing KCS changes the way support staffers resolve issues. With each case, staffers:

1. **Search throughout the resolution process.** Often, staffers don't search, thinking they know the answer already, or assuming the answer won't be in the knowledgebase. Or if they do search, they may give up early on in the process. Persistent searching can unearth knowledge which can be linked to the case to:
  - Provide faster, more consistent resolutions
  - Improve or correct existing knowledge
  - Track the underlying causes of support cases
  - Avoid creating duplicate content.

Searching then linking is a habit that needs to be developed and reinforced.

1. **Capture knowledge while solving the problem .** While talking with the customer or working a web-submitted case, staffers jot down the problem statement in the customer's own words. When working the issue, they document approaches and hypotheses. Most successful analysts are already making notes without being asked—in case notes, in Notepad, or on a pad of paper. KCS just formalizes this process.

The result is that, if knowledge isn't already in the knowledge base, the analyst has already created a solution that describes the problem in a way the next customer will understand and relate to. And, experience has shown that creating content in this way adds structure to the resolution process, so cases get closed just as quickly even as knowledge is being captured.

2. **Capture the essence.** Finding answers by searching case notes is hard because they're written in unstructured text that blends the problem ("Error starting application after upgrading to 10.3"), the solution, root causes, and customer-specific details ("Joe really needs an answer today!")

KCS adds structure to content, separating case-specific details (recorded in case notes) from reusable problem, environment, and solution details (recorded in solutions, or knowledge objects.) And, while our second-grade teachers might not approve, solutions are captured as bullet lists or numbered resolution steps—complete thoughts, but not complete sentences—which are easier to write **and** easier to read than paragraphs of prose. There's less noise, and more signal.

3. **Build quality into the process.** Too often, staffers complain about knowledge “those other people” created. Or, they’re intimidated to touch solutions created by experts. KCS replaces this sense of individual ownership with group ownership—each staffer takes responsibility for **all** knowledge she interacts with.

In practical terms, this means support staffers who view a solution have three choices: they can use it, linking it to the case as it’s closed; they can fix it, if they have their technical expertise and are KCS certified; or they can flag it to be fixed with their comments about what should be improved.

KCS also requires the organization to implement continuous improvement. KCS practices integrate the case management and knowledge management workflows, keep the knowledge base vital, provide new tools for performance assessment, and leadership the cultural change required for effective knowledge management.

### **Publishing Quickly Without Sacrificing Quality**

KCS eliminates the twin bottlenecks of technical review and editorial review before sharing content inside the support center. In place of brute-force reviews, KCS employs five interlocking practices for solution quality:

1. **The content standard**, a clear usable document that defines a quality solution.
2. **Solution sampling**, in which designated KCS experts rate a number of solutions per staffer each month using a quality checklist defined in the content standard.
3. **A certification model**, in which only approved staffers may publish or edit solutions directly. Certification requires training, hands-on experience, and coaching. Staffers whose solution quality drops below a threshold may have their license revoked.
4. **A performance review model** that looks at a broad array of knowledge metrics to benchmark each staffer’s contributions. Metrics can be tricky, as mandating easily-measured activities—for example, telling staffers to create 10 new solutions each month—always corrupts the knowledge base. KCS makes the knowledge value a very explicit part of the job description and review process.
5. **Just-in-time solution quality**, in which all staffers take responsibility to “use it, flag it, or fix it.”

Once reused a few times inside the support center, content becomes eligible for publishing to the website. The idea is that if a solution has been validated in the process of solving, say, three cases, it’s worth sharing with customers through self-service—it’s clearly not a one-off issue, and the content is known to be helpful. By eliminating a

separate technical and (in some cases) editorial review for external publication, support organizations deliver customers relevant information they need ASAP.

Of course, not all knowledge fits neatly into the KCS model. Some kinds of solutions—troubleshooting guides for common symptoms, for example—are broader than a single solution and won't be captured during the resolution of any one single case. KCS organizations appoint technical experts as "knowledge domain managers" to track the knowledgebase and create or suggest these sorts of higher-level knowledge articles.

### **Making the Transition**

KCS requires a significant rethinking of knowledge, support processes, support staffers' job descriptions, and rewards and recognition. It requires senior executive and management buy-in, a carefully executed communications plan, and an enabling technology platform. It generally requires help from experts outside the company. It's not an initiative that should be taken lightly.

But for those who take the plunge, the results are remarkable. KCS adopters, including a number of SSPA STAR Award winners, have seen:

- 30% - 60% reduced time to resolve
- Improved ramp-up time, from months to weeks
- Efficient creation of user-ready content for web based self-service
- Product improvements through painless root cause analysis
- Increased staff satisfaction; reduced redundant work
- Increased customer satisfaction and loyalty
- Capacity to create new value-added service and support offerings

We look forward to working with more SSPA members so they can realize these benefits, too.

Knowledge-Centered Support *is a service mark of the Consortium for Service Innovation.*

### **About David Kay.....**

*David Kay is principal of DB Kay & Associates, a leading provider of training and consulting in knowledge management, self-service, and collaborative support. David has been recognized as an Innovator by the Consortium for Service Innovation, and has been certified as a knowledge management best practices trainer. He has been granted two patents for his work in next-generation customer support. David is also the co-author of the book Collective Wisdom: Transforming Support with Knowledge.*

*Dave will be conducting a training day on this topic at the SSPA Services Leadership Conference taking place Nov 12 – 14 in Washington D.C. Space is limited.*

**[Click here](#)** or call the SSPA at 858-674-5491 for more information.

*Also, don't miss Dave's breakout session: "Closing the Loop: How Support Can Drive Product Improvement"*

*In this session, you will learn how to:*

- *Leverage support's unique perspective on customer needs*
- *Make support's input more meaningful in the product development process*
- *Provide the development team with actionable structured feedback*

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