# Avoiding Knowledge Management Pitfalls

## Ten Common Mistakes and How to Avoid Them

**VERINT**

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## Introduction

You've probably heard about the benefits of knowledge management (KM). An Aberdeen Group study found that knowledge management users saw higher customer satisfaction, a higher number of quality SLAs met, fewer complaints, and higher agent utilization.[*] But maybe you've tried to use KM in your organization and haven't achieved these results. Success in KM involves much more than simply selecting and installing software.

KM is a holistic program with six key components: content, metrics, engagement, governance, culture and user experience. Organizations that succeed in KM typically attend to all aspects of this program, involving people, process, and technology. This paper examines common reasons that some KM projects fail and offers insight into how to avoid these pitfalls. Let's take a closer look at how each of these components plays an important role in building a successful KM program.

## 1. Failure to Set and Track Specific Goals

KM is not simply a "nice-to-have" application for the contact center. It is a targeted solution to a specific set of problems. When selecting a KM vendor and planning your implementation, your team should have a clear understanding of the challenges you are looking to overcome, and how the application will help you accomplish this. Your goals may include:

- Decreasing handling time

- Increasing first contact resolution

- Reducing mistakes

- Improving compliance

- Enhancing customer satisfaction

As you move through the process of selecting your KM vendor and evaluating your decision criteria, refer back to your ultimate goals. Rather than selecting the solution that has the most features or the slickest user interface, you should base your decision on the features required to help you change the metrics you have identified. While you plan your implementation, you should continually refer back to these goals and metrics and track your progress. If you are not achieving the results you have planned for, you can adjust your tactics over time.

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[*] Knowledge Management for an Integrated Service Experience, Aberdeen Group, December 2015.

## 2. Doing Too Much at Once

Once you've decided to tackle KM, it's understandable that you want to see as many benefits as possible. However, taking on too much in a single deployment can create a number of problems:

- Stakeholders and end users could lose interest if the implementation takes too long to complete.

- You might miss the opportunity for a quick win to build momentum and excitement.

- Design mistakes and assumptions may not be recognized until very late in the process.

- Priorities, goals and challenges can change over time as the business changes.

It is important to use a phased approach to your KM delivery. In the first phase, use a pilot group of contact center agents to test assumptions and realize quick wins. Doing so will allow you to install and configure the core technology, as well as establish fundamental business processes and content standards. Once these standards are in place and assumptions have been vetted, the second phase of KM delivery can expand the project to additional lines of business in the contact center.

When you reach the point where your KM program is established and successful in your contact center, you can have more confidence that your knowledge base contains the right content, and that the right processes are in place to maintain it. At this time, the third phase of the rollout should expand knowledge to self-service on digital channels, as well as to any applicable branch or assisted channels. This phase may involve integrating with third-party systems to help generate the optimal user experience. You should be ready to define an enterprise approach to leveraging knowledge, tools, and processes throughout your organization.

## 3. Starting with the Wrong Group

In addition to using a phased approach, selecting the right group for the initial pilot is critical to future success. Your selected pilot group should be one that is most likely to see measurable results, propelling the project forward to other groups. Analyzing several factors can help you determine if a particular group is primed for KM success. These factors include:

- Call volumes – Ensure the pilot group receives significant enough call volume that changes will, be statistically significant.

- Call complexity – the pilot group should field a significant number of calls that are complex enough to be assisted by KM.

- Associated content – Take inventory of content that already exists in the identified topic areas to ensure that it is easy to find and understand.

- Current performance – Choose a group that is currently underperforming and would benefit from KM. For example, select individuals whose calls frequently take longer than desired or include extensive hold times and escalations.

- Change tolerance – Employees must be willing to use new tools and processes.

The result of this comprehensive analysis will support you in finding a pilot group with a greater probability of being successful.

## 4. Not Focusing on End Users

Technology implementations involve many details, so often people get mired in the complexities of the new system and forget about the end users. But user needs and system usability should always remain top of mind as you plan the contents of the knowledge base, the user interface, and the navigation pathways.

When choosing content to include in the knowledge base, you should first identify the biggest pain points of your end users. When do they struggle to find answers for customers? What are the most problematic call types? Focus on the top call drivers and most frequently used processes, and ensure you have the best content in place for those situations. As you establish appropriate knowledge resources for these top call drivers, you can then seek out additional content for lesser used subject areas.

Once your content is in place, you must make it easy to find. End users will find content from either searching or browsing. Navigation hierarchies should be easy to follow to guide users to the content they need, and search should be tuned based on the way end users are likely to search. Usability testing should be conducted with real end users to help ensure you are correctly designing the user interface, search, and browse capabilities in a way that is logical to them.

## 5. Improperly Authored Content

Just because a piece of content addresses the answer to a customer question does not mean it will be effective for your end users. By following best practice guidelines for authoring content, end users will be able to find and consume the information quickly and easily.

