Introduction – a bit about Jerry Rice

- **Swedish Medical Center**

- **Western Wireless**

- **Washington Mutual**

- **Charter member, nation's first KMUG**

- **Charter member, new KM Local Interest Group**

- **Former President, HelpDesk Northwest**

- **Guest lecturer, UW i-School Masters Program**

First, let's talk scope:

"Knowledge Management" – what exactly does THAT mean?

- Business Intelligence
- Communities of Practice
- Knowledge Base Management
- Knowledge Sharing – community
- Knowledge Sharing – customers

- Content, Document Management
- Expertise Location
- Trend Analysis
- Data Mining
- Metadata, taxonomy and search management

Knowledge Management Team - Early objectives

2001: WaMu's first formal Knowledge Management team / function was originated by a cross-departmental project to fulfill the following objectives:

SAVE MONEY!
5 Tiers of Serving Customers

Objective: minimize the number of requests a CSR has to field while improving customer service levels

CSR

IVR

Email

Chat

Net

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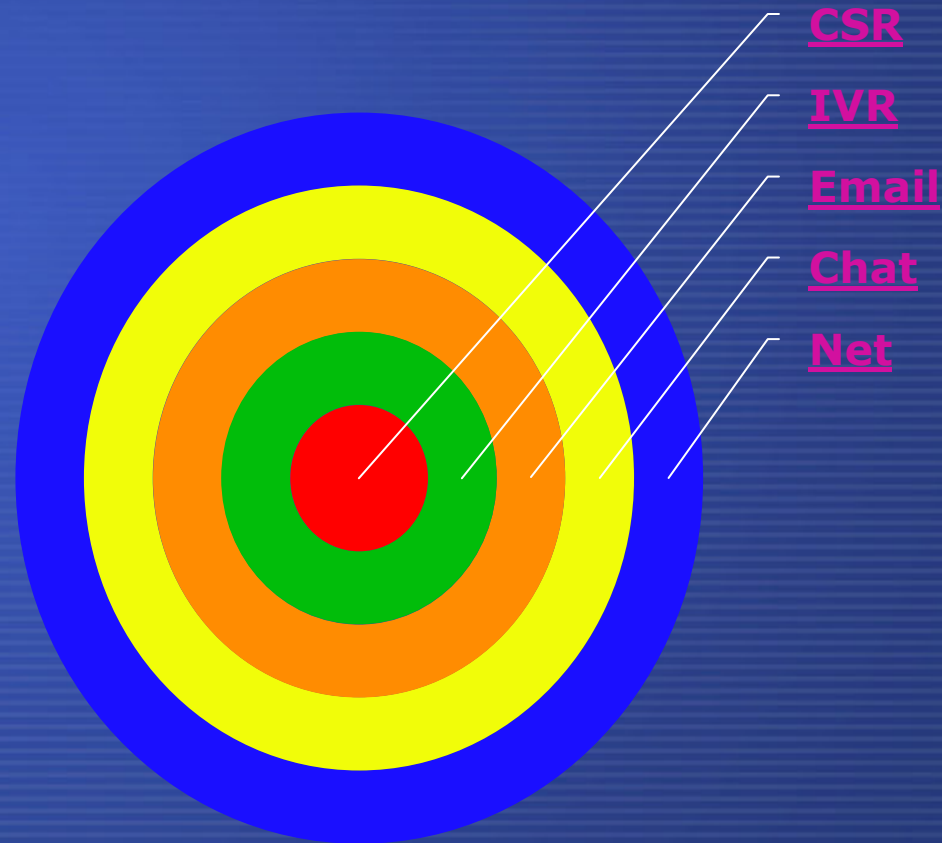
Knowledge Management Team - Early Objectives

- **Create, maintain, and continually enhance a comprehensive Knowledge Management database to enable efficient and cost-effective problem resolution.**

  - **Variety of sources**

  - **Wide range of services, applications**

 - **Varying levels of technical proficiency among users**

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Knowledge Management Team - Early Objectives (cont.)

- Enable Washington Mutual employees to use Self Help tools for resolving issues and checking issue status.

  - Customer-facing end-users

  - Wide-ranging technical capabilities

  - Heightened awareness of privacy, security issues (can you say, "Sarbanes-Oxley"?)

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Knowledge Management Team - Early objectives (cont.)

