Knowledge Management in the Contact Center

Best Practice Guide

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Executive Summary

Implementing knowledge management in the contact center can have a profound effect on the quality and efficiency of your service operations. Customers benefit from interactions with more knowledgeable agents, who are empowered to resolve issues with greater speed, accuracy and consistency. Agent training costs can be substantially reduced and job satisfaction increased as interactions with customers become more positive. Implementing knowledge management, however, requires careful planning. Success depends on an implementation with targeted goals and the development of knowledge that is closely aligned with service needs.

This paper provides a series of best practices to help you achieve outstanding results from your knowledge management implementation in the contact center. It summarizes the lessons Verint® and its customers have learned through many years of successful deployments and highlights the best practices we have found are most crucial to success.

Here, you will find best practice guidelines for:

1. Determining the objectives of your knowledge management implementation
2. Planning a successful implementation strategy
3. Designing a robust knowledge base
4. Developing useful content
5. Improving knowledge constantly

Determining Objectives and Metrics

To set the goals for your knowledge management deployment, identify the areas that are most critical to your company's service operations and then determine the metrics against which the deployment will be measured.

Select metrics that will provide a comprehensive view of the business, akin to a balanced scorecard, such as daily operational metrics (reduced talk time, higher first contact resolution, reduced tier-2 escalations) and performance metrics (improved customer satisfaction, higher employee morale, lower agent turnover or faster time to competency for new hires).

Your chosen goals and metrics will guide your knowledge management implementation. For example:

If the goal is to increase first call resolution for tier-1 customer service representatives and reduce tier-2 escalations, deployment will focus on two areas. First, you will need to ensure that content is available at the tier-1 level to cover the majority of customer issues. Second, tier-1 agents will need research tools, including the most sophisticated search capabilities, such as natural language search with automatic recognition of query intent combined with guided resolution. These more advanced capabilities can enable your tier-1 agents to more quickly and accurately identify the issue that needs to be addressed and select the best resolution for that issue.

Alternatively, if the goal is to reduce tier-1 call times, then consider limiting research techniques and the amount of content available to these agents. Rather than allowing tier-1 agents access to multiple search technologies and broad content, you may focus on more structured resolution techniques. As you determine the goals and metrics, establish benchmarks so that you will know the true average for each metric before the knowledge management implementation.

Planning an Implementation Strategy

An effective implementation strategy requires:

- A well-rounded implementation team to champion the project and ensure the development of high-quality knowledge base content.
- A realistic roll-out plan that eliminates the risks of a “big bang” implementation approach.

Developing a Strong Leadership Team

Knowledge management is much more than a technology implementation. It is a deep cultural transformation in people, processes and tools. As a result, the implementation requires strong leadership. Management will need to understand the relevance of knowledge management and how it contributes to business goals. Knowledge management must be viewed as part of the vision for optimizing the overall customer experience and empowering the support organization to achieve this vision.

Several organizational roles are critical to the success of a knowledge management team, including:

