

MEMBER SUMMIT 2024



CONSORTIUM
for Service Innovation™



Fort Worth, Texas



CONSORTIUM
for Service Innovation™

Reimagining the way we work together

Non-profit alliance of companies

A strategic think tank pursuing innovative ways
to improve engagement



Photos by Andy Kiendl



Shared experiences
spark innovation



Sharing our Experiences



105 Professionals

35 new people
7 new Member companies
50 companies total



Sessions

17 People; 13 Member Companies; 1 Professor

Machine Automation
People & Culture

KCS Journeys & Intelligent Swarming
Art, Empathy, and Artificiality



Open Space

30 Topics Explored!!!!

AI use cases, impacts, & maturity dominated



Countless
Connections





Exploring the Intersection of Artificial Intelligence, Empathy, and Knowledge

- Look Before You Leap; Our Adapting World with AI – Matt Seaman, Consortium
- Employee & Customer Efficiency & Experience with Gen AI – Romain Garcia, PTC
- Supporting Humans Through Change – Kelly Murray, Consortium
- Embracing & Improving Collaboration: Tending to Remote Teams – Madison Hoffman, Zendesk

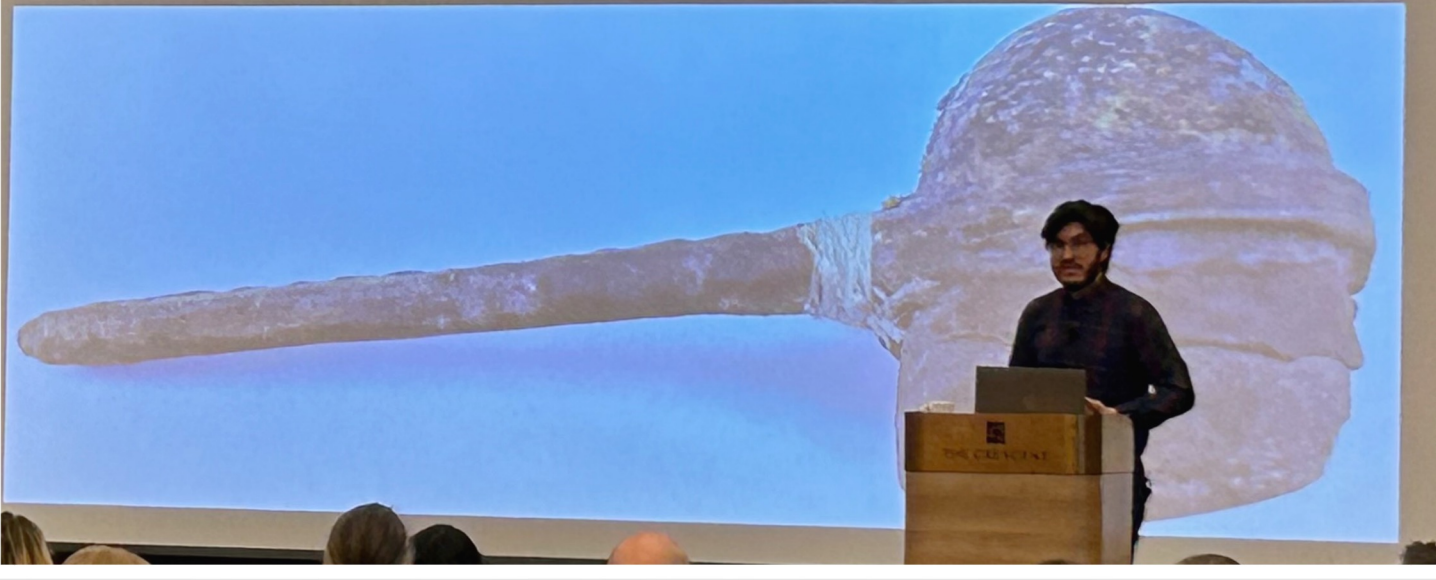
Break Out Sessions

- Empowering Champions: the KCS Journey at proALPHA - Nicole Quarti & Christian Matzke, proAlpha
- Doing More with Less: Innovation in a World Full of Constraints - Sarah Thomas Hamm, Blizzard Entertainment
- Adopting Intelligent Swarming in Waves – Royce Abel, Autodesk
- Course Correcting: When Conversations Go Off the Rails – Lana Kosnik, Upland, Kendall Brenneise, F5, Jessica Peralta, Calix



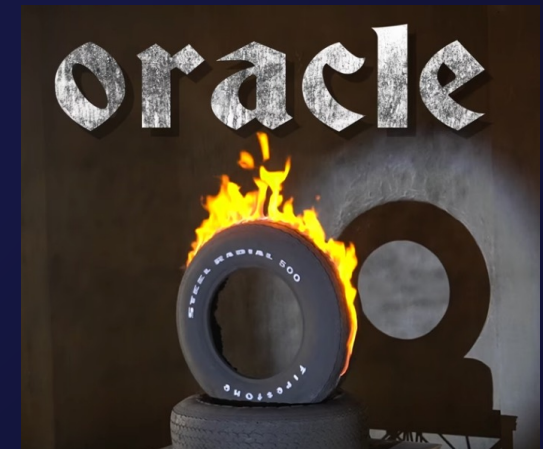
Exploring the Intersection of Artificial Intelligence, Empathy, and Knowledge

WHAT IS TECHNOLOGY?