- **Provide a single resource for sharing of technology support results and information throughout the technology support environment. [TSG]**
  - **"Dotted line" relationships - authority issues within Division**

  - **Reliance on information sources in other (business) divisions**

  - **Did I mention wide-ranging technical capabilities?**

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KM "Wheel o' Knowledge"

for Problem Management
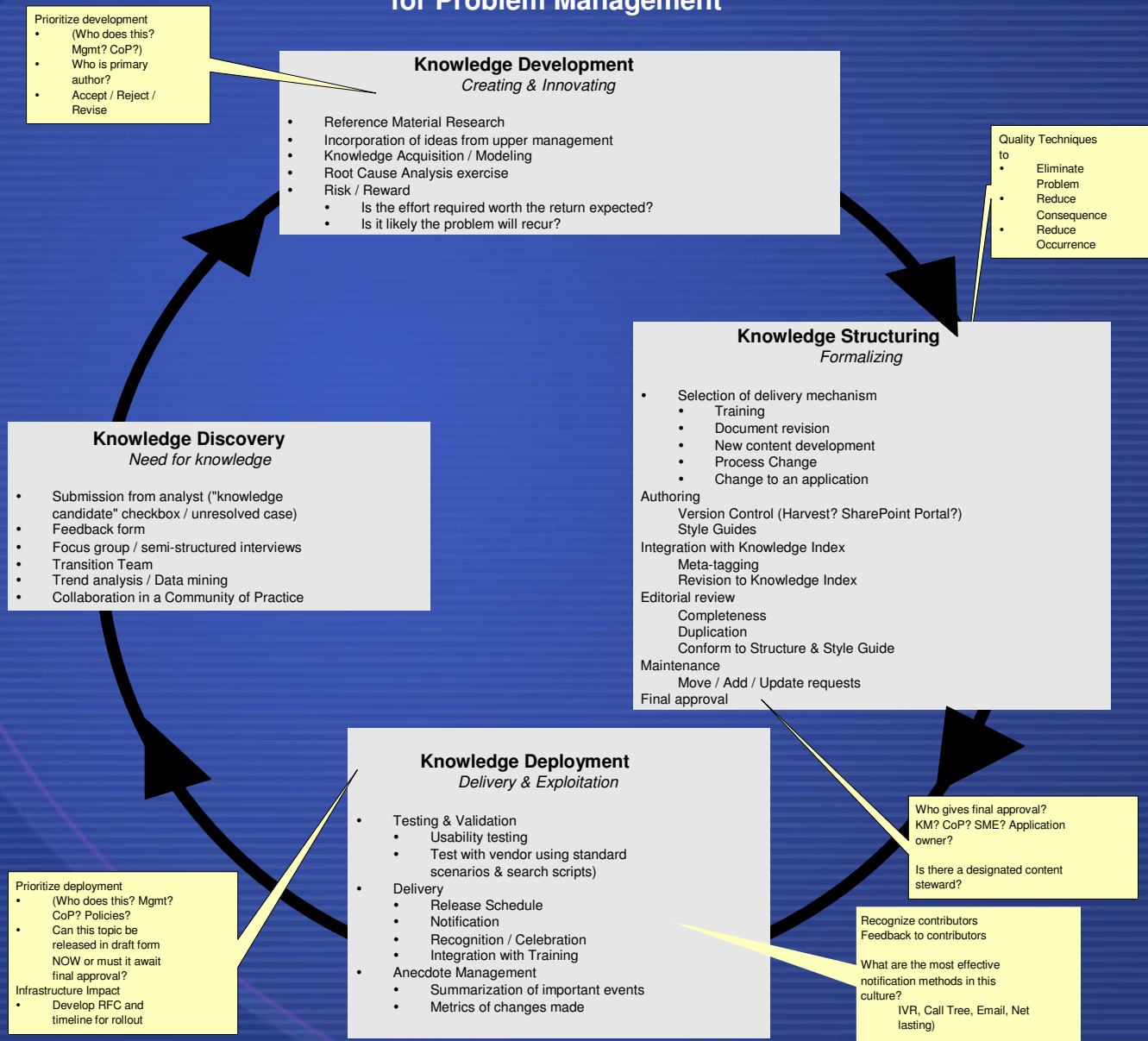
Prioritize development
- (Who does this? Mgmt? CoP?)
- Who is primary author?
- Accept / Reject / Revise

Knowledge Development
Creating & Innovating

- Reference Material Research
- Incorporation of ideas from upper management
- Knowledge Acquisition / Modeling
- Root Cause Analysis exercise
- Risk / Reward
  - Is the effort required worth the return expected?
  - Is it likely the problem will recur?

Quality Techniques to
- Eliminate Problem
- Reduce Consequence
- Reduce Occurrence

Knowledge Structuring
Formalizing

- Selection of delivery mechanism
  - Training
  - Document revision
  - New content development
  - Process Change
  - Change to an application

Authoring
- Version Control (Harvest? SharePoint Portal?)
- Style Guides

Integration with Knowledge Index
- Meta-tagging
- Revision to Knowledge Index

Editorial review
- Completeness
- Duplication
- Conform to Structure & Style Guide

Maintenance
- Move / Add / Update requests

Final approval

Knowledge Discovery
Need for knowledge

- Submission from analyst ("knowledge candidate" checkbox / unresolved case)
- Feedback form
- Focus group / semi-structured interviews
- Transition Team
- Trend analysis / Data mining
- Collaboration in a Community of Practice

Who gives final approval? KM? CoP? SME? Application owner?

