KCS v6 Adoption Guide

The KCS® v6 Adoption Guide is the accumulation of over twenty years of adoption experiences by KCS Academy Certified Trainers and the staff of the Consortium for Service Innovation. This guide is an invitation to success. While it provides a step-by-step approach for planning a KCS adoption, it is not intended to be "the only right way." Our aim is to share what we have learned about what makes for a successful KCS adoption and help you maximize the many benefits of doing KCS.

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Introduction

KCS is an approach to knowledge management that originated in high-tech customer support. The methodology has evolved over the past 25 years to become a rich set of principles and practices that create dramatic benefits for any information- or knowledge-intensive organization. KCS v6 seeks to generalize what we have learned in tech support organizations. While we are gaining experience with KCS in HR, legal, professional services, product management, engineering, and development organizations, many of our examples are still based on tech support.

This Adoption Guide is meant to complement the KCS Principles and Core Concepts paper, the KCS v6 Practices Guide, and the Measurement Matters paper (v6 coming soon). A thorough understanding of these three documents is critical to a successful KCS adoption. The KCS Principles and Core Concepts provides the guidelines for alignment. The KCS v6 Practices Guide provides examples of how to operationalize the KCS principles. The Measurement Matters paper describes the dynamics an organization must deal with on the KCS journey. Sustained success with KCS requires a change in how we measure the health and value being created in a knowledge-centric environment. Because value can only be measured at the point of realization, most organizations have to make a two dimensional transformation:

1. A shift from focusing on transactions and activity to a focus on value creation.
2. An expansion of the scope of measurement beyond the traditional organizational boundaries.

It is our intent to minimize the duplication of information. As a result, there are numerous references to details included in the other documentation mentioned. However, some level of duplication is unavoidable.

In this section:

- Terminology and Scope
- KCS Benefits
- KCS Adoption Overview
- Adoption Activities
- Adoption Success
- KCS: The Great Enabler
Terminology and Scope

Terminology

Vocabulary is important, and it is a challenge as different organizations and industries use different terminology for similar things. For example, in tech support there are numerous terms used for the support event including incident, case, trouble ticket, call, or service request. In this guide we will use the term “incident.” We will use "knowledge worker" as the generic term for people involved in resolving issues and problem solving activities. In tech support the knowledge worker is often the Support Analyst: the folks in the support organization who solve customer issues. These people are also called support agents, support engineers, or customer support reps (CSR).

This guide uses the same terms as those found in the KCS v6 Practices Guide glossary. A few bear repeating:

- **Knowledge worker** - Anyone who does intellectual or cognitive work (as opposed to physical work). People who use data and information to make judgments and decisions and/or take action. Knowledge workers can play the role of responder or requestor.
- **Domain** - A loosely defined collection of knowledge. For example, a domain would be the collection of knowledge about:
  - A business process or policy
  - A product or family of products
  - A service or a professional service offering
- **Requestor** - A knowledge worker seeking information or resolution to an issue.
- **Responder** - A knowledge worker providing a resolution to an issue or assisting in the development of a resolution to an issue.
- **Interaction network** - Anyone involved in requesting or responding.
- **Customer** - We use the term customer in the broadest context of any customer-supplier relationship, or requestor-responder relationship. Customers may be internal or external to the company or institution. An employee requesting information from HR or Legal is a customer, a student requesting information from the admissions department of a university is a customer.
- **System of record** - The system used to track interactions. In tech support, this is the case/incident management system. In environments that do not use a case/incident management system to track requests, there are often a number of systems used to track work and the associated interactions (instant messenger, task or project management software, etc.).
KCS Scope

Knowledge-Centered Service (KCS) is a robust set of principles, practices, and techniques for creating, maintaining, and leveraging knowledge in an interactive environment. While KCS started out as one important element of an organization’s overall knowledge management strategy, KCS has evolved to become the knowledge management strategy for the whole organization. KCS seeks to reuse, improve, and - if it doesn't exist - create knowledge as a by-product of interaction. Just as the Agile development methodology has replaced the waterfall model in development organizations, KCS is replacing the waterfall model of content or documentation development. KCS is "agile knowledge management."

The KCS methodology is based on 25 years of academic research, experiences, and investment by the members of the Consortium for Service Innovation.

Knowledge is information upon which people can act. Knowledge is intangible. It can not be counted or measured in discreet terms, and it can not be measured at the point of creation or capture. Knowledge is measured at the point of value realization; it is measured by the value it creates for the audience it serves. Knowledge includes content and context.

KCS is based on the following characteristics of knowledge:

- It is gained through experience and interaction
- It is never perfect or 100% complete
- It is constantly evolving because we never stop learning
- Our confidence in what we know is gained through use, experience, and interaction

Knowledge is not pristine, perfect, or static; it is actually dynamic and quite messy. KCS allows us to capitalize on the collective experience of the organization and manage the risks associated with the dynamics of knowledge. This is what makes KCS so different from other traditional knowledge management (KM) or knowledge engineering practices. The traditional models are "knowledge from a few" for the use of many. KCS is knowledge from many for the use of many.
KCS Benefits

For Consortium members who have been on the KCS journey for a few years, KCS has come to be known as the "great enabler." Capturing the organization's experience in a knowledge base proves to have many benefits. While the operational benefits of KCS are profound, there is a long list of functions that KCS enables (see KCS: The Great Enabler). If done well, KCS dramatically increases a team or function's value proposition to its employees, its customers and to the organization.

KCS Benefits

KCS enables the organization to improve its ability to capitalize on what it collectively knows. The benefits happen over time and can be put into three general categories:

The near-term benefits of KCS, realized in the first 3-9 months, include:
- Improved resolution times by 25-50% (improved capacity to handle requests)
- Improved first call resolution and reduced escalations
- Improved skills, job satisfaction, and confidence for the knowledge worker (less stress)

The mid-term benefits, realized in 9-18 months, include:
- Dramatic improvement in user success with self-service
- Reduced training time for new employees

Long-term benefits, realized in 18-36 months, include:
- Business improvements based on patterns and trends of the user experience
  - Identifying improvements in features, functionality, processes, policies
- Enabling the use of AI to improve user success in finding resolutions
- Enabling analytics that provide predictive and preemptive capabilities (proactive customer engagement)

The degree to which the knowledge worker consistently reuses, links, improves, and - if it doesn't exist - captures knowledge as they resolve issues is directly related to the degree to which the organization will realize the
benefits of KCS. Maximizing and sustaining dramatic KCS benefits is fundamentally about people and their understanding, buy-in, beliefs, and behaviors. The workflow model, content standard, and technology are enablers.

We have found that people aren’t likely to do things if they don’t understand why they are doing them. Therein lies the challenge. Everyone in the organization needs to understand the big picture. Said another way, the knowledge workers who do the Solve Loop have to understand how their participation enables the Evolve Loop, and benefits the people they’re serving, the organization as a whole, and the knowledge workers themselves.

This is why the KCS adoption model focuses so much on leadership, coaching, and communication.

Coaching and validation of understanding through a licensing model are important elements in promoting understanding and changing behaviors. To fully realize KCS success, the Solve Loop practices (capture, structure, reuse, improve) have to become a habit for knowledge workers, not something they occasionally do, or something only some of them do.

The Power of Certification

The KCS Academy, the only authorized certification body for KCS, offers rigorous, industry-level certification programs for some of the roles described both here and in the KCS v6 Practices Guide. The certification programs validate that individuals have an operational understanding of the KCS methodology. The criteria and exams for certification were developed by the members of the Consortium with guidance from a psychometrician (an expert in exam development and validation).
The organizations that have made use of the Academy’s certification programs are reaping the benefits of KCS. Knowledge workers who truly understand the methodology and how it can benefit them consistently create more value than those who don’t.

**KCS Certification programs include:**

- **KCS v6 Fundamentals** – Entry-level certification for anyone interested in learning the basics of KCS.
- **KCS v6 Practices** – Advanced-level certification for those demonstrating thorough, deep, and broad understanding of KCS.
- **KCS v6 Trainer** – Advanced-level certification for experienced trainers who hold the KCS v6 Practices certification and intend to sell and deliver accredited KCS training.
- **KCS v6 Internal Trainer** – Advanced-level certification for experienced trainers who hold the KCS v6 Practices certification and intend to deliver accredited KCS training within a specific company.

For a listing of official KCS workshops and certification offerings please visit the [KCS Academy](https://library.serviceinnovation.org/KCS/KCS_v6/KCS_v6_Adoption_Guide/000_Introduction/020_KCS_Benefits).
KCS Adoption Overview

While the basic premise of KCS is quite simple (solve it once, use it often), adoption of the methodology is not. KCS challenges traditional practices in how we think about organizational structure, process, and measurements. For most organizations, a successful KCS adoption requires a significant transformation. As a result, a thoughtful adoption and change management strategy is required.

Two important concepts have emerged from successful KCS adoptions:

1. Go with the flow
2. Start small, create some success and excitement, and then invite others to join

We have learned that the best place to start the adoption process is at the point of demand: as close to the audience you serve as possible. The “go with the flow” concept uses demand to drive the adoption. Capturing issues at the first point of contact preserves the context of how the user experienced the issue. If the resolution is not known by the first point of contact, a work-in-progress (WIP) article is created and that draws others in the organization into the knowledge base to add resolutions. In the traditional tiered support model, levels 2 and 3 should be finishing the WIP article as they learn or develop the resolution. One approach we know does not work is starting at the back end of the support process (level 2 or 3) and pushing knowledge forward to level 1; the knowledge article is like a fish swimming upstream. If the organization has moved to an Intelligent Swarming model (no tiers of support) the person requesting assistance from others should finish the WIP article as the resolution becomes known.

Start with a small group to create internal referenceability.

The "start small, create some excitement, and then invite others to join" concept suggests starting with a small group (we call it a wave) of 25-50 knowledge workers and creating some success and internal referenceability, which in turn generates curiosity and interest from others to get involved. This creates an environment that draws or invites people into the process. Unlike many technology implementations that impose change on people (and which inevitably create resistance), KCS adoption is designed to create interest in KCS across the organization.
Creating an environment where people see value in KCS and want to learn the practices is key for a healthy and sustainable knowledge-centered organization that will evolve over time and continue to produce value for the knowledge workers, the business, and most importantly: the customers.

The foundation for a successful adoption includes the creation of a performance assessment model, workflow, content standard, strategic framework, and adoption strategy. These critical foundation elements are developed during the design session, which we will discuss later.

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**Waves and Phases**

We cannot overemphasize the "start small" concept. We have never seen a large scale "everybody starts the KCS journey at the same time" approach work in organizations of more than 50 knowledge workers. For most organizations, KCS is a big change. Starting small enables us to learn and tune the foundational elements based on experience. It also minimizes the resource impact of coaching during the learning phase.

KCS is a journey, not a destination.

We call the groups or teams adopting KCS "waves." As a wave of adopters progresses on the KCS journey, they move through phases. The phases are milestones on the journey. Where waves are groups of people, the phases represent the maturity of the wave. A simple example is an organization of 30 knowledge workers (across levels 1, 2 and 3): they start the adoption as one wave of adopters. As they learn to do KCS and the knowledge base grows to include most of what they know, they will move through the phases of maturity.

If the organization is 280 knowledge workers and they all work in the same knowledge domain, then this adoption would have multiple waves. The initial wave might include 35 or 40 people. The second wave might be 100 people and the third wave would be the balance of the organization (about 150 people). Each wave creates coaches that support the next wave.
A more complex example would be a large organization that supports multiple knowledge domains. This would require multiple KCS adoptions, potentially with multiple waves. For example, if the company supports both hardware and software, or operating systems software and application software, the organizational structure would reflect two (or more) distinct groups that have very little interaction with each other. In this case, each group would have their own KCS adoption and each adoption may have multiple waves. Each wave would progress through the phases of adoption based on their proficiency and success. One caveat on this is the move from Phase 2 (Adopting) to Phase 3 (Leveraging), as this transition is dependent on both the knowledge base maturity for that domain, and the readiness of the knowledge workers. Earlier waves may have to wait for later waves to catch up so the whole domain can move into Phase 3.