- Narrow the scope – Each article should correspond to one specific topic to help users to find the information they are looking for. When long documents are used instead of brief articles, valuable seconds are wasted scanning through the document to find the few sentences that correspond to the issue at hand.

- Be visual – In addition to keeping an article concise and limited to a particular topic, the text itself should be structured for maximum readability. Agents in busy contact centers must read and comprehend information while simultaneously talking to customers on the phone. Using bullets, tables, and images makes it much easier for employees to quickly digest the necessary information.

- Use common terminology – Avoid technical jargon when authoring content. This will not only make the article easier to read and comprehend for the employees serving customers, but will also prove crucial if you decide to expose your knowledge base to the customers directly via self-service.

- Select problem-based titles – Customer service inquiries are largely about problems and resolutions. When customers contact an organization, they typically only know the problem they are having. Therefore, knowledge articles should use titles that describe problems, not solutions.

This will assist in quickly finding the article that will provide the appropriate resolution and greatly improving the accuracy of search queries.

## 6. Trying to Make One Size Fit All

No two employees are alike. Individuals come from various backgrounds, with different skills, styles and expertise. Likewise, customers and their service issues can be just as varied. Because of this, it is impossible to provide great service across all employees and all issues with a "one size fits all" approach.

Knowledge should be accessible in a variety of ways, including keyword search, natural language search, and browsing. The browsing hierarchy should be multi-faceted, allowing employees to find the same article from different categories depending on how they choose to navigate.

Customer service issues are also quite varied. Some issues are simple, requiring a straightforward FAQ to provide an answer. Complex questions may need several related articles, or a guided question-and-answer process to determine a resolution. Still other issues are so rare that they may not warrant their own knowledge base articles.

A proper knowledge base should consist of four layers:

1. Guided scripts – For frequent, high value complex processes, these can ensure the right steps are followed every time the process is required.

2. Knowledge articles – All top call drivers should be supported by knowledge articles. These should follow standard templates, such as FAQs, articles, and how-to's.

3. Reporting – Unusual or infrequent issues can be answered by searching existing documentation. Reporting can show when these issues occur more frequently and warrant authoring formal knowledge articles.

4. Community content – Online communities can be leveraged to address emerging issues that may not exist in formalized content, such as documentation or knowledge base articles.

## 7. Not Collecting Feedback

No matter how much planning goes into your KM implementation, you likely won't get everything right on the first try. Knowledge is an ever-changing asset, not a one-time project. Once you think you have all the knowledge you need, new issues arise, procedures change, and new products are released. The best way to ensure your knowledge does not stagnate is to ask for feedback. Your end users are the best source of information about what is working and what is missing within the knowledge base. Additionally, seeing their feedback having an effect on the system helps give end users a sense of ownership over the knowledge.

End users should be able to submit feedback on the quality of search results, missing content, and the content of individual articles. The users should be able to submit ratings on the overall quality of an article but should also be allowed to leave free-form feedback.

A good strategy to elicit feedback from end users is to close the feedback loop. When an end user submits feedback regarding a piece of content, it should be routed to the owner of the particular article. The owner can then review the feedback submission and decide on next steps to take. Whether the feedback is rejected for a particular

reason, or if it results in changes to the knowledge base, this information should then be delivered back to the original submitter to let him or her know that the feedback has been heard. End users are more likely to continue using the knowledge base if they feel that their voice is heard, and that the system is being improved based on their advice.

## 8. Leaving it Alone

A KM initiative will not be successful if you simply deploy the software, sit back, and expect results. KM is a constantly evolving element of your organization's success. If you do not clearly and directly support, measure, and evolve your KM capabilities, you may begin to see waning results over time. The first recommendation in this paper is to set specific goals. By tracking these goals over time, you will be in position to evolve and improve as the knowledge in your organization changes.

In any organization, knowledge itself is an ever-changing entity. The content that worked for your employees on day one will not work forever. Over time, not only do you need to edit and create content, but you should also track your target metrics to ensure you are still meeting or exceeding the goals you have set. As your business evolves, you may even consider developing and tracking new goals that match the objectives of your changing organization.

