

White Paper

Knowledge Management for Customer Service

How KM can increase customer satisfaction, retention and profitability

Content

Intro	3
What is Knowledge Management?	4
The 4 Pillars of Modern Knowledge Management	5
How to Plan a Knowledge Management Project in 6 Steps	6
The Technology Behind Knowledge Management	8
Knowledge Management for Customer Service	10
USU Knowledge Management in Action	12
Conclusion	14

Intro

Excellent customer service today is more than an 800 number or live chat window. At its center is the customer and the focus is no longer on single interactions, but on the overall and long-term customer experience. Customers today expect speedy on-demand, omnichannel service, i.e. using the channel of their choice wherever and whenever they need to. Driven by rapid technology changes and major players raising the bar, customers have never been so picky nor able to quickly