Is there a designated content steward?

Knowledge Deployment
Delivery & Exploitation

- Testing & Validation
  - Usability testing
  - Test with vendor using standard scenarios & search scripts)
- Delivery
  - Release Schedule
  - Notification
  - Recognition / Celebration
  - Integration with Training
- Anecdote Management
  - Summarization of important events
  - Metrics of changes made

Prioritize deployment
- (Who does this? Mgmt? CoP? Policies?)
- Can this topic be released in draft form NOW or must it await final approval?

Infrastructure Impact
- Develop RFC and timeline for rollout

Recognize contributors
Feedback to contributors

What are the most effective notification methods in this culture?
- IVR, Call Tree, Email, Net lasting)

Our Early Challenges

**WaMu's acquisition strategy resulted in:**

- **Disparate technology support functions**

- **Diverse end-user / customer constituencies**

- **Geographically dispersed locations**

… all being brought together in a single enterprise.

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Initial State: the "Black Cloud o' Service"

- *Too many entry points, handoffs.*
- *Incompatible problem management systems.*
- *Inconsistent systems and processes for service content management.*

Result = disjointed, inefficient, uncoordinated support experience
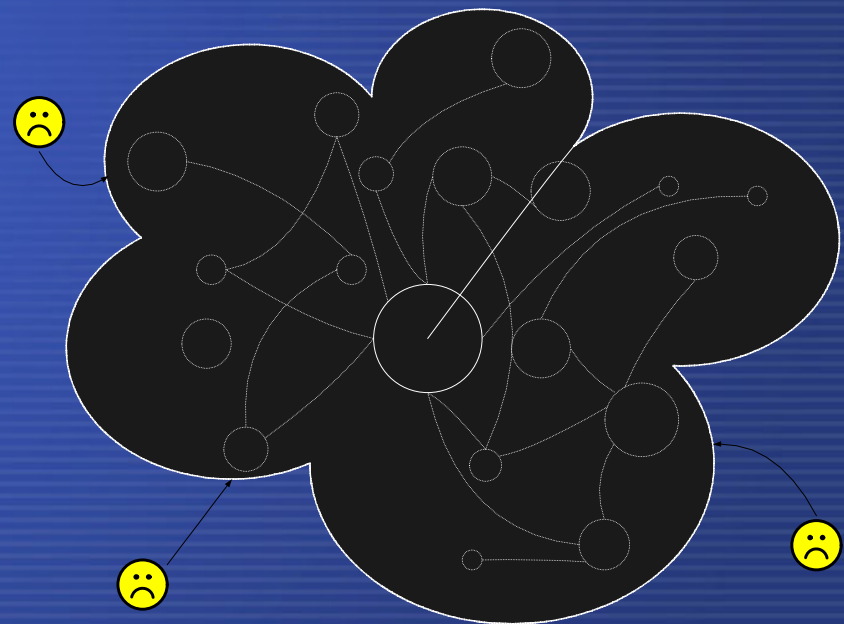
What we did (and are doing) about it....

*Focus: Seamless Transfer
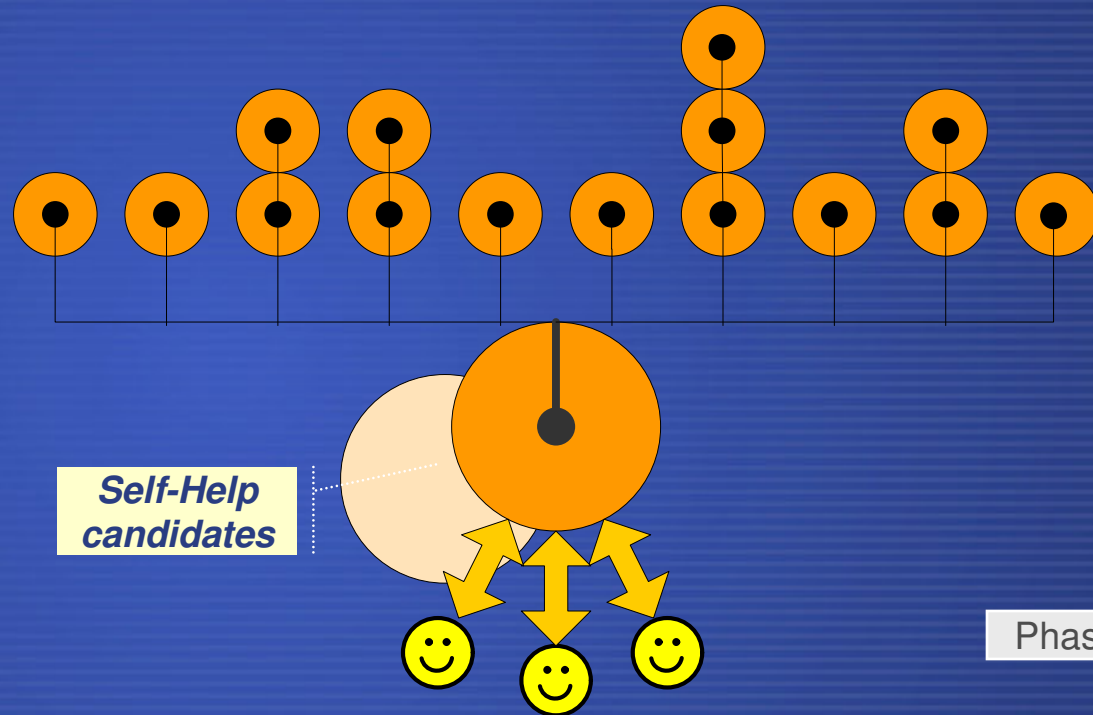and Escalation*