Determining the waves for adoption is discussed during Phase 1 as part of the Design Session.

The adoption phases are based on key milestones along the KCS journey. Each of the four phases of adoption defines the focus and actions for that phase, as well as the exit criteria. The four phases are:

- Phase 1 – Planning and Design
- Phase 2 – Adopting
- Phase 3 – Leveraging
- Phase 4 – Maximizing

The chart on the next page shows a sample timeline of the four phases of adoption. Each organization moves at its own pace. Large organizations often have groups or waves of adopters at different phases of adoption at the same time. It is important to transition to the next phase based on the exit criteria identified for each phase, not based on an arbitrary, pre-established timeline.

Change Management

As we have mentioned, KCS represents a significant change for most organizations. Organizations who treat KCS adoption as a serious change initiative create greater benefit than those who approach it casually. We have found that organizations that embrace a formal change management methodology like Kotter or ADKAR tend to do well with their KCS adoption. If you have change management professionals in your organization, by all means engage them in supporting your KCS adoption.

https://library.serviceinnovation.org/KCS/KCS_v6/KCS_v6_Adoption_Guide/000_Introduction/030_KCS_Adoption_Overview

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Large organizations should consider building a KCS Center of Excellence (CoE) in order to manage multiple adoptions across the organization. The KCS CoE is a small team of dedicated resources with a deep understanding of KCS and change management. The KCS CoE is described in Appendix B.
Adoption Activities

The typical sequence of events for a KCS adoption include:

1. KCS Assessment: understanding and sizing the opportunity
2. Assessment results presentation, executive briefing and buy-in
3. Selection of the KCS Council
4. KCS v6 Practices Workshop and Certification for the KCS Council (Design Session)
   1. The workshop and the Design Session may be completed as part of the same multi-day session or done separately
5. First version of foundation program documents are prepared (Performance Assessment, Workflow, Adoption Strategy, Content Standard, Strategic Framework)
6. First technology update (if required to start practicing KCS Solve Loop)
7. Coach Training
8. Wave I
   1. Knowledge worker training
   2. Updates for foundation program documents
   3. KCS Publisher licensing
9. Wave II (and each subsequent wave)
   1. Knowledge worker training
   2. Updates for foundation program documents
   3. KCS Publisher licensing
   4. KDE (Knowledge Domain Expert) training and Evolve Loop activities

Sample Adoption Timeline

For each of the four phases, this guide provides a:
• Definition
• List of activities
• List of exit criteria to ensure completion of the phase
• List of techniques to engage stakeholders in each phase
Adoption Success

There is no "single most important action" that drives a successful KCS adoption. Below are the critical components for success.

- Gain cross-functional buy-in and alignment through thoughtful and continuous communications
- Develop content guidelines and workflows that support a just-in-time publishing model
- Define and practice the workflow before shopping for tools or making significant changes to the existing tools
- Develop measures and baseline values for expected results
- Implement training, coaching, and the license model for knowledge workers
- Implement training programs for managers

Many of the steps listed above are about creating understanding and buy-in of KCS by the knowledge workers and the managers. We cannot overemphasize the importance and need for communications. Successful adoptions have implemented the KCS license model with coaching, training, and certification programs to promote and assess understanding.

For large organizations with multiple domains adopting KCS, building a KCS Center of Excellence (CoE) is recommended. The foundation elements we talk about as part of Phase I - Planning and Design, are unique to a domain; one size doesn't fit all. The KCS CoE works with each domain to conduct an assessment and identify unique elements of the workflow, content standard, and measurement framework that will help ensure success for the domain. For the details on building a KCS CoE please see Appendix B.
KCS: The Great Enabler

A thriving KCS implementation makes a whole slew of interesting things possible for all three stakeholders: the organization, the requestors, and the responders.

The things KCS enables for....

<table>
<thead>
<tr>
<th>The Organization</th>
<th>Requestors</th>
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<tbody>
<tr>
<td>• Automation: chat bots, detection &amp; repair, predictive customer engagement</td>
<td>• Self service success</td>
</tr>
<tr>
<td>• Cross-organizational communication and collaboration; silo-busting</td>
<td>• Lower level of effort on known</td>
</tr>
<tr>
<td>• Lower operational costs</td>
<td>• Consistent responses on known</td>
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<tr>
<td>• Increased employee loyalty/lower turnover</td>
<td>• Reduction in time to find</td>
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<tr>
<td>• Reduce time to proficiency/expertise</td>
<td>• Streamlined access</td>
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<tr>
<td>• Automation: chat bots using KB</td>
<td></td>
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<tr>
<td>• Machine learning/matching problems &amp; solutions</td>
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<tr>
<td>• Predictive capabilities based on articles reuse and linking</td>
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<tr>
<td>• Increased consistency/reduced risk of error</td>
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<tr>
<td>• Reduction in duplication</td>
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<tr>
<td>• Improved requestor success &amp; productivity leading to increased NPS, revenue,</td>
<td></td>
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<tr>
<td>engagement</td>
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<tr>
<td>• Improved compliance, less variation</td>
<td></td>
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<tr>
<td>• Business improvements; features, functions of product/services, process, policies</td>
<td></td>
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<tr>
<td>• Voice of the Customer initiatives</td>
<td></td>
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<tr>
<td>• Capture/retention of organizational knowledge</td>
<td></td>
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<tr>
<td>• Optimizing resource utilization (people work new!)</td>
<td></td>
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<tr>
<td>• Improved brand reputation, deliver on brand promise</td>
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<tr>
<td>• Organizational alignment/consistency to vision and across the lifecycle</td>
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<tr>
<td>• Omnichannel capabilities &amp; consistency</td>
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| **Responders** | • More interesting work/elimination of redundant work  
• Lower level of effort on known  
• Consistent responses on known  
• Increased confidence during on boarding  
• Less stress, more trust in peers  
• Sense of belonging  
• Wider scope of work, diversity  
• Empowerment, direct influence  
• Impact beyond one-to-one, sense of contribution  
• Collaboration independent of space, time and organizational boundaries  
• Faster development of resolutions  
• Constant learning  
• Opportunity to develop skills and new roles; coach, KDE  
• Leadership opportunities  
• Visibility to impact of contribution  
• Cross-functional solution development |
Phase 1 - Planning and Design

Phase 1 builds the foundation for a successful implementation. It entails:

- Assessing the current state of knowledge practices
- Getting the right people involved across the organization to form the KCS Council
- KCS training for the KCS Council
- Designing a workflow and content standard that is good enough to get started
- Creating a communications plan
- Developing an adoption plan and road map
- Establishing the measurement model and baseline measures against which we can assess progress

The planning and design phase can take anywhere from four weeks to a number of months depending on the size and diversity of the audience adopting KCS. The KCS Program Manager coordinates the design activities. In small organizations (10-50 people), this may include program management and project management responsibilities. In large organizations (50-1000s), the KCS Program Manager will need the support of project managers for each knowledge domain. It is critical to clearly define responsibility for the adoption activities.

In this section:

- Assessing the Current State
- Getting the Right People Involved
- KCS v6 Practices Workshop
- The KCS Design Session
- Defining Wave 1
- Exit Criteria for Phase 1
Assessing the Current State

KCS Opportunity Assessment

Definition

The KCS Opportunity Assessment evaluates the current processes, content, and culture. The assessment identifies the extent to which the current practices align with KCS practices and where they don’t. The evaluator uses the results of the assessment to recommend opportunities for improving the current organizational practices and to quantify the benefits. This is important information for the KCS Design Session.

The assessment compares the current organizational processes with the KCS practices in areas including:

- Interaction management
- Problem solving
- Technology and infrastructure
- Knowledge management
- Leadership and culture

The Approach

The individual doing the assessment, the “evaluator,” is an objective observer exploring opportunities, not a judging party. It is important that the evaluator be an outside resource or someone who is not closely associated with the organization or domain. It is the responsibility of the Executive Sponsor and KCS Program Manager to create an open, non-judgmental environment for the assessment participants.

The assessment begins with data collection. The KCS Program Manager will complete the KCS Opportunity Assessment Survey (see Appendix A) for the current working environment, culture, tools, and metrics. In addition to the data collection, the evaluator conducts a series of interviews with representatives from the management team and knowledge workers.

Assessments are completed for each domain. In large global organizations it is important to include multiple locations to identify variations across geographies. It is also important to include all the levels of the organization involved in the problem solving process. This ensures a complete view of the current state. The results of the assessment will provide
background information and highlight areas of focus for the KCS Design Session. A typical KCS Opportunity Assessment for a domain takes 2-3 days of onsite evaluations, observations, and interviews. If multiple locations are involved in the assessment activities, the time allocated must be adjusted accordingly.

To review and validate the assessment findings, the evaluator convenes a session (usually 2-3 hours) with the Executive Sponsor, management representatives, and key knowledge workers from the domain. In addition to validating the current state, the goal of the session is to create an understanding of KCS, how it differs from the current practices, a sizing of the potential benefits, and a high level understanding of the dependencies for a successful KCS adoption.

Supplemental Materials for the KCS Opportunity Assessment

To help facilitate the KCS Opportunity Assessment, the following are helpful:

- KCS Opportunity Assessment Survey (see Appendix A)
- Create an invitation to participate in the interview process that includes some context for the KCS program
- Provide an agenda to participants for site visit
- Provide an agenda to participants for results presentation

If the sponsor of the assessment decides to move forward with KCS, the next step is getting the right people involved.
Getting the Right People Involved

The first step is to identify and confirm an Executive Sponsor. The Executive Sponsor must have influence on those who will be impacted by the organizational change. It is typically a person holding a Senior VP or VP title: an executive whose organization includes the knowledge workers. The Executive Sponsor needs to have control of the budget for the KCS initiative and have accountability for the results. The Executive Sponsor acts as the KCS advocate with policy and process owners across the business including: Legal, Finance, HR, IT, and Product Development. While the Executive Sponsor is not a regular participant on the KCS Council, they should receive periodic briefings on the Council’s progress and they must support the effort by allocating resources and budget for the program.

The next step is to create a cross-functional and cross-geographic KCS Council. In addition to the KCS Program Manager, this team is composed of knowledge workers and management representatives from the domains that are adopting KCS, an IT Liaison, a Web Liaison, and if possible, a communications specialist.

**KCS Program Manager** - Responsible for coordinating the adoption plan and the project plan, this person ideally holds a KCS v6 Practices certification from the KCS Academy.

**Knowledge workers and management representatives** – Knowledge workers and management representing a cross-section of the knowledge domain(s), geographies, and, if applicable, outsource partners who will be involved in adopting KCS.

**IT Liaison** - Responsible for driving the tool functionality, reporting, performance, and integration required to support KCS.

**Web Liaison** - Responsible for ensuring the organization’s website protocol is included in the content standard and coordinating plans for self-service.

Participation on the KCS Council for the majority of the members is part-time. Members continue to be involved in their respective primary roles. In very large organizations some members of the KCS Council may be full-time. See the write up on the KCS Center of Excellence in Appendix B for details.
KCS v6 Practices Workshop

The most successful adoptions invest in training and certification. All the members of the KCS Council should attend a KCS v6 Practices Workshop, and it is highly recommended that the Council members attain the KCS v6 Practices Certification from the KCS Academy. This certification ensures a thorough and consistent understanding of the KCS principles, practices, and techniques across the Council members.

The KCS v6 Practices Workshop has evolved over the past 20 plus years as the KCS methodology has evolved. It is a very effective and efficient way to create KCS evangelists. The workshop includes both lecture and high-impact, hands-on experiences, which has proven to align KCS understanding across organizations and reduced time to obtain business benefits from KCS. There are a number of KCS Trainers around the world who are certified by the KCS Academy to deliver the KCS v6 Practices Workshop and are qualified to facilitate the KCS Design Session. The KCS Academy Certified Trainers can also administer the KCS v6 Practices certification exam as part of the workshop.

