The ABCs of Success with Knowledge Management
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Laying the Foundation

Success in knowledge management depends on a variety of factors. Let’s explore some tactics from A to Z to help you find success on your journey.

Ask the right questions. Why are we doing this? What are we looking to achieve? Start the project with a clearly defined set of goals you can always refer back to as you select a vendor and begin your project.

Be aware of cultural and process ramifications. Success in knowledge management is about more than technology. As you plan your project, take into account culture and process changes that may be needed.

Craft a plan. As you begin the journey into knowledge management, make a plan and timeline of how you will succeed. How will you choose vendors to evaluate, and what evaluation criteria will you select? Which pilot group will be first to deploy?

Devote the right resources. Your project won’t be successful if you don’t make it a priority and allocate sufficient resources. Plan for this resource allocation — not only during the selection and implementation process — but also for ongoing maintenance. Consider contracting external resources with knowledge management experience.

Educate yourself. Understand the differences between knowledge management, content management, and enterprise search to know exactly what you need to meet your goals.
Building the Business Case

Find the metrics that matter to your organization. Knowledge management can impact handle time, wrap-up time, compliance, first-contact resolution, training time, customer satisfaction, call deflection, and more. Choose the metrics that correspond best to your business pains.

Gather baseline data. How will you know if you’ve improved if you don’t know where you started? Gather baseline metrics now, so you’ll be able to measure ongoing improvement as you deploy knowledge management.

Hunt for hidden metrics. The benefits in efficiency and productivity may be obvious, such as streamlining your current authoring process, improving agility, reducing training time, and incurring less maintenance overhead.

Include soft metrics. While hard numbers such as handle time and first-contact resolution will likely be critical to your business case, don’t leave out “softer” metrics, such as improving the customer experience and employee job satisfaction. While these may be more difficult to quantify, they still provide an important benefit to your business and your customers.

Justify your projections. To gain approval for your business case, you must have a justification for your numbers. Use time and motion studies to estimate the actual impact that knowledge management will have on your employees’ productivity.
**Selecting a Vendor**

**Keep an eye on your goals.** Vendor evaluations can be complex, with each vendor highlighting some new feature you may not have considered. Stay focused on your fundamental goals to avoid being swayed by features you may not need.

**Look under the hood.** Almost any application can look impressive in a demonstration. Dig a bit deeper with specific questions to really see if the system meets your needs.

**Meet with other customers.** Whether in person, on the phone, or by reading case studies, verify that customers with similar business problems to your own have been successful with the solution.

**Never skimp on flexibility.** Find a vendor who meets your needs regarding deployment options, scale, and flexibility to be sure the solution will meet your needs.

**Opt for a partner, not a vendor.** Choose to work with a vendor that you feel will be a true partner to your organization in the long run. Choose a team that shows true expertise in the industry, and an organization with a roadmap in line with your needs.
Implementing with Best Practices

Put your end users first. Always consider the solution from an end user’s perspective. Perform usability tests to ensure your application is logical, easy to use, and a natural extension of how they work.

Question your existing content. Does it really need to be in the knowledge base? Does it need to be edited, reorganized, or reformatted? Often, “less is more” when it comes to knowledge, so your users aren’t overwhelmed with too many search results with irrelevant content.

Rein in your articles. Each article should answer one specific question only. Long documents are difficult for employees to navigate and read while they are trying to engage with customers.

Set up logical navigation. Create logical pathways to get to articles that make sense to your end users without requiring too many clicks. Keep in mind that different users may think about a problem in different ways, so offer different options.

Take the time you need up front. The decisions you make during this initial implementation may impact your solution in the long run, so now is not the time to take short cuts.

Use standard configuration options when possible. Customizations may be tempting, but will make your application more difficult to maintain and upgrade in the long run.
Building on Your Success

Verify that employees are benefiting from the solution by collecting feedback. Ask for feedback on specific articles and search results, as well as feedback on the system overall.

Win-win. A successful first implementation not only improves the quality of service you provide, but it also builds momentum for future phases.

Examine your metrics. Are you making the changes you intended? Refer back to your initial goals and see if you are hitting your targets. If not, adjust your strategy as needed.

Yay! You’ve completed your first phase and it was successful. Be sure to communicate these successes to a wider audience to gain support for future endeavors.

Zero in. Now that your first phase is complete and successful, find your next target for expansion and further success.
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