Phase 1

Phase 2

Phase 3
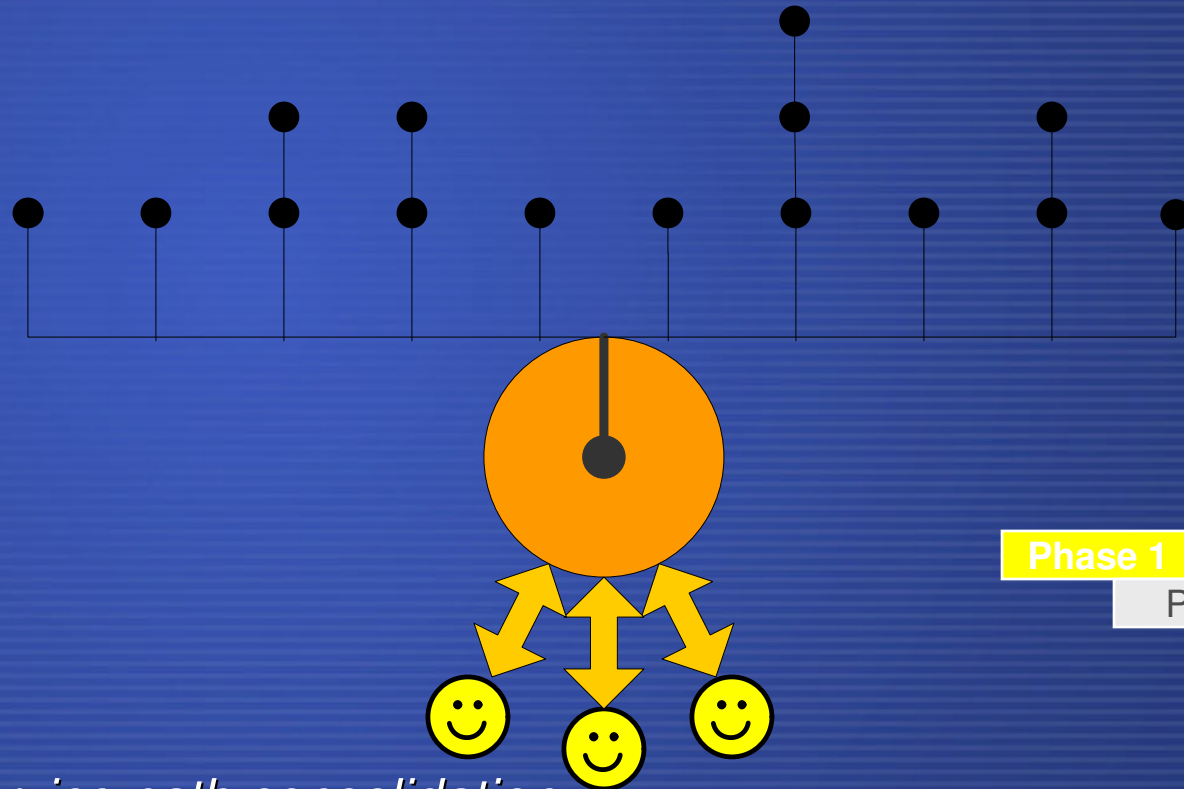
Service path consolidation
- Single call-in number for internal service customers.
- Establish common problem ticketing tools
- Initial knowledgebase implementation to support Level 1, 1+ agents.

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What we did (and are doing) about it….