Another helpful tactic to help ensure your KM program is staying on track is to schedule a periodic health check. For example, Verint's professional services team offers such a service—a short engagement in which Verint experts analyze the current health of your KM system, spot potential issues, and offer recommendations to improve the quality and effectiveness of your content. These health checks can often spot issues or opportunities that you may have missed in your own routine measures.
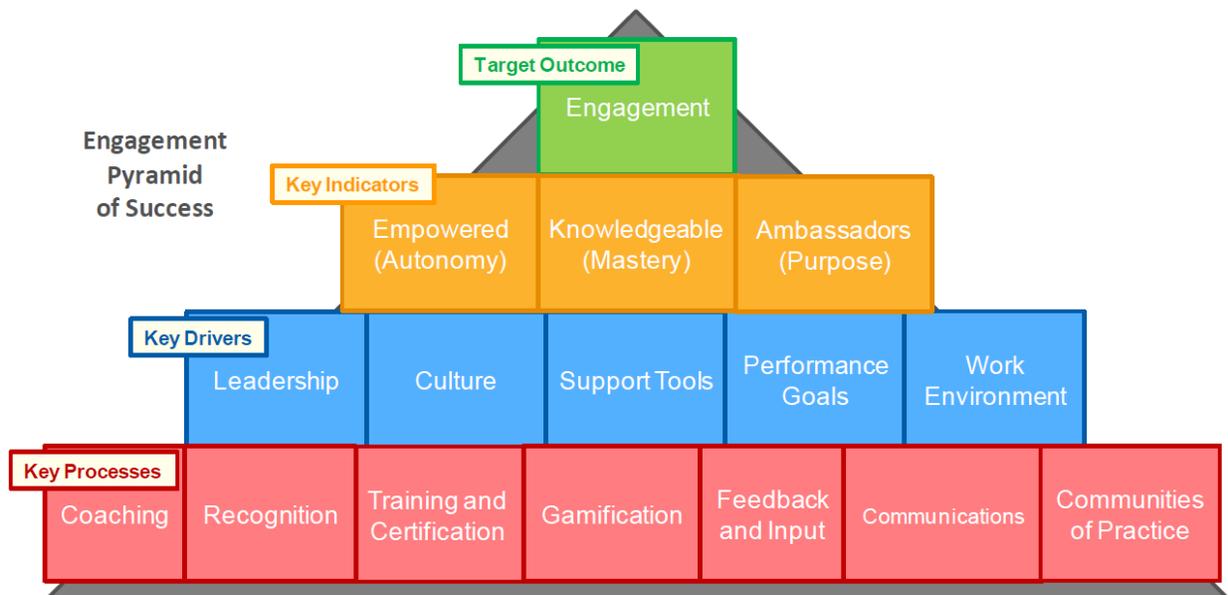
## 9. Lack of Adoption

Knowledge adoption is a huge problem for many organizations. Whether it's because end users have had a bad experience with a previous knowledge base, or they simply don't want to change their current behaviors, organizations sometimes find that end users do not use a new KM system. Lack of knowledge base adoption can be avoided with planning during and after the implementation through several tactics:

- **Building excitement** – Many organizations try to involve end users throughout the implementation process to build excitement for the new system. Early demonstrations and even naming contests can help build momentum and excitement for the system, as well as establish trust that it will function as expected.

- **Gamification** – Gamification is a way to reward employees for the desired behavior. By earning points for using the system and competing with one another users can be incented to dramatically increase their system usage. Over time, the end users will see the value of a well-designed system, regardless of the associated games.

- **End user involvement** – As mentioned previously, employees are more likely to use the system if they feel that their voices are heard in making the system better. Be sure to collect feedback from end users and report on the status of feedback that has been submitted.

## 10. Minimizing the Importance of Culture

To be successful with a KM program, all relevant parties must adopt a cultural shift to a new way of working. If this cultural change is not addressed, users might not be engaged, and stakeholders might not see the benefits desired. The key elements required to achieve success through cultural change are highlighted in the diagram below.

**Engagement Pyramid of Success**

**Target Outcome**
- Engagement

**Key Indicators**
- Empowered (Autonomy)
- Knowledgeable (Mastery)
- Ambassadors (Purpose)

**Key Drivers**
- Leadership
- Culture
- Support Tools
- Performance Goals
- Work Environment

**Key Processes**
- Coaching
- Recognition
- Training and Certification
- Gamification
- Feedback and Input
- Communications
- Communities of Practice

The diagram shows that processes such as coaching, recognition, feedback, and communication should be put in place across the user base. These processes reflect the key drivers around leadership, culture, and performance. If these processes are in place, end users are more likely to feel empowered and knowledgeable, leading to an engaged work force and a successful knowledge program.

As an example of driving cultural change, one large multimedia provider developed a KM roadshow, visiting 13 employee locations throughout the United Kingdom. The purpose of this roadshow was to build excitement around the program, as well as further communication, credibility, training and user engagement. Programs such as these can have a vital impact on the success of your KM initiative.

## Conclusion

As you can see, success in KM involves far more than a software deployment. Best practices around deployment strategy, content structure, and employee culture are as critical to your success as the application itself. Rather than simply selecting a software vendor, you should partner with an organization that has the experience, thought leadership, and track record of success to help you implement knowledge-centered best practices throughout your organization. By avoiding the ten pitfalls described here, you can develop a more effective KM program, poised for success across people, processes, and technology.

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