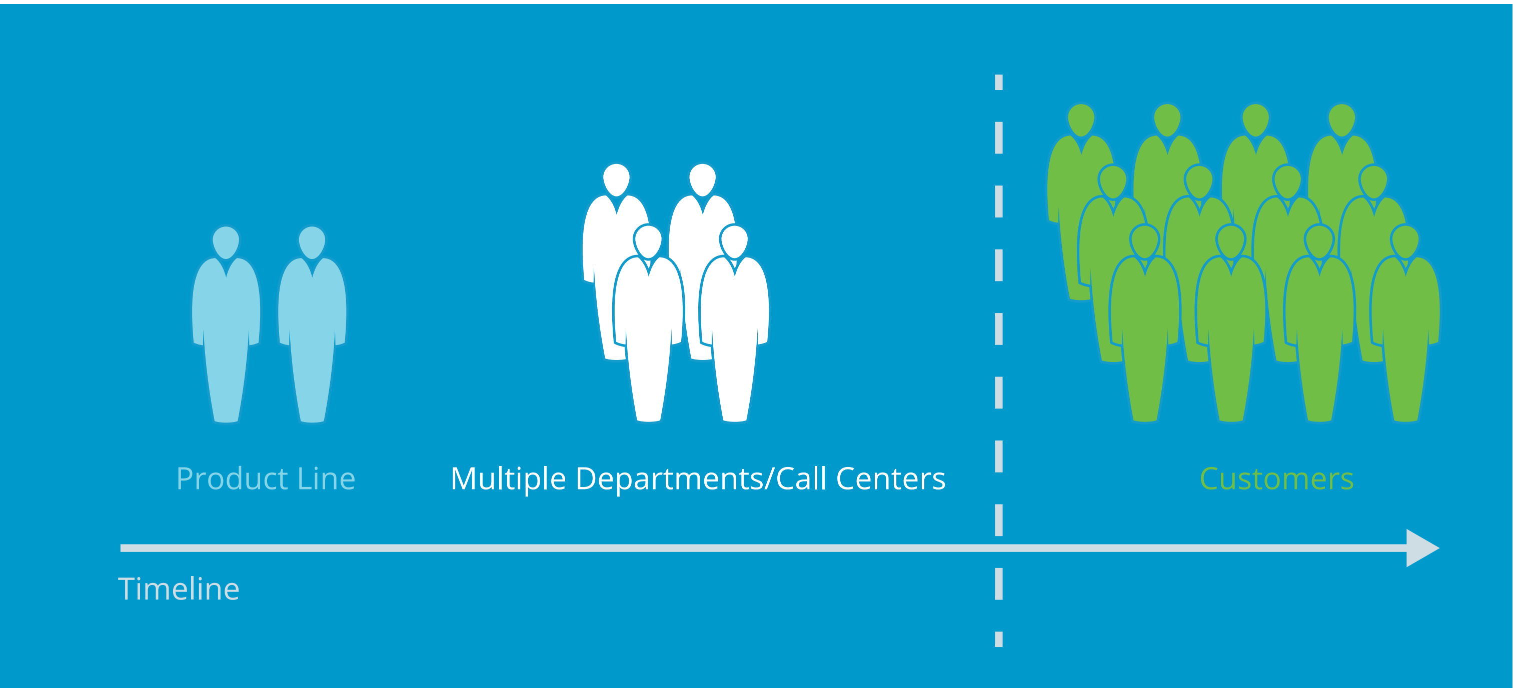
- **Executive sponsorship** – The transformational nature of knowledge management requires at least one executive who will champion the initiative and provide ongoing, visible leadership and corporate backing. Without this level of support, the initiative is unlikely to succeed.
- **Knowledge management business owner** – This contributor defines the overall experiences for the contact center (and, if applicable, future self-service) implementations, such as the user interface, which knowledge retrieval aids will be available and the level of personalization. (For later self-service implementations, the business owner should also coordinate communications to customers to promote self-service and drive adoption.)
- **Knowledge base owner** – Knowledge base owners drive the creation and maintenance of content in the knowledge base by defining structure and types of content, content styles and standards, as well as the process for knowledge creation. For example, the knowledge base owner needs to decide if there will be dedicated staff to create solution content or if content creation will be the collective responsibility of agents. They also coach the authoring team to help them become proficient. (In smaller organizations, this role is usually combined with the knowledge management business owner role.)
- **Authors, reviewers, editors** – These resources create and maintain knowledge. Make sure that you are adequately staffed for these functions. If customer service representatives will be key knowledge contributors, ensure that they have adequate wrap-up time to complete the submission of new content.
- **IT** – Technical specialists will be responsible for maintaining the systems used by the knowledge management solution.

Planning a Phased Roll-Out

The experiences of Verint customers reinforce a roll-out strategy that starts with deployment in the call or contact center rather than customer self-service. By deploying internally first, you gain the opportunity to test and improve the usefulness and depth of solution content.

Once knowledge management has been fine-tuned in the contact center, it can then be deployed for customer self-service. Because the content and guidance methodologies have been improved and expanded upon through customer service representatives' use, self-service customers will experience a more mature and robust implementation that may lead to higher rates of adoption and, ultimately, customer satisfaction.

As you plan a roll-out strategy, avoid the "big bang" implementation. Start small by deciding which organization is most ready to benefit from and willing to implement knowledge management.



The experiences from the initial deployment can be used to improve subsequent roll-outs and, in our experience, can result in cost savings that fund subsequent phases of deployment.

For example:

- Implement knowledge management for one product line or geographic area. The success in this one department or product group will drive interest from other teams.
- Within your chosen target, focus use of knowledge management only for those service interactions that generate the largest number of calls or are the most costly, rather than trying to address every possible customer inquiry.

Designing a Robust Knowledge Base

A robust knowledge base contains content that is appropriate to customer questions and can easily be traversed to find the best possible answer in the shortest amount of time. The knowledge base design plan should take into account:

- Guidelines and standards for content development that will aid the inquiry-resolution process.
- Content categorization (taxonomy) that logically organizes content and increases its "findability."
- Content life-cycle management to ensure it can be created quickly and made available while maintaining content accuracy and validity.

Developing Content Standards

Knowledge base content is different from content retained in other types of repositories, such as content management systems or file systems. Knowledge base content must be highly focused and developed with an awareness that it must be easy to find and use. As a general rule, ease of use requires that content is written to answer a specific question in as few words as possible. Content usability should also take in to consideration the user's level of knowledge and experience.

The more intimately you understand who will be using published knowledge, the more likely you will be able to produce content that delivers maximum benefit. For example, content may need to be presented differently for novice and expert agents. Novices may be more successful with step-by-step instructions and photographs, while experts need just abbreviated explanations and reminders.

When establishing standards for content creation, keep the following in mind:

- Each piece of content should contain just one idea.
- The style should be simple and practical with steps for resolution explained logically and concisely.
- Rather than providing exhaustive descriptions, content should be as short as possible and use a direct, informal tone.
- The content structure should be uniform and use a consistent vocabulary and taxonomy.

Content Templates

Templates can very helpful for developing content with a high degree of findability and usability. For example, consider creating a Troubleshooting template, a How-To template and an Information template, each of which contains predefined headers to guide the author in capturing all the needed information.

