Building a Successful Knowledge Management Program

ON THE AIR

Pete Talks

Hosted by Peter J. McGarahan.

Special Guest:
Bill Purcell

Thought Rock
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Candid and insightful conversations between IT industry professionals in a dynamic, unpredictable talk-show format.

Thank you for joining facilitator Peter McGarahan and KM Champion and practitioner William Purcell as they discuss lessons learned from years of building a successful Knowledge Management program.

Peter J McGarahan

Bill Purcell

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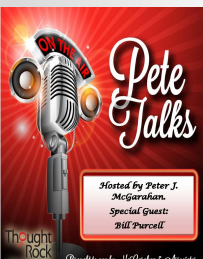
The KM Program

Bill is a leader within the IT Enterprise Support Organization for Paychex, Inc. Peter and Bill will discuss and share Knowledge Management success stories and practices from the front line:

1. Making the KM initiative a program and cultural imperative to ensure senior sponsorship, team member participation, behavior traction and sustainable progress.

2. Planning, implementing and integrating the tool with industry best practice processes.

3. Training teams on Knowledge-centered Support practices and the capabilities of the KM tool.

4. Communicating and engaging other teams who are critical in creating and maintaining the knowledge used at Tier-0 (Self-service) and Tier-1 (Support Center).

5. Establishing KM Goals & Objectives (CSF) and KM Success Metrics (KPI) aligned with the organizational objectives and designed to deliver predicable outcomes of accountable, measured performance.

The KM Program

Knowledge Management (KM) plays a critical role in how services are delivered and experienced by both the employees and the customer. KM rarely reaches its potential impact and return on the investment in time, money and people when positioned as a project. For KM to be measurably successful and sustainable, it has to be implemented as a program. KM success is based on 80% people and 20% tools.
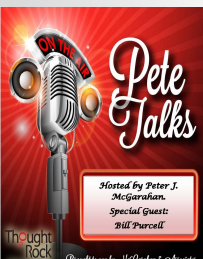
The KM Program

Peter and William will address the reality of all of the necessary components organizations need to be successful in planning, implementing, operating, measuring and continuously improving their KM program.

Key take-aways:

- Increase self-service adoption, KM 'buy-in' and participation at all levels of the organization.

- The importance of integrating KM into the ITIL Incident Management process workflow.

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The KM Program

Key take-aways (Continued):

- Introducing Knowledge-Centered Support (KCS) best practices into your service and support environment to address resolving issues, answering questions and fulfilling requests.

- How to implement Content Authoring & Management practices and discipline - Reasoning behind introducing Knowledge Centered Support (KCS) practice for Using, Flagging, Fixing and Adding (UFFA) knowledge articles stored in the "single source of truth."
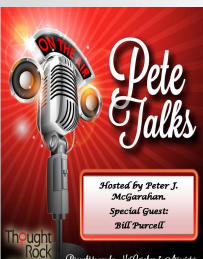
"IF YOU DON'T LIKE CHANGE, YOU'LL LIKE IRRELEVANCE EVEN LESS

<u>The Knowledge Imperative:</u>

1. Publishing great content and knowledge timely and relevant to increased productivity, engagement and consistent results.

2. Integrating technologies that allow employees to easily capture, publish, share, search and use knowledge nuggets to solve problems, share experiences, collaborate ideas and connect distributed workforce.

3. Connecting the vibrant community to share lessons learned and expand communication channels for improved awareness and buy-in
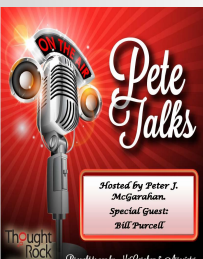
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Creating the Knowledge Strategy and Plan


1. **Know where you are**
   - Assessing your organization's current knowledge tools, practices, preferences and performance around service strategy, structure (support model), process, people, tools and metrics is an all-important baseline.

2. **Know where you are going**
   - Envisioning the end result or how you visualize Knowledge impacting your organizational and business performance.

