KCS in Action: Maximize Success by Implementing Coaching

November 16, 2021

Chat Questions and Answers

Recording

Questions	Monique Cadena - Akamai	Christie Morin - Broadcom	Jason O'Donnell - Autodesk
What technologies/tool does each company use?	Salesforce for case and knowledge work, and a custom coaching dashboard built into Salesforce	Wolken Software for case and knowledge work, Cubit and Incorta for KPI reporting, Slack for communications	Salesforce for case and knowledge work, Acrolinx for content quality, PowerBI for KPI reporting, Slack for communications
are coaches centralized or in the departments? are they the SMEs on the teams?	Coaches are in same Org, same team, same role as KWs. Mostly under same manager but some do Coach KWs for other managers.	our coaches are on the same team, meaning under the same manager; but that does not imply same product.	Our coaches sit in the same teams for whom they are coaching. Our reviews, however, are done by coaches outside of their direct teams and we are working to decentralize that review process even more. But, delivery of those coaching conversations are indeed in the same team.
How are the Coaches trained to coach?	2 part: 1. LMS course: Coaching Skills for Leaders and Managers 2. 2 hour Live training session covering real life examples and practicing "coaching". Includes: understanding Coaching vs Mentoring. using the Coaching dashboard, tools, etc. Followed up by support from their assigned lead Coach	We have training journey in our LMS that covers how to complete coaching activities within our tool as well as coaching materials.	Same as Christie: self-guided training, plus 1:1 sessions with leads for coach-the-coach type learning combined with periodic calibration sessions.
Did you publish your articles Day 1, or did you wait till you had a x number of articles before you went live with the customer service?	Day 1 - Nearly every case is validated by the customer so at a minimum articles should be published internally. Regardless of reuse frequency we publish externally what we can as soon as we can (because we can't predict the future of demand). Our publisher licensed KWs publish appropriate articles externally right away (before they close the case; see 90/0 rule). If a candidate or contributor think their article can be external, they publish it Internal and mark a checkbox called "Flag Coach for Customer Article" (custom) so when their coach is doing the CSC process (which also includes checking to see the article was set to the right audience/entitlement) the Coach can publish the article external (assuming it meets the criteria). This along with getting rid of WIPs (because the case notes are the WIP), and the 90/0 goal of publishing before case closure means we don't have a backlog of WIPs, and the Draft backlog is low (mainly Evolve Loop articles). This makes it easy for people to publish what we can as fast as we can, both internally and externally.	Day 1 - we encourage in the workflow.	Day 1 as well. All KCS programs I have been involved with were implemented with existing knowledge bases and support content processes already well established. As such, we integrated KCS changes in iterative fashions to overlap our existing business needs to get content out fast, so we continued publishing while training our teams on KCS principles and adoption.
Any advice on dealing with resistance from other areas outside of the knowledge team to give up the expected hours per week for the 'kcs coach' role?	Our Coaches all come from the org that practices KCS. Having the executive over that org understand the big picture, eco-system, and benefits, but most of all the "what if we don't do coaching risks" means that they are bought in and anyone in that org understands this is part of the program requirements needed to be successful.	Not really- we have had success with other groups like sustaining engineer wanting to help contribute to the KBs as they realize the more they can share, the less that gets escalated to them	Working those 1:1 relationships and connections to really get teh buy-in helps. Taking the time to show the value of coaching in combination with the overall program tends to bring people into agreement. Likewise, finding resources is always a tough space to be in so showing how the coach ehnances efficiencies in the longer term is helpful. At the end of the day, allowing a team to not have a coach and continue to struggle may be necessary while you drive your other teams who do have coaches to better success. Sometimes teams just need to see it for themselves.
Has anyone had to standup KCS in an non-KCS environment? How long did it take and how did you do it?	While I have done some new and some rebooted, I don't think sharing the timeline is helpful, there are too many variables to consider 1. Culture of your org/company 2. Experience of your KCS Owner 3. Size of your KCS team. 3. Number of KWs 4. How fast your business partners can output request (IT, reporting, etc.).	no	In my prior company, we stood up KCS in a method I referred to as KCS-light. It was a stripped down version of the KCS principles applied across a global support team that took over a year to implement. It never really took hold the way it should without a well structured and focused coaching program, though we built some amazing champions along the way. When we unified all business units later on and rebooted KCS across all of them (some with prio KCS implementations, some without) we did it a more sturctured fashion and took us about 3 years to actually complete the rollout and get the program to some level of maturity. The coaching program was a key piece to that later rollout's success.
1. Are the panelist coaches part of the KM org/function, or part of the BU, or HR, etc.?	Our Coaches all come from the org that practices KCS.	(same as Jason)	I am part of the KM org as the program manager. I sit in the Global Product Support (GPS) org on the strategy team. While in my experience KCS leadership is often found in the Support org, KCS leaders can and often should sit in broader organizational structures that have influence over more that just support strategies. To your question, specifically, our Coaches are all part of the GPS team as well and function in day-to-day roles as both coach and support specialist.
2. Are their coaching responsibilities limited to just KM work or do they do other coaching developmental activities too?	KCS practices only. We do have a Case Quality Coaching program modeled after our KCS Coaching program. The Coaches are typically different, but there are a few people that are both.	focus on KCS activities only.	Our coaches are predominantly focused on case and content coaching in a Support environment. While they have the ability to branch out to larger development topics, typically the resource and time constraints drive a tighter focus on the case and knowledge work in front of them and we rarely step out from that tighter support perspective.
3. Lastly, what development and training do you find help coaches with their coaching tasks?	Same. Coaching skills and soft skills. Understanding the difference between coaching and mentoring, they are not mentors, they are peer coaches.	(same as Jason)	Coaching workshops as initial training and refreshers go a long way. We also have some internal self-guided training that helps as well. But the two main areas we really focus on are 1:1 coaching conversations between Leads and the coaches, as well as quarterly calibration sessions to ensure we are all aligned to the same level.