Art, Empathy, and Artificiality

- Nick Bontrager,
Associate Professor of New Media Art
TCU





Open Space Sessions!!!

- **Collective Experience In Action** – Sara Feldman, Consortium
- **KCS in Pre-Sales at Oracle** – Pat McBride, Oracle
- **Cultivating KCS Buy-in** – Jessica Wu and Monika Virmani, Alation
- **Outside the AI Box** – Travis Myers, JLG
- **Navigating, Supporting, and Advocating for Major Change** – Andrea Hughes, SAS

THANK YOU Dinner Sponsors





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Look Before You Leap
Our Adapting World with AI



The Intersection



Generative AI
Deep Learning
Robotics

Feeling Economy Skills

- Empathy
- Creative Problem Solving
- Relationship Building
- Communication
- Adaptability

Services Skills!!!



**Artificial
Intelligence**

Knowledge

Information

Data

Currency of Services

The Interaction Layer



The differentiator won't be the underlying technology,
it will be *the interaction layer as a gateway to experiences.*



Desirability

- Use Cases, Employee Experience, Customer Experience, Co-creation

Feasibility

- Technology & infrastructure to achieve the desirable

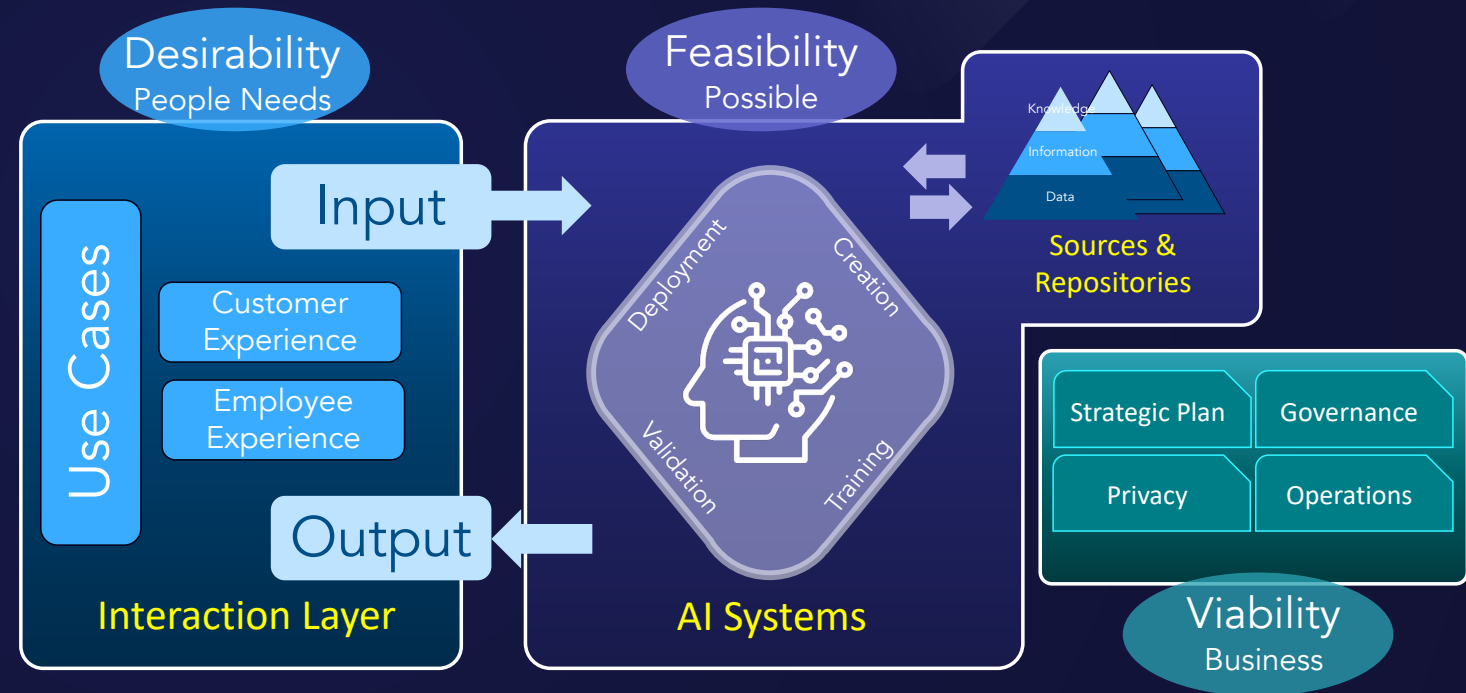
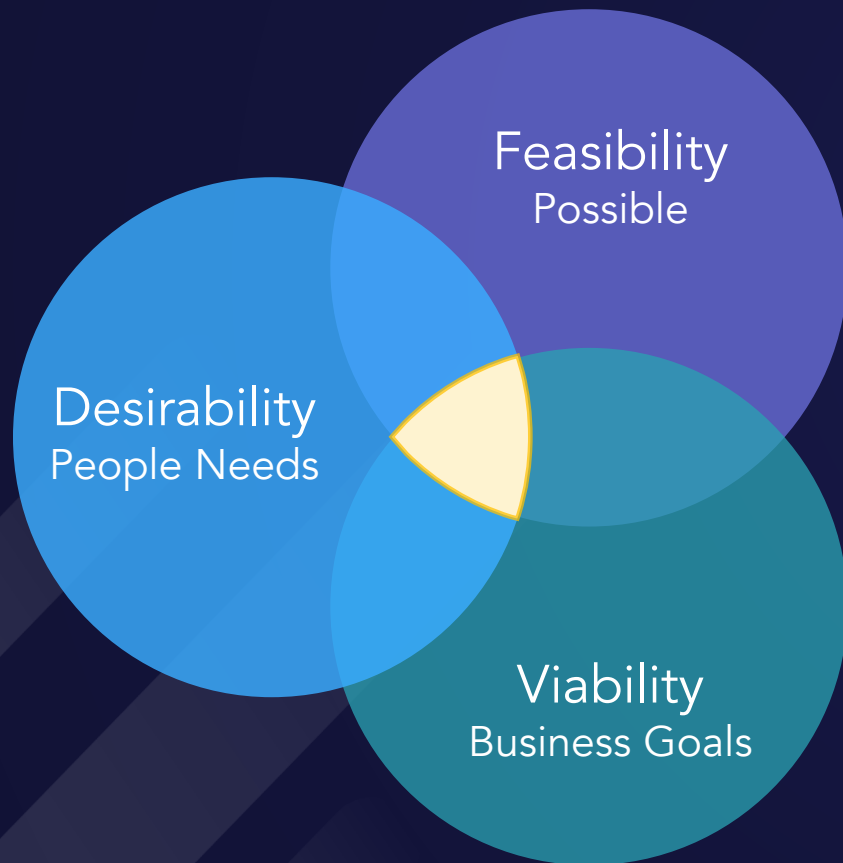
Viability

