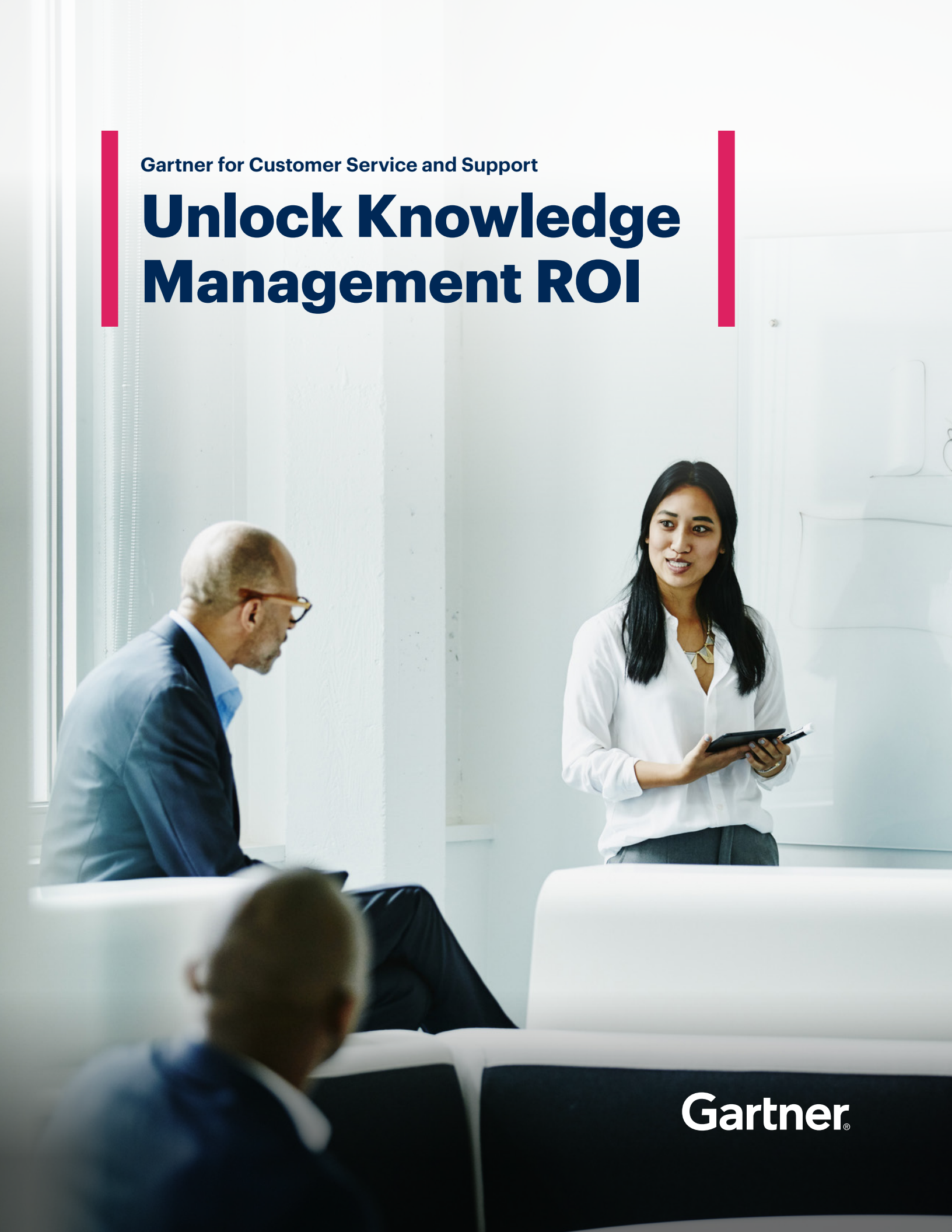


Gartner for Customer Service and Support

# Unlock Knowledge Management ROI



Gartner®

**Organizations have not realized the value of their knowledge management investment, even with the right technology stack. Customer service and support leaders must include a clear vision, defined roles, metrics and communications on change, for knowledge management program success.**

# Overview

## Key Findings

- Achieving knowledge management (KM) program success requires more than technology. It requires a vision for your organization's overall service delivery model.
- Traditional support center operational metrics (e.g., FCR, time to resolve [TTR]) often contradict KM-focused outcomes.
- Leadership underestimates the impact of learning new technologies on individual employee performance and the supporting roles required to adopt change.
- Communications tend to focus on technology rollout project status at the expense of the human side of change.

## Recommendations

For successful service and support channel strategy and execution:

- Create a vision for embedding KM practices into your overall service delivery strategy by rethinking the role that knowledge plays in solving support cases, and the required people and process components for KM.
- Learn the impact of KM practices on the employee experience across the support organization, and create new (or update existing) job descriptions and responsibility matrices accordingly.
- Update metrics and KPIs to make them inclusive of KM-
- Communicate the vision, the "why" and the "how" multiple times, in multiple ways and on multiple days.