Once the KCS Council has a good understanding of KCS and how it applies to them, the next step is the KCS Design Session.
The KCS Design Session

The goals of the KCS Design Session include:

1. Develop the initial foundation elements (documentation) to prepare for Wave I:
   - Content standard
   - Workflow or process map
   - Performance assessment model
   - Communications plan
2. Establish ownership of the documents the team creates, and
3. Create the strategic framework: align the benefits of KCS with the goals of organization

The design session usually takes 3-4 days. The ideal sequence is to have the KCS Council members attend a two-day KCS v6 Practices workshop followed by a four-day KCS Design Session the following week. While there are always a few open issues or questions after the design session that need to be resolved before Wave I starts, the time invested upfront to fully understand and exercise the KCS practices pays off in the long run. The design session can be combined with the KCS v6 Practices workshop, however that makes for a very intense week and requires time in the following weeks be allocated to work on open issues.

After the KCS Design Session, when Wave I is kicked off, the knowledge workers will test the new KCS workflow and content standard with their existing technology. This early experience will identify improvements before engaging the Wave II knowledge workers. It will also identify functional and integration requirements for the technology. It is critical that we finalize the technology requirements based on actual experience with the workflow and content standard, not based on presumption. Only after we have some experience with the process and the content standard should we finalize the technology and integration requirements. If we have the option to shop for new technology, between Wave I and Wave II is the time to do it. Shopping for technology before we have experience is like shopping for clothes before we know what size we wear.

As mentioned, we create the first draft of the foundation deliverables in the design session. These must be tailored to the needs of the domain, and in the case of very large support organizations, there may be variations of the deliverables based on the unique characteristics of each domain. This is particularly true for the content standard and the workflow.
If different groups support different customers or different kinds of requests, or if they use different tools for interaction, incident management, or knowledge management, there may be unique requirements for the workflow and content standard. That being said, we find 80% of both the workflow and the content standard are common across all domains.

### Design Session Deliverables

The deliverables from the KCS Design Session include:

- **Strategic Framework** – Describes how the benefits of KCS align with or contribute to the company’s high-level goals and objectives.

- **Content Standard** – Describes the structure or format of an article, the intent of each of the fields, recommendation on the writing style, metadata definitions, and the article life cycle and states. The content standard also defines the Article Quality Index (AQI): the criteria by which article will be scored.

- **Workflow** – Describes the Solve Loop process, which includes reuse, linking, and integrating the creation and improvement of knowledge into the problem solving process. This deliverable also describes the Process Integration Indicators (PII) that will be used to assess compliance with the workflow (link rate and more importantly link accuracy)

- **Performance Assessment Model** – The measures for individuals, teams, and organizational performance. Defining the KCS licensing model is also an important element of the Performance Assessment Model.

- **Technology Functional Specifications** – The list of features and integration requirements needed for the tools to support the KCS practices.

- **Communications Plan** – Identification of the audiences, key messages, frequently asked questions, and objections as well as the timeline or project plan and mediums for communication activities.

- **Adoption Plan and Road Map** – A road map for implementing KCS that includes the waves of adoption, list of Wave I participants, and timeline for engagement of the subsequent waves and phases of adoption.

The output of the design session is a first draft of each of the documents listed above. By first draft we mean it must be sufficient to start Wave I. The KCS Council will continuously improve these deliverables based on the experience of the early adopters in Wave I.

Details about all the deliverables listed above can be found in the [KCS Practices Guide](https://library.serviceinnovation.org/KCS/KCS_v6/KCS_v6_Adoption_Guide/010_Phase_1_Planning_and_Design/040_KCS_Design_Session) with the exception of the Adoption Strategy and Road Map, described below.

### The Adoption Plan and Road Map

We have talked about adopting KCS in waves: not everyone across the organization starts doing KCS at the same time. The Adoption Plan and Road Map is typically one of the last exercises in the design session. It helps the KCS Council decide who should be in the first wave. This is a critical decision and often requires considerable discussion. The goal is to identify a group of 25-50 knowledge workers who are most likely to be successful with KCS, and who will contribute to testing and improving the workflow and content standard based on their experience.
Considerations for selecting the participants in Wave I:

- Knowledge workers who would benefit from each other’s experiences - that is, they work in the same knowledge domain
- Represent all levels of the request resolution process:
  - If an article is framed (work-in-progress) by the first point of contact and they cannot solve the issue, the person they escalate to, who will finish the article, needs to be in Wave I as well.
- Represent multiple geographies (perhaps not all geographies but at least two, if applicable)
  - Having the experience of some who work in a different culture and/or language is important in Wave I
- The team is open to new and different ideas - they have a history of success with change initiatives
- Management of the team understands KCS and is bought-in

For large support organizations this can become quite complicated. The Adoption Planning Matrix is a helpful tool in facilitating the discussion on domains and adoption waves. By identifying the numbers of people in each knowledge domain, level, and location, we can see the landscape and more importantly the scope of those involved. Do not get hung up on the accuracy of the numbers; ballpark estimates are fine.

Typically teams and managers have a personality or history around embracing change. Some are good at it, some aren’t. Use the + 0 – indicators for team and manager attitudes towards change (positive, neutral, negative).

Once we have a map of the organization's landscape and attitude, it becomes easier to pick out a group of 25-50 knowledge workers who work in a domain and would likely be successful at adopting KCS. These are our candidates for this first wave.

Criteria for Design Session Success

While the entire KCS Council needs to be aligned to the goals of the program, much of the work in the design session is done in sub-groups: one sub-group for the strategic framework and performance assessment model, and one for the content standard and the workflow. The entire KCS Council needs to work on the communications plan together.

The sub-group that works on and owns the strategic framework and the performance assessment model should be mostly managers and supervisors with some representation by knowledge workers. The sub-group that owns the content standard and the workflow should primarily be made up of knowledge workers. It is critical that the people who resolve issues and create and use knowledge articles every day be the ones to develop the content standard and the workflow model. When management gets involved in the content standard and the workflow, they inevitably over-engineer it.
Let the people who solve problems (and create and use knowledge articles) design the workflow and the content standard.

Additional success criteria for the KCS Design Session:

- All members of the KCS Council must be in the same room
- Best if held at an off-site location to limit distractions
- The ideal size group is 14-18 participants. A design team of more than 20 people is difficult to manage. If the group is larger than 20 people it is better to break into two design teams aligned with different domains, or engage two facilitators for the session.

Criteria for Evaluating Options

The design session should be very interactive and include discussions on various ways to address the challenges the KCS Council will face; this is very important. The KCS v6 Practices Guide is a great resource but it is, as the name states, a guide. It describes an approach to implementing KCS. There are many ways to implement KCS. Other than the four KCS Principles, there are very few absolutes. These four principles along with the eight KCS Practices make for excellent criteria when evaluating options.

Some groups have created posters with the KCS Principles graphic (right) and posted them in the meeting rooms where the design session work is being done. The following questions are helpful when evaluating options:

Aligning with the KCS Principles

- **Trust**
  - Are we designing from a basis of trust... or mistrust?
  - Are we trusting people’s ability to make good judgments?
  - Are we giving them the information they need to make good judgments?

- **Create Value**
  - Are we doing tasks in the context of the big picture: the desired long term outcome?

- **Demand Driven**
  - Are we doing things just-in-time, in response to demand, and in the context of the requestor’s experience?

- **Abundance**
° Are we promoting learning, collaboration, sharing, and improving?

The Goal of KCS

Create findable, usable knowledge for a specific audience.

- Findable: how does the option being considered improve the audience's ability to find it?
- Useable: how does the option being considered contribute to the usefulness of the knowledge?
Defining Wave I

Wave I Definition

A KCS adoption happens in waves; the number of waves depends on the size of the organization. The first wave is important because it will:

• Test the workflow and content standard
• Identify and/or validate the technology and integration requirements
• Create internal referenceability and excitement about the program

At the completion of the KCS Design Session, we created the Adoption Plan and Road Map. This exercise identified the initial group of 20-50 knowledge workers (Wave I) who will incorporate the design deliverables into their workflow. Once Wave I is complete and the workflow and content standard are updated, it is important to update the organization's formal job descriptions of the knowledge workers with the responsibilities described in the KCS roles.

Selecting Participants for Wave I:

• Already in a responder role answering questions
• Represent end-to-end points to complete the workflow
  • Represent multiple geographies
• Are potential coaches for subsequent waves

KCS Roles

Decisions about the KCS licensing model are made during the design session and need to be implemented in Wave I. The licensing model is one of many areas where the theme "keep it simple" proves to be good advice. We are seeing very successful KCS adoptions with a simple two-level model for the majority of the knowledge workers: candidates (learning KCS) and Publisher (full rights and privileges). These organizations also have KCS Coaches and KDEs.

The roles defined by the KCS Practices Guide are:
Knowledge Workers – Anyone who does intellectual work as opposed to physical work. People who use data and information to make judgments and decisions and/or take action. Knowledge workers can play the role of responder or requestor. In the KCS model, knowledge workers can earn any of the following license levels:

- **KCS Candidate** — Provisional contributor to the knowledge base. A basic user of the knowledge base who is familiar with capturing and structuring content. Can create internal articles and modify their own but cannot modify others. KCS Candidate works closely with a KCS Coach.

- **KCS Contributor** — Creates, modifies, and reviews articles for publishing to a defined audience, usually internal users only.

- **KCS Publisher** — Empowered and expected to make good judgments in making articles visible to an external audience.

- **KCS Coach** – KCS expert and influencer who supports the development of the KCS Candidates and KCS Contributors.

- **Knowledge Domain Experts (KDE)** – Looks after the health of the knowledge base. Has deep domain expertise and an extensive understanding of KCS. Responsible for identifying Evolve Loop content based on patterns of article reuse in the Solve Loop. The KDE is focused on a collection or domain of content.

Successful adoptions have a formal licensing process for the KCS roles and a formal coaching program to help knowledge workers who are interested in learning KCS and earning a license. For a list of criteria as a starting point for the licensing model see the Appendix D: KCS Roles and Competencies in the KCS v6 Practices Guide. This list should be updated to include competencies that are unique to the organization's processes and tools.

For those who aspire to be KCS Publishers, Coaches, and KDEs, it is highly recommended that they earn the KCS v6 Practices Certification from the KCS Academy. The KCS v6 Practices Certification ensures individuals have a thorough understanding of the KCS principles and practices.

**Initial Coaching**

The KCS Coach’s responsibility is to assist in the development of the skills of the Wave I participants. The knowledge workers in Wave I who demonstrate good coaching skills (strong influence and interpersonal skills, show an interest in the development of others) are good candidates to coach their peers in the subsequent waves of adoption. Coaches do not have to be subject matter experts in the domain they are coaching. They do have to be KCS enthusiasts and experts.

There are two approaches to coaching for Wave I:

- Peer coaching program - Members of Wave I are put in teams of three. They review articles they have created or modified and discuss issues and best practices with the workflow.

- KCS Council members act as Coaches
In either case, some training on coaching skills and how to do the AQI and PII assessments should be provided for those who are coaching. See the Coach Development section for more information on coaching.

Establishing Baseline Measures

Before beginning Wave 1, the KCS Council members who created the Performance Assessment Model in the design session should establish baseline metrics. This is necessary to track progress. The metrics may be different for each domain but typically include:

- Customer satisfaction and loyalty
- Employee satisfaction and loyalty
- Time to resolution
- First contact resolution or escalation rate
- Average requests handled/closed per month per knowledge worker (capacity)
- Time to proficiency (for new people)
- Cost per request

The Performance Assessment Model created during the KCS Design Session defines the specific measures that will be used by the organization. This is easy to do for the traditional metrics that are known. For the new measures, a baseline must be estimated. The accuracy of the baseline is not important as long as the way it is measured is consistent throughout the adoption. It is the trend that will show we are making progress.

For more information about recommended measures, see the Measurement Matters paper.
Exit Criteria for Phase 1

Once the Wave I participants are committed and have met the following exit criteria for Phase 1, the group will move into **Phase 2 - Adoption** of the KCS program.

