Knowledge Management Best Practices within Service Management: A KCS\textsuperscript{SM} Overview

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Knowledge Management Best Practices

The old way:

- Dedicated knowledge management team
- Content created in preparation of demand
- Knowledge is verified, validated, and published
- Knowledge is an optional resource
- Knowledge is someone else’s responsibility

Known as Knowledge Engineering
- Follows a manufacturing process
The Support Demand Curve

Demand

Time
Dynamic Knowledge Management

1. Knowledge immediately available for reuse.
2. Validation based on demand
3. Compliance review based on demand

Return
$ Investment
Rework and redundancy eliminated

Demand

Time

Knowledge is Trusted

1 – First Incident

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Knowledge Management Best Practices

The new way:

- Create content as a by-product of solving problems
- Evolve content based on demand and usage
- Develop a KB of our collective experience to-date
- Reward learning, collaboration, sharing and improving

Known as Knowledge-Centered Support (KCS)

- Developed by the Consortium for Service Innovation
- Research began in 1992
- Promoted by HDI in 2003
- Compliments and enhances ITIL

Simple premise:
To capture, structure, and re-use support knowledge
The Concepts of KCS

KCS is a methodology and a set of practices and processes that focuses on knowledge as a key asset of the support organization.

KCS is not something we do in addition to solving problems... KCS becomes the way we solve problems.
Top Ten Reasons Support Centers Need KCS

10. Respond and resolve issues faster.
9. Provide answers to complex issues.
8. Provide consistent answers to customer’s questions.
7. Address support analyst burnout.
6. Address the lack of time for training.
5. Answering recurring questions.
4. Identify opportunities to learn from customer’s experiences.
3. Improve First Contact Resolution.
2. Enable self-service.
1. Lower support costs.
Tangible Benefits

• Operational efficiency
  ▪ Improved time to resolve 30% - 60%
  ▪ Increased support capacity 22% - >100%
  ▪ Improved time to proficiency months to weeks
  ▪ Efficient creation of content to enable self-service
  ▪ Identification/elimination of root causes

• Increased job satisfaction
  ▪ Less redundant work
  ▪ More confidence
  ▪ Reduced training time

• Increased customer satisfaction
Who Has Invested in KCS?

- Lucent
- Nortel Networks
- Motorola
- 3Com
- Unisys
- Peregrine Systems
- Intel
- Network App.
- BMC Software
- EMC
- Microsoft
- Novell
- QAD
- HP
- Oracle
- Legato
- Lexmark
- SGI
- Amdahl
- Attachmate
- VeriSign
- CompuCom
- ARAMARK
- Texas Instruments
- Abbot Labs
- JP Morgan Chase
- Sanofi-Aventis
- Pepsi Co.
- Bingham Young University

Partial list
Knowledge Centered Support Practices

Evolve

- Leadership & Communication
- Performance Assessment
- Process Integration
- Content Health

Solve

- Capture
- Structure
- Reuse
- Improve

Knowledge Articles
The Knowledge Article Concept

Integrating the experience of the three stakeholders
The Solve Loop

Capture

- In the problem solving process
- In the moment
- In the customer’s context
- Information about the environment
- Relevant content
- When tacit becomes explicit
- Search the KB before you add
An Operational View

- Admin Information
- Issue
- Environment
- Resolution
- Incident History

**Incident** *(a snapshot in time)*

**Article** *(reusable)*
Structure

- Requires a template or form
- Provides context for content
- Improves readability
- Promotes consistency
- Complete thoughts, not complete sentences
- Keep it simple
- The issue and environment define a framed article
Incident

• Customer called about a problem win WIN7 and an iPhone. The iPhone will not sync. Reviewed sync settings and could not find anything wrong. Customer has meeting and would like a call back tomorrow am.

• Talked to Bob about iPhone problem, he is running Win7 on a Leveno T41 and he needs to disable the USB power management option. Bob asked to leave the call open until he reboots and test it.

