

# Passion and Persistence: You Can Implement KCS on a Shoe-String Budget

## History

Scott Stegner, Senior Vice President of Global Customer Support at Schneider Electric, began his knowledge management journey back in 2003 when he attended an MBA program boot camp at INSEAD University in Fontainebleau, France. He read a Xerox case study detailing how they had put a business process and tool in place that enabled the copier technicians to trade knowledge about what worked when they were out fixing their copier machines. The case study included compelling information about how much time had been saved and how many cases had been deflected.

This case study inspired Scott to come back to Schneider Electric and put a similar set of processes and tools in place. They began by building a SQL database that they named “Lessons Learned.” Initially this didn’t catch on with the engineers at Schneider despite numerous attempts to socialize and change the culture. So for many years, the effort stagnated. At various times the initiative

was “revitalized” but the culture change just didn’t stick. However, Scott didn’t give up on the dream. When he learned about Knowledge-Centered Support and its impressive track record, he was willing to implement it in his organization.

## The Journey

Scott’s persistence paid off though, because like many things, the timing was finally right and the dream became reality. Now, let’s review the journey that they took at Schneider Electric to get there.

### *The Right Person in the Right Job*

Scott assigned David Fisher to the knowledge-base initiative. Previously a support engineer within the Dallas organization, David displayed a passion for “helping customers help themselves.” Through David’s creativity, the global team was able to successfully bring Scott’s vision into reality.

### *Shoestring Budget*

The most important item to note is that this program was completed on a shoestring budget; the knowledgebase was pro-



*Even on a small budget, it is possible to implement KCS.*

grammed in-house with a shareware search tool and an SQL database. The “skunk works” effort was completed in-house. David designed the KB tool they have in place today interactively with customer involvement and specifically to support their KCS implementation. David purposefully kept the tool light because KCS isn’t about the tools, but should make it easier to participate in knowledge sharing.

### *Evolve Measures*

Along the way, the KCS implementation and the collaboration that became the norm in that environment required that metrics and measures be

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## Goals

- Disseminating consistent information
- Gathering “tribal knowledge” from engineer’s personal notebooks
- Building better relationships with customers

## Benefits

- Huge case deflection (10K highly complex cases—and \$1.5M US saved in 2011/12)
- 10 years of sales growth without a corresponding growth in the support budget
- Customer satisfaction higher than ever (best within the company)
- Help onboard new talent and get them up to speed quickly
- Preserve knowledge upon engineer retirement
- Keep talent engaged: improving the knowledge tool keeps them engaged
- Employee satisfaction remains very high
- Employee retention is very high
- Recognition internally for innovation and creativity
- Successfully avoid “tsunami” of support needs as new products are released by focusing on issue avoidance

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## *Evolve Measures, cont*

changed to reflect that support engineers are doing more than just answering questions on the telephone. They are participating in other value-added activities worthy of highlighting.

Scott and David came to the conclusion that they needed to identify what these specific value-added activities were and align points and weights to each activity. Examples of these activities include: knowledge creation, article editing, linking, defects documented, community/forum interaction, global collaboration on cases and case resolution activities.

David started plotting the data within a simple Excel spreadsheet, avoiding the time and expense of creating a dashboard early on. They validated that the system worked, was aligned to what was believed to be “value-adds,” and accurately demonstrated when the support engineers were participating. After a period of validation, David globalized and automated the process.

For those familiar with gamification, this is the “points” and “leaderboard” elements commonly deployed to motivate and energize. In this world, everyone competes against him- or herself. There is an attitude of collaboration and a spirit that everyone can achieve their goals within the context of the greater purpose of helping customers.

## *Focus on the Search*

At Schneider Electric, David and his team spend a tremendous amount of time watching searches behind the scenes and tweaking the search engine to make it work better. Also, David’s team had to sort out how to manage foreign language searches. They found that forcing customers to search in English was slowing down adoption. A simple and elegant solution was implemented involving the use of Google Translate. This technology is embedded into the search experience allowing users to type in the search terms in their native language and retrieve documents translated into their native

language. Keep in mind that the knowledge base is still all captured in English.

## *Find a Champion and Get Out of the Way*

Scott completely centralized the development of the tools and processes to his most passionate champion - David. Giving the zealous champion freedom to make things happen meant that incredible things began to occur. While this development and deployment model might not scale to a large organization, it proved to be very effective model to consider because it allowed for rapid prototyping and greater experimentation. At Schneider Electric, something dreamed in a morning meeting can be live in the system later the same day. Control for decision-making about the tools and the processes remains at the discretion of those to use the system every day. Participation at this level breeds greater interest and accountability to make it work.

## *Focus on a Higher Purpose*

Finally, Scott has built a culture that is focused on making the customers

know that “someone cares.” At Schneider Electric, the attitude isn’t one of cost-savings, but instead a firm focus on making it better for the customer by helping them be successful. The KCS implementation has been very low budget (SQL database and a free search engine; 2 legacy CRMs: Siebel, Soffront; Jive Community and instant messenger), but the pay-off has been huge. Having an invested and proud team who feels very connected to the customer pays huge dividends.

## **Today**

These huge dividends are reflected in the fact that over time, the support organization has become the “department of choice” to work in. The environment is one of challenge and alignment to a higher purpose. The leaders within the organization offer engineers as much autonomy as possible in the work that they do. This is a huge shift from the early days, when getting out of the support organization as fast as possible was the norm.

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The experience Scott Stegner has gained through the years implementing a culture-changing KCS program has caught the eye of other organizations within Schneider Electric. They are working to implement similar culture changes throughout other organizations globally with the intent to build a culture of collaboration throughout the entire company and remove the artificial barriers. They have a lively Community in place today, but want to continue to grow that implementation to help the customers initiate and keep a record of the collaborations.

## Lessons Learned

- Seek input from external “innovation leaders” to keep up to date on industry trends and Best in Class concepts like those highlighted by the Consortium for Service Innovation.
- Significant culture change requires tireless support from leaders within the organization.
- Don’t expect to rush culture change; it will take much longer than you think before it really sticks.
- Enlist the support of a “champion” or team of champions who believe passionately in what you are trying to accomplish.
- Don’t design the system in an “ivory tower”; give end users the responsibility to design the system themselves.
- People and process are more important than the tool.
- Be prepared to evolve your metrics as the implementation matures. Expect to start with both team and individual measures but over time evolve to a more integrated and holistic performance management process.
- Don’t ignore the search. It is definitely worth the investment to keep the search working well.
- Don’t be afraid of a “Big Dream.” Just get started and take it step by step. Over time you will get where you want to go.

- Remember that you need to reach critical mass in your knowledge base. That is a different size for each organization, but KCS implementation will likely struggle along until you reach the tipping point.
- During this period while you are getting to critical mass, persistence will be the key. Don’t give up! Remind yourself that this is going to work. Just grab your early adopters and keep pushing on the key messages.
- Don’t hesitate to use grassroots organizing techniques. Engage directly with the end users as they usually believe in the work sooner than their managers.



*Budget constraints force innovation and communication.*

## About Schneider Electric

As a global specialist in energy management with operations in more than 100 countries, Schneider Electric offers integrated solutions across multiple market segments. Focused on making energy safe, reliable, efficient, productive and green, the company’s 130,000+ employees work to help individuals and organizations make the most of their energy. Specifically, Scott Stegner’s organization supports a family of complex products that include software and hardware components in the HVAC and building security industry.

## 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.

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

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