



Quest Publishes in the Workflow

The **KCS v6 Practices Guide** says we should share most of what we know externally as quickly as we can. To increase the use and success of self-service, 90% of the articles in the KB should be available externally immediately or within 90 minutes.

At Quest, they've met a goal of 90/0: 90% of what they know is published externally at or before case closure, and they are reaping the benefits.

The Goal

A KCS program refresh was launched at Quest (then Dell Software Group) in August 2013 to identify gaps, rebuild the foundation, mature and enhance the program, and increase adoption - especially during and after several acquisitions. The first year of the refresh included one company and about 175 Support Engineers. Over the next two years, the program enhancements grew to include another seven companies that were part of the Dell Software Group, which meant training on both the KCS process and in many cases, a new unified platform. (As of this writing, Quest support consists of 369 Support Engineers who handle an average of about 9200 Service Requests (SRs) per month.)

Monique Cadena, Knowledge Management Senior Advisor, was focused on several areas for improvement:

- Increasing KCS adoption by gaining buy-in from Engineers,

- Improving Article Quality and workflow adherence via a new KCS Coach program,
- Reducing resolving/reworking of known issues, and ultimately,
- Increasing customers' self-service success

All of Support was involved in the championing and support of the KCS refresh program and enhancements. Thanks to strong executive leadership offering constant support and communication, the leadership team ensured KCS was a priority for their teams.

Quest put all Engineers through new training that focused on the KCS methodology, its benefits, and how to be successful with the KCS workflow. They also trained KM Champions, a team of peer advocates who became KCS Coaches to help teammates adopt KCS best practices.

Coaching Was Key

65 KM Champions were trained to become KCS Coaches. These were selected Engineers who spent anywhere from two hours a month, to two hours a week (depending on their team's KCS maturity level) mentoring each person within their team, ensuring they had all the information and skills they needed to become successful. Areas of focus included:

- Searching early and often in order to reuse content, versus spending time on an issue that had previously been solved; ensuring the KB was the first place the Engineer looked before attempting to solve an issue.
- Recognizing how to enhance articles with customer context so that the articles could be more easily found by customers.
- Capturing new issues and publishing content before the Service Request was closed; ensuring Engineers captured what they learned,

making it available immediately and minimizing capture loss.

- Ensuring that articles used or created were linked to Service Requests, which allowed customers to view the content on the portal, or be emailed the KB article for future reference.

“I believed it could be done,” says Monique. “I believe we can publish 90% of what we know before or at case closure - with no impact to our average handle time.” Monique’s refresher training for Engineers and Coaches focused on both the KCS process, and the *why* of that process, and made sure Engineers understood the benefits to them personally. It was some time before her dashboard was redesigned so she could measure when cases were closed against when an associated article was published, and she was thrilled when she saw that, indeed, articles were being published at or before case closure. Monique explains, “No one was tracking this previously; the agents started doing it because they understood the why.”

