

# Knowledge Management for The Age of Mobile, Social and Multichannel Customer Experiences

What you need to do and how you can get there

Prepared exclusively for



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## **Executive Summary**

Knowledge Management has been with us since the 1960s, yet we have not been able to understand it sufficiently to maximize value from its practice. While many implementations have returned value to organizations, there have been many failures for each success. But, here's the good news - we have learned sufficient to distill and leverage best practices to implement knowledge management (KM) and maximize ROI.

Solutions we can final deploy.

Knowledge Management is not a technology, rather a discipline that leverages technologies. The continuing evolution of business through social that we experienced the past five years, and the coming changes that mobility is bringing, are rendering obsolete what we considered best practices a short time ago. Following the seven most important lessons learned will help organizations reach returns as planned; these lessons are:

- 1. Federate Knowledge
- 2. Build Support Across Channels (including new social and mobile channels)
- 3. Remove Barriers to Knowledge Creation
- 4. Tap into the Crowd
- 5. Leverage a Dynamic Infrastructure
- 6. Make it Easy to find Knowledge
- 7. Empower Users to Generate and Enhance Knowledge

When the KM solution is deployed, and the above lessons are followed for ongoing maintenance and adaptive enhancement, it can begin to generate value for the organization. As we have learned over the years, the KM strategy has to be formulated with a view to creating awesome experiences for customers. Knowledge is a fundamental component to fulfill customers' expectations; it must be part of the experiences they receive from the organization.

The next evolution of knowledge management, providing awesome experiences and leveraging social channels and mobility is by no means the final one. Knowledge Management is constantly evolving for organizations that adopt it. Many more lessons will be learned in the next few decades that will continue to increase the value of knowledge in the organization.

The seven lessons above, and the rest of this white paper, are the best place to get started.

# New Channels Redefine Knowledge Needs

Knowledge Management, the final frontier.

Although it may seem a lighthearted attempt at defining what Knowledge Management is, and a tip-of-the-hat to Star Trek, there is a lot of reality in that statement. Dubbed one of <u>the three big</u> <u>problems left to solve in CRM</u><sup>1</sup>, Knowledge Management has a checkered past that shows the potential and the value it can bring, but is light on the achievements against the same.

Ever since the 1960s we have been looking for the best model possible to empower <u>knowledge workers</u><sup>2</sup> to share their knowledge. Whether the term, and the attitude, "*management*" is the proper one to use or not is irrelevant; the concept that knowledge must be captured, used, and maintained has been

Currently in the third and fourth generation of tools and procedures, knowledge has been found to play a dominant and relevant role in many business functions, including customer service. adopted by virtually all businesses and propelled countless implementations. Currently in the third and fourth generation of tools and procedures, knowledge has been found to play a dominant and relevant role in many business functions, including customer service, a core component of the overall customer experience.

Using knowledge for customer service had been quite simple until now: knowledge existed and resided with the agents that staffed the phones in the call center – whether in their heads or in knowledgebases. Customer expectations are that the expense of time and energy of dealing with an agent is necessary to obtain their answer. The internet led to a disruption of this model; the myriad new channels available brought what turned out to be

empty promises of cost savings and resource optimization in a multi-channel deployment. Organizations deployed self-service solutions where the knowledge supposedly existed and was discoverable without the hassle of talking to agents.

These solutions changed the expectations for the customers from accepting delays to obtaining an answer from a human or to demanding the information to be easily available via all channels.

## Social Changes the Game

The social evolution and social channels brought the last change: empowered users to create and share knowledge, increasing their collaboration to generate knowledge and reducing dependence on the knowledge provided by the business; it was no longer necessary to get an answer from the company or even from their resources. All interested parties that knew the answer collaborated via online communities to share this knowledge. At the same time, consumers are also demanding prompt

<sup>&</sup>lt;sup>1</sup> <u>http://www.destinationcrm.com/articles/Columns/Departments/Connect/The-Big-Three-81572.aspx</u>

<sup>&</sup>lt;sup>2</sup> <u>http://en.wikipedia.org/wiki/Knowledge\_worker</u>

answers from businesses and use the social megaphone to complain to the world if they get ignored or get poor service.