# Introduction

KM technology has come a long way over the last decade. KM solutions are often now integrated with CRM and ticketing (customer engagement) platforms, which leverage federated search experiences, chatbots and AI. All of this creates the opportunity for simplified access to knowledge that makes agents more efficient and increases the customer's ability to self-serve.

This sounds like a winning proposition: The ability to deliver a better customer experience 24 hours a day, while creating an improved employee experience and a reduced price per interaction for the organization. Then why, after hundreds of thousands, in some cases, millions of dollars' worth of investment, are so many of these programs struggling to realize the return on investment or failing entirely?

Successful KM programs require CSS leaders to think differently about knowledge and how to deploy change across their organizations. Launching a KM program requires an understanding of how knowledge is created, used, managed and retired throughout the organization.

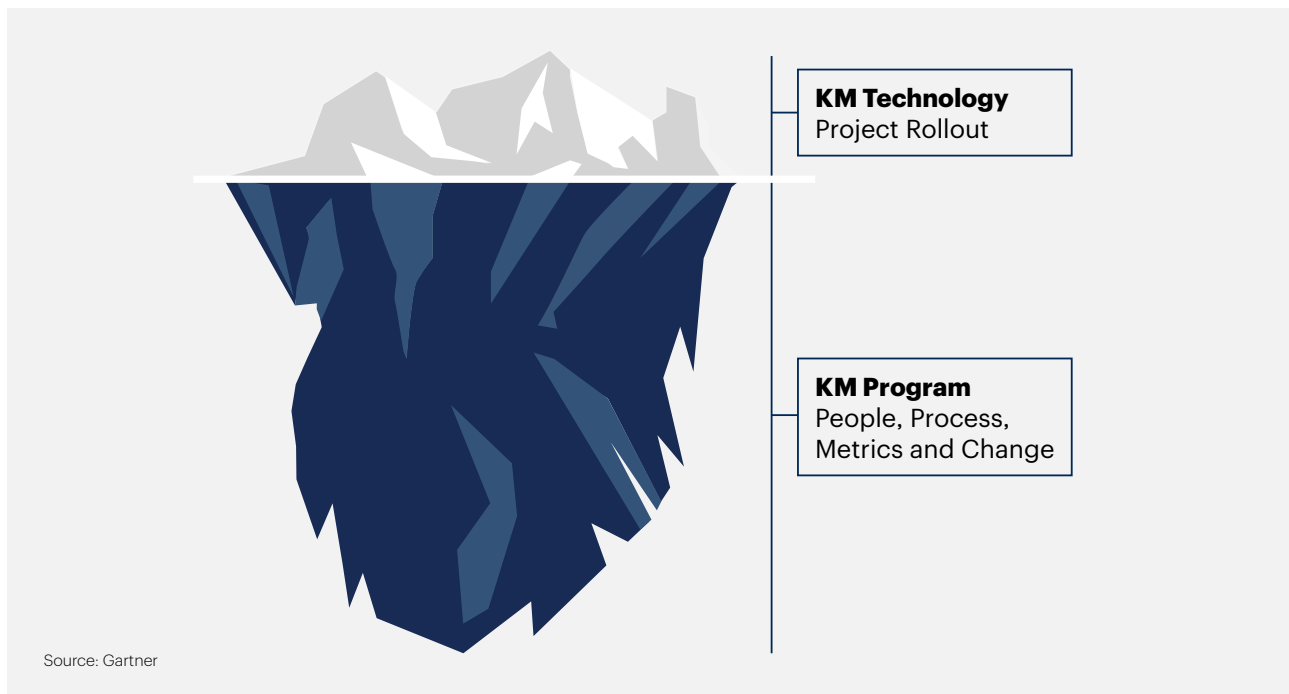


# Analysis

## Create a Vision

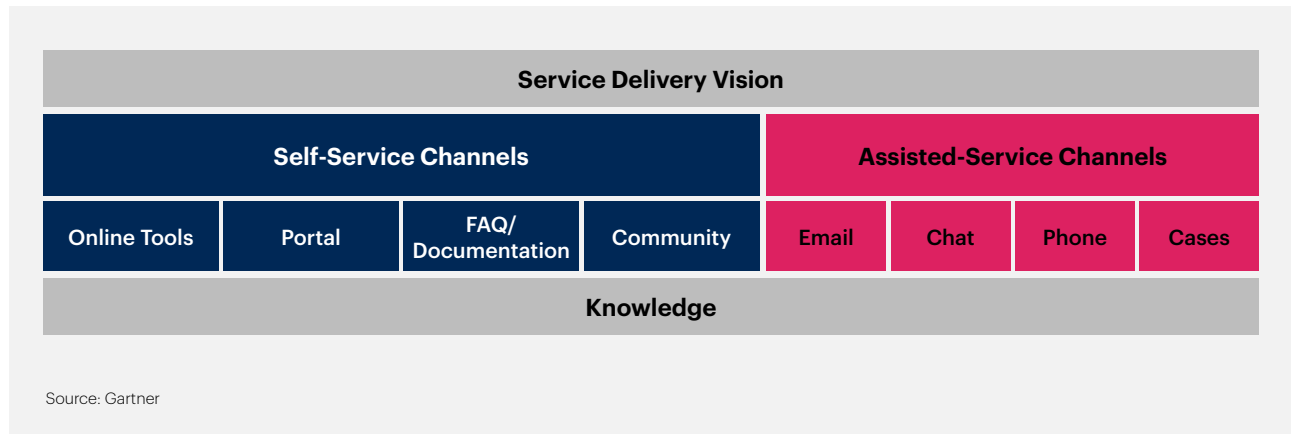
Leadership does not always appreciate the level of organizational change management required for a successful KM program initiative. Many organizations focus entirely on the project rollout of the KM technology system. Successful KM programs focus significantly more on people, process and metrics than they do on technology (see Figure 1).

**Figure 1: Where KM Programs Tend to Focus**



A successful KM program rollout requires leaders to set a vision for service delivery that includes KM as a foundational component, and communicate this vision to their employees. When building a vision for service delivery, consider the two distinct sections of the overall program — self-service and assisted service. Each section operates independently but also relies on the interoperability of the other for success (see Figure 2).

**Figure 2: Service Delivery Model**



In addition to clearly defining the service delivery capabilities as part of the vision, leaders must develop a vision that includes the “why” and answers the following questions:

- Why is knowledge foundational to the success of the organization?
- How will knowledge impact the customers?