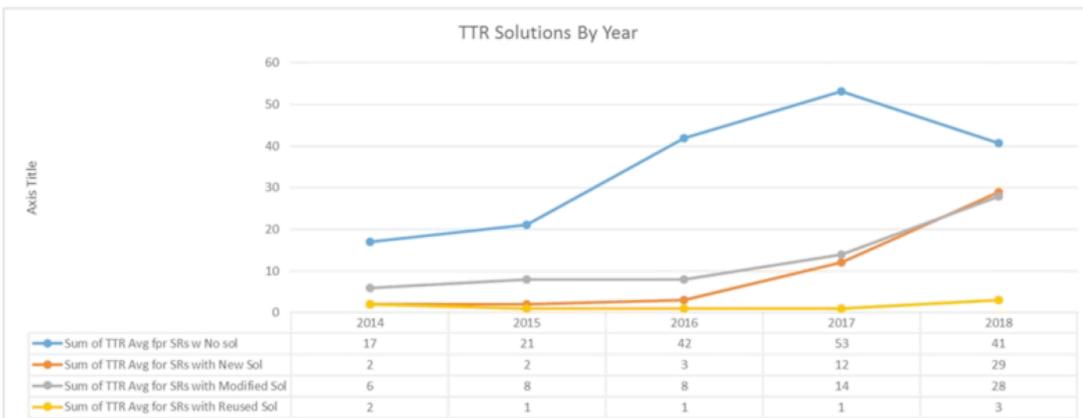
The Results

Publishing 90% of what Quest knows at or before case closure has demonstrated the impact of publishing just-in-time content and capturing customer context with increased customer success on the web. The fact that the Engineers have little to no backlog is an added benefit!

- **Since the refresh of the KCS program, the percentage of new articles completed and published before the SR is closed has gone from 0.3% to 95%.**
- Participation and skill in all the KCS competencies dramatically improved after implementing the role of the KCS Coach. In the past six months alone, Quest has seen the number of Engineers who are licensed to publish externally increase from 42% to 70%. “All of our successes have been around having coaches in place,” says Monique. “Training introduces these concepts, but if there is not a Coach to keep it in front of them, they’ll forget about it because they consistently have other priorities being

pushed to them.”

- Buy-in and adoption has increased, KB create and modify numbers have improved, and customer views on the portal have increased. The average percentage of closed SRs that have a KB article linked to them rose over the last seven quarters from 36% to 67%. The average over the last four quarters is 70%.
- This rapid publishing of articles is one factor that has contributed to providing timely content and increased customer success with self-service. In the last year, Quest’s Self Service Success (SSS) measure has increased from 47.6% to 57.9%, and Customer Site Experience (CSE) from 38% to 68.1%, and both numbers continue to rise.



Quest - and their customers - are reaping the benefits of having a mature KCS implementation in place, demonstrated by their trending time to resolution.

About Quest

Quest helps solve the complex technology and security problems that stand in the way of organizations' ability to always be ready for what's next. With Quest solutions, companies of all sizes can reduce the time and money spent on IT administration and security, so they have more time to focus on and invest in business innovation. Quest has more than 100,000 customers worldwide across its portfolio of software solutions spanning database management, data protection, endpoint systems management, identity and access management, and Microsoft platform management. For more information, visit www.quest.com.

About the Consortium for Service Innovation

The [Consortium for Service Innovation](#) is a non-profit alliance of organizations focused on innovation for the support industry. The Consortium and its members have developed the KCS methodology over the last 25 years, and are committed to developing innovative ways to deliver customer support.

"The customer base has not changed significantly in the last five years for the Toad product line. As you can see [below], the SR volume has reduced while the customer sentiment has held steady and/or increased. The web SR deflection rate for Toad is ~34% year over year.

In June of FY16 we implemented KB links inside the products taking the customers to the KB article specific to their error or issue. KCS has created a new SR "baseline" for the Toad products, which has allowed me to shift resources to other product lines."

—Steve Vrieling,
Support Leader for Information Management, Quest

Toad Product Line					
Fiscal Year	SRs Created	Average TTR	Average Participation %	NPS	OSAT
2014	6804	10.73	72	64%	93%
2015	6468	10.63	76	64%	91%
2016	4830	13.36	77	66%	92%
2017	4342	32.48	80	77%	94%

Next Steps

Quest is anticipating putting all of their managers through the Support Coach Training by Dr. Beth Haggett. They have learned that in order for KCS adoption and its related benefits to be sustained or increased, continued coaching and mentoring is needed. Engineers need to understand how the activities they perform affect the company goals and

success. Quest holds Quarterly KCS Health reviews with Directors, Managers, and KCS Coaches to review and discuss health indicators, trends, and opportunities. Indeed, the overall outcomes of Quest's refreshed KCS program demonstrates that the 90/90 goal (or faster!) is a positive reality, not just aspirational.