

Improving the Customer Experience with the KCS Evolve Loop

The KCS Evolve Loop: What Is It?

A team uses Knowledge Centered Support (KCS) to capture and use the collective knowledge—not only to solve individual customer issues, but also to improve organizational learning. It allows the team to put what is known (knowledge) to work to improve the customer experience.

KCS methodology uses double loop operational processes of the Solve Loop and the Evolve Loop that reinforce optimization of knowledge base health and organization capabilities. The Solve Loop represents the individual workflow driven by customer requests for assistance (incidents). The Evolve Loop is a continuous improvement process that looks systemically at the collection of articles gathered from customer

interactions looking for process, knowledge base, and product quality improvements. Clusters of KCS articles of similar cause and resolution are indicators of improvement opportunities.

Initiating Evolve Loop Activities

In 2011, the Omgeo support organization made a strategic decision to put the KCS Evolve Loop into action. They found that, like many other organizations, Omgeo had lots of data regarding cases and issues, but it wasn't being used effectively.

Fortunately, Omgeo's Doris Jurisson, Executive Director of Client Operations, understood that Knowledge Centered Support (KCS) methodology specifically recommends the use of the Evolve Loop activities as a tool to analyze the knowledge base data and identify

opportunities to eliminate customer issues. Her support was critical and with executive endorsement, Patrice Ficociello and Diana Freeman prioritized this effort. According to Diana, "... it was the best thing we ever did."

Getting Started

To avoid getting overwhelmed initially, Patrice and her team decided to select a product area to focus on. There were several factors that helped them determine where to start. They wanted to keep the process simple, and for Patrice and Diana, their decision was also driven by the availability of data. Lastly, an existing "escalation avoidance" initiative was already underway which offered another reason to integrate the efforts.

Upon selection of the area of focus, Ken DuCharme pulled data and initiated report building. This can be very time-consuming and for Omgeo it proved to take a significant effort. Patrice and Diana estimate that it took approximately 40 hours to gather, scrub, build test reports and adapt the reports as needed.

Challenges

- Improve the customer experience with Omgeo products and services
- Repeating issues coming to the support team
- Reducing the number of repeated escalations
- Lots of data but not in a format that is easily actionable

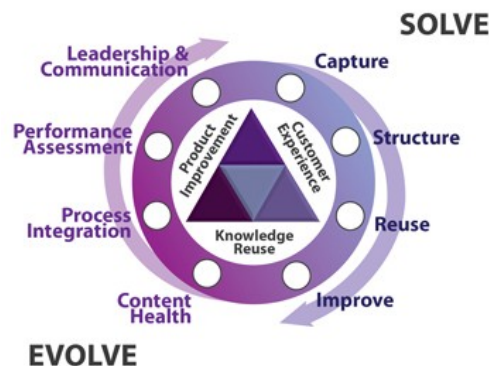
What They Did

- Prioritized the KCS Evolve Loop activities
- Analyzed clusters of articles to find patterns
- Built communication highway to development organization

Benefits

- Identified high priority customer experience improvement opportunities
- Improved communication between Support and Development
- Motivated support staff to tag knowledge accurately

KCS Double Loop Process



Omgeo focused on Technique 4 of the Process Integration practice in the KCS Practices Guide: Closed Loop Feedback for the Whole System.

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When embarking on this, be prepared to invest time to get the reporting built up front. The upside is that this investment will continue to provide returns, especially if you design the reports so that they can be reused with only minor updates. Build the reports assuming future reuse.

After working on the initial report building and scrubbing, Diana put her experience with customers and products to work, looking for clusters. She identified the themes and put information into buckets. To transform data to information, you have to really understand the context of the clients and how they are using the information. Don't assume that the product managers understand how the clients use the product. Be prepared to explain what the client's problem is, why they call support, and offer suggestions on what you think should be changed to improve the customer experience.

Build Communication Highways to Development Organization

After completing the data collection and analysis, they turned their attention to building bridges with the

development organization. Patrice and Diana felt very successful and proud that they could capture the data. However, they quickly learned that presenting data isn't enough. When the development contact looked at the data, she reported it was interesting but not actionable. Patrice reflects that, "we gave them data but not information." It was a great learning moment. It does not work to simply push the data; instead it is critical to spend time educating, interpreting and making the data consumable. In addition, it became clear that the data and analysis interpretations needed to be dissected in different ways. For example, for Omgeo, Patrice and Diana took an action to bring back the data aligned by customer. It is important to remember that for some groups outside of support, taking a look at the data from a client-specific view is going to be more relevant.