The world of knowledge management today is dramatically altered by:

- The shift in the sourcing and origin of the knowledge,
- The change in available channels to obtain it and interact with subject matter experts, and
- The speed at which knowledge is expected to flow

From a single repository powered and maintained by a company via a single channel to a distributed world of knowledge that is not always owned and managed by the organization, customers have more choices now.

Organizations must embrace these trends and understand they don't position social and communities as alternative sources of knowledge, rather as a complement to their KM efforts of the past decade (sometimes longer). Embracing this concept will allow organizations to leverage all existing knowledge, regardless of origin, into a single, universal knowledge repository for the benefit of all.

## The Mobile Revolution Adds to the Urgency?

The next generation of consumer and IT change, driven by the use of mobile devices and the un-tethering from fixed-line telephones, desktops, and office locations to virtually anytime and anywhere compounded the problem by magnitudes; It is no longer necessary to be in a specific place or use a specific channel to interact with knowledge, the organization, or the experts that hold it.

According to a <u>recent study by Speechcycle</u><sup>3</sup>, half of users that require customer service prefer to try to solve it on their own before reaching out for the call center or contact center. The most dramatic

change in the past 24 months was to find these users interacting via their mobile devices – not via the traditional web site when trying to fix their own problems.

Organizations have responded quickly to this change by provisioning mobile-capable and mobile-enhanced web sites. Consumers and customers using the new mobile channels expect them to work the same as, if not better than, other channels, but according to Nielsen Norman group, in over two-thirds of cases that is not how it works: more than 76% of users reported having 76% of users that try to use applications via a mobile device have problems

problems using mobile applications. The experiences they had via telephone, web self-service, email and other must be replicated in these new social and mobile channels.

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http://www.speechcycle.com/press-releases/speechcycle-and-echo-research-study-reveals-customer-experience-t rends-for-service-provider-market.html

The penalties for organizations not addressing these needs are stiff – mobile and social customers are impatient and vocal: <u>almost two thirds of users that had unsatisfactory resolutions through these</u> <u>channels said they would be less likely to buy from companies</u><sup>4</sup> with which they already had a relation – <u>and one quarter of those having problems confessed to resorting to communities and social channels</u><sup>4</sup> to express their dissatisfaction. On the flip side, today's vocal customers also post happy experiences, creating a big opportunity for businesses to promote their successes.

The new mobile, social and multichannel customer is driving organizations to provide timely answers to solve problems and meet their goals, and KM can be a critical enabler. We will discuss in this report what organizations must do to get ready to deal with this sea change and how to leverage KM to build their brand through great customer experiences in this new era.

# Organizations Are Not Prepared

Organizations rushed to meet the demands of the new consumer without putting a comprehensive and robust infrastructure for unified multichannel knowledge management, or even a strategy for it, in place mainly because they were afraid of the bad publicity from poor service. This approach did not work, dragging traditional customer service and the brand with it.

As stated before, one-fourth of all consumers that had unsatisfactory service experiences in 2010 made

use of social channels to express their dissatisfaction (link) – a rise of 50% from the year before. Indications for 2012 are that the number of people taking to social channels to expose unfulfilled service expectations has tripled or even quadrupled since - customers are now wielding their social power more than ever before for faster service.

This is not a sustainable model for organizations.