## Focus: Build out KBs

Self-Help candidates

Organize Knowledge Assets within Service Domains

- **Shared platform and intranet delivery**
- **KM team established common content management standards and managed workflow for publication pipeline**
- **KM team, SME's establish candidate pool for self service**
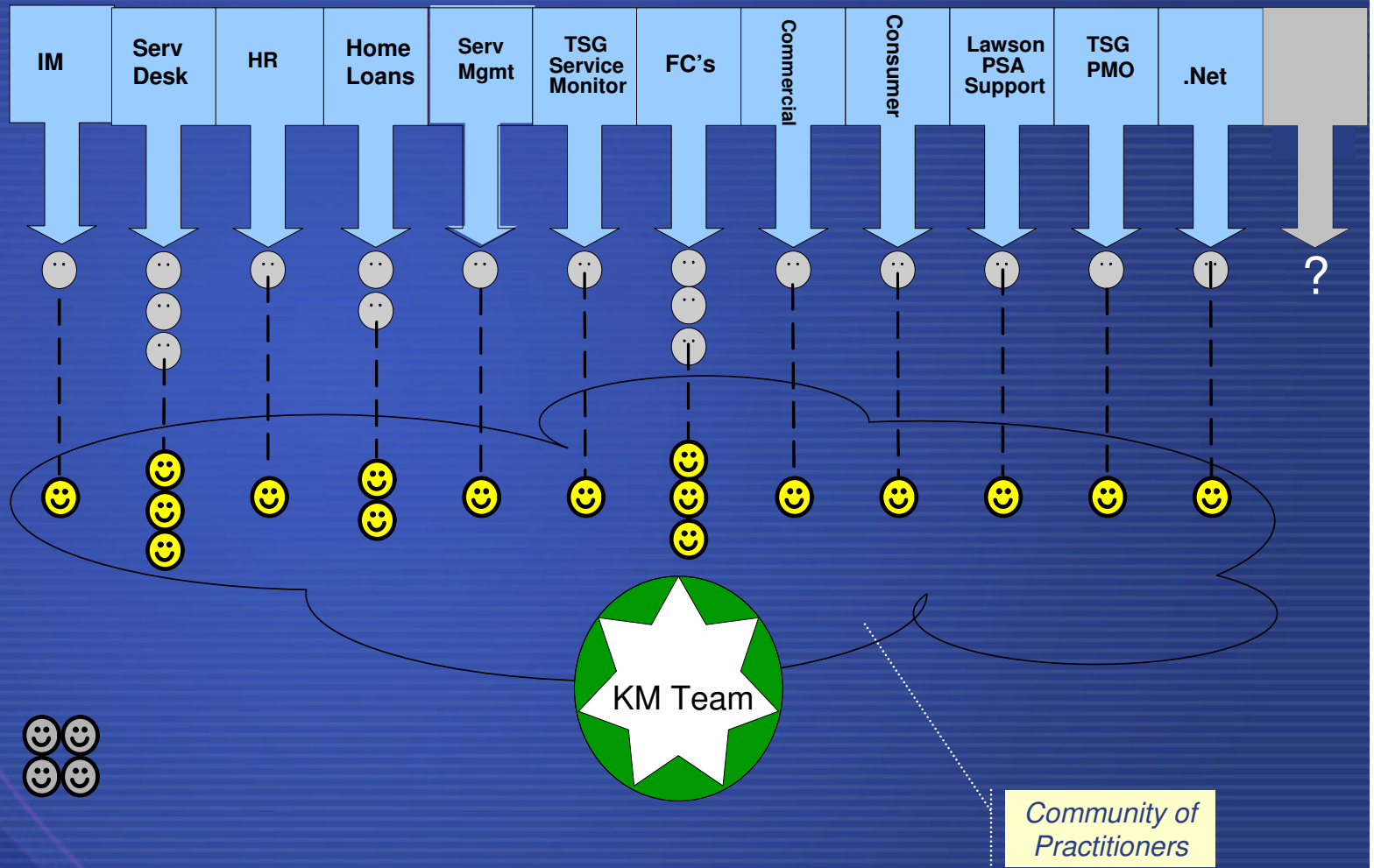- **Improve customer interaction management of Tier 1 content**

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Going forward….

