

## What Knowledge Management Isn't

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By Tom Hresko - Posted Jul 21, 2003

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People often equate knowledge management with other information systems or processes, such as CRM, document management, content management, or sales force automation. There's no question that knowledge management works hand in hand with all of these, but it focuses on a different function.

Simply put, knowledge management is really about retrieving, acquiring, and adapting corporate knowledge. By *retrieving* I mean the act of finding an answer to a user's question, not unlike looking up something in a phone book, just a bit more complex.

But what if it's a question for which no answer exists? That's where *acquiring* comes in. True knowledge management allows users not only to define the problem and find an answer as part of the search-and-retrieval process, but also to create a new answer when no answer is available, and make it available for others to use again and again.

And finally there's *adapting* knowledge, which respects the vastly different approaches that people and organizations use to answer questions. Knowledge management should be able to adapt and mold to the business requirements of the organization, even as those requirements change.

When you put all this together--acquiring, retrieving, adapting--it becomes clear that through knowledge management, support organizations can answer questions and resolve problems using, reusing, and adding to, information that exists all over the company, which in turn improves the bottom line.

But, what makes a successful KM system? There are four best practices that are critical to the success of a knowledge management solution.

### **Best Practice #1: Integrate KM in the day-to-day workflow.**

Many software initiatives fail by increasing the burden placed on the people they were intended to help. Where they promised efficiency, they have often resulted in more work. To succeed, a knowledge management solution must mimic the natural work processes of the support agents, whereby knowledge is accessed, captured, and improved as an intrinsic part of how agents interact with customers to solve problems. In other words, the software not only assists an agent with the problem at hand, but also extracts additional knowledge from the interaction to improve content for subsequent interactions.

### **Best Practice #2: Provide access to the most relevant knowledge, wherever it's located.**

Many support centers function in an information silo, incapable of accessing valuable information that already exists in other departments, in corporate databases, from business partners, or in publicly available documents. For most companies, potentially valuable information resides in multiple locations in multiple file formats, both within and outside the enterprise.

As a result, KM systems must have the ability to pull valuable information from a wide selection of file formats, databases, and legacy systems. Such interoperability ensures that people can take advantage of content that has already been developed and approved for user manuals, employee handbooks, partner extranets, marketing communications, and a host of other sources. This, in turn, directly improves the return on investment (ROI) already made in the people and systems assigned with creating knowledge.

But widespread information access isn't quite enough. Efficient support organizations, and the people they serve in Web-based, self-service environments, require precise answers to questions. Although most search engines allow users to type queries in everyday language, plain English is of little consequence when the search engine's only purpose is to retrieve entire documents or information sources, leaving the user to find the needle in the haystack. Successful knowledge management technologies must be able to fully process natural language, interpret the meaning of words in the context of the question, identify the intent of the question, rank possible responses, and return only the most relevant solutions.

### **Best Practice #3: Get top management committed to the goals.**

An executive at a Fortune 100 company once said to me, "If we only knew then what we already know now, we won't have to solve the same problem over and over again." Typically, organizations develop an abundance of information and knowledge over the years that are never leveraged by the organization. It is the role of top management to turn knowledge into a strategic corporate asset.

For this to happen KM advocates need to develop a well-defined project plan that includes:

- Resource requirements
- Individual and departmental roles, responsibilities, and lines of authority
- Accountability processes
- Inherent risks and risk-management plan
- Implementation steps, timelines, and dependencies
- Communication strategy for project members, knowledge workers and supervisors, and senior managers

Once executives and senior managers have embraced the plan, they should also become part of the review process for evaluating progress and results, with specific emphasis placed on the company's ROI.

#### **Best Practice #4: Measure performance and analyze results--before and after.**

Successful knowledge management depends on committed executives and knowledge workers over time. This means tracking performance, measuring results, and reporting findings. Typical metrics that encourage ongoing executive support demonstrate the ROI--the dollar savings that result from such things as:

- Reducing escalations to higher-cost second- and third-tier agents
- Accelerating the speed with which problems are solved to increase the number of tickets closed
- Decreasing the number of incidents in which field staff are dispatched to customer locations
- Increasing the number of problems solved via intranet- or Web-based self-service versus higher-cost assisted service

Typical metrics that turn individuals into knowledge contributors who support corporate goals highlight personal achievements, such as:

- The percentage of call tickets that were closed using knowledge-base solutions they personally produced
- The number of solutions created by their team or department
- The percentage of problems that were solved using existing knowledgebase solutions versus solutions that had to be newly created

Finally, performance tracking and analysis helps organizations understand where the knowledge gaps are so they can direct their resources toward creating or improving information based on what customers, employees, and partners actually want.

In recent years industry research groups have repeatedly documented the value of KM to call centers, help desks, and other support environments. Knowledge-based support is now being seen as the key to successful assisted service and Web-based self-service.

But despite advances in information technologies, KM is much more than a user interface wired to information databases. It is an approach to customer service that believes all questions can be answered and all problems solved by implementing a system that has as its cornerstone the retrieval, acquisition, and adaptation of the knowledge.

#### **About the Author**

Tom Hresko is vice president, worldwide sales at Primus Knowledge Solutions. A former Network Associates executive, Hresko joined Primus in April 2002. Prior to Network Associates, Hresko held executive positions with Sprint Communications and PricewaterhouseCoopers. He has a Harvard MBA and did his undergraduate work at the University of Michigan. He is a seasoned enterprise sales professional with a solid track record of growing revenue.