KNOWLEDGE MANAGEMENT BEST PRACTICES FOR CUSTOMER SUPPORT

PART 1 - INTERNAL KNOWLEDGE MANAGEMENT

WHAT YOU'LL LEARN

Knowledge management is a powerful concept that encompasses many areas. We take a deep dive into the principles of knowledge management and how to share knowledge to enhance customer service and improve the bottom line. In Part 1 we introduce the concept and share best practices for internal knowledge management.

INTRODUCTION

In any organization, the adage proves true that "knowledge shared is knowledge gained."

While it may seem obvious that a more informed team is a more productive team, knowledge-sharing, when done well, also has a direct and powerful effect on a company's bottom line—especially when that knowledge is shared for the benefit of customers.

In most organizations, a company's customer service agents are the ones who have the most regular, daily contact with customers. In effect, they are closest to influencing the company's bottom line: Happy customers stay, while dissatisfied customers leave. That's why a robust and multi-channel knowledge management system is a vital tool for the success of any customer service desk.

WHAT IS KNOWLEDGE MANAGEMENT?

Knowledge management (KM) has many definitions. At its most basic concept, it means managing what you know to your advantage. For individuals, much of this is done in our minds, which may or may not be efficient. For groups, organizations, and companies, a more focused effort is required, utilizing best practices and leading technology.

Consider the basic definition of the term "knowledge":

1. Facts, information, and skills acquired by a person through experience or education; the theoretical or practical understanding of a subject.
2. Awareness or familiarity gained by experience of a fact or situation.

<div align="right">Oxford Dictionay, 2014</div>

The management of knowledge is typically a business or enterprise initiative that attempts to deal with or control the knowledge collected and used by an organization - from databases and documents to procedures and individual expertise.

Thomas Davenport, a leading expert in the field, provided a simple definition in 1994 that is still widely used today:

"Knowledge Management is the process of capturing, distributing, and effectively using knowledge."

As valuable as knowledge management is, the effective use of that knowledge has always been challenging. Every company has unique knowledge management needs which drive different policies and procedures, but basic principles still apply.

Throughout the past half-century, successful Knowledge Management initiatives have provided enormous returns to the bottom line, and competitive advantage to diverse businesses around the world. In customer support environments, it is particularly beneficial to have a centralized knowledge reservoir. Companies who sell a product with multiple components or versions can realize a direct benefit from being able to cross-reference an entire collected library for technical support and issue resolution. Having the information readily available can even make the difference between first-call resolution and an ongoing problem for your customers.

In this 3-part series, we will discuss the different aspects of knowledge management, best practices, and how to use knowledge management to enhance customer service.

In Part 1 we discuss Internal KM and share best practices for development of a Knowledge Base. Part 2 explores External KM: sharing your knowledge with your customers. Finally, in Part 3 we will introduce Knowledge Management 2.0: taking it to the next level by expanding your definition of knowledge resources and being proactive in customer support.

PART 1: BEST PRACTICES IN INTERNAL KNOWLEDGE MANAGEMENT

A company should clearly define knowledge management objectives and incorporate them into their overall business strategy and priorities.

You may choose a customer-centered approach with a sharp focus on improving customer service and satisfaction. For customer service centers, the primary goal is often first contact resolution, which in turn reduces labor costs for the service center while increasing productivity for your customers and improving the overall customer experience.

Revenue growth, increased productivity, employee satisfaction, and risk reduction are other common objectives of a knowledge management strategy. Many companies with a focus on continuous improvement include a knowledge management statement in their mission or value statements.

Active buy-in from all departments, at all levels, is necessary for the success of any KM strategy. Lack of support is the most commonly cited reason for failure. Management must recognize the value of knowledge management. A strong champion at the executive level is recommended, as well as agreement at all levels of management to change the culture by encouraging participation by those who contribute and those who reuse.

UNDERSTAND WHAT KNOWLEDGE NEEDS TO BE MANAGED

Explicit knowledge (such as processes, procedures, and technical specs) is frequently documented but may be buried on someone's hard drive or in a file share. This information should be managed through an integrated system that is easily accessible to everyone who needs it.

The higher risk though is the potential loss of implicit and tacit knowledge which has never been written down. Employees, specialists, and 'experts' have learned how to do things in the best way possible. These abilities, developed in performing a job, are sometimes difficult to communicate, but may be some of the most critical knowledge for your business to capture. This information is invaluable to pass on to new employees, and documenting it will help you avoid the loss of this knowledge if the expert suddenly becomes unavailable or leaves the company.