## Exit Criteria

<table>
<thead>
<tr>
<th>Phase 1 Exit Criteria</th>
<th>Benefits</th>
<th>Readiness Evidence</th>
</tr>
</thead>
</table>
| Organization commitment | • Clear vision and goals  
                          • Budget approval | • Executive sponsor buy-in  
                          • Management team buy-in  
                          • Budget approval  
                          • KCS Council resources made available  
                          • Communication sent from executive about plan and goals |
| Strategic Framework complete | Defined expectations for customer, employee, and organization | Separate customer, employee, and business views with related benefits and anticipated results  
                          • Content standard is understandable and easily accessible  
                          • Process in place to update content standard |
| Content standard available | Consistent article content |                   |

<table>
<thead>
<tr>
<th>Phase 1 Exit Criteria</th>
<th>Benefits</th>
<th>Readiness Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Article Quality Index defined</td>
<td>High quality articles</td>
<td>AQI can be captured in an easy to use tool and accessible to all coaches</td>
</tr>
<tr>
<td>Workflow defined and tested</td>
<td>Enable the Solve Loop</td>
<td>Workflow has been documented and tested with current tools</td>
</tr>
<tr>
<td>Process Integration Indicators defined</td>
<td>Process compliance</td>
<td>Link rate and link accuracy assessment process defined, and measures captured and accessible to coaches</td>
</tr>
<tr>
<td>Licensing model defined</td>
<td>Rights and privileges aligned to competency</td>
<td>License level rights and privileges defined with clear criteria to award license and conditions and terms for removing a license</td>
</tr>
<tr>
<td>Coaching model defined</td>
<td>Consistent interpretation of content standard and workflow</td>
<td>Coaches identified and trained</td>
</tr>
<tr>
<td>Performance Assessment Model defined</td>
<td>Learning and development</td>
<td>Draft metrics developed and defined (largely derived from AQI and PII)</td>
</tr>
<tr>
<td>Baseline metrics established</td>
<td>Measure of progress</td>
<td>All draft metrics have a baseline measure</td>
</tr>
<tr>
<td>Phase 1 Exit Criteria</td>
<td>Benefits</td>
<td>Readiness Evidence</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>-----------------------------------------------</td>
<td>------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Communication plan in place</td>
<td>• Benefits defined for each stakeholder</td>
<td>• Written communication plan with project owner</td>
</tr>
<tr>
<td></td>
<td>• Commitment to project</td>
<td>• Review and signoff of plan by Executive Sponsor</td>
</tr>
<tr>
<td>Technology functional specifications drafted</td>
<td>Minimize technology investment for Wave I (practice KCS before major investment in tools)</td>
<td>• Process for testing communications effectiveness</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Process for feedback and improvement</td>
</tr>
<tr>
<td>Adoption Road Map complete</td>
<td></td>
<td>• Technology assessment complete</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Technology supports the basic workflow</td>
</tr>
<tr>
<td>Training program for Wave I users</td>
<td>Engage Wave I participants</td>
<td>• KCS Council engaged</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Wave I members identified</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Training scheduled for Wave I</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Training materials and scenarios developed and tested</td>
</tr>
</tbody>
</table>
# Stakeholder Engagement

Techniques to engage stakeholders in Phase I *(see complete Stakeholder Engagement Matrix in Appendix C)*

<table>
<thead>
<tr>
<th>Audience</th>
<th>Executives</th>
<th>Managers</th>
<th>Knowledge Workers</th>
<th>Business Owners</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Phase 1 - Planning</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Develop the Strategic Framework</td>
<td>- Engage C-level executives in Strategic Framework</td>
<td>- Receive KCS overview and information about how it will help them</td>
<td>- Representative managers participate in KCS v6 Practices Workshop and Design Session</td>
</tr>
<tr>
<td></td>
<td>- Review cost benefit analysis and baseline measures</td>
<td>- Understand the timing of benefits</td>
<td>- Receive KCS Council participate in KCS v6 Practices Workshop and Design Session</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Understand the impact of self-service success on traditional measures</td>
<td>- Support the introduction of new measures for the health and value of support, and set C-level expectations for new measures</td>
<td>- Help with identification of early adopters and KCS Coaches</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Contact references (executives at other companies who have been successful)</td>
<td>- Fund and support KCS Council and the coaching program</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Fund and support KCS Council and the coaching program</td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>
Phase 2 - Adopting

The goals of Phase 2 are to develop KCS competencies in the knowledge workers, create excitement through early success stories, and establish internal referenceability.

It entails:

- Preparing and launching Wave I
  - Knowledge worker training
  - Management training
  - Coaching and developing the coaching program
  - Sampling and scoring the articles created during Wave I (AQI and PII)
- Updating technology (functionality and integration)
- Deploying additional waves of adopters

This phase can take anywhere from twelve weeks to one year.

In this section:

- Preparing for Wave I
  - Management Training
  - KCS Coaching Program
  - Knowledge Worker Training
- Technology Update
- Additional Waves
- Exit Criteria for Phase 2
Preparing for Wave I

In Wave I we will test and update the workflow, content standard, and measurement model we created in the design session.

To prepare for Wave I we need to:

- Train the managers on the new measurement model
- Train the knowledge workers on KCS
- Develop and deliver coaching for the wave participants

These activities are the same steps we will do for each wave of adopters. The unique element of Wave I is that it is the first test of the workflow and content standard. At the end of Wave I we want to update those documents as well as the technology platform to support additional waves.
Management Training

KCS Leadership Workshop

KCS success requires a new way to think about and manage knowledge workers. The profound KCS benefits of reducing organizational costs while improving the customer’s experience and success are realized by shifting the organization from a transaction-centric model to a knowledge-centric model.

The single, most frequent point of failure in making this transition and sustaining the benefit is management’s failure to embrace the needed leadership practices and value-based measures. The traditional approach of hierarchical organizational structures, linear processes, activity-based measures, and performance assessment does not promote (and in many cases discourages) KCS behaviors.

The KCS Leadership Workshop is intended for managers in organizations who are adopting the KCS practices. The workshop develops the perspective, concepts, and skills needed to successfully lead a knowledge-centered organization.

During the KCS Design Session, the team creates a Performance Assessment Model. These performance metrics are validated during Wave I. Once Wave I is in progress and reports are available, the managers participate in a KCS Leadership Workshop to learn how to interpret the trends in the leading indicators (activities), the outcome indicators, radar charts, Article Quality Index (AQI) and Process Integration Indicators (PII). Most importantly, managers learn how to have a conversation with knowledge workers about KCS understanding, buy-in, and behaviors – not about the numbers! If knowledge workers engage in the right behaviors and exercise good judgment in using the Solve Loop techniques in the context of the desired outcomes, great things happen.

This workshop gives managers a new perspective on their role and introduces managers to the power of:

- The inherent motivational elements in the KCS methodology
  - a sense of accomplishment (mastery), a sense of responsibility (autonomy), recognition of contribution, and more interesting work are consistently motivating
  - rewards and punishment are not sustainable motivators
- Replacing linear process models with double loop processes
• Value-based measures instead of activity-based measures
• Performance conversations that focus on KCS understanding, buy-in, and behaviors - not the numbers
• Engagement and influence (versus command and control)
• Leading versus managing
KCS Coaching Program

KCS Coaching is too often overlooked or dismissed. Coaching is a critical aspect of a successful KCS program and a coach development program is an essential component of Phase 2. Consortium member companies have demonstrated a strong, direct correlation between the amount of time spent coaching and the benefits realized from KCS. An effective coaching program is a necessary investment.

Coaching is Critical

The benefits gained with KCS are proportional to the investment made by the organization in coaching.

The responsibilities of the KCS Coach include:

• Acting as a change agent by promoting understanding of the intent and benefits of KCS
• Promoting understanding and adherence to the content standard (article quality)
• Promoting understanding and adherence to the Solve Loop processes (Process Integration Indicators)
• Assessing the quality of articles and adherence to the process
• Providing feedback to the knowledge workers and, when appropriate, to management
• Establishing rapport and meeting regularly with the knowledge workers they are coaching
• Attending regular KCS Coach meetings
• Providing recommendations to the KCS Council to improve the workflow and the content standard

The KCS coaching program introduces these responsibilities and techniques for selecting the right people. It also includes providing the coaches with the tools and techniques to enable coaching success.

The coaching program includes:

• Organizational Network Analysis tools to select the right coaches
• KCS Coach Development Workshop
• On-going support of coaches
Selecting the Right Coaches

KCS Coaches need to have strong interpersonal skills and an excellent understanding of the KCS practices. It is important to select coaches who are respected and trusted by their peers, and who are interested in helping others be successful. They do not have to be subject matter experts or technical leads. In fact, as a general rule, we find the subject matter experts often do not have the influence skills or interaction style required to be an effective coach. There are some exceptions where subject matter experts also have the influence skills to be a good coach, but organizations who have simply defaulted to having their subject matter experts take on the role of KCS Coach without assessing their level of influence and interpersonal skills have not been successful.

During Wave I, certain individuals will demonstrate the characteristics of a good coach. The Wave I participants who naturally evolve into the role of helping others should be considered for KCS Coach positions.

Another approach that has proven to be successful in identifying coach candidates is a technique called Organizational Network Analysis (ONA, also known as Social Network Analysis). ONA exposes the trust network within the organization or team. ONA is a mathematical analysis and visual representation of relationships, flows, and influence between people. Data for the ONA is collected through a simple survey and run through an ONA tool. The output is a map that identifies the trusted, influential individuals who have the characteristics of a good coach. The results are often surprising! The organization chart or reporting structure so often used in organizations does not reflect who is influencing change in the organization. Corporate anthropologist Karen Stephenson says it best:

“You have to discover the world of connections buried underneath the traditional hierarchy. Knowing who trusts whom is as important as knowing who reports to whom. Ignore this hidden structure and your quality team players will jump ship, mentors will abandon their charges, institutional memory will vanish, and glad-handing schmucks will weasel their way into power.”

The ONA map provides important insight into who the influencers are in the organization. However, the map alone is not sufficient. We find the highest level of success in identifying coach candidates is a combination of the ONA map and management judgment. The ONA map is an important compliment to management's view of the organization or team.

Once you have identified people with the characteristics of a good coach, the next step is to be sure they have the time and tools needed to be an effective coach. Enabling time to coach inevitably creates a significant challenge for management, as the organization is rarely going to add additional resources to cover the coaching activities and the
KCS learning curve for the knowledge workers. If the team understands the benefits they will realize with KCS, and they are excited about doing KCS, they will often figure out a way to support the coaching activity.

A powerful message from leadership about the importance of KCS and their commitment to its success is relaxing service level expectations for 6-8 weeks while the team learns KCS. (Interestingly, we seldom see the service levels actually drop).

Coaching during Phase 2 of the KCS adoption should take 25-50% of a coach's time, so a coach should be responsible for five to eight people who are working towards their KCS license. When the knowledge workers are consistently following the workflow and creating quality articles, the coaching time will decrease from daily to weekly and eventually monthly. The goal is for the KCS Coach to develop others' KCS competencies so knowledge workers are searching, reusing, improving and, if it doesn't exist, creating articles with very little assistance from their coach.

KCS Coach Workshop

Influencing others to change their behavior requires skills beyond that of the typical knowledge worker. Once the coaches are identified, they participate in a KCS Coach Workshop. This workshop focuses on strengthening influence skills, understanding reports and tools available, and the process of coaching. It was developed by Dr. Beth Haggett, and is offered as a KCS Aligned service by several KCS Certified Trainers.

By using the AQI and PII checklists, KCS Coaches provide feedback to the knowledge workers to promote the use, improvement, and creation of well-structured, useable articles. There is additional information about the KCS Coach program in the KCS Practices Guide.

The KCS Coach Workshop is a two to three day session with the following goals:

- Acquire an awareness of the influence skills needed to effectively coach
- Provide an opportunity to practice influence skills and assess individual strengths and growth opportunities
- Understanding the tools, techniques, and process for coaching
- Commit to working together as a team
- Appreciate the responsibility of being a coach in helping coachees achieve their goals with respect to KCS
- Create excitement about the opportunity to be a coach
Coaching for Coaches

The coaches need to establish regular communications as a coaching team and should have weekly or by-weekly meetings to discuss issues and to calibrate their interpretation and use of the AQI and PII and the KCS Roles and Competency list.