- Who will be the recipient of knowledge?
- How will they access the knowledge?
- Who will be responsible for creating and maintaining knowledge?
- How will the KM program impact the employee experience?
- How will the knowledge contributions be measured and rewarded?

A well-defined vision helps keep programs on track and provides stability as challenges arise. The ability to come back to the vision is critical to maintain alignment and keep everyone moving forward together.

## Define Roles

A critical component of KM program effectiveness is that many people within the organization must create and maintain knowledge, which requires clear responsibilities and accountability. Determine who is in the best position to create and update each type of knowledge (e.g., FAQ, product documentation, process improvements, policies, customer education, etc.) so that all employees know their core KM responsibilities. Once you have assigned responsibilities, you can achieve accountability through:

- Hiring or dedicating a resource to lead the KM program and manage the KM systems and tools
- Adding knowledge management accountabilities to agent, engineer, rep, team leader and manager goals and rewards programs
- Updating job descriptions and responsibility matrices for all support reps, team leaders, managers, and directors and support executives
- Embedding KM within the virtual “fabric” of the organization to increase social pressure
- Implementing gamification features within KM, such as voting, rating and visibility into effectiveness

## Update Metrics

One of the biggest obstacles with operational support center metrics and knowledge management is that the objectives are often at odds with each other. For example, your vision might be to shift volume from the assisted-service channel to the self-service channel by ensuring that repeat-type questions are available for answering on the self-service portal. In this case, CSS leaders must recognize that the volume that cannot be answered by the portal will continue to be routed to the assisted-support channel. These unanswered questions will be largely questions that have not previously been solved. Solving unknown questions takes additional time; therefore, the TTR measures for these questions will take longer, thus you will need to adjust the metric goal for TTR to reflect this change.