- Business alignment and support

The Interaction Layer



The differentiator won't be the underlying technology,
it will be *the interaction layer as a gateway to experiences.*



Use Principles to Test Ideas



What could this look like for AI?

Are we designing from a basis of **trust**?

- Taking into consideration transparency, accountability, security, and integrity for people and data

Are we focusing on **value creation** (not activities)?

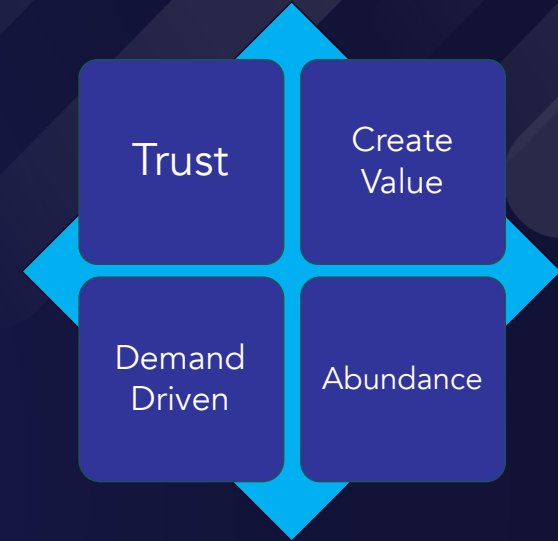
- Implementing AI to advance the stated outcomes and goals of the organization (*what's your use case?*)

Does it align with the principle of **abundance**?

- Implementing these technologies to enhance vs replace capability (creativity, innovation, diversity of perspective)

Is it **demand driven**?

- Harvesting and learning from trends and patterns in the usage of these technologies





GENERATIVE AI -PTC SOFTWARE OPERATIONS & SUPPORT

Romain Garcia
Knowledge Manager

April 2024



Embracing & improving collaboration:

Tending to remote teams



Maddie Hoffman
Director, Digital Customer Experience



Technology is
forcing faster
adaptations



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Supporting Humans
Through Change

Kelly Murray
Consortium



We have the tools
to support our
people

GENERATIVE AI -PTC SOFTWARE OPERATIONS & SUPPORT

Romain Garcia
Knowledge Manager

April 2024

GENERATIVE AI USE CASES FOR SUPPORT - THEMES

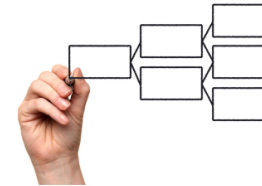
Help humans to author content in compliance with defined standards <u>examples</u> - Article Authoring Assistant - Assessment of written communication	Aggregate complex transaction history <u>examples</u> - Case history - Community topic summary	Prevent duplication of records <u>examples</u> - Duplicate articles - Duplicate SPRs	Capture voice-based interactions as digestible text <u>examples</u> TSE phone calls with customers	Conversational (Q&A) engagement with Knowledge Base <u>examples</u> - Internal chatbot - Customer-facing Chatbot
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EASY TO PROTOTYPE