Focus: Move MORE Knowledge Closer to Customers

Phase 1
Phase 2
Phase 3
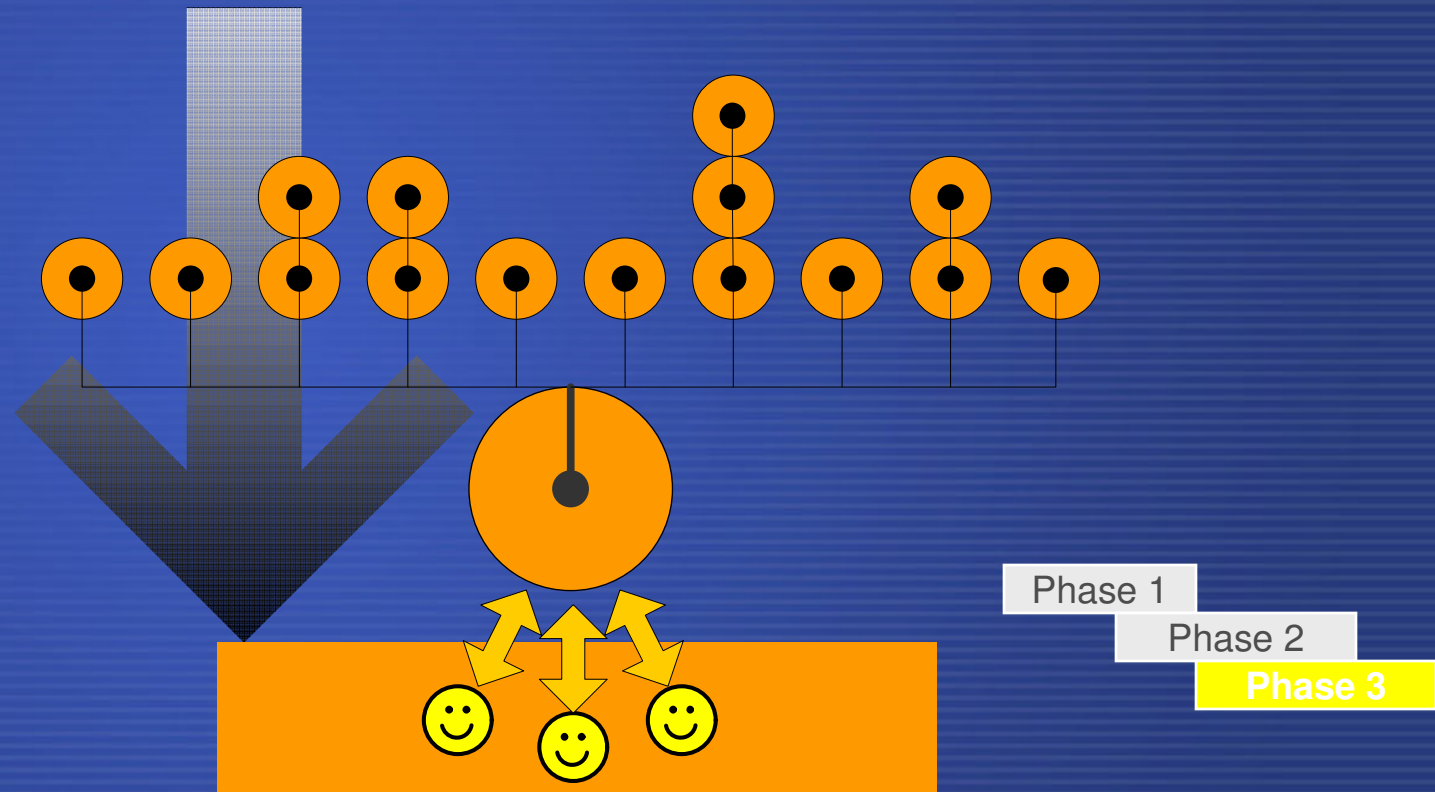
Knowledge Network
- **Federated kb's adapt and exchange content fluently, fluidly**
- **Move solution information progressively closer to the client**
- **Manage transition between self service tools,assisted support.**

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Distributed team for content production

| IM | Serv Desk | HR | Home Loans | Serv Mgmt | TSG Service Monitor | FC's | Commercial | Consumer | Lawson PSA Support | TSG PMO | .Net | |

Community of Practitioners

KM Team

?

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Key points for Knowledgebase Improvement

- Data transfer between the Knowledgebase and Problem Management Ticketing System, other systems.

- Version control and collaborative document management/creation/editing.

- Integration of external knowledge sources -"canned" knowledge, other kb's through a common search gateway.

- Web-enabled, native database development.

- Internal Support Portal. Variety of self-support options for internal customers:
  - FAQS
  - Password Management
  - Knowledge Base(s)
  - Self-Diagnostic Tools
  - Self-Healing Tools/Automated, or "Quick" Fixes

Knowledgebase Management role

Focused on knowledgebase management for internal support and migration of content toward internal self-service. The result should be growing self-service offering and knowledge resources to support first tier/first touch (or NO touch!) resolution.

