Achieving Great Things With KCS

PTC started their KCS (Knowledge-Centered Support) journey as many others do: with a desire to meet two primary objectives. The first was to adapt the support organization from one primarily delivering assisted support to one also offering robust self-service options. The second challenge was to grow capacity of the existing support organization by investing in knowledge capture and retention while maintaining the size of the support organization.

In 2008, Stephane Pinault, Senior Director of PTC Technical Support for Europe and Asia, began researching how others were meeting these complex challenges. Upon discovering KCS, he believed that this methodology was the best way to meet the challenges PTC faced. He attended a KCS Foundations Workshop and a KCS Design Workshop to gain the necessary skills to be successful.

Return on Investment
Funding approval was secured with the help of the Consortium's KCS Benefits Calculator, which PTC Technical Support used to prepare a compelling financial justification for the KCS implementation. This included the technology expense of moving to an integrated KM and CRM system. Even using a conservative financial model, Stephane reports that PTC is meeting ROI objectives. Examples of data tracked include the following:

- Number of cases reusing knowledge
- Business growth and comparative flat headcount
- Growth in the number of customer visits to the website
- Exceeded the targeted KCS improved internal efficiency
- Exceeded the targeted case deflection

Business Runs Better with KCS
With the implementation of KCS, PTC found that they met new customer demands for service and still maintained a highly efficient operation. Here are some of the operational outcomes for PTC:

- Time to resolution improved on the large share of the cases and especially when reusing knowledge
- Managers reported that time to ramp up new engineers decreased with the use of a good knowledge base
- KCS enabled support agents to develop new skills by assuming responsibility for supporting customer self-service needs
- Avoided spikes of customer contacts when releasing a major update to the software

PTC leaders also look to the assisted support category for KCS impacts as well. Of the entire volume of cases, 55% are flagged as a reuse. This high reuse indicates significant time saved with "Time to Resolve" impacts.

Customers are Happier with KCS
Stephane found it necessary to incorporate self-service success indicators to the reporting dashboards used at PTC. They are happy to report an 8% response rate on a post-web visit transactional survey. This survey is very helpful to gather self-service success indicators directly from customers. Quite early, they observed the impact of KCS by the 120% growth rate in the number of accesses to the knowledge base. At the same

Challenges
- Grow capacity by investing in knowledge capture and retention
- Adapt call-centric organization to meet customer demand for self-service support
- Manage the robust knowledge base that supports the customer self-service strategy at an economical cost

What They Did
- Attended KCS Foundations and Design Workshops
- Used KCS Benefits Calculator to make conservative estimates on cost savings
- Tracked the right metrics to understand impact of KCS implementation

Benefits
- Improved time to resolution
- Improved time to agent proficiency
- Improved use of self-service portal and knowledge base
- Increased customer-reported case deflection

time, 60% of customers indicated they were successful at finding what they are looking for. Customer-reported case deflection also was significant.

Lessons and Recommendations
Manage KCS as a program and involve all geographies and organizations from day one: with Foundations and Design workshops through to the different waves and finally full production

Break down the KCS implementation into phases and adapt the measures as you go. Add self-service success measures to those used to measure assisted support success

Identify critical changes needed to make your customer support portal more effective:
- Consider entering the ASP contest for best Web support sites to get input on changes needed for the customer facing support portal.
- Identify and develop relationships with some customers who are willing to provide feedback

Invest early in positions needed to oversee the KCS implementation. At PTC, this position is called the Knowledge Manager. This is a critical position to ensure success of the implementation.

Enable multi-lingual knowledge if this is a strategic priority for you. To do this, invest in a "globalization manager" who helps to make sure that the web portal experience and the content presented there are localized to the languages needed for your business. This will ensure that non-English speaking customers utilize the self-service option in high numbers.

Consider the KDE role and plan to utilize this role as soon as possible. It is very valuable having dedicated resources who are accountable to analyze the knowledge base for root causes of inbound issues.

Despite taking precautions, PTC experienced adoption issues because some managers were driving KCS participation with metrics. This meant that they were not participating for the right reasons and did not really understand the value of KCS. PTC addressed the resulting diminished quality content and manipulated reuse data by:
- Communicating directly to managers violating KCS principles
- Driving accountability and ownership of KCS from high level of the organization
- Utilizing Article Quality Index (AQI) to convey adherence to standards
- Providing continuous education sessions for managers
- Making critical KCS data easy to access by managers via reporting dashboards
- Developing a manager-specific workshop to help them understand the data and what should they do next

If possible, enable the ability to "flag or fix it" as soon as possible. At PTC, people happily began reusing, but not participating in creation and maintenance. When it was easy to do that, these activities were done as well.

Optimize and tune the search engine as much as possible to avoid complaints about search and to avoid the creation of duplicates.

About PTC
PTC delivers technology solutions that transform the way manufacturers create and service their products. Founded in 1985, PTC employs approximately 6,000 professionals serving more than 27,000 businesses in rapidly evolving, globally distributed manufacturing industries including industrial equipment, automotive, "high-tech & electronics, "aerospace and defense, retail & consumer and medical devices.
Manufacturers must evolve to overcome new challenges and increasing complexity, but our goal is unchanged: to deliver technology solutions that help manufacturing leaders achieve and sustain a product and service advantage.

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.