REQUIRES CORPORATE SUPPORT AND INVESTMENT

2) Start with something that is 'easy'

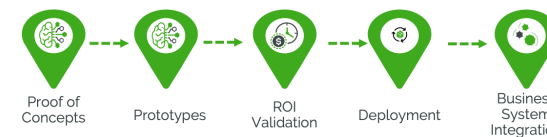
IDENTIFYING GENERATIVE AI USE CASES IN SUPPORT ORGANIZATION



- Select key support processes for evaluation
- Bring process owners and subject matter experts together
- Hold workshop to identify potential use cases for Generative AI

1) It takes a team to define the experience and use cases

USE CASE DEPLOYMENT STRATEGY



3) Have a solid plan and clear expectations

4) Understand the Benefits and Risks
(it is not just a shiny new thing)

BENEFITS AND RISKS

Great Productivity tool



Article Quality



記事

Change Isn't All or Nothing



Pre-Contemplation: no intention to change in the foreseeable future

Contemplation: Considering making changes but have not yet made them

Preparation: Increased commitment to change, begun to make small changes

Action: Engaging in new behaviors for a short period of time

Maintenance: Consistently engaging in new behaviors

Prochaska, Norcross & DiClemente

Adaptation is a process

Three Things



1. Fear is mitigated in community.
2. The process of change is messy and complex.
3. What's the shorthand for "a culture in which we are consistently supporting each other through change"?

A focus on culture navigates the mess





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Supporting Humans
Through Change

Kelly Murray
Consortium

People

Connection

- Monthly social hour
- Convocations & celebrations
- Peer coaching



Collaboration

- Demo Days/Design studios
- Drop in co-working sessions



Autonomy

- “Office hours”
- Optional but recorded meetings
- “Open door” leadership



Process

Planning

- Establish roadmaps, at least quarterly
- Conduct your own QBRs & kickoffs



Rituals

- Project management like Kanban or Agile
- Strategically use meetings & async catch-ups



Communication

- Clear mission, vision, goals, and objectives
- Share everything*, even if it doesn't seem interesting



Technology

Shared visibility

- JIRA, Asana
- AI-generated notes from meetings shared along with resorings



Async communication

- Slack, Teams
- Automated prompts for both Standups and “Getting to know you”



Collaboration

- Figma, Lucid
- “Comment” and “Suggest” mode in Google suite



Embracing & improving collaboration:

Tending to remote teams



Maddie Hoffman

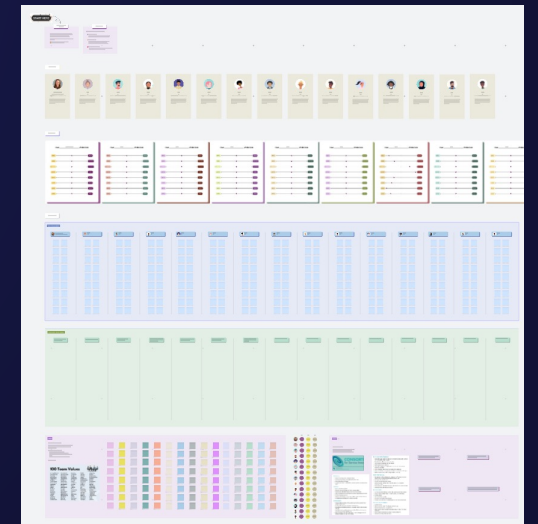
Director, Digital Customer Experience



A practical, planned, intentional, approach to connecting

Take the time for the team to get to know each other, support each other, and refresh their relationships

Consortium Works:
Nurturing an Adaptive Workforce



Better decisions. For a better future.

Empowering Champions:
The KCS Journey at proALPHA

April 9/2024 – Consortium Member Summit

Nicole Quarti & Christian Matzke



Doing More with Less: Innovation in a World Full of Constraints

Sarah Thomas Hamm



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Break Out Session 1 & 2

Better decisions. For a better future.

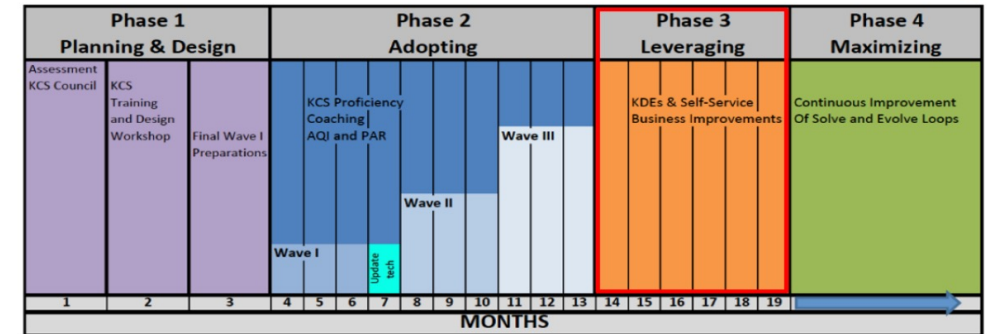
Empowering Champions:
The KCS Journey at proALPHA