3. **Know how you plan to get there**
   - The Knowledge Strategy, Plan and Roadmap, the result of your gap-analysis assessment against your future-state, should foundationally align what you need to do to make progress against the plan.
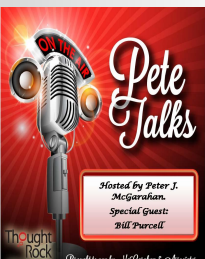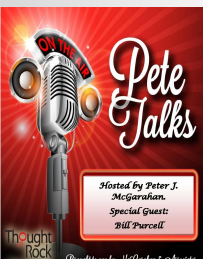
The Supporting Structure of Knowledge
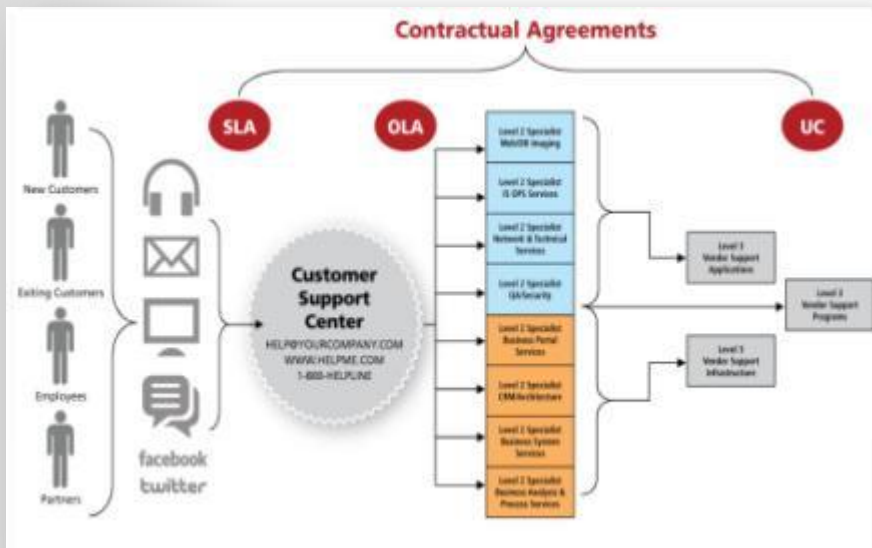
The Supporting Structure of Knowledge

To deliver knowledge to customers via the preferred phone and self-service channels, these major corporations have successfully:

"The single source of truth"

- Integrated Knowledge Management into the Incident Management workflow.
- Implemented Content Authoring & Management practices and discipline.
- Introduced and operationalized the Knowledge Centered Support (KCS) practice for Using, Flagging, Fixing and Adding (UFFA) knowledge articles to the "single source of truth."
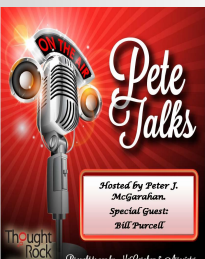
Creating the Knowledge Team

Knowledge Manager

- **Role: To architect the KM process and ensure it's successful implementation and continuous improvement.**

Subject Matter Experts

- **Role: To contribute frequently to the creation and maintenance of the knowledge as it relates to their domain and subject area of expertise.**

Front-line Analysts

- **Role: To search and use knowledge to resolve issues on First Contact, flag KAs that need fixing and issues that need KAs creating.**

The Collaborators

- **Role: Working together, these workers share knowledge real-time (Conversation) and are the ones best positioned to capture as created.**

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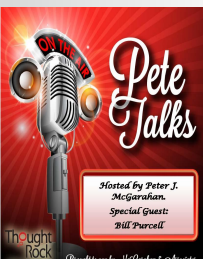
Making UFFA a Priority

Track all service and support activity.

Process and Tool as one (Integrated)!

- The solutions must be provided to the support analyst during the Incident Management Process to facilitate first contact resolution (FCR).