# The Added Pressure of Experiences

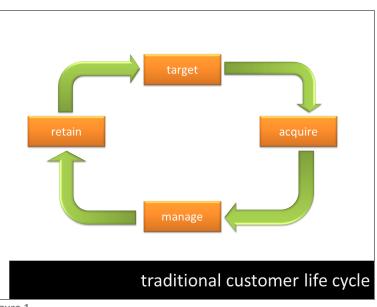


Figure 1

In addition to the social and mobile demands on the organization, the social consumer is focused on receiving value in exchange for their loyalty and business – value that is reflected in the expectation of

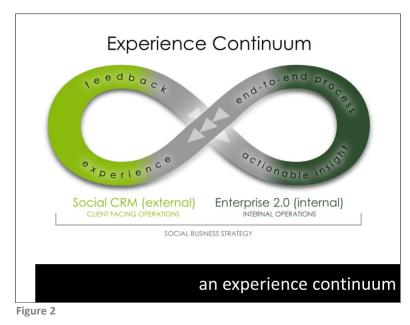
<sup>4</sup> 

http://www.forrester.com/North+American+Technographics+Customer+Experience+Online+Survey+Q4+2010+US/ -/E-SUS805?objectid=SUS805

<u>awesome experiences</u><sup>5</sup>. It is no longer sufficient to simply provide an answer, but the process must conform to user expectations, feedback must be collected, and innovation and improvements to the process and the knowledge made based on that feedback – that defines an awesome experience.

The traditional customer life-cycle of "target-acquire-manage-retain" is no longer sufficient for organizations to interact with customers (figure 1). This company-centric model solely focused on efficiencies does not yield awesome experiences nor does it accommodate the new channels, new expectations, or new communication models with social customers.

Organizations must focus on improving the triumvirate of *experience-knowledge-process* in collaboration with their customers and the cycle highlighted in figure 1 cannot deliver that. The new model, the experience continuum, is centered on the three items in the triumvirate: collaboration with and between customers and employees, collecting feedback to improve processes, and a methodology



to improve the knowledge, the experiences, and the outcomes.

The experience continuum (figure 2) is where organizations have to focus to deliver awesome experiences based on timely and effective knowledge. Only <u>one in four</u> organizations<sup>6</sup> today have a strategy in place to deliver improved customer experiences, but when 98% of consumers cite experience as the leading reason to do business with a company, the time to improve experiences is now<sup>7</sup>.

Essential to closing the gap between delivering value to customers and creating value for the organization is a unified, innovative, multichannel Knowledge Management solution.

# The Weak Link in Delivering Awesome Experiences – Knowledge

The problem we are having in creating and delivering awesome experiences is the improper understanding of how to do that. We came to the erroneous conclusion some time ago that great

<sup>&</sup>lt;sup>5</sup> <u>http://estebankolsky.com/2009/05/a-methodology-for-crafting-awesome-experiences/</u>

<sup>&</sup>lt;sup>6</sup> <u>http://econsultancy.com/us/reports/multichannel-customer-experience-report</u>

<sup>&</sup>lt;sup>7</sup> <u>http://www.baselinemag.com/c/a/Business-Intelligence/Connected-Customers-Demand-Better-Service-199473/</u>

experiences are complicated, full of bells-and-whistles. In reality, when asked<sup>8</sup>, customers simply expect the right answer, at the right time, and in context.

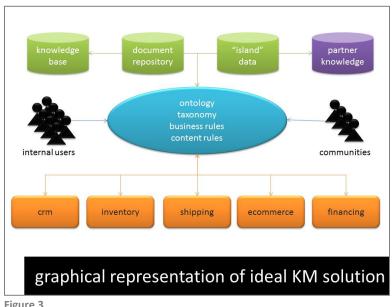
### Simple.

By focusing more on creating multi-channel complex experiences than on delivering answers organizations miss the mark and failing their customers. The solution is simpler than what most of them think: implement proper knowledge management solutions to make the knowledge available at the right time, in the right place – and to ensure that the knowledge is accurate, easy to understand, and actionable.

In other words, implement a knowledge management solution to run in conjunction with the collaboration loops so knowledge can be captured, curated, stored, searched, retrieved, and used properly. As simple as it sounds, most organizations don't yet understand what it takes to build that.