April 9/2024 – Consortium Member Summit

Nicole Quarti & Christian Matzke



Adoption road map



Kick-off:
12/2020

6 month
break

11 waves
(online)

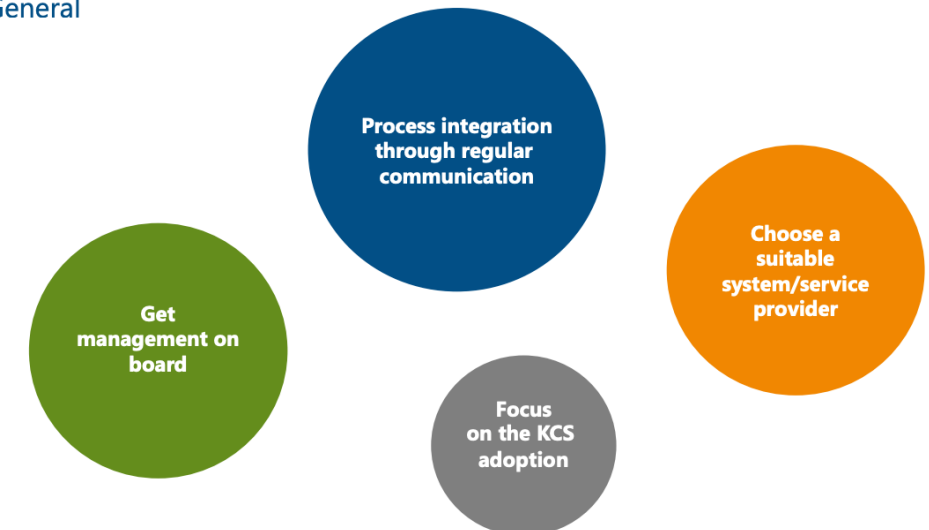
Budget
freeze
due to
Covid

Target:
42 mos
Actual:
39 mos

Plan, invest, prepare for disruption, find your best path

- Focus on the KCS adoption – be careful about competing programs
- Integrate KCS training: Practices, Fundamentals OLT, Certified Internal trainer
- Implement in smaller waves: 11 at proAlpha
- Invest in Coaching: A coach with each wave
- Communicate, communicate, communicate

General



Support Model Challenge



- How would you support your KB with a drastic reduction or dramatic change in your support model?
- Bonus - How do you preserve quality?

Machine Translation Challenge



- How have/would you implement Machine Translation?
- Bonus - How do you ensure quality without native speaker resources?

AI/LLM Challenge



- What do you want AI/LLMs to do for your KB?
- What should humans still do in the KM process?



Doing More with Less: Innovation in a World Full of Constraints

Sarah Thomas Hamm

Very Interactive Session



Intelligent Swarming By the Book: Adopting in Waves @Autodesk

AUTODESK OBJECTIVE: Improve collaboration to increase productivity and reduce resolution time for our customers

Royce Abel
Technical Support Sr. Manager | Intelligent Swarming Business Lead

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Course Correcting: When Conversations Go Off the Rails



Kendall Brenneise
Senior Manager, Digital
Services



Jessica Peralta
KCS Program Manager



Lana Kosnik
KCS Practice Manager



Break Out Session 3 & 4

Intelligent Swarming By the Book: Adopting in Waves @Autodesk

AUTODESK OBJECTIVE: Improve collaboration to increase productivity and reduce resolution time for our customers

Royce Abel
Technical Support Sr. Manager | Intelligent Swarming Business Lead

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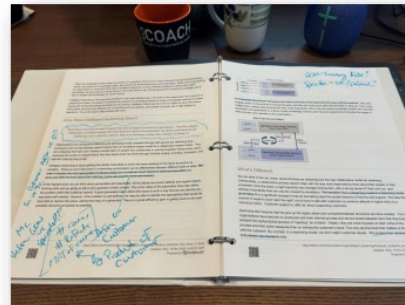
Objectives, Measures & Risks

SWARMING OBJECTIVES	GOOD (PILOT)	BETTER	BEST
Can find the Best Available person to help	Find someone with skill	Find someone with skills & motivation to help	
Measure the creation of value by individuals & teams	Activity	Value and/or Reputation	
Managers are facilitators and coaches		Culture	
Only 1 Case Owner		Trust	
One Team / No Tiers		Shift away from Tiers	
First Owner is Likely Best Owner		Intelligent Routing	
People can see all work relevant to them		Workspace	
People Choose to help or Op-in		Workspace & Culture	
SUCCESS METRICS	▲ ASAT MRT	▲ Customer Effort Employee Effort	▲ MRT Backlogs Case Owners
RISKS	▲ Too much collaboration Motivation	▲ Underutilized skills Low motivation	▲ Technology investment System upkeep