Some organizations have sustained and improved the coaching program by having a lead coach. Others have used the Coach Workshop facilitator or the KCS Program Manager to follow up periodically with the organization’s coaches to reinforce the skills from the workshop and to discuss challenges and implement strategies. These meetings can be done via web sessions.
Knowledge Worker Training

The training for Wave I focuses on KCS Solve Loop practices including the content standard and the workflow that were created during the KCS Design Session.

Wave I Participant Training

This session focuses on teaching knowledge workers how to do KCS. Wave I participants learn how to reuse, improve, and if it doesn't exist, create knowledge.

The duration of this training depends on a number of variables. Many organizations use a combination of computer-based training and classroom workshops.

A few considerations that influence how much training is required are:

- How much exposure the Wave I participants have had to KCS
- How familiar they are with the tools they will be using
- How much can be done through online, computer-based training

It is highly recommended that some time be allocated for classroom workshops to provide an opportunity for supervised practice of the workflow and creating articles that adhere to the content standard.

Knowledge Worker Training

- Use live knowledge base
- Role-play customer scenarios
  - Use real incidents to practice creating articles
  - Plan for time to socialize the experience

The goals of the training for the Wave I participants include:

- Understanding why we are doing KCS: the benefits for them, the benefits for the customers, and for the organization
- High level understanding of both the Solve and Evolve Loops and the interdependence of the two
- A detailed understanding of the Solve Loop practices and the structured problem solving process
- A detailed understanding of the content standard and what makes for findable, usable articles
- The importance of capturing the customer's context in the workflow
• Searching for and finding existing articles
• Improving while reusing and understanding the processes for flag it or fix it
• Improving or creating articles based on their search terms: searching is creating
• An opportunity to practice the workflow, in the technology they will be using, based on scenarios
• An understanding of the KCS measures, AQI and link accuracy
• An appreciation for the KCS licensing model and the role of the coach

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### Sampling and Scoring of Articles

During Wave I, KCS Coaches begin to use the sampling and scoring process for the Article Quality Index (AQI) and the Process Integration Indicators (PII - in particular link rate and link accuracy) that were created during the KCS Design Session. The coaches provide feedback to the Wave I participants. The goal is to move the Wave I participants to KCS Contributors or KCS Publishers as quickly as possible.

Each group or wave of adopters must successfully exit Phase 2. Depending on the size of the organization, subsequent waves may be necessary to deploy KCS to all knowledge workers. Using a wave approach helps minimize the impact of coaching, as it develops new coaches to support the next wave and assures that each team is creating quality articles before adding more people.
Technology Update

At the completion of Wave I the KCS Council, working with the IT Liaison, should conduct a detailed evaluation of the knowledge management system, and the integration with other tools being used. Functional specifications should be developed for improvements in functionality and integration that will support the workflow and the content standard. The improvements should be deployed after Wave I and prior to engaging additional waves.

Four Considerations

There are four important considerations in positioning the technology platform to successfully support KCS.

1. Responsiveness - KCS requires that the system perform at, or near, the speed of conversation
2. Functionality - All the functionality to support knowledge work is available on the market today
3. Integration - Unfortunately, all the required functionality does not exist in a single, tightly integrated platform.
4. User interface - Most vendors provide an application interface that is designed to highlight all the features and functionality of the product. What we need is a user interface that makes it easy for the knowledge worker to do the right thing.

Responsiveness

As compute power and network capacity continues to increase, the issue of responsiveness has become less of a problem. It is, however, an important consideration. Integrating reuse, improvement, and creation of knowledge into the workflow requires a system that functions at or near the speed of conversation.

Functionality

The KCS Verified Self-Assessment Worksheets provide a framework for functional specifications needed to support KCS success.

Integration

Most knowledge workers will have five to seven different systems that they use to get their work done. In the typical customer support environment there is the incident management system, knowledge management system, collaboration tools, and the systems of record for the customer's install base, instance, product or service portfolio. The integration of these systems to support the workflow is an important enabler and something that should be considered in the budgeting for platform.
User Interface

The design criteria for the user interface should be based on the workflow and designed such that 80-90% of the knowledge workers’ tasks can be done on a single screen. This also represents an investment. The two best examples we have seen of user interfaces focused on enabling knowledge work were developed in-house and sat on top of various applications. The knowledge worker seldom, if ever, interacted with the individual application interfaces. And, 80-90% of the work was done on a single screen.

The Enlightened Executive

The goal of these four technology considerations is to enable the knowledge worker to do the right thing with as little effort as possible. The dilemma for leadership is that the cost of doing these four things really well is painfully obvious, while the benefits of knowledge worker productivity and job satisfaction are not. People are always the shock absorber between what the organization wants them to do and the tools and platforms the organization provides to enable them to do it. If people understand the big picture and the benefits, they will do some pretty amazing things to compensate for the tool and platform deficiencies...for a while. It is hard to sustain or maximize the KCS benefits if people do not see continuous improvement in the functionality, integration, and user interface.

Enlightened executives will make the investment in the platform because they can see it is the right thing to do, even if the benefits are hard to immediately quantify.
Additional Waves

As a general rule, Wave I is done when 90% the participants in Wave I have a KCS license. The level of license required for Wave I participants is dependent on your licensing model. The goal is to have the knowledge workers in Wave I doing their work without intense coaching. The Wave I participants' workflow and articles should be sampled through the AQI and PII process.

Once Wave I is completed and the technology, content standard, and workflow have been updated based on the Wave I experience, we are ready to deploy additional waves of adopters. If the additional waves are in same domain as as Wave I or are in different domains but using the same (updated) foundation elements from the design session (content standard, workflow, measurement model) we essentially repeat the activities we did in "Preparing for Wave I."

One key difference for Wave II and beyond, however, is we now have more coaches - coaches who have experience with KCS. The number of coaches that came out of Wave I can help to dictate how many knowledge workers can be in Wave II, if you haven't already planned for that.
Exit Criteria for Phase 2

Phase 2 established learning, excitement, and momentum for KCS. The Solve Loop behaviors have become a habit for most knowledge workers because they realize the value in doing it.

At the end of Phase 2, we would expect to see improvement against the baseline measures: cost per incident will decrease due to the reuse of knowledge, and service quality will increase. There will be an increase in employee satisfaction as a result of the recognition gained from having others reuse their knowledge.

Phase 2 has resulted in benefits for the knowledge workers and the business. The benefits include efficiencies gained from improving the workflow, internal reuse of knowledge (reduction of rework), and a reduction in cost per incident. The benefits for the customer happen during Phase 3: the goal is to further improve operational efficiency while improving the customer experience, reducing customer effort and creating stronger customer loyalty.

Exit Criteria

<table>
<thead>
<tr>
<th>Phase 2 Activities</th>
<th>Benefits</th>
<th>Readiness Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>KCS Training and Coaching</td>
<td>Understanding and buy-in, knowledge workers have adopted the KCS workflow and understand the content standard</td>
<td>80-90% of knowledge workers are trained and licensed (KCS Contributors or KCS Publishers)</td>
</tr>
<tr>
<td>Knowledge base is being used for 65%-85% of requests</td>
<td>Reduced rework, leveraging the collective experience of the organization through reuse of knowledge,</td>
<td>Link accuracy is 90% or greater. Link rates are 65%-85% (this range represents the fact that using the knowledge base has become a habit, and</td>
</tr>
<tr>
<td>Phase 2 Activities</td>
<td>Benefits</td>
<td>Readiness Evidence</td>
</tr>
<tr>
<td>-------------------</td>
<td>----------</td>
<td>-------------------</td>
</tr>
<tr>
<td>Articles are being reused or modified as needed, and created if they don't exist</td>
<td>Most of what the organization knows has been captured in the knowledge base</td>
<td>Reuse rate of existing articles is greater than creation rate of new articles</td>
</tr>
<tr>
<td>Functional and integration improvements identified in Wave I have been implemented</td>
<td>Optimal process drives how the work gets done. Make it easy for the knowledge worker to do the right thing.</td>
<td>Technology supports the workflow (through modifications to existing tools or acquisition of new tools)</td>
</tr>
<tr>
<td>Articles adhere to the content standard</td>
<td>Articles in the KB are sufficient to help (findable and usable)</td>
<td>AQI average for the team is equal to or exceeds the AQI target</td>
</tr>
<tr>
<td>Wave I has seen improvements in the baseline measures</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Stakeholder Engagement

Techniques to engage stakeholders in Phase 2 (see complete Stakeholder Engagement Matrix in Appendix C)
<table>
<thead>
<tr>
<th>Audience</th>
<th>Executives</th>
<th>Managers</th>
<th>Knowledge Workers</th>
<th>Business Owners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adopting</td>
<td>• Review Strategic Framework</td>
<td>• Receive training on KCS concepts and new performance assessment model (old measures can disrupt KCS success)</td>
<td>• Attend KCS training and get a KCS Coach</td>
<td>• Periodic status updates on progress</td>
</tr>
<tr>
<td></td>
<td>• Receive regular updates on the status of adoption activities and success stories</td>
<td>• Align team goals to reinforce and recognize KCS behaviors</td>
<td>• Share anecdotes about success</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Build relationships and communicate with Business Owners about the value of article reuse reporting and root cause analysis</td>
<td>• Celebrate achievement of KCS licensing levels (recognition of those who earn license)</td>
<td>• Recognition for achievement of KCS licensing levels and creation of value in the knowledge base</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Advocate the value support creates for the business (to C-level executives)</td>
<td>• Support KCS Coach activities</td>
<td>• Support KCS Coach activities</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Align Director goals and measures (VP direct reports) to re-enforce/recognize KCS behaviors and contribution</td>
<td>• Coaching for managers</td>
<td>• Coaching for managers</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Support KCS assessment program for teams (KCS Council manages and evolves)</td>
<td>• Management representation on the KCS Council (selection and/or rotation)</td>
<td>• Management representation on the KCS Council (selection and/or rotation)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Review plans and reporting to support new value-based measures</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Don't stop here! Knowledge worker motivation to continue using the knowledge base will be lost unless the redundant work gets removed from the workflow. There are two approaches for eliminating known issues:

1. Root cause analysis and corrective actions that remove the cause of the issue
2. Publish articles externally to self-service so known issues are findable and solvable by the customer

These two things are critical in sustaining KCS. Phase 3 defines the approach for leveraging the knowledge base and ensuring these things happen.
Phase 3 - Leveraging

The move from Phase 2 to Phase 3 happens when the knowledge base for the domain has reached critical mass; most of what the organization has learned from their interactions has been captured in a way that is findable and usable by the audience making the request.

In this section:

- Activities for Leveraging the Knowledge Base
  - Self-Service Success
  - Developing the KDE Program
  - Expanding the Measurement Model
- Exit Criteria for Phase 3

Phase 3 entails:

- Continue coaching and learning
- Reinforcing the new behaviors
- Developing Evolve Loop content
- Leveraging the knowledge base through pattern and trend analysis (the KDE role)
- Delivering value to the customer through self-service
- Delivering value to the customer through business improvements
- Modifying performance measures from individual to team
- Adding or updating self-service measures
- Developing separate processes for handling new vs. known issues

One of the criteria for entering Phase 3 is that enough content has been collected in the knowledge base that customers have a better than 50% probability of finding something helpful through self-service. The indicator for this is that the internal article reuse rate is equal to or greater than the create rate. In Phase 2 we used article reuse as the indicator for which articles should be published to self-service. As we move through Phase 3, we want to move away from using reuse counts as the deciding factor on what gets published for self-service, to relying on the judgment of the KCS Publishers. The goal? 90% of what is known internally, and usable by the customer, will be published to self-service at the time we know it (at or before case closure). It is a bold goal, and more information can be found in this case study.
We want to get as much of what we know to the self-service model as quickly as possible. This is because in mature KCS environments with effective self-service models, we see the reuse patterns of articles in self-service is very different from the internal reuse patterns. Most support organizations only see a very small percent (typically less than 3%) of the total customer demand for support (for more on this topic see the “Demand Based View of Support” presentation at www.thekcsacademy.net/kcs). This means customers don’t open an incident for the majority of the exceptions or issues they encounter. Data from Consortium for Service Innovation members shows that customers will use a good self-service mechanism ten times more often than they will use the assisted support model (support center). Internal reuse is a reasonable short-term indicator of the value of an article, but in the long term, we want to enable customers to access most of what we know because they will often reuse articles, or solve issues, through self-service for which they would never have opened an incident.