## The Ideal Knowledge Management Solution

Building the ideal Knowledge Management solution is not about replacing all efforts to date in KM, nor is it about putting together complex rules and control points to ensure that knowledge is pristine,



approved, and meets the needs of the organization. It is instead about understanding three things:

1) Knowledge resides anywhere, not just in the organization

2) Knowledge is used by most every process in the organization, if not all of them

3) The role of knowledge management is not just to manage the creation and maintenance of knowledge, but also to find and collect it, and then make sure it delivers value to users.

Figure 3

Organizations that went down this path before realized that it is not about creating large stores of data and knowledge, indexing it, and providing search boxes all over the place, but rather to ensure that knowledge can be created anywhere, by anyone, but also be findable by the right process or person at the right time. To this end, Knowledge Management is more about the components between everyone and everything – as shown in figure 3.

http://hbr.org/2010/07/stop-trying-to-delight-your-customers/ar/1

The ability to tap into everything and everyone with knowledge related to the organization's business and to categorize, organize, structure, index, and search the repositories to find the right answer at the right time is far more effective to the needs of the organization than building immense document repositories and indexing every word in them.

The benefits of a centrally located taxonomy and rules to use specific knowledge, for example, far outweigh the costs and trouble of making it happen – over the long run. Alas, in a world where budgets and approvals must happen on a yearly basis it may troublesome to justify the creation of a solution that delivers excellent value over a long time.

Thankfully, we have plenty of data to justify doing so.

## Justification for Fixing Knowledge Management

Until recently we did not have a common methodology for justifying KM deployments. For the most part, those who chose to provide financial justification found themselves either using incomplete

models, which simplistically focused on call reductions or AHT (average handle time) reduction and were ill suited to justify the value achieved, or they followed obscure metrics that only made sense to a few organizations.

The Technical Support Industry Association (TSIA) <u>recently published a report</u><sup>9</sup> where they looked for the metrics that could be tracked across different implementations and cross-referenced with KPI (key performance indicators). Among the metrics they found to be useful for justifying a KM solution we find:

• Deflection – how many calls did not happen as a result of having a KM solution

### Metrics to Justify KM

- Deflection
- Talk Time
- First-Call Resolution
- Escalations
- Incidents per shift
- Training days
- Incident costs
- Volume by channel
- Talk Time how long agents were on the phone with customers to solve the problems
- First-Call Resolution how many customers had to return after their interaction for a second time (or multiple times) to get an answer
- Escalations how many issues were solved at the initial contact without having to involve a supervisor
- Incidents per shift how many transactions an agent can handle in one shift
- Training days how long does it take to train the agent
- Incident costs how much does each interaction cost
- Volume by channel how may interactions of each type were handled in each channel

Following the metrics and methodology, they documented some great case studies:

<sup>&</sup>lt;sup>9</sup> <u>http://jragsdale.wordpress.com/2012/04/11/the-roi-of-knowledge-its-not-what-you-expect-its-much-more/</u>

- One of the members studies reported a reduction in incident resolution between one and seven percent almost immediately, in addition to a reduction of over 15% in the number of issues escalated. The combination of more interactions solved without escalation in addition to fewer incidents that arose from a better self-service solution lowered their cost per interaction by almost half.
- 2) A different member for TSIA reported increasing the volume of their self-service solution more than 14%. Since self-service was their cheapest channel to provide support, they were able to both reduce the number of people who called in as well as the costs associated with that. A reallocation of agents from phone duty to knowledge management duty gave them an almost 25% improvement in their bottom line.
- A third member interviewed for the report mentioned getting a reduction of almost 25% in the cost to manage their call center, and further investigation led them to the discovery of nearly 40% in the time to resolve incidents over the phone due to better knowledge available to their agents.