As you move forward, recognize the value of what you don't 'know' as a business. Some experts boil this down to four steps:

1. **Know what you need**
    What you need should be defined as you outline your knowledge management strategy. The initial content will be obvious – the processes and references that are used most in the company, and the answers to common problems.

2. **Know what you have**
    What you have could include an existing, localized Knowledge Base or list of frequently asked questions (FAQs) which could be used immediately for core content.

3. **Define the gap between the two**
You may have identified a demand for answers to questions for which the knowledgebase has no content. This could include the rewrite of a poor or incorrect submission or the summarization of the answers to a list of FAQs.

4. **Identify where you will store and index the knowledge.**
This is most often some sort of Knowledge Base (KB). Hosting your knowledge base on a company web portal will offer anytime access.

DEVELOPING A KNOWLEDGE BASE

Knowledge management for most organizations begins with the creation of a Knowledge Base, a one-stop "data center" that contains documentation and information outlining standard processes and technical data that is accessible to the individuals and teams needing that information.

Not long ago, it was common for a company's information technology staff to rely on Knowledge Base portals to provide real-time documentation of policies, procedures, and best practices related to the company's various software and technical platforms. Over time, and recognizing the benefit of sharing this valuable information, more companies opened up access to their internal Knowledge Base to employees beyond the technical team, deploying a "self-service" approach to information and document sharing across departments.

As a customer support organization, it is strongly recommended you have some type of knowledge base serving internal information-sharing purposes.

Once you understand the scope of your knowledge base requirements, you can start looking for automated tools and techniques for retrieval, storage, and access.

YOU HAVE TO START SOMEWHERE

In the development of an enterprise-wide knowledge management strategy, you should first identify all current and ongoing knowledge management initiatives. Some of these may be sophisticated, some may be very simple. Once identified, standardization of the documentation is a positive first step, and will make consolidation much easier.

The identification of existing KM resources will help you collect a significant amount of valuable content to start your Knowledge Base. You may even identify a particularly successful initiative and decide to expand on it.

There may be specific areas that you want to focus on first, where the payback will be greater or where serious risks and issues have been identified which could be addressed by the creation of a knowledge base - for example a collection of common issues that the customer support team

sees on a daily basis. One of the benefits of a knowledge base is that it is ever-changing, flexible, and scalable to your organization's ongoing needs.

Develop a plan for maintenance and continuous improvement. An effective knowledge base is not something you just set and forget. Keeping it relevant and efficient will require cleaning on a regular basis.

A successful KM program should include a content management process, with regular reviews and improvement actions defined. Ongoing control and maintenance is important so that the information is accurate, well written, and current. Monitoring analytics over time will help you identify what information is being used, what is not, and what isn't relevant. All three groups require attention.

Your plan should clearly define criteria for validation of new material and archival rules. Redundant or conflicting entries should be combined or resolved. Low quality materials should be improved or removed. Out of date and unused entries should be archived in a timely manner.

Identify Knowledge Owners throughout your organization to improve the development of your knowledge base, both in content and quality. These champions will be responsible for maintaining the accuracy of the knowledge base, as well as adding new information. A dedicated Knowledge Base Manager or team may be necessary, depending on your requirements.

SUCCESSFUL KNOWLEDGE MANAGEMENT IS A CULTURE, NOT A PROCESS

For KM to be successful, it must be a part of the company culture, integrated into the processes and strategies of the business. All employees and managers must not only understand the value of the knowledge base, but support and participate in the collection, optimization, and reuse of knowledge.

Collaboration is critical. Include all organizational departments such as Sales, Finance, Research, Development, Operations, and others to identify information that would be useful to include in the knowledge base. It is also advised to establish wikis and internal tools for collaboration.

To ensure company-wide involvement, show employees the direct value of knowledge management to themselves. How will it make their job easier, more satisfying, or financially rewarding? Involving your employees in the entire process (including the program goals) will help ensure participation in, and growth of, your KM strategy.

Many companies already use some type of internal KM, and while it is a great foundation for improving ticket resolution times for support agents, that is only a small part of the benefits to knowledge management. Once you have an established KM system, why not use those resources to improve your customers' experience and promote self-service?

Learn more in Part 2: External Knowledge Management/Knowledge Sharing

TEAM SUPPORT

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ABOUT TEAMSUPPORT

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