Royce Abel
Autodesk Technical Support Sr. Manager

Swarming by the Book

- Study Practices Guide
- Get Inspired & Inspire!
- Evaluate Tools
- Recruit & Educate Project Team
- Define Success Measures
- Meet with CSI Members
 - Intel, CSI, Ping Identity
- Define Roadmap & Scope of Practices



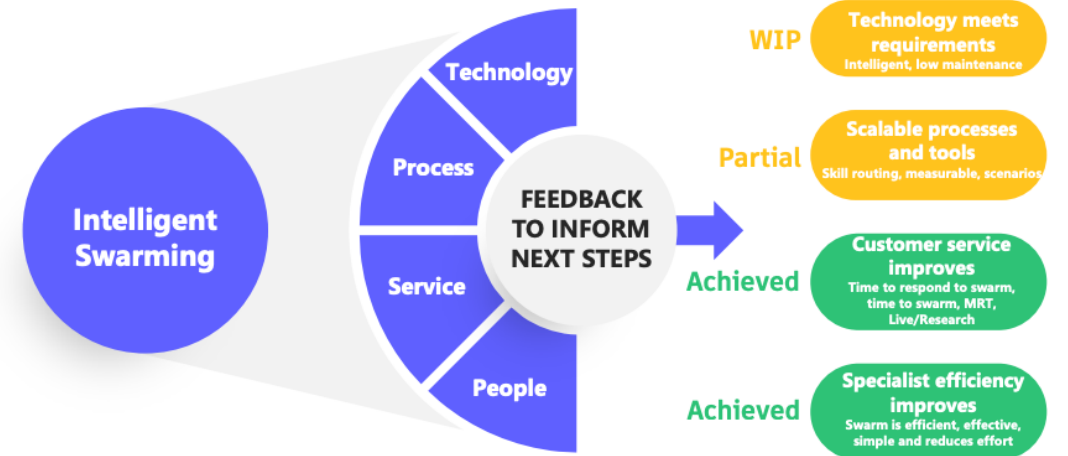
Royce Abel
Autodesk Technical Support Sr. Manager

PILOT

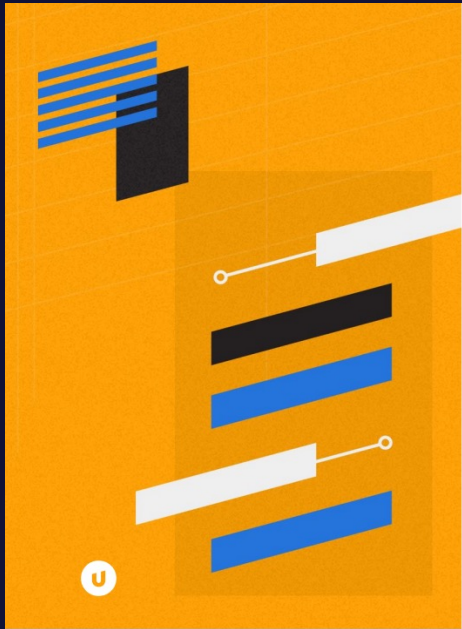
EVALUATING



GOALS

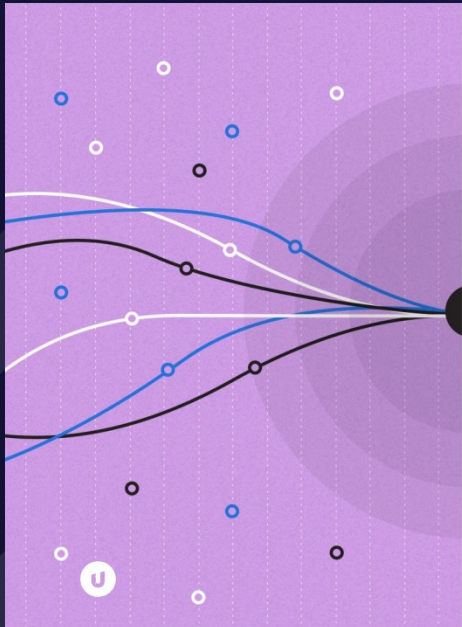


Royce Abel
Autodesk Technical Support Sr. Manager



Let's explore how to:

- Handle the derailed conversation in the moment
- Get it back on track
- Manage the next interaction



Key Points

- Stay Present in the moment
- Phrases to get back on track:
 - Thank you for sharing your feelings on...
 - I'm happy I was here when you needed someone to listen...
- Ask Before Coaching
 - Are you ready to talk about...
- Reflect before next interaction
- Distinguish an "off the rails" moment vs. consistent disrespect/aggression

Course Correcting: When Conversations Go Off the Rails



Kendall Brenneise
Senior Manager, Digital
Services



Jessica Peralta
KCS Program Manager



Lana Kosnik
KCS Practice Manager



Demonstration / Scenarios were recorded
In the Member Wiki

Day 2: Full Day of Open Space!!!