While many issues resolved by customers using self-service will be those for which they would not have opened an incident, some of their self-service success will be on issues for which they would have opened an incident. This means the nature of the work coming into the assisted model (support center) will shift over time. A higher percentage of incoming incidents will be new, as many of the known issues are now solved through self-service. Knowledge workers will be spending more of their time solving new issues, and this results in a dynamic that may not have been expected.

As self-service becomes more effective, many of the support measures will move, in what traditional terms would be “the wrong direction.” Time to resolution and cost per incident will increase due to the fact that we have removed many of the known or easy issues from the work mix, and it takes longer to solve new issues. This is reflected in an increase in the new vs known ratio, and this ratio is an excellent indicator of the effectiveness of your self-service model.

In Phase 3 we need to re-think and expand our measures to include customer success through self-service, and the impact we are having by identifying opportunities for business improvements. The business improvements can be in the area of policies, processes, products, or services. We can contribute to organizational learning by providing actionable, quantifiable feedback to the business owners about high value improvements based on the patterns and trends of knowledge reuse. The health and contribution of the support organization can no longer be measured solely inside of support!
Activities for Leveraging the Knowledge Base

The KCS Council evaluates the maturity of the KCS program using the guidelines from this Adoption Guide. When the knowledge base has become a valuable resource to the organization for learning and for solving known Issues faster and more consistently, other opportunities for the organization start to come into focus.

There are a number of important activities in Phase 3:

- KCS Council focus shifts from adoption activities to continuous improvement activities
- Focus on Self-Service
- Launch the KDE Program
- Introduction of new measures

KCS Council

As a knowledge domain moves from Phase 2 to Phase 3, the focus of the KCS Council for that domain shifts from developing KCS proficiency and the Solve Loop activities to driving continuous improvement and leveraging the knowledge through the Evolve Loop activities.

In large organizations with multiple domains, this means the KCS Council many may need to support domains that are in different phases at any one point in time.
Self-Service Success

Five Key Enablers for Self-Service Success

1. Findability - The content must be in the context of those who are using self-service (KCS addresses this)
2. Completeness - Most of what we have learned internally must be available to self-service quickly; 90/0 (KCS addresses this)
3. Access - Making it easy to access self-service for the users (integration of self-service into the application interface)
4. Navigation - Support browsing and searching, and offer easy transition from self-service to assisted (no dead ends)
5. Marketing - A plan to encourage use of self-service

For details on the key enablers please see the KCS Practices Guide.
Developing the KDE Program

The Knowledge Domain Expert (KDE) is responsible for the health of a knowledge domain from a content point of view. The KDE must be a subject matter expert in the domain in order to identify duplicate articles, knowledge gaps, and the optimal approach to resolving complex issues. The KDE is also responsible for analyzing patterns and trends, and facilitating the creation of high value content.

KDE responsibilities include:

- Ensuring efficient and effective problem solving by the team.
- Applying expertise in data mining to perform trend analysis and find the significant patterns in the data.
- Assisting in the fundamental development and maintenance of knowledge base quality and flow, including the knowledge base quality methodology, article standards, and process guidelines.
  - Performing the New vs. Known Analysis
- Developing and analyzing reports on key metrics for business value of the knowledge base, such as article reuse rates, web-enabled call avoidance, and improvements to resolution times.
- Ensuring effective knowledge base operations by monitoring related information (organizational effectiveness, resource allocation, new article creation trends) and making recommendations to management to accommodate changing conditions.
- Advocating for changes necessary to maintain the knowledge base as an effective tool for achieving business objectives.
- Providing input for items that have worldwide impact. For example, monitoring and defining the KCS article metadata, prioritizing enhancement requests, coordinating training efforts where feasible, and planning for upgrades and systems integration enhancements.
- Influencing the owners of products, documentation, processes, and policies to make improvements
- Participating in the KCS Council.

The KDE function has a high dependency on reporting capabilities. Additionally, there are significant opportunities to use emerging AI capabilities (machine learning, automated pattern recognition, classification and clustering, sophisticated text analytics) to support the KDE in their analysis activities. Many organizations now employ Data Scientists who
specialize in AI capabilities. Providing the KDEs with data science capabilities is a great way to compliment the KDEs' domain expertise.

Knowledge Domain Expert Workshop

This workshop develops Knowledge Domain Expert (KDE) skills, which are necessary for managing all the knowledge about a particular subject (a knowledge collection or domain). The KDE’s role is to monitor the health of the knowledge base as a collection of articles, the distinction between articles, and the patterns across articles. The number of KDEs will depend on the number of knowledge collections that make sense for an organization (assessed during the KCS Design Workshop).

Evolve Loop

The KCS Practices Guide describes a double loop process: the Solve Loop and the Evolve Loop. The Solve Loop practices enable organizations to capture and reuse the collective experience of the organization in supporting customers. The Evolve Loop enables organizations to learn from that collective experience and identify improvements in both the support processes and the products. The Evolve Loop is a continuous improvement process. The New vs. Known study is an example of an Evolve Loop practice.

New vs. Known Study

Once customers are using self-service, understanding the ratio of new versus known issues coming into the organization is an indicator of the health of the knowledge flow and the effectiveness of the self-service model. A primary focus of the KDE is to facilitate the New vs Known study.

There are some key opportunities to learn from the content that have been captured through Phase 3 of KCS Adoption:

- Improved capture and link rates
- Improved linking accuracy
- Improved the speed and quantity of articles published for self-service
- Promoted customer use of self-service
- Increased customer success of self-service

For more detail on the Evolve Loop, please see the KCS Practices Guide.
Expanding the Measurement Model

As we begin to leverage the knowledge base we have to rethink and expand our measurement model. Phase 3 moves us from a one-to-one relationship between the responder and requestor to a one-to-many relationship. This is where we really leverage the "solve it once, use it often" concept. By making the knowledge we have captured available to our customers through self-service, we have the opportunity to reuse a responder's resolution for all the requestors who encounter that issue. We need to add customer use and success with self-service to our measurement model.

In addition to enabling customer success with self-service, we also have the opportunity to identify and drive business improvements based on the patterns and trends of article reuse. This is the role of the KDE. Trend identification, root cause analysis, and corrective actions may be taken in a number of different business areas including company processes and policies as well as improvement to the usability, features, and functionality of our products and services. We need to update the measurement model to include the business value of taking corrective actions on pervasive issues.

The value created by leveraging the knowledge base can not be measured inside the organization that captured the knowledge; it is realized by others outside that organization!
Exit Criteria for Phase 3

Once the organization has established ways to leverage the knowledge base and has met the following exit criteria for Phase 3, the organization will move into Phase 4 - Maximize.

Exit Criteria

<table>
<thead>
<tr>
<th>Phase 3 Activities</th>
<th>Benefits</th>
<th>Readiness Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>• First contact resolution increased compared to baseline</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Participation rate has stabilized</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Time to proficiency decreased compared to baseline</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Resolution capacity increased by at least 25%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 80-90% of articles meet target AQI</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Cost per incident decreased from baseline</td>
</tr>
<tr>
<td>Key Performance Metrics are consistently reviewed to assess behaviors.</td>
<td>Demonstrates commitment to the program</td>
<td></td>
</tr>
<tr>
<td>Work has become more meaningful</td>
<td>Motivation factor for employees</td>
<td>Employee satisfaction increased from baseline</td>
</tr>
</tbody>
</table>
### Phase 3 Activities

**Knowledge base has shown value internally**

**Benefits**
- Assures customers will find helpful articles

**Evidence**
- Reuse of existing articles is equal to or greater than creation rate

**Assess self-service (New vs Known study)**

**Benefits**
- Improve self-service experience (success rate)

**Evidence**
- Improvement in new vs known ratio

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### Stakeholder Engagement

Techniques to engage stakeholders in Phase 3 (see complete Stakeholder Engagement Matrix in Appendix C)

<table>
<thead>
<tr>
<th>Audience</th>
<th>Executives</th>
<th>Managers</th>
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</tr>
</thead>
</table>
| **Phase 3 - Leveraging** | • Review reports on the benefits: performance against baseline measures  
• Review top reused article report with analysis  
• Implement the new measurement model for self-service measures and cross-functional measures (time to cure)  
• Acknowledge KCS impact and value in communications (news-letters, all-hands meetings) | • Training on new measurement model  
• Develop team measures  
• Provide constant feedback to knowledge workers on the impact of their knowledge contribution  
• Acknowledge knowledge workers who are creating value | • Review article reuse reports - both internal and self-service. (Knowledge workers must be able to see the impact of their contribution.)  
• Receive feedback from the AQI and PII reviews  
• A few knowledge workers take on the role of KDE | • KDEs review article reuse reports and analysis with Business Owners  
• Develop plans for root cause analysis and corrective actions for pervasive issues |
- Advocate for the value support creates for the business
- Review new value-based measures with C-level executives
- Support the KDE program
- Review analysis from the New vs Known studies done by KDEs
Phase 4 - Maximizing

The benefits of capturing and reusing the collective experience of responding to requests is profound. Having a healthy knowledge base derived from interactions with customers is valuable in so many ways. It does, however, take some effort to maintain the focus over time. Many of the benefits are not immediate; it is a delayed-gratification model. The ability for the knowledge worker to see the impact of their contribution to the knowledge base is a critical element in sustaining focus. Knowledge worker contributions that must be recognized include:

- Reuse and accurate linking
- Modifications to existing articles as they are being reused
- Adherence to the content standard (AQI scores)
- Internal reuse of articles and feedback
- Customer reuse of articles and feedback

It is fundamentally the responsibility of senior leadership to create an environment that enables knowledge worker visibility to the impact of their contribution. This is accomplished by funding reporting capabilities and dashboards as well as feedback systems. The managers, coaches and KDEs also play an important role in supporting these activities.

In this section:
- Continuous Improvement
Continuous Improvement

Continuous Improvement Activities

<table>
<thead>
<tr>
<th>Phase 4 Activities</th>
<th>Benefits</th>
<th>Readiness Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Articles available for self-service</td>
<td>Customer has faster visibility to article</td>
<td>90/0 rule—90% of what the support organization learns from resolving issues is on the web within 0 minutes of becoming known.</td>
</tr>
<tr>
<td>Self-service success (call deflection or issues resolved without assistance or escalation)</td>
<td>Customer can find the article without having to call</td>
<td>85/85 goal—at least 85% of the time customers are using self-service first and at least 85% of the time they are finding what they need (customer interaction maps help here).</td>
</tr>
<tr>
<td>Work shifted from known to new</td>
<td>New opportunities and challenges for employees</td>
<td>New vs known—the work in the organization shifts from mostly known to mostly new, . Knowledge workers spend the majority of their time resolving new issues. This will vary based on</td>
</tr>
<tr>
<td>Phase 4 Activities</td>
<td>Benefits</td>
<td>Readiness Evidence</td>
</tr>
<tr>
<td>--------------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Incident volume decreased</td>
<td>Opportunities to create additional value for customer</td>
<td>Number of requests/incidents declines (this needs to be normalized to install base or revenue in order to account for the dynamics of the business)</td>
</tr>
<tr>
<td>Problems are being removed from the product or request for enhancements being implemented increased</td>
<td>Improved product</td>
<td>Increase in the number of business improvements identified (product function, service, process, policy)</td>
</tr>
<tr>
<td>Time to adopt new/enhanced products</td>
<td>Customer success measured</td>
<td>Decrease from the baseline</td>
</tr>
<tr>
<td>Support cost as a percentage of revenue has decreased</td>
<td>Lower cost</td>
<td>Support costs have dropped by 25-50%, and the volume of customer issues resolved is up at least 100% (web success combined with incidents closed)</td>
</tr>
</tbody>
</table>
### Phase 4 Activities

<table>
<thead>
<tr>
<th>Phase 4 Activities</th>
<th>Benefits</th>
<th>Readiness Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer satisfaction and loyalty increased</td>
<td>Increase customer success</td>
<td>Increase from the baseline</td>
</tr>
<tr>
<td>Employee satisfaction and loyalty increased</td>
<td>Increase profit</td>
<td>Increase from the baseline</td>
</tr>
</tbody>
</table>

### Stakeholder Engagement

Techniques to engage stakeholders in Phase 4 *(see complete Stakeholder Engagement Matrix in Appendix C)*

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</tr>
</thead>
<tbody>
<tr>
<td>Phase 4 - Maximizing</td>
<td>• Review/update Strategic Framework</td>
<td>• Celebrate customer success with self-service</td>
<td>• Access to internal and external reuse reports</td>
<td>• Review information about self-service activity patterns, trends and customer feedback</td>
</tr>
<tr>
<td></td>
<td>• Review reports on customer success with self-service measures and a summary of top reused article (internal reuse and customer use) reports</td>
<td>• Celebrate changes in the products, services, and/or policies due to patterns in the knowledge base</td>
<td>• Acknowledge contribution to self-service success</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Review cross-functional measures (time to cure)</td>
<td>• Visibility to and acknowledgement for changes in product due to patterns in the knowledge base (their contribution)</td>
<td>• Visibility to and acknowledgement for changes in product due to patterns in the knowledge base (their contribution)</td>
<td>• Review information about self-service activity patterns, trends and customer feedback</td>
</tr>
<tr>
<td></td>
<td>• Acknowledge KCS impact and value in communications (newsletters, all-hands meetings, ops review with C-level)</td>
<td>• Acknowledge knowledge workers who are creating value</td>
<td>• Review information about community activities: patterns, trends, and sentiment</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Advocate for the value support creates for the business</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Review analysis from New vs Known study</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Important Lessons Learned

The concepts behind KCS are really quite simple.