These metrics, methodology and case studies do not represent the only way to obtain a proper financial justification for deploying KM – but certainly make it easy to find a way to do so. The bottom line, after many years of short-sighted, non-strategic measurements and models, we are finally at the point where justifying a deployment of KM is feasible, possible, and desirable.

# Lessons Learned: Creating an Ideal Knowledge Management Solution

Throughout the past 20 years, but especially in the last four to six, we discovered many things about how to deploy better KM solutions. From what knowledge to include, how to maintain and index it, through the best way to access it and share the contents across channels and functions, KM is not today what was originally conceived by Peter Drucker in 1965 when he presented the research around the new "knowledge" workers.

Among these many lessons, there are seven that are fundamental to well deployed KM solutions:

### Lesson 1 – Federate Knowledge

The knowledge that the organization needs for their processes tends to be spread out; parts of it may reside with partners or suppliers, parts with customers, and parts even with governmental institutions or even competitors. It is impossible to store, maintain, and keep current all this knowledge. A far better model is to federate the knowledge: let each subject-matter-expert or knowledge owner maintain their own knowledge in the best manner for them (some may choose a knowledge base, some may choose a community, and some many choose an alternative repository) and later aggregate all these sources behind a single search engine.

Federated knowledge (a best-practices model is shown in figure 4) is more than simply letting others maintain and handle the knowledge, - it is also the acknowledgement that those who know better

answers or have complementary knowledge to offer may not have direct contact with the organization, but have found a way to contribute and collaborate towards a complex, elaborate and very complete knowledge repository. A best practice is to label the sources of federated search results so that customers and other users know where they are coming from so they can infer reliability of the sources, while the business can protect itself from liabilities, especially in regulated industries.

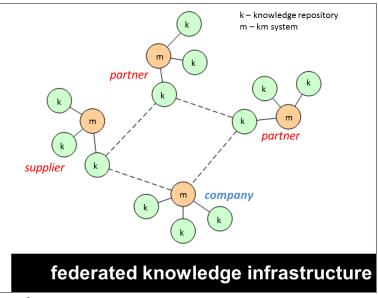


Figure 4

The basis of properly and effectively answering all questions and service issues, as well as improving R&D and other functions not directly related to the customer or the product, but that have influence in both, is to have a well federated knowledge management system.

## Lesson 2 – Build Support across Channels

One of the most common mistakes made at the beginning of the multi-channel "revolution" in the late 1990s and early 2000s was to build an incredible knowledge powerhouse online to support self-service for customers, while ignoring all the other channels. This "perfect" solution, however, was always less than so and with time the knowledge began to deteriorate (we had not yet learned the lessons we know about knowledge maintenance today, for example) and when this happened customers normally migrated to other channels.

Those other channels did not have access to the same knowledge and the answers were inconsistent, or not existent, resulting in lowered satisfaction among customers. This was a hard lesson to learn by the early adopters of multiple channels: the knowledge that feeds the answer in one channel must come from the same, not close enough or similar –the same repository or knowledge base, for all channels.

We are seeing a much better deployment of multiple channels fed by a single knowledge repository, but we are also seeing the emergence of social channels making a tad of a problem for some organizations. Social channels are exactly the same as any other channels (with their nuances like Twitter's character limitations, of course) and the solutions implemented to capture, generate, and maintain knowledge must apply equally to all channels.

Businesses with existing CRM systems can leverage best-of-breed KM solutions from vendors that are not only focused on KM but also provide deep, integrations with CRM systems.

### Lesson 3 – Remove Barriers for Knowledge Creation

Another problem we see today with knowledge management is that organizations believe they are the only source for it; even in cases where they identify outside subject-matter-experts (SME) that can help, they put those through a complex and lengthy process of knowledge creation (and maintenance) that makes SMEs not want to contribute. This parochial approach to knowledge is not smart for the organization or its customers.