A good, standard template for writing content includes the following:

- The problem/question: What are customers trying to do? What are they asking? What was the customer experience that drove the question?
- The environment: product, model, revision level, etc.
- What has been altered in the environment?
- The resolution: How to fix the problem; answer to the question.
- The cause: The underlying reason(s) for the problem.

Developing Useful Content

Choosing the Right Content

You can determine which knowledge is most valuable by creating a task-driven view of knowledge and analyzing user demand for specific pieces of content, such as the content needed to support the common activity of opening of a new account. One strategy for determining which content is most needed is to use the standard 80/20 rule:

Identify the **20 percent of issues** that are causing **80 percent of inquiry volume** or the greatest customer dissatisfaction. Improving agent performance for this 20 percent will deliver the fastest ROI. Another strategy is to look for inquiries that may not be the most common, but are at such a level of complexity that they typically result in high-cost interactions.

Writing in the Language of the Customers

Content needs to be written—or in the case of existing content, re-written—in a direct and informal style that speaks in the language of customers. What this means is that customers are most likely to talk in terms of symptoms, while the language used by customer service representatives is usually technical and presumes deep product knowledge. For example, the customer will say, "My system is slow." The agent will say, "There is a performance problem." To bridge this gap, solutions should be written in the customer's words with an extensive list of synonyms maintained to account for the diagnostic language of the agent. In addition, many times, an industry, company or department will have a specific vocabulary that needs to be understood by the knowledge management solution. These key terms should be captured as synonyms or an industry-specific lexicon so they can be used in searches, thus making it easier to locate relevant information.

For example, a telecommunications company might need to add the following acronyms that are specific to the industry and company:

- MTSO – Mobile telephone switching office
- AAA – Authentication, authorization, accounting
- AAP – Add a phone
- CIBL – Credit imposed balance limit

Creating Titles that Enhance Recognition

Good solution content and powerful search tools are useless if users find it difficult to recognize appropriate solutions when they appear in search results. The common practice of presenting the main thought of the solution in the title presumes that users will recognize that solution as relevant when they see it. Unfortunately, this is often not the case. Failure to recognize good content when it appears produces two negative results:

- Investment in writing the content goes unrewarded and fails to contribute to the goals set for resolution.
- Additional effort and resources are wasted authoring new content to fill in knowledge gaps that do not actually exist.

Apply the practice of writing in the language of the customer to the titling of content as well. Consider what the customer service representatives knows about the situation. The title should focus on the primary symptom addressed by the solution instead of the solution itself. Alternatively, configure the user interface for search results to display matching symptoms or questions as results.

The goal is the same regardless of which method you choose—do everything possible to enable users to easily recognize when they have found relevant content.

Improving Knowledge Constantly

Optimizing content is not a one-time activity. Once implemented, the health of the knowledge base must be constantly monitored with new content added, erroneous content adjusted and obsolete content removed on a regular and timely basis. It is most important that content in the knowledge base reflects solutions that have been proven in the real world of front-line customer support.

This can be achieved in two ways:

- Enabling agent contribution to the knowledge base.
- Analyzing service data to determine content usage trends.

Employee Contribution

The most effective method for developing meaningful content is to fully integrate support customer service representatives in the knowledge creation and maintenance process. Empowering agents to contribute their expertise when it is required is particularly useful for filling in knowledge gaps, especially for those infrequent or low-value questions that you have deliberately chosen not to address in the initial implementation because they do not heavily impact customer satisfaction or costs.

Using Analytics to Identify Solution Trends

The types of analysis that can positively impact service effectiveness include:

- **Solution use over time** – Tracking the use of knowledge objects over time will identify solutions that are rarely used and are candidates for deletion to streamline searching and content maintenance. Prune this unused content from the knowledge base. This analysis will also pinpoint the most frequently used content to which special care and attention should be given. An extra review of this content before it is made visible to customers is a good practice. This helps streamline the content in the knowledge base, ensuring that it is relevant and accurate.
- **Search terms used** – By analyzing search terms used by customers and how these terms are grouped together, you can gain insight into the language of customers so that solutions can be more closely mapped to their vernacular.
- **Search results** – Analyzing search results lists can identify which solution answered a customer's question and where it appeared in the list so that solution ranking can be improved This provides a measure of content usefulness and how easy it was to find, while also pinpointing gaps in the knowledge base.

Conclusion

The best practices discussed in this paper have been used with repeated success by Verint customers. In combination with the Verint proven solutions for e-service, self-service and contact centers, these practices have helped support organizations achieve a level of service that can drive higher rates of customer satisfaction and loyalty, employee productivity and operational efficiency. Verint Professional Services can help you implement these best practices with comprehensive strategy development and implementation design services to help maximize the value of your knowledge management solution. These services include:

- Advisory services to help you establish quantifiable business goals and a strategic roadmap to ensure the success of your knowledge management project.
- End-to-end deployment services based on quality assurance methodologies to help facilitate implementations being completed on time and on budget, meet business objectives, are stable, scalable and easily maintained, and achieve the projected ROI.
- Optimization services to help ensure that the performance of the technology solution meets and exceeds expectations.

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