The Solve Loop:
- Integrate the creation and maintenance of knowledge into the problem solving process
- Make the knowledge "sufficient to solve"
- Let demand drive our focus for what knowledge to create and what knowledge to improve

The Evolve Loop:
- Leverage knowledge for self-service
  - Identify high value content based on article reuse
- Identify high impact opportunities for business improvements (processes, policies, products, or services) based on the customer experience (patterns and trends in the knowledge base)

These concepts are well established in academic work and research. Many of the concepts in KCS align with the quality concepts of Dr. Deming (see Deming's 14 Principles). Nonaka and Takeuchi's book The Knowledge-Creating Company was a constant reference during the formative years of KCS.

*Why then do organizations struggle with KCS adoption?*

Because a successful adoption of KCS requires that we rethink traditional processes, structures, measures, and management practices. That's a hard thing to do!

Familiar “Ditches”

Following are the most common points of failure in KCS adoptions:

- Lack of management ownership
  - It is important to have a strong staff or KCS Council to support the KCS adoption. Ultimately, the ownership for KCS success must lie with the managers. As a domain moves from Phase 2 to Phase 3, there is a need to overtly shift the accountability for KCS success from the KCS Council to the managers. KCS is a bigger change for management than it is for the knowledge workers. Having a plan to coach the managers can be helpful in making this transition.
- Ineffective coaching program
  - An effective way to pick the right coaches is to survey the organization about who they trust. Coaches need to have a belief in KCS and strong influence and interpersonal skills. They don't necessarily need to be subject matter expert.
  - Give the coaches time to coach! It is an investment that will pay off.
- Not having the knowledge workers design the workflow and content standard
Let the people doing the work (the knowledge workers) own the workflow and content standard, and keep both simple! While there should be management representation on the KCS Council, management should not be the owners of the workflow and content standards. When management owns those they often over-engineer them.

- Not changing the metrics as we move from Phase 3 - Adopting to Phase 4 - Leveraging
  - Traditional support measures will show dramatic improvement in the early phases of adoption. As we start to deliver a high percentage of what we know through self-service, the traditional event-based measures will all go in the “wrong” direction. We must re-set executive expectations and understanding of the traditional measures and introduce measures that include customer use and success with self-service.

Once KCS has been implemented in an organization, that organization must transform its measurements from transaction-based to value-based. The health and contribution of the value being created can no longer be measured by the time and number of transactions processed. The value must be measured in terms of the effectiveness of the knowledge flow and collaboration that goes beyond the traditional boundaries of the organization, in all directions.

KCS continues to evolve. If you would like to be part of creating the next version of KCS, become a member of the Consortium for Service Innovation at www.serviceinnovation.org.

This guide comes from lessons learned through the collective experiences of members of the Consortium for Service Innovation. Below are some quotes from member Program Managers who have adopted KCS.

**What worked well with your KCS Adoption?**

- "The biggest skeptics turned out to be our biggest evangelists...once they experienced the benefits."
- "Reuse counts helped us get the right information on the self-service website."
- "Piloting the process and content standard with the tools we already had before purchasing a new tool."
- "The KCS v6 Practices Workshop was high impact and an important element in our success."
- "Customers using the same search tool and knowledge base as used internally."
- "Gathering a lot of feedback on how to make the tools better."

**What did you learn from your KCS adoption?**

- "The way it is sold to the knowledge workers is important. They need to understand the big picture as well as what's in it for them."
- "Clear accountability – the managers have to own KCS success. It cannot be viewed as a staff function, or viewed as something extra or additional to handling incidents. KCS has to become a core competency, integral to the business."
- "Wish we had a better understanding of what we needed for success before we went shopping for a tool."
- "Understand engineer workflow before switching a new tool."
- "Can't sustain KCS without continuing change and improvement."
- "Have resources aligned. You can not over-communicate what KCS is about and why you are doing it."
About the Authors

Consortium for Service Innovation Staff

**Greg Oxton** has been facilitating, organizing, and evangelizing the work of the Consortium for Service Innovation since he joined the Consortium staff in July of 1996. Since then, he has facilitated the evolution of the KCS methodology as well the other Consortium initiatives. He has helped over 70 companies, of various sizes and in a variety of industries, adopt KCS.

**Melissa George** was one of the very early adopters of KCS and one of the founding members of the Consortium for Service Innovation. She has been associated with the Consortium's work since 1992 and joined the staff in 2001. Melissa has provided guidance to numerous companies on KCS adoption. In addition to facilitating the Consortium's initiatives, Melissa is also the President and CEO of the KCS Academy, a wholly-owned subsidiary of the Consortium for Service Innovation and the only authorized certification body for KCS.

**Kelly Murray** is the chief communications officer for the Consortium for Service Innovation. She joined the Consortium staff in 2011, where she captures, structures, reuses, and improves the content that the Consortium members create. She has served as chief editor for the KCS Principles and Core Concepts document, the KCS v6 Practices Guide, and the KCS v6 Adoption Guide.

Special Thanks

To **Jennifer Crippen and David Kay** of DBKay and Associates for their contribution to the KCS v6 Adoption Guide. Long-time KCS Certified Trainers, they have been exceptionally generous in sharing their extensive experience in helping companies adopt KCS.

Thanks also to the additional 38 KCS v6 Certified Trainers (internal and external, at the time of this writing) around the world for their ongoing support and feedback.
Appendix A: Opportunity Assessment Survey

Understanding Operations

1. Number of knowledge workers? (worldwide audience for knowledge sharing/KCS)

2. Geographies: how many locations? (centers with more than 6 people)
   
   1. Locations and number of people in each?

3. Company employees vs. partner employees (outsourced)
   
   1. # of company knowledge workers
   2. # of outsourced knowledge workers
   3. Number of partner/outsource partners

4. Domains - how many knowledge domains (products, services, processes) are supported? Most organizations support a variety of products or technologies and organize them into groups or families, which in turn have a certain number of knowledge workers associated with supporting a domain.

5. Support structure
   
   1. How many levels of support do you have? (how many escalations happen between the customer's first point of contact and the business owner (policy, process owners or product development?)

6. People and product groups (see the Adoption Planning Matrix worksheet under Adoption Plan and Road Map)

7. Workload
   
   1. Number of requests (incidents/cases) closed per month
   2. % from customers
   3. % internal (if applicable)
   4. For internal help desk/service desk, average incidents/user/month
   5. Channels of incident/case submission by customers (the total of 1-5 below should be 100%)
      
      1. % via web submit (click to create/submit an incident)
2. % via chat
3. % via email
4. % via phone call
5. % other (please describe, i.e. system-generated)

6. Utilization rate? (% of time knowledge workers are working on issues/requests – usually in the neighborhood of 50-65%)
   1. The timeliness of the content (time to publish)

8. Customer self-service model?
   1. Briefly describe the kinds of self-service delivery are used:
      1. Integrated into the application user interface
      2. Automation (detect, report, repair)
      3. Portal or Web based self-service
         1. Customers sign in to use the web self-help (yes/no)
         2. Types of self-help offered? (FAQs, search KB, online docs)
         3. % of customers who use the web before opening an incident?
         4. % of time the customers find what they need on the web?

9. High level goals: what are the key initiatives for the company/institution this year? (at least the top three)

10. What is your long term vision for the organization?

11. How is the organization viewed by other departments within your company? (ex: very well integrated, it is the voice of the customer, or not integrated with sales but integrated well within development).

12. Describe any major changes or initiatives that have occurred within the organization during the past three years and any impact on employee or customer satisfaction.

13. What role does the organization play in contributing to the key company initiatives?

14. Organizational measures: what are the executive level metrics for the organization?
Process

1. Problem solving methodology
   1. Training on problem solving? (e.g. Kepner-Tregoe)
   2. How is collaboration enabled? (wikis, blogs, IM, email, phone, face to face, online via web session)
   3. Technical mentoring program? (formal, informal, none)

2. Content development process
   1. Is there a knowledge management process in place?
   2. Is there a knowledge base (KB)?
   3. What are the criteria for what gets put into the KB?
   4. How and when is content for the KB created?
   5. Is there a life cycle defined for the knowledge articles? (yes, no)
      1. Life cycle states?
   6. Do the users of the content have a way to give feedback to the creators of the content?
   7. How is the content in the KB kept up-to-date?
   8. What measurements are in place to assess:
      1. The usefulness of the content
      2. The completeness of the content (% of what is known versus what gets published?)

3. Management communications:
   1. Methods?
   2. Effectiveness- is there a measure for the effectiveness of communications?
      1. Do people understand the goals and objectives of the organization?
      2. Do people understand how they are measured and why?

People

1. Performance assessment: how is the knowledge worker contribution measured?
2. Teamwork: how is teamwork encourage and assessed?

3. Knowledge worker rewards and recognition: what programs are in place?

4. Team-based rewards and recognition: what programs are in place?

5. Observations about the culture:
   1. Is it combative/competitive or collaborative?
   2. Is the leadership model focused on command and control or alignment: providing task level direction vs influence? (employee engagement, participation, and enablement)
   3. To what extent is there trust between knowledge workers?
   4. To what extent do the knowledge workers trust and respect their managers?
   5. To what extent do the managers trust and respect the knowledge workers?
   6. Do people deal with contention and conflict or it is avoided/ignored?
   7. If people deal with contention/conflict is it in a constructive way?
   8. To what extent are people willing to make commitments and be accountable?

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**Tools**

1. Current tools
   1. CRM/case management system(s)
   2. Knowledge management system(s)
   3. Collaboration tools
   4. Other key tools the knowledge workers use
Appendix B: Building a KCS Center of Excellence

Adopting KCS in very large organizations (more than 500 support analysts) can be a challenge. For most organizations KCS represents a significant change, and a successful adoption requires a focused change management effort.

A KCS Center of Excellence is a small team of people who integrate KCS expertise with change management expertise. The people who facilitate an adoption across the organization must be KCS evangelists as well as change management experts.

The KCS Center of Excellence staff must have program and project management skills as well as the capability to do the following KCS activities:

• Assessments
• Design
• Training for support analysts and managers
• Coaching and coach development
• Business analysis and metrics

This Appendix describes the roles and an approach to building a KCS Center of Excellence and is intended to compliment both this guide and the KCS v6 Practices Guide. It is intended for large support organizations who are adopting KCS. The KCS Center of Excellence is the core of the larger global KCS Council.