Article

Issue:
• Cannot sync phone

Environment:
• iPhone
• Windows7

Cause:

Resolution:
1. Disable USB power management. [How to disable USB power management](#)
2. Reboot the PC.
Structured Knowledge

• Issue
  – Question
  – Error Message
  – Symptoms
  – Keywords
• Environment
  – Application
  – Hardware
• Cause
• Resolution
  – Resolution Detail
  – Links to Related Info

• ID Number
• Title
• Abstract / Summary
• Meta Data
  – Audience
  – Categorization
  – Create Date/Time
  – Modified Date/Time
  – Author / Modified By
  – Source
  – History Information
Reuse

• Search early, search often
• Seek to understand what we collectively know
• Search words are candidate knowledge
• Link relevant articles to incidents
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Content Health

- KCS Article Structure
- KCS Article Lifecycle
- Content Standard
  ... tailored to the organization
- Visibility Matrix
- Knowledge Monitoring
The Knowledge Article Life Cycle

Minimum States:
- Work In Progress (WIP)
- Draft
- Approved
- Published

Optional States:
- Technical Review
- Compliance
- Rework
- Obsolete
Process Integration

- Structured Problem Solving (SPS) seeks to understand before seeking to solve
- Seamless Technology Integration
- Search Technology for KCS
- Closed Loop Feedback
Simple Incident Process

Create Incident

Search KB

Article Found?

Yes

Article Correct?

Yes

USE IT

Close Incident

No

Research or Escalate

Solve It

FLAG IT / FIX IT

ADD IT
Performance Assessment

- KCS competency model
- Integration subjective and objective metrics
- Measure lagging (results) and leading (activities)
- Team and value-creation measurements
- Feedback systems

*A Balanced Scorecard*
KCS Competencies

Competency defines system rights and privileges.

Some in the organization will stay, while others evolve.
Leadership & Communication

- Alignment to a compelling purpose
- Create a strategic framework
- Promote teamwork
- Tap into internal motivators
- Rewards and recognition program
- Communications is the key
- Support and encourage good performance and deal with inadequate performance
- Engage the people doing the work to figure out how best to get it done
KCS Roles

- Sponsor – provides vision, objectives, and resources
- KCS Coordinator / Manager – coordinate and oversee
- KCS Program Team – designs the implementation
- Management – motivates and supports
- KCS Pilot Team – pilots and evangelizes
- KCS I or KCS Candidate – uses and contributes
- KCS II or KCS Contributor – uses, contributes, and enhances
- KCS III or KCS Publisher – uses, contributes, enhances, and publishes
- KCS Coach – monitors and mentors process and people
- Knowledge Domain Expert – monitors and enhances knowledge base
- KCS Council – assumes ongoing management
The KCS Practices

Evolve

Knowledge Articles

Capture
Structure
Reuse
Improve
Solve

Leadership & Communication
Performance Assessment
Process Integration
Content Health
KCS

• Developed by the Consortium for Service Innovation, a non-profit member based organization in the United States in 1992
• Designed to improve support operations of member companies
• Contributed to by senior support practitioners from global corporations

ITIL

• Developed by the United Kingdom’s Office of Government Commerce (OCG) in the 1980’s
• Intended to improve management of IT services in the UK Central Government
• Contributed to by expert IT practitioners around the world
KCS Integrates with ITIL Process

• Incident Management
  – As well as Request, Access, and Event
• Problem Management
• Change Management
• Release & Deployment Management
• Service Level Management
  – Impact on SLAs and OLAs
Where to learn more…

• HDI’s Knowledge Management Foundations: KCS Principles workshop
• HDI’s Knowledge-Centered Support Fundamentals
• HDI Webinar Archives
• HDI Focus Book: Knowledge Management Maturity Model

• [www.serviceinnovations.org](http://www.serviceinnovations.org)
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