The three reasons for tapping outside SMEs with appropriate capture and knowledge methods are:

- Ideation generation of new ideas, products, and services can be easily done by parsing, analyzing, and leveraging the knowledge captured and shared by either third-parties or business stakeholders. Research and Development functions depend on the knowledge generated about existing and new products to "round up" the genesis of new and improved solutions.
- Feedback similar to ideation, customers, consumers, partners, and suppliers even employees can provide and find feedback on products, services, processes, and functions performed by the organization by looking at the new knowledge and use that information to improve and innovate. The "trick" for modern KM systems is to leverage that knowledge to grow the repository as well as the ability to feed it to other processes to ensure it is acted upon.
- 3. Solutions The notion that knowledge can only be leveraged for customer support is not true. While older systems rely on that model, we are seeing smarter systems set up in a way that allows them to capture the solutions, where they may reside, and leverage to provide the necessary answers. This customer centric-model of letting the customers and consumers provide the knowledge to power the solutions, and the organization merely acts as an operator of these systems.

#### Lesson 4 – Tap into the crowd

The evolution of blogs, online forums and social networks made it incredibly easy to tap into sources of knowledge that were not available prior. Subject matter experts that before were either unreachable or that had to comply with very complex processes to contribute their knowledge to the organization can now be reached and contribute in far simpler ways via social channels.

The migration of existing communities, of the genesis of new ones, to online communities where knowledge is shared among these same SME as well as other interested parties makes it far simpler for a willing organization to tap into the knowledge that exists about their products and services and leverage them to implement better solutions.

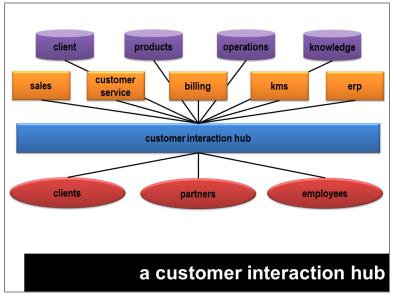
As an example, support communities can reduce the costs of supporting customers by half or more while providing sources of knowledge, subject-matter-experts, and interested parties in ways that were prohibitively expensive and complex before. Moreover, businesses can harvest the best of social knowledge, scrub it and add to its own knowledgebase as well.

Use of these SME and communities to both generate and manage knowledge is what makes the evolution of social channels a game-changer for organizations. This is nothing compared to the evolution in knowledge what will follow the recent explosion in mobility and right-time support models

- the next evolution in KM. Having the appropriate infrastructure to support social and mobile as well as traditional channels in a unified and consistent way is crucial to the success of your support organization embarking on these new channels.

## Lesson 5 – Leverage a Dynamic Infrastructure

In the early 2000s Gartner introduced a new model for Customer Service architectures called the <u>Customer Interaction Hub</u> (CIH)<sup>10</sup>. The three purposes for this model were to centralize the processing and management of the interaction, to make it ever-so simple to add channels to the existing solution



and to leverage the same components for all channels and systems integrated into it (figure 5).

The customer interaction hub gains validity in today's world of social and mobility evolutions by showing how an early adoption of this model could've benefited the organizations when faced with how to implement these new channels and operational models. Few companies had adopted such a dynamic and flexible infrastructure coming into this new evolution unfortunately.

Figure 5

The rise of new channels means that

an organization will either a) make the same mistakes (or similar) as before and create isolated experiences that a customer will find unsatisfactory over time due to the disconnect, b) panic and try to find a "quick fix" solution that does not solve the issue, or c) simply add support for the new channels to their dynamic model – not only for the new channels of social and mobile today but also for whatever new channels may emerge in the future.

The rise of new channels should not be an occasion of stress for a well-planned customer service solution, rather a celebration of a job well done in the past, and a competitive advantage to those that have easily added them to their solutions.

Going forward, we do expect to see more organization adopt such a model, and we also expect to see the next evolutionary model of cloud computing provide the fuel to take the CIH to the next level for all that adopted it and use it. Such a dynamic, flexible, platform-centric model of computing is precisely what the cloud entails when done properly.