30 Topics Explored

Notes for each session in the
Member Only Wiki

High Energy!!

- AI topics dominated the sessions
- Multiple follow-up discussions are being planned

STAY TUNED



SUMMARY OF CONVERSATION:

- Product writes defects w/ RCA & solution
- Support now writes the reports which causes a linking issue since KBA exists to describe the issue & not linking the reports

Ideas:

- Support creates KBA when a defect is created w/ defect #. Dev updates the article w/ cause, workarounds (if known), then solution w/ assistance w/ doc team & support for working
- Is it

KEY INSIGHTS:

- KBAs for defects
- Is it ok to publish defects?
- Is it ok to publish w/out solution
 - how many customers impacted
 - can you subscribe for updates
- Dev & Prod Eng do not write KBAs / defect reports
- Needs collab between Support & Dev
- Some integration & automation w/ Dev tools & CRM tools
- Address PE resistant to RCS

SUMMARY OF CONVERSATION:

- Discovering value is deeper & more complex than simple metrics
- Where there is activity, there is value - growing or eroding
- Value is tangible or intangible
- How do I get from where I am now (tactical) to the vision of looking at value (strategic)
- Every role in delivering value has a different lens and scope. Context remains key
- VES: Value Enhancement Score (Metric, AARP) new measure for them, post-interaction
- Brand promise as north star
- Coordinate value delivery measures across customer touchpoints
- How do we build connections between value measurement at various levels
- How do we relate our day-to-day activities to a value story - do they support, enable, deliver?

KEY INSIGHTS:

- How do we maximize customer value when our metrics are generated by & measure activity
- Customers are the judge of the value they received
- Each stakeholder has their own perception of value

NEXT STEPS:

- Value chain mapping
 - Activities > outcomes
 - spectrum of tangible to intangible
 - one for each 'lens', which often aligns to role

Started these in the room w/ suggestions from the group

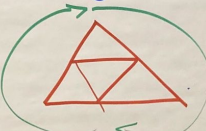
More convos in the expansion of measuring success

ATTENDEES:

capture online at serviceinnovation.org/member-summit-2024-agenda

SUFFICIENT TO SOLVE

Perfect Enemy of the Good



F.O.P.A.

FEAR OF PUBLISHING ARTICLES

> SEEK TO UNDERSTAND & ASKING TO SOLVE

> FOR IMPROVEMENT TO HAPPEN IMPERFECT ARTICLES

TOPIC: Keeping Critical Thinking Alive in the Age of AI

SUMMARY OF CONVERSATION:

Are we looking at reduction of critical thinking w/ availability of AI?

Younger gen -> greater impact

What is critical thinking?

- Applying experience to make decision and context

Understanding the problem

Changes in heading w/ Covid

AI is understanding greater context

Memory Emotional Analytic Knowledge

Consultative approach (more one-on-one, less guided)

Using training to rebuild analytical skills

Empower agents to make decisions

Trust & perceived accountability

Cultural problems w/ coaching

ATTENDEES:

Allie Fachhaber, David Kay, Morgan Yorkley, Joe Lombardo, Jacob Warts, Matt C. Sander, Van der Merwe, Maria Lee

SUMMARY OF CONVERSATION:

Some of the AI tools used:

- Einstein GPT (Salesforce)
- CRGA (Coveo)
- Open Source model (ORCCA and LAMA)
- WORKDAY AI Implementation
- First response on case - AISERA Gen AI

Next use case - analyst assist piece for content creation.

Their Knowledge is on Salesforce, Integrated with Coveo - AISERA

Agent assist use cases

KEY INSIGHTS:

- Einstein is ok for chat summary
- Charge per query is the downside for many of these chat gpt models. Custom models might help.
- Structured data (emails, chat, phone calls) essential for AI generated Kbs.
- Change management is tough. Judgement is required. LLM deployments are different than data analysis. Cost vs benefits, scalable and maintaining the base are some things to consider. User adoption is also critical. 0-6 scale measure where 6 is great. Tweak it to your needs.
- LLM that works best for text generation: open AI, MS co-pilot studio also open ai, chat gpt seems to be the best. Gpt 3 seems slow. Lama 7 is good at summarisation. Others are better at data analysis.

NEXT STEPS:

Should we become experts in prompt engineering?

LinkedIn courses in prompt engineering.

Think about writing differently for AI as the audience

Standardizations is the key for AI

ATTENDEES:

Kendall Brenneise, Jerrod Kimbler, Andrea Hughes, Jason Kaufman, Johnny Padma, Sai Prasad, Sarah Thomas, Hamm

SUMMARY OF CONVERSATION:

- Are we enabling this level of leadership and ensuring they are a key role in our success; globally, organizationally, internally with teams, customers,
- Allow them to be ~~active~~ part of the conversation & solutioning
- Ensure understanding and their change management, before introducing it to their teams for team adoption
- Have we illustrated the connection between "strategy/transformation" and the day to day work?
- managers = manage change BUT ~~not enabling them to manage changes~~

KEY INSIGHTS:

- Have we shared the why?
- Buy-in doesn't stop
- Do they understand the role they play in a successful transformation?
- How do we ensure that: Manager inspiration trickles down?
- Coaching for managers
 - ownership model how
- Should we formalize pilot teams for managers

NEXT STEPS:

What would be in the "manager" tool kit?