The global KCS Council supports the Phase 1 and 2 activities for each of the adoption waves. As the waves of adoption move into Phase 3 and 4, ownership for the KCS processes and results become the responsibility of line management. The KCS Council then focuses on continuous improvement.

In this section:

• Structure
• Roles
• Building the KCS Skills
Structure

The KCS Center of Excellence is typically a small team of people who are dedicated full-time to KCS adoption activities. The exact number of people required is a function of the size of the organization adopting KCS and the speed of adoption. The global KCS Council includes the individuals in the KCS Center of Excellence as well as individuals within the respective organizations who have been designated as KCS focal points or KCS adoption coordinators. The KCS focal points are part-time and reside in the organizations they represent. They should include both managers and front-line knowledge workers from each of the organizations.

The global KCS Council is responsible for development and continuous improvement of the KCS foundation elements including:

- Strategic Framework
- Communications plan
- Measurement framework
- Workflow or process definitions
- Content standard
- Adoption roadmap
- Technology requirements

As the organization embraces KCS as an integral part of their business, the focus of the global KCS Council shifts. Early in the KCS adoption process the KCS Council must drive the KCS activities. In order to sustain KCS over time, it is critical that the line managers take responsibility for encouraging the KCS practices as well as the KCS results. Post-adoption, the KCS Council focuses on continuous improvement of the content standard, the workflow model, and the functionality and integration of the tools.
Roles

It is best to start with people who are experienced in program management, project management, and training: folks who have been part of other successful change initiatives. It is also important for them to have some context for the service and support business.

While there are numerous roles described in the KCS Center of Excellence, each role is not necessarily an individual. That is: one person may take on multiple roles.

Key roles include:

**Global KCS Program Manager:** KCS champion or evangelist, chief marketing officer for KCS.

**Project Manager:** Someone to look after the details of scheduling and tracking the status of dependencies, open issues, and key milestones. Depending on the size and diversity of the organization, there may be multiple Project Managers.

**KCS Trainer(s):** An experienced trainer, ideally who has been certified as a KCS Trainer by the KCS Academy, who can deliver KCS training to the line managers, support analysts, and KCS coaches.

**Lead KCS Coach:** A person to coach and coordinate the KCS Coaches. Ideally this person is KCS v6 Practices Certified by the KCS Academy. They conduct training, coach the coaches, and coordinate ongoing coaching activities. This person needs to have a deep understanding of KCS and coaching techniques, and act as leader and advocate for the KCS Coaches within the organization.

**KCS Architect/Auditor(s):** The KCS Architect/Auditor needs to have a deep understanding of KCS and the support processes and tools being used in the support organization. Ideally this person is KCS v6 Practices Certified by the KCS Academy. They will facilitate KCS assessments and design sessions as organizations begin the KCS journey. As the organizations mature, the KCS Architect/Auditor will conduct KCS audits to assess and provide feedback on compliance to the KCS program as well as analyze results achieved. They require both analytic and influence skills.
**Business Analyst:** The Business Analyst provides data to support KCS adoption planning, in particular helping to identify high value/high impact areas of the business whose adoption of KCS would create the greatest benefit. They assist in defining the measurements framework during the design session(s) and they are responsible for implementing the data capture and reporting capabilities. The Business Analyst works closely with IT and must have an understanding of the intent of KCS metrics, data extracts, data warehousing, and reporting tools. Operations research and data analytic skills and experience are very helpful in this role.
Building the KCS Skills

There are numerous activities involved in building the KCS Center of Excellence. These activities are best done as part of the initial planning for adoption and as the organization prepares to start Wave I. The goal is to enable the KCS Center of Excellence to support the ongoing adoption activities beyond Wave I.

KCS Introduction and Overview: KCS represents a dramatic shift in how we think about and manage support. While KCS is based on Consortium members’ experiences, much of it is not intuitive and many of the proven practices challenge traditional thinking about knowledge, people, process measures, and organizational structures. It is common to hear:

"I attended a KCS workshop before and I was surprised how much more I got out of the second one!"

The KCS Introduction and Overview is an important first step in people embracing the KCS practices. It is often done with different audiences: executives, line management, and support analysts. The sessions vary in length from one hour briefings for the senior executives to two to three hour overviews for support analysts.

These sessions often happen over a period of time and before the KCS Center of Excellence resources have been identified.

Preliminary Adoption Planning

- Attendees: Program Manager, Business Analyst, Center of Excellence staff if they have been identified
- Duration: 1-2 day working session
- Objectives:
  - Conduct a planning session to review the organizational demographics (structure, locations, and processes)
  - Develop high level Adoption Road Map: develop initial plan for waves of adoption and timing. Identifying the waves of adoption and timing across the organization is critical in identifying who should attend the KCS v6 Practices training and KCS Design Session, and in determining the resource requirements for the KCS Center of Excellence
  - Develop initial plan/process for coach selection and training

KCS v6 Practices Workshop

https://library.serviceinnovation.org/KCS/KCS_v6/KCS_v6_Adoption_Guide/070_KCS_Center_of_Excellence/030_Building_the_
• Attendees: Center of Excellence staff and representatives from Wave I and Wave II organizations  
• Duration: 2 day training  
• Objectives: Develop an in-depth understanding of the KCS practices  
• Certification: Center of Excellence staff to take KCS v6 Practices certification exam

KCS Design Session

• Attendees: Center of Excellence staff and representatives from Wave I and Wave II organizations  
• Duration: 4 day working session  
• Objectives: Develop the first draft of the foundation documents (strategic framework, content standard, workflow and problem solving process, communications plan)

Trainer Session

• Attendees: Center of Excellence KCS Trainers  
• Duration: 3 day working session  
  ◦ Review workshop materials and make updates specific to the content standard and workflow developed in the Design Session  
  ◦ Review workshop exercise facilitation and debrief  
  ◦ Develop the adoption activities for follow on waves of adoption including assessment criteria, Organizational Network Analysis for coach identification, design session needs, and training  
  ◦ Prepare for exam  
• Certification: KCS Internal Trainer exam  
  ◦ Administer the exam (written exam – 60-90 min)  
  ◦ Review exam results with Certified Trainer candidates (60-90 min)
Appendix C: Stakeholder Engagement Matrix

Techniques to create and sustain stakeholder engagement in KCS, by adoption phase.

<table>
<thead>
<tr>
<th>Audience</th>
<th>Executives</th>
<th>Managers</th>
<th>Knowledge Workers</th>
<th>Business Owners</th>
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</thead>
<tbody>
<tr>
<td>Phase 1 - Planning</td>
<td>• Develop the Strategic Framework</td>
<td>• Representative managers involved in KCS Design Session and adoption planning</td>
<td>• Receive KCS overview and information about how it will help them</td>
<td>• Representative managers participate in KCS v6 Practices Workshop and Design Session</td>
</tr>
<tr>
<td></td>
<td>• Engage C-level executives in Strategic Framework</td>
<td>• Review cost benefit analysis and baseline measures</td>
<td>• Receive KCS overview and information about how it will help them</td>
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<tr>
<td></td>
<td>• Understand the timing of benefits</td>
<td>• Understand the impact of self-service success on traditional measures</td>
<td>• Help with identification of early adopters and KCS Coaches</td>
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<td></td>
<td>• Support the introduction of new measures for the health and value of support, and set C-level expectations for new measures</td>
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<tr>
<td></td>
<td>• Contact references (executives at other companies who have been successful)</td>
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<td></td>
<td>• Fund and support KCS Council and the coaching program</td>
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**Phase 2 - Adopting**

- Review Strategic Framework
- Receive regular updates on the status of adoption activities and success stories
- Build relationships and communicate with Business Owners about the value of article reuse reporting and root cause analysis
- Advocate the value support creates for the business (to C-level executives)
- Align Director goals and measures (VP direct reports) to reinforce/recognize KCS behaviors and contribution
- Support KCS assessment program for teams (KCS Council manages and evolves)
- Review plans and reporting to support new value-based measures

- Receive training on KCS concepts and new performance assessment model (old measures can disrupt KCS success)
- Align team goals to reinforce and recognize KCS behaviors
- Celebrate achievement of KCS licensing levels (recognition of those who earn license)
- Support KCS Coach activities
- Coaching for managers
- Management representation on the KCS Council (selection and/or rotation)
- Attend KCS training and get a KCS Coach
- Share anecdotes about success
- Recognition for achievement of KCS licensing levels and creation of value in the knowledge base
- Periodic status updates on progress

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<tr>
<td><strong>Phase 3 -</strong></td>
<td><strong>Review reports on the benefits: performance against baseline measures</strong></td>
<td><strong>Training on new measurement model</strong></td>
<td><strong>Review article reuse reports - both internal and self-service. (Knowledge workers must be able to see the impact of their contribution.)</strong></td>
<td><strong>KDES review article reuse reports and analysis with Business Owners</strong></td>
</tr>
<tr>
<td><strong>Leveraging</strong></td>
<td><strong>Review top reused article report with analysis</strong></td>
<td><strong>Develop team measures</strong></td>
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<td><strong>Develop plans for root cause analysis and corrective actions for pervasive issues</strong></td>
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<td></td>
<td><strong>Implement the new measurement</strong></td>
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model for self-service measures and cross-functional measures (time to cure)

- Acknowledge KCS impact and value in communications (news-letters, all-hands meetings)
- Advocate for the value support creates for the business
- Review new value-based measures with C-level executives
- Support the KDE program
- Review analysis from the New vs Known studies done by KDEs

- Receive feedback from the AQI and PII reviews
- A few knowledge workers take on the role of KDE

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<tbody>
<tr>
<td><strong>Phase 4 - Maximizing</strong></td>
<td>• Review/update Strategic Framework</td>
<td>• Celebrate customer success with self-service</td>
<td>• Access to internal and external reuse reports</td>
<td>• Review information about self-service activity patterns, trends and customer feedback</td>
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<tr>
<td></td>
<td>• Review reports on customer success with self-service measures and a summary of top reused article (internal reuse and customer use) reports</td>
<td>• Celebrate changes in the products, services, and/or policies due to patterns in the knowledge base</td>
<td>• Acknowledge contribution to self-service success</td>
<td>• Review information about community activities: patterns, trends, and sentiment</td>
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<td></td>
<td>• Review cross-functional measures (time to cure)</td>
<td>• Acknowledge knowledge workers who are creating value</td>
<td>• Visibility to and acknowledgement for changes in product due to patterns in the knowledge base (their contribution)</td>
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</tr>
<tr>
<td></td>
<td>• Acknowledge KCS impact and value in communications (news-letters, all-hands meetings,</td>
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https://library.serviceinnovation.org/KCS/KCS_v6/KCS_v6_Adoption_Guide/080_Stakeholder_Engagement_Matrix

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You Know You Are Doing KCS When...

**Phase 2 Benefits: operational improvements**

- Knowledge workers integrate use of the knowledge base into their problem solving process
  - It is a faster way to identify known issues
  - Access to others' experience helps them solve new issues faster
  - Creating and maintaining articles in the workflow takes zero (0) incremental minutes
- Percentage of problems recognized as "known" doubles
- Average time to resolve drops by 20-50%
- Support capacity increases by 20-50%
- The biggest cynics become KCS advocates because they have “experienced it”
- Knowledge worker morale is at an all-time high
- Turnover rate is at an all-time low
- Peer pressure becomes a primary motivator: knowledge workers don’t tolerate their peers messing up the knowledge base

**Phase 3 Benefits: leverage knowledge to improve self-service and the business**

- 90% of customer usable content is published to the web when the resolution is known (90/0)
- Customer use of and success with self-service is over 70%
  - Content in the customer’s context
  - Self-service design: choices on how to find content (browsing and searching) and no dead ends
- The work in the support center shifts from mostly known to mostly new
  - Perceived incident complexity in the support center increases
- Knowledge workers are spending a higher percent of their time on new, challenging issues
- Support process evolves to a non-linear, collaborative network
For more information the organizational benefits and measures of KCS please see the [Measurement Matters](https://library.serviceinnovation.org/KCS/KCS_v6/KCS_v6_Adoption_Guide/080_Stakeholder_Engagement_Matrix) paper.