Initially, Patrice and Diana presented their findings to a single person within the target organization (e.g., development). However, they found that it proved to be most effective to present the findings to many different people within the devel-

opment organization (e.g., development engineers, product managers, design engineers, etc). This proved to be much more effective in making sure that the right information reached the right person at the right time.

Don't let all your efforts to pull, scrub, analyze and present information be lost to the email abyss. Build a communication bridge with development. Present the information to many people after learning how the target audience works and align the information you have into the way that they work.

In this case, Diana and Patrice utilized a combination of personal relationships and the company organization charts to identify whom to invite to the initial meetings.

This required that Patrice and Diana acquaint themselves with the processes and timelines in development to make sure that the information provided was coming at the right time. For example, the Director of Business Analysis and Design validated that it was helpful to hear information about what the clients were saying.

In this case, the timing was perfect because development was in the process of redesigning the product and the information helped them understand the importance of simplifying the design. She took the information and immediately put it to use during the design efforts. In fact, the design director has hopes of working with the support team to identify clients who are willing to participate in the agile development process.

Finally, Patrice and Diana worked very hard to make the information easily available. Don't assume that because you provided it, that it will be opened and used. It is very likely that you will have to push the information into the reports/dashboards used by the development teams. Find out where they go and how to make it really visible and easy. Patrice and Diana make sure that this information is available at all times and easily at their fingertips

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Don't Wait to Get Started

Once you have approximately 6-12 months of data, don't hesitate to start with your Evolve Loop activities. Of course it depends on your specific environment, but this will be sufficient to provide strong evidence of trends observed. Without historic data, the message might not be as powerful.

In addition, the sooner you start, the sooner you get good at doing it. Patrice and Diana confirm that "practice makes perfect." Each time you execute an Evolve Loop analysis effort, the time to complete it is reduced. At Omgeo, subsequent efforts took half the time.

Benefits

- Customer experience improvements with product changes implemented
- Prioritized customer experience issues with improvement opportunities
- Improved communication with counterparts on the development team
- Increased motivation of support engineers to tag knowledge accurately
- Enhanced visibility of support engineer participation in KCS activities
- Ability to close the loop with support engineers to convey importance of KCS

Lessons Learned

- Expect an up-front investment in building the reports; make them reusable and easily customizable
- Tailor messages to meet the needs of the development organization
- Present findings to many different teams within the development organization
- Acquaint yourself with development processes and timelines to make sure that the information you provide arrives at the right time
- Be strategic and make your information visible in their workflow
- Don't wait to get started.
- It is invaluable to have the help of a support agent with experience who truly understands what the solutions mean and can group them into meaningful categories.

About Omgeo

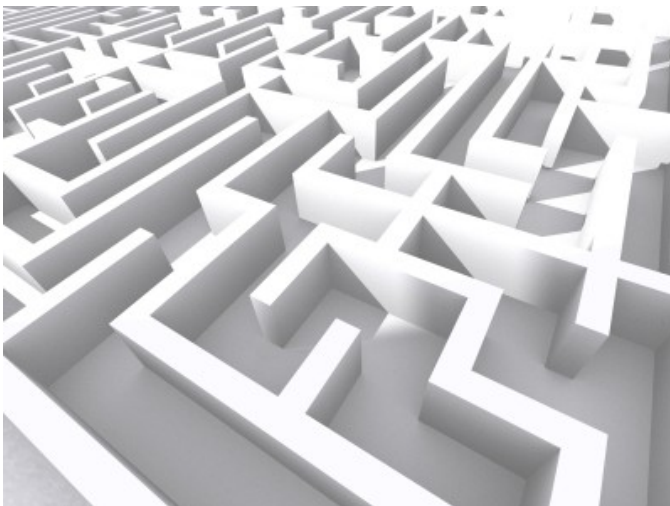
Omgeo offers a robust suite of exceptions and reconciliation management services and is committed to serving the needs of the worldwide investment community by developing complete, scalable, and global solutions for managing the trade management process in real-time.

With 6,500 clients representing over 2,400 financial institutions in 52 countries around the world, Omgeo associates span every major global financial center, including Boston, New York, London and Hong Kong, with a total of 16 offices around the world.

About the Consortium

The Consortium for Service Innovation is a non-profit alliance of organizations focused on innovation for the support industry. The Consortium and its members have developed the KCS methodology over the last 18 years, and are committed to developing innovative ways to deliver customer support.

Although navigating the Evolve Loop can feel complex, the benefits to the organization are many.



Case study developed by MelissaLynne Burch for the [Consortium for Service Innovation](#)

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