Providing Quality Solutions at the Speed of Conversation

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About The Speaker

- 12 years with PepsiCo/Taco Bell IT and Business Planning
- Managed the Service Desk and all of the IT Infrastructure for 4500 restaurants, 8 zone offices, field managers and Corporate office
- 2 years as a Product Manager for Vantive
- Executive Director for HDI
- 6 years with STI Knowledge/Help Desk 2000
- 8 years with McGarahan & Associates
- 2 years as Chairman, IT Infrastructure Management Association (www.itimassociation.com)
1. Creating a simplistic process for Knowledge Management that facilities the end-result of a first contact resolution by presenting the service representative with quality solutions, answers and procedures during their initial contact with the customer.

2. Creating a Knowledge Management adoption strategy that details purpose, tactics, practices and measurements of success.

3. Creating realistic roles and responsibilities around the Knowledge Management Initiative.

Provide Knowledge @the Speed of Conversation
Simply UFFA; a part of the KM culture!

Knowledge Management is NOT a one-time project; It's a Program and a way of doing business.
Common Mistakes

• Thinking that IT is the only stakeholder, owner and beneficiary of KM.
• Not defining a common glossary of terms and key word indexing approach for optimization of search engines.
• Not considering long-term governance, maintenance and change management of knowledge.
• Under resourcing the project and program with a cross-functional team of qualified, engaged professionals.
• Coming out of the gate with a manageable and impactful scope.
• Thinking an integrated, suite approach to KM will solve your issues.
• Not setting expectations nor establishing the correct success metrics and targets for the KM program.
The KM Program

- To continuously capture,
- Structure, and
- Re-use knowledge
- In an integrated solution

- Easily accessible
- To resolve issues quickly
- With measurable results

**SIMPLY STATED**
Everyone knows, uses and contributes knowledge

The knowledge is a source of training

Self-service use dwarfs internal IT service and support activity

No more knowledge hunting, it’s captured as it happens

The culture cares and shares knowledge freely

A quality focus on measurable results

**KA Quality** = Use (KBU) & Effectiveness (FCR, R@L0).
Measuring the End-Result

- # Knowledge Articles created.
- Frequency of use of Knowledge Articles created.
- Average age of knowledge articles created.
- % of knowledge articles less than 6 months old.
- Time to search for information.
- Staff & End-User confidence in finding the right information.
- % of staff accessing, contributing and modifying documents & # steps and time to access a document.
UFFA “Must Dos”

- 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).
- Using knowledge when available for timely resolution – minimize escalations.
- 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.
- Knowledge articles successfully utilized at Tier-1 (FCR) are prime candidates for Self-service.
- Let L2 / L3 focus on higher priority items / infrastructure / application projects.
Discipline & Process

1. Capture in the workflow
   - Knowledge is captured as a natural by-product of solving a problem

2. Structure
   - Improves the analysts’ problem solving process
   - For the context and relevance of search response

3. The process of searching is also the creation process (in the event you don’t find anything)

4. Just-in-time training
   - Solutions provide analysts with continuous, relevant learning

5. Manage solution quality through use and to new audiences based on demand

6. Wholly beneficial
   - As a methodology KCS provides significant benefits to each of the three stakeholders (customers, analysts, the business)
Integrating KM into the Process

1. Customer Initiates Contact
   - Incident Record Opened
   - Analyst Response
   - Analyst Resolution (FCCR or Escalation)
   - L-2 Response (Acceptance)
   - L-2 Resolution or Escalation
   - L-3 Response (Acceptance)
   - L-3 Resolution
   - Follow-up (email link to survey/phone call)
   - Self Closed

2. Demand driven Knowledge

3. Effort
   - KA Use, Add, Flag, Fix

4. KA USE / Add / FIX

5. Customer Validation

SLA Metrics
- User Initiates Contact
- SLA: Abandons
- SLA: Average Wait in Queue
- SLA: ASA (Average Speed to Answer)

OLA Metrics
- Effort to Resolution
- Time to Close

McGARAHAN & ASSOCIATES
Service and Support Value
Continuous Improvement

KCS Double Loop Process

LEADERSHIP
Performance Assessment
Content Evolution
Workflow

CAPTURE
Product Improvement
Customer Experience
Knowledge Reuse

SOLVE
Structure
Searching is Creating
Just-in-time Solution Quality

EVOLVE
Managing the KM Initiative with UFFA:

1. (U)se Knowledge
2. (F)lag Knowledge
3. (F)ix Knowledge
4. (A)dd Knowledge

Create Content
- Names of Content Authors:
- Content Title:
- Content Purpose:
- Content Audience:

Review and Test Content
- Names of tester:
- Review cycle:
- How tested:
- Approver:

Publish Content
- Names of Content Authors
- Content Title:
- Content publish date:

Content Alert/Aware
- Names of Content Users by Group:
- When communicate d to:
- How they were communicate d to:

Use Content
- Displays the number of times solutions were viewed, used, and rated.
- Displays usage information by solution.
- Displays usage information by user.
- Displays the detail information for each usage event.

Measure Content Effectiveness
- Authoring History
- Authoring Process
- Published Documents
- Up for Review
- Search History
- Usage and Feedback

This is the process for targeting, creating, reviewing, testing and publishing new knowledge articles.

Implementing KM - A Quick Start

This is a continuous improvement process where knowledge articles are measured for effectiveness and continually refined to meet its "viewed/use" ratio.
Everyone has a Role!

• Create the Knowledge Manager position.
  – Define a KM strategy, plan and processes.
  – Appoint Category Owners, Content Authors (SMEs).
  – Identifying, creation, approval & updating content.
  – Monitor / measure the use / quality of knowledge (KBU and reports).

• Involve the Support Analyst’s early in the process.
  – Get their buy-in, create awareness and ideas, feedback & contributions.

• Provide Support Analysts with guidelines / expectations /training
  – Reinforce continuous contribution, usage and end user conversion.

• Managing to resolution with these rules for (UFFA)
  – (U)se Knowledge
  – (F)lag Knowledge
  – (F)ix Knowledge
  – (A)dd Knowledge
### 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 and are the ones best positioned to capture as created.
Thinking Differently

• Do you require Analysts to search the KB before escalating the incident to Level-2 resources?

• Would you make self-service automated password reset mandatory for all customers if you had 50% adoption, 90% success rate & a high customer satisfaction?

• Have you calculating the cost for resolving repetitive issues / fulfilling requests via the phone when you KNOW self-service WORKS?

• If your self-service solution contained a robust library of content and solutions, would your require your customers to always check the self-service portal before calling the service desk?
"Being a service leader is about positively impacting the world around you! It’s not about you, it's about all that you can do to make other people successful."

Thank You
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