Use, Add, Fix and Flag (UFFA) capabilities!

- Ability to flag incidents / problems that require Knowledge Articles to be added or current Knowledge Articles to be fixed.
- Ability to contribute their own quality knowledge (Add).
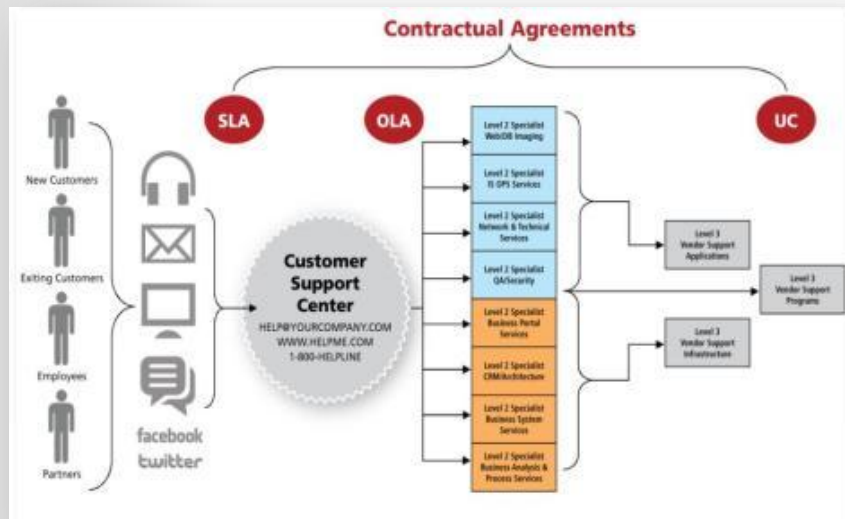- Incentive, recognition, rewards, performance appraisals around UFFA.
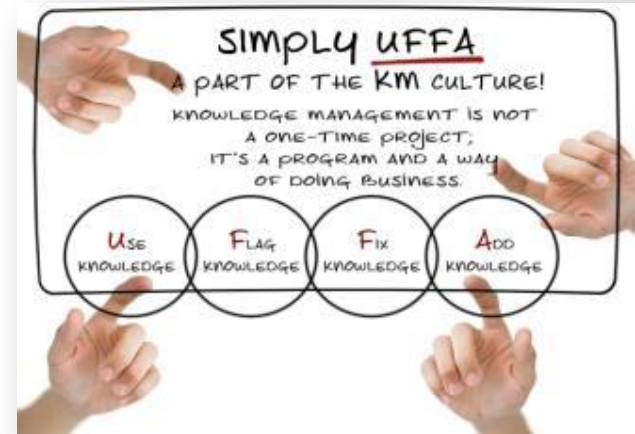
"Deliver Knowledge at the speed of conversation"

- Using knowledge when available for timely resolution – minimize escalations.

Knowledge articles successfully utilized at Tier-1 (FCR) are prime candidates for Self-service.
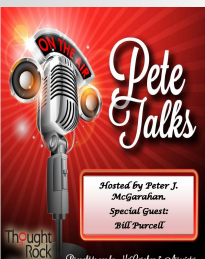
Self Service Structure

- ## Fix It – contains self-service
  functionality, tools and Knowledge Articles targeted and written for customers designed to resolve their issues on First Contact / Attempt.

- ## Order It – contains standard Service
  Request forms that provide a means for customers to order from the Services Catalog.

- ## Learn It – contains instructional
  "How-To" Videos, procedure-driven Knowledge Articles and any lessons learned that can be easily shared with customers looking for assistance on how they can get something done.
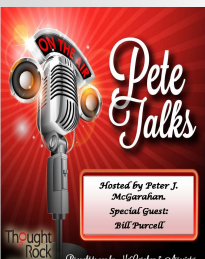
Self Service Success Steps

Engage your targeted audience first. They typically know what they want to find and use on Self-Service. They can tell you how they have done it before; easily, quickly, comfortably and successfully.