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How do you set aside time for them? How to do you create a case for Management to set aside time?	Time: They self manage. Case: Same as Jason, though our initial ask was 1 hour per week per Coachee with the understanding this was new and as the program matured the time would lessen based on coach and coachee. It also was helpful to have all our Managers and Directors go through a session w/the KCS Owner (me) titled "Managing in a KCS Support Model", one of the things included in that session is understanding the coaching process, the value, expectations of the coach, and how the managers can support them.	We let them figure it out with their manager.	This was done early in the process as the prgram was being designed and rolled out. Part of the buy-in conversations with managers to obtain direct agreement and adherence to the time commitments needed. We specifically call out a 35% commitment for each coach's time.
Is there a documented "process" for doing the coaching? We have a very small team and want to start small with one KB, but don't know how to start - randomly choosing Authors to review, articles to review, and all. ServiceNow has the AQI, BUT the reporting to id the other things is.... rough.		(same as Jason)	Yes, we have documented all expectations and guidance for our coaches in our internal WIKI. We have a global pool of cases populated by our Data Analytics team from which the coaches draw to review outside of their direct teams. Cases are selected at "random" based on closure date within the quarter and have not already been reviewed. Article reviews are done in-line with case reviews as an outcome of the overall process.
Do the panelists employ coaching metrics to compare the effectiveness and impact/effectiveness of individual coaches as well as the leveraged benefits of the coaching program as a whole?	Same as Jason -And we also monitor how often we are meeting our coaching goal, that is correlated to the other health indicators. Focus on coaching and the other things will fall into place.	(same as Jason)	Not a direct coaching metric, but rather a dashboard view of our KCS program with slicing by manager/coach/geo/product and date ranges. In that view we can show trends of contributors by coach to help identify if a new coach may be too strict or too lenient and trigger a calibration session, as well as overall health of the program from multiple perspectives.
Do you leverage automated flow's in the background to help you move knowledge from one state to another based on defined set of rules?	See my day 1 publishing comments.	(same as Jason)	No automated flows. Any state change for our content is manually triggered by a contributor or publisher. That said, I am working on a lifecycle management strategy that would help us utilize automation for some content events.
@monique - how did you develop the onboarding/ training program for Coaches? What was the timeline for this?	I appreciate the question, but it's tough to answer :) Given I've been doing this for a long time, I'll estimate with only that as the focus I could create a coach training program in about a week, but remember I've been doing this a LONG time. Also I learned a lot from the expert in Coaching, Dr. Beth Hagget. A long time ago, she taught me how to train Coaching classes; when I was at Dell, our org was largely remote (pre-pandemic) and there was no easy option for us to do a live class, so I picked up a lot of wisdom from her!		-
Q for panelists: do any of you define coaches via a distinct job family/function or are they generally part of the standard support org job families?	No. Part of the same pool of KWs. It helps if they do the same work!	No special distinction.	Coaching, for us, is a secondary role for any support specialist. As such the job family and function from an HR perspective is the same as any other support specialist role. We do have some graduated leveling and our coaches tend to be in the higher levels of their job families, but no discrete differences in family for the specific coach role.
@Jason - would love to hear more about flag and improve in salesforce			We are looking at transitioning from an internal corrective action method of evolve loop improvement, to utilizing a Salesforce specific flag in the knowledge article to trigger "FixIt" efforts. Combined with a dedicated writer to manage the FixIt list, this should help us bypass the existing manual multi-tool process and focus our efforts in the singular tool for content capture and modification. We will continue, of course, the idea that reuse is review and encourage all our teams to modify when they are able to make the appropriate changes, and flag when they aren't.