1:1 leadership & coaching is DIFFERENT than our adaptive framework

Leading Teams, Groups, Adult Learning

- How DO WE ENABLE MANAGERS?
- BUBBLE UP & INCLUDE MANAGERS IN STRATEGY & Transformational changes
- CULTURE OF ADAPTATION

ATTENDEES:

Amanda Jennewein, Jennifer Crippell, Joe Lombardo, PETRICK MCBRIDE, Royce Abd, Will Coffey, Maddie Hoffman, Ludwig Hail, MELISSA BURCH, Travis Myers

capture online at serviceinnovation.org/member-summit-2024-



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Day 3

4 Quick Discussions &
Bringing it all Together



KCS in Pre-Sales at Oracle

We have a lot in common...

Strategic Framework

As with support, the strategic framework is central to a successful KCS program. The vision and communication plans also share much with the ways support KCS programs are launched.

Solve Loop Essentials

Common elements such as Collective Content Ownership, Search Early/Often, Capture in the Workflow, Article Structure are the same

Legacy Content

We face many of the same challenges in implementation as we seek to consolidate and aggregate dozens of informal knowledge initiatives and approaches into a common methodology

KCS Beyond Support: It works!!!

In the Member Wiki

KCS in Action: Optimizing Sales Support through KCS 2022 - Pat McBride

Consortium Conversation: KCS Beyond Support & Services 2023 - Pat McBride, Ludwig Heil, Sara Lustenberger



Jessica Wu and Monika Virmani, Alation



Cultivating KCS Buy-in

It takes time, persistence, and dedication

KCS is a Journey

- Vision: Be clear
- Strong leadership
- Over communication
- Consistency
- Collective ownership, build together
- Mentors & coaches are critical



Outside the AI Box

"As products become ubiquitous, customer experience is our differentiator"

We are supporting people with a job to get done quickly

- ✓ Knowledge Captures helps us respond in minutes & seconds
- ✓ Based on our knowledge we can influence product changes
- ✓ Our knowledge helps is train new employees faster
- ✓ People support each other to share what we know



Navigating, Supporting, and Advocating for Major Change

We should stop talking about change.

It is *Adaptation*

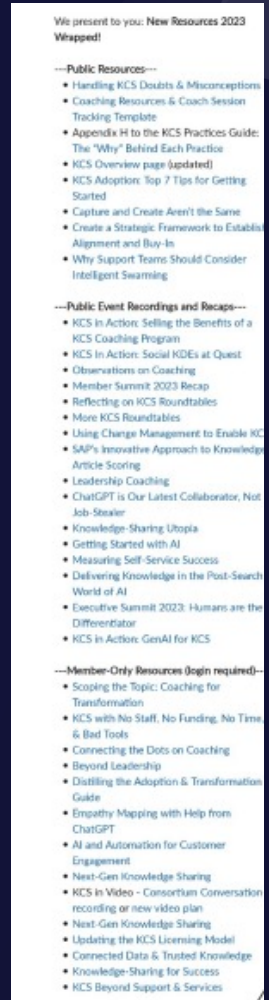
Nothing stands still, it is not one change, it is a constant state of adapting to any number of variables.



Collective Experience In Action

Shared experiences spark innovation

It is you, the brave
Consortium Members and
community that make it
all work!



Upcoming Events: *Check the events calendar often!*



Members Only | Virtual



May 2 | 8 AM Pacific

Consortium Conversation

**KCS for Engineers +
Middle Management Buy-In
@ Calix**



CONSORTIUM
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Members Only | Virtual



June 25-26 | 8-Noon Pacific

Team Meeting

**Thoughtful & Strategic
Automation**



CONSORTIUM
for Service Innovation™



Public Event | Virtual



May 8 | 8-9 AM Pacific

KCS in Action

**A Scrappy-But-Measurable
KCS Workflow in Slack**



NEAL TRAVIS
ACADEMY TO
INNOVATE HR



CONSORTIUM
for Service Innovation™



Public Event | Virtual



June 13 | 8-9 AM Pacific

KCS Transformation Series
Adopt in Waves



CONSORTIUM
for Service Innovation™



Public Event | Virtual



June 20 | 8-9 AM Pacific

KCS Verified Vendor Series

**Faster, Easier, Better:
Coaching Enablement via
your Knowledge Base**



LANA KOSNIK
UPLAND RIGHTANSWERS



ALEX BAKER
UPLAND RIGHTANSWERS



CONSORTIUM upland
for Service Innovation™ **RightAnswers**

Consortium Summit 2025: Atlanta, Georgia



Thompson Hotel | March 25-27, 2025



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