Personalize the self-service experience with profile and preference information that continues to learn with each interaction.

Build trust, confidence and set expectations accordingly, delivering - regular status updates that keep employees informed of resolution / fulfillment or next steps.

Measure adoption, experience and success rate.

- **Ensure** marketing articulates employee-centric benefits beyond the obvious cost-cutting reasoning.

- **Train** over the phone using remote control. Send members of the Service Desk out to the business to provide hands-on training. Highlight ease-of-use.

- **Appoint** self-service champions as spokespersons, who, by word-of-mouth and leading by credible example, increase adoption while providing you with valuable feedback on what to add next to the self-service portal because if you did – they would USE it.

Social Knowledge
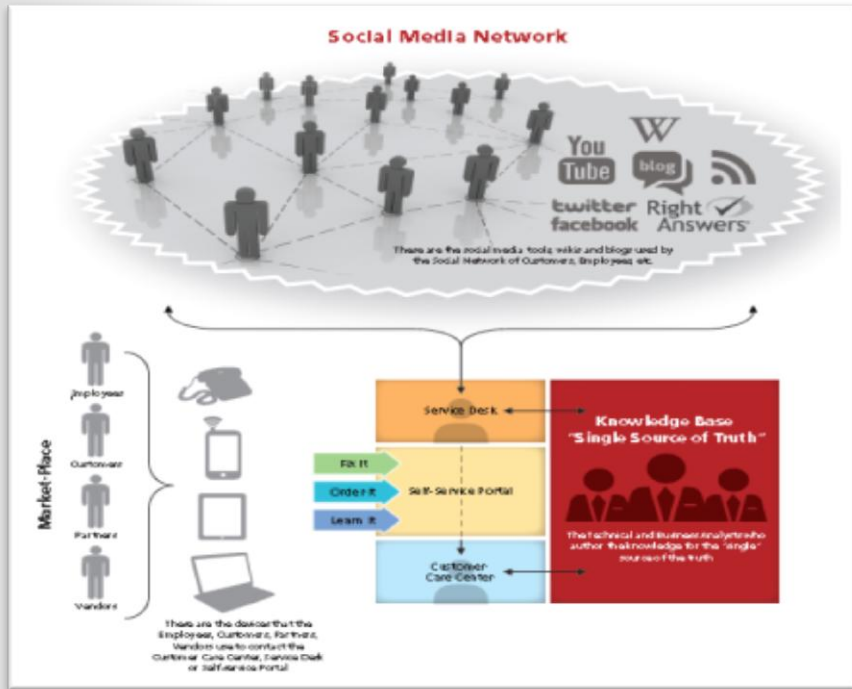
- Supplying the correct answers to people with questions.
- Supplying quality solutions to people with problems.

- Fulfilling standard service requests in a timely manner.
- Sharing lessons learned of things that people figured out.
- Sharing expertise and knowledge with others.
- Collaborating with others on ideas (hitch-hiking to another direction and piggy-backing to a new level).
- Communicating and keeping stakeholders engaged and involved during business and technology changes, updates, outages, rollouts, upgrades, etc.
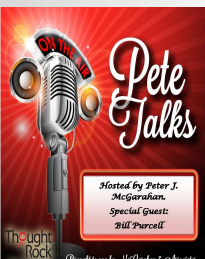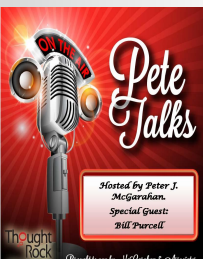
Thank You

A Big Thank You to Bill Purcell, Thought Rock Productions and You, our audience.

Join us Tuesday, December 11th for our next conversation on the Power of Metrics, Reporting and Storytelling with industry thought leader and ITSM expert Malcolm Fry.

Help us grow our community / audience!

Please pass the word to your colleagues!

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Thank You For Attending!

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We'd Love To Hear From You!

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