- **Establish, maintain and improve common taxonomy or translation layer to control vocabulary.**

- **Common processes for content management.**

- **Establish, consult, support, and train solution validation representatives for each knowledge domain/service area.**

- **Promote capture, transfer, and re-use of service support content. Ensure and demonstrate this through measurement and analysis.**
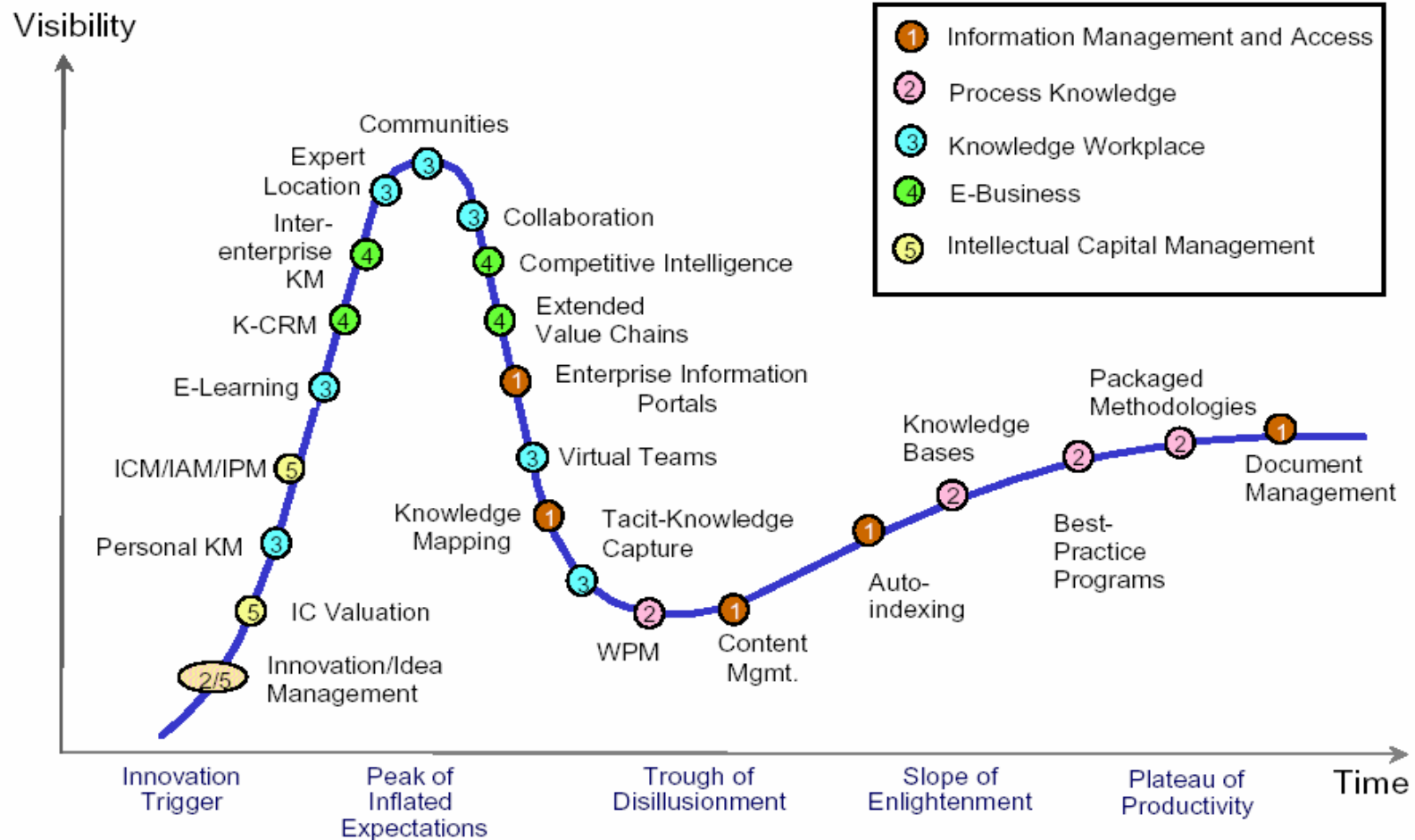
Other Knowledge Management Functions

- **Facilitation of community of practitioners involved in knowledge capture authoring and validation.**

- **Establish metrics to be captured relative to knowledgebase use. Provide ongoing analysis of these metrics to develop actionable improvement plans.**

- **Ensure administrative access to the knowledgebase system by appropriate WAMU resources.**

- **Identify service issues appropriate for self-service authoring. Prepare and evaluate content for successful self-service user adoption.**

- **Progressively enhance the knowledgebase to include solutions and reference documents developed specifically for the WAMU environment, its applications and processes.**

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Beyond Knowledgebase: Critical KM functions

To consciously manage its Knowledge, a company needs to:

- Identify all the KM and collaboration projects, and link them together to support coordination. Support better use of resources and knowledge sharing.

- Provide central KM support, resources and consulting to all business units.

