

2009 Member Summit Agenda

Optimizing your Knowledge Management Investment

Consortium for Service Innovation
15th Annual Member Summit
November 11-13, 2009
Intuit, 5601 Headquarters Drive, Plano, TX
Local contact; Laura Savio (214-387-2262)

[Registration and logistics](#) on the web

2009 Member Summit Theme:

Optimizing your knowledge management investment:

- Are you getting the most out of your KCS investment?
- Four strategies to assess and tune your support process
 1. Understanding support demand and how best to satisfy it
 2. Support agent/engineer engagement
 3. Capitalizing on what we know (remove known)
 4. Enabling collaboration (focus on solving new)

Wednesday, Nov. 11 2009

7:45 Registration table opens

8:00 Breakfast (protein available)

9:00 Welcome and Consortium Updates – Mike Runda (Intuit) and Greg Oxtan (Consortium)

9:45 Assessing the Customer Demand for Support – Brad Smith (Yahoo)

What is the total customer demand for support and how do we satisfy it? Symantec has quantified the nearly famous “Funnel and cloud” model. Symantec will share their assessment of demand for support and discuss how they are looking to measure and optimize the customer experience in a holistic support model that includes the three support paths: assisted (support center), customer success with self-service and customer success in online communities.

10:30 Break

11:00 Are our support agents fully engaged in KCS? – Greg Oxtan, Mike Griffiths (SAP Business Objects), Adam Volpe (RIM)

A popular topic at a number of our town meetings this year was the challenge of getting and sustaining support agent participation in KCS. What is emerging from those discussions are techniques engagement that includes measures and coaching. We will discuss the details of this model, members’ experiences as well as ways to assess the effectiveness of our engagement strategy.

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Optimizing your Knowledge Management Investment

Noon Lunch

1:30 Are we fully capitalizing on what we know? What we have learned from the New vs. Known Study – Panel discussion: Mark McCarthy (Mentor Graphics), Robert Rose (Symantec), Curtis Hawks (HP).

Solve it once use it often - KCS captures the collective experience of the support organization in resolving customer issues. The reuse of solutions is a good thing.... to a point. While the near term goal is capture and reuse the longer term goal is to minimize reuse in the support center by increasing customer success with self-service (often mis-represented as case deflection) or eliminating the source of known issues from the product. Understanding the ratio of new Vs known issues being handled in the support center and the nature of those issues is important in assessing the effectiveness of our self-service model and identifying opportunities to improve self-service.

3:00 Break

3:30 Just-in-time Publishing – what is the link between just-in-time publishing and customer success on the web and how do we do it? Al Lowrie (Intuit)

Intuit has had success with a rapid publishing model; they will share how it works and its impact on customer success with self-service.

4:30 Wrap up for the day

5:00 Adjourn

6:00pm Group Reception and Dinner at Cru (in Legacy Town Center)

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Thursday, Nov. 12, 2009

8:00 Breakfast (protein available)

9:00 Welcome

9:15 Understanding the problem solving process – Robert Rose (Symantec), Brad Smith (Yahoo)

What if we could model the problem solving process in a visual way; actually see the path a case takes through our support organization? Turns out Value Maps are a great way to do this! Brad (being a big fan of value maps) has done some work on this and will share an example with the group. If there is interest, we will make this a topic for a team meeting in 2010 and explore the possibilities.

10:00 Break

10:15 Leadership Challenges – panel discussion: Doris Jurisson (Omgeo), Marco Bill-Peter (Red Hat), Mike Runda (Intuit)

Member experience with what works and what doesn't in making the transition from a transaction based support model to a value based support model (KCS). What do we need to be thinking about in terms of the business model, people and the infrastructure?

11:30 Summary and introduction to Open Space

Noon Lunch

1:00 Open Space Discussions (all attendees)

Open space has proved to be one of the most valuable items on the Consortium agenda. The attendees define the open space topics and the discussions tap into the collective experience and insights of those present – which is always enlightening!

5:00 Adjourn

6-7:30pm Evening Reception at Coast (in Legacy Town Center)

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Friday, November 13, 2009

8:00 Breakfast (protein available)

9:00 Welcome and summary of the open space sessions

9:45 Is our organization collaboration friendly? Melissa Burch (Oracle), David Kay (DBKay), Melissa George

As more issues are resolved through self-service a few interesting questions come up:

- How do we improve the speed (cost) and accuracy of solving new issues
- When and how do we move from a tiered escalation model to a collaborative swarming model?
- With a distributed and “opt-in” workforce how do we get support agents/engineers to contribute?

Creating an environment that enables collaboration is necessary in optimizing and sustaining the benefits of KCS. More importantly, a collaborative environment is critical in enabling an efficient swarming environment. We will discuss the characteristics of a collaborative environment, an assessment tool and techniques to improve collaboration.

11:30 Summary, closing thoughts and next steps

Noon - Adjourn