Lesson 6 – Make it Easy to Find Knowledge

<sup>&</sup>lt;sup>10</sup> <u>http://www.gartner.com/research/spotlight/asset 113804 895.jsp</u> (paid clients only).

In our research we found that customers implementing KM solutions had one major problem: the KM was being kept for internal purposes mostly, with only about one-third of organizations sharing the knowledge that their agents had with their customers. This is a very troublesome statistic for four reasons:

- If users don't have access, direct and unencumbered, to the knowledge then automation is not possible and they end up frustrated that the organization is "hogging" the knowledge and not sharing it. The satisfaction level among those users will be lower, but for the wrong reasons. Not simply because they cannot get an answer or that is complicated, but because the trust between the organization and the users does not exist.
- 2. Beyond access, businesses should also enable users to find the knowledge easily, going beyond basic choices like keyword search. There have been innovations in knowledge findability over the years such as natural language search, topic trees, guided help, etc., which do a better job of inferring user intent and quickly get them to the answer. With best-of-breed KM solutions, businesses can offer all these capabilities to suit users' search styles instead of force-fitting one-size-fits-all approaches.
- 3. Automation, the holy grail of customer service transactions and highly sought for other interactions as well, cannot happen without the right knowledge powering those transactions. There is no easier way to upset a customer than giving them access to restricted, dated, and incomplete knowledge via automation systems while the current and updated knowledge resides behind the firewall and only visible to the agents.
- 4. The benefits highlighted throughout this entire report can only be realized when knowledge is made available and users can find their own answers accurately and quickly.

### Lesson 7 – Empower Users to Generate and Maintain Knowledge

Among the many lessons learned and the best practices collected, this is the compilation of all the above – but also the hardest for organizations to embrace.

Knowledge does not belong to the organization, belongs the users that generate and maintain it, and to those that benefit from its use. The organization, if it plays any role in a well-designed KM solution, is the vehicle to enable users of the knowledge to be able to use it.

Few of the systems we have seen out there have been good at empowering users of the knowledge to generate and maintain it, with online communities taking the early lead in that model. The ownership feeling that organizations have in relation to knowledge – even when allowing SME, partners, practitioners, and other interested parties to contribute – is detrimental to the long-term use of the knowledge and to keeping it fresh.

In the same research quoted in the previous point, two-thirds of organizations admitted to not allowing users, or anyone not associated with the rigidly structured KM solution deployed, to generate and manage the knowledge. This is tantamount to not allowing an airline pilot to fly his plane or to tell a surgeon to not cut into a patient.

From lessons learned we know that the leading Knowledge Management systems were designed to allow all users and contributors to easily contribute knowledge – this empowerment is what makes them want to contribute and reduce the costs while improving customer experience.

## **Actionable Conclusions**

The idea that Knowledge Management has nothing new to contribute is ludicrous.

We are barely starting the era where organizations will benefit from having properly deployed and implemented Knowledge Management systems; we are just learning how to do it right.

The evolution of communications and collaboration in the next five-to-ten years will bring increases of 10 to 20 times (potentially hundreds of times more) the amount of data and knowledge that organizations are going to see between what is generated in social channels and what the evolution of mobility can bring. Mobility will also bring many more subject-matter-experts to the surface, people that can contribute that could not before, and organization must have the infrastructure to deal with that.

The seven lessons learned we shared in this paper are the essence of how an organization must build their infrastructure and understanding for the future. It can be summarized in three stages:

- 1. Build the right infrastructure
- 2. Leverage it across the organization
- 3. Maintain it and find new uses constantly

The only thing we learned about knowledge management in the past 50+ years of living with it is that there is no magic formula or single solution; a leading organization wanting to leverage knowledge management must understand it is a process that takes time, patience, and commitment – and yields amazing business results and hard-to-match competitive advantage over time.

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