- Provide community of interest contact point and information resource for those interested in KM and collaboration

- Provide services internally such as: KM product testing and recommendations, resources to help in starting KM pilot projects
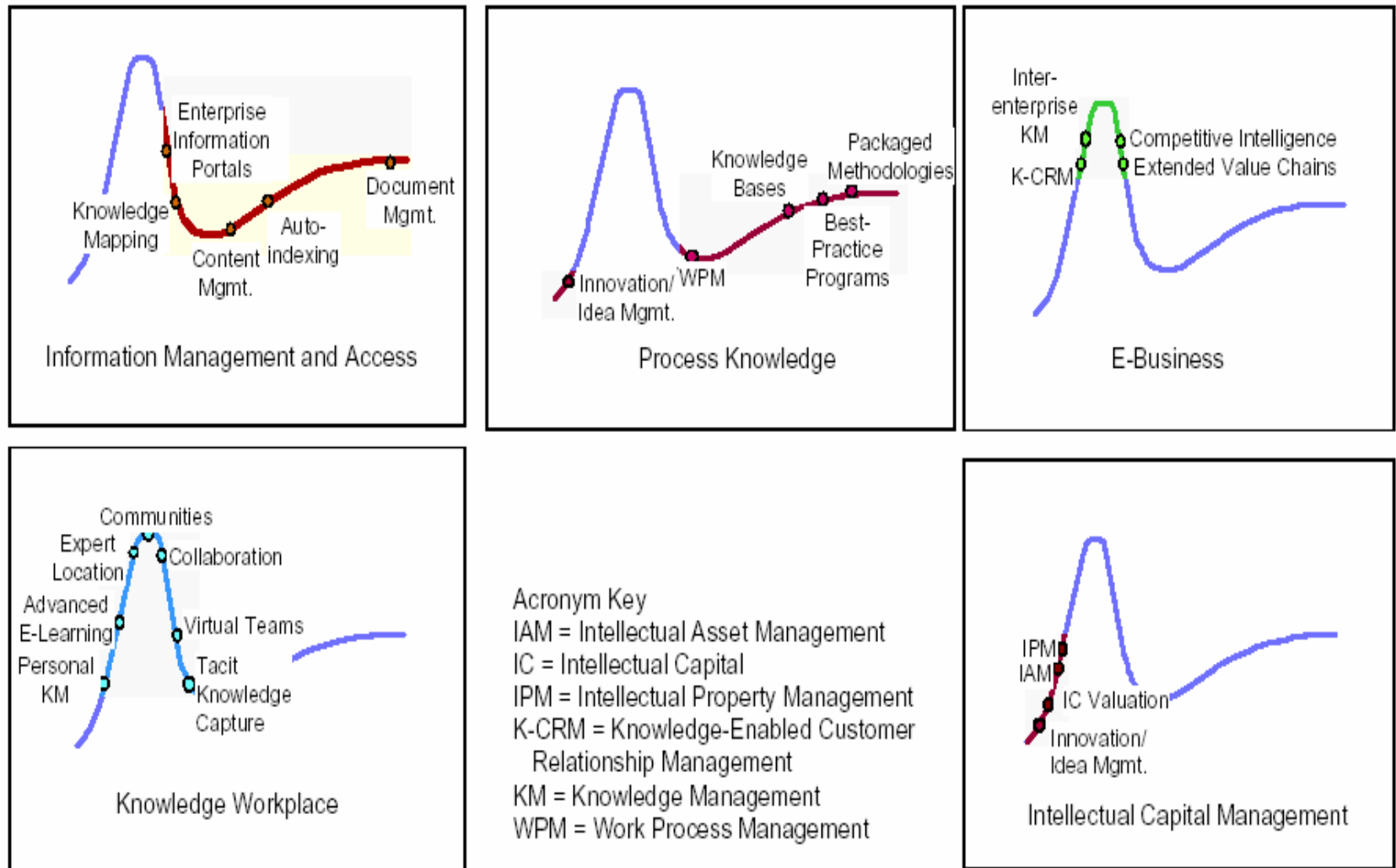
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Figure 1
The KM Hype Cycle

Source: Gartner Research

Figure 2
Breakdown of the KM Hype Cycle by Category

Information Management and Access

Enterprise Information Portals
Knowledge Mapping
Content Mgmt.
Auto-indexing
Document Mgmt.

Process Knowledge

Knowledge Bases
Packaged Methodologies
Best-Practice Programs
Innovation/Idea Mgmt.
WPM

E-Business

Inter-enterprise KM
K-CRM
Competitive Intelligence
Extended Value Chains

Knowledge Workplace

Communities
Expert Location
Collaboration
Advanced E-Learning
Virtual Teams
Personal KM
Tacit Knowledge Capture

Acronym Key
IAM = Intellectual Asset Management
IC = Intellectual Capital
IPM = Intellectual Property Management
K-CRM = Knowledge-Enabled Customer
    Relationship Management
KM = Knowledge Management
WPM = Work Process Management

Intellectual Capital Management

IPM
IAM
IC Valuation
Innovation/Idea Mgmt.

Source: Gartner Research

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Thank you.

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