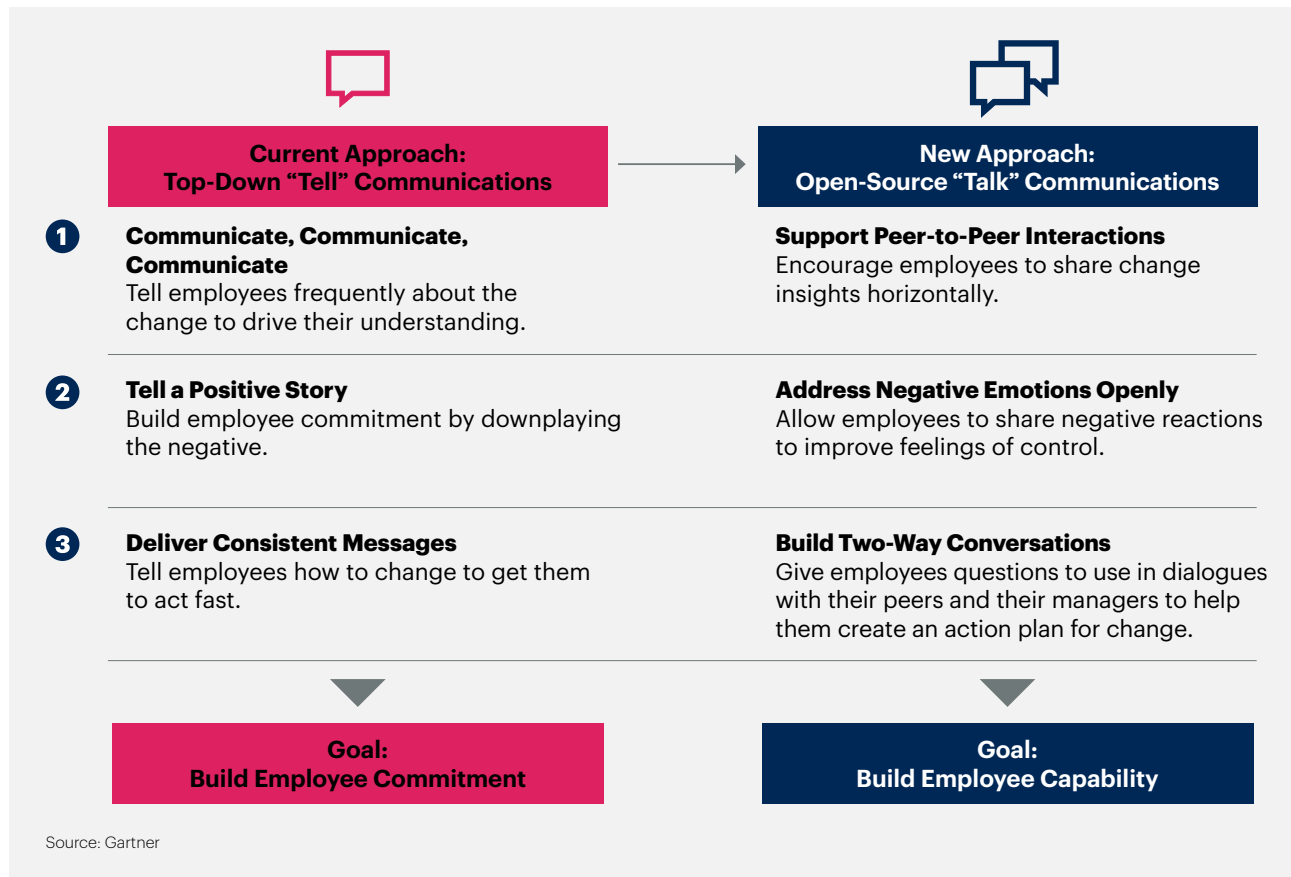
CSS leaders should take time to review all current operational metrics (CSAT, CES, etc.) with this lens to make sure they are supportive of the program, and make adjustments to the goals as necessary.

## Communicate the Vision

Providing the team with regular, timely updates on technology projects is a key step to successful adoption of any new platform, but updates on the technology project are not enough. Communications must include operational changes needed for overall KM program success — for example, communicating about the changing responsibilities related to knowledge. Delivering training and coaching employees to understand the updates to workflow and processes that arise from the technology rollout are important, but these steps are just the beginning.

Leaders should use “talk” rather than “tell”-style communications. Traditional top-down (tell) communications can cause stress during change. Leaders should shift the focus from positive and consistent messages to two-way, peer-driven dialogue (talk). Leaders can facilitate two-way communication by asking employees to seek information that helps them understand what is required of them, and makes them feel part of the change, not its subject (see Figure 3).

**Figure 3: Three Ways to Shift to Open Conversations**



Most organizations focus on increasing employee commitment to a change, to help them maintain their effort and performance during a change. Unfortunately, focusing only on increasing commitment makes employees feel more stressed. You want to ensure that employees have the tools, information and people to be successful.

The table below can help leaders structure conversations with relevant stakeholders around the implications of change communication on essential employee capabilities.

**Table 1: Change Communications Template**

Questions for Stakeholders
Who are the key sponsors of, and partners for this change?
Please give a short description of the change. What is changing? What closely related things are not changing?
What is the timing and duration of the change, including start date, key milestone dates and completion date?
Why are we making the change? What problem are we hoping to solve, or what opportunity are we hoping to capture? What alternatives did we consider? What facts and assumptions drove this decision?
What is the target business outcome? What does success look like? How will success be measured?
Who are all of the different stakeholders who contribute to this outcome, including internal and external? What does each group currently do, and how does that relate to the change? How influential is each group?
Which behaviors are most critical to our desired outcome? What do we need employees to do differently to achieve our outcome?

Source: Gartner


Deliver communications about change consistently, through multiple channels (emails, town halls, intranet updates, videos, etc.) and provide the opportunity for dialogue, questions and feedback.

## Evidence

This research is based on analyst expertise and over 500 Gartner inquiries with clients over the past 10 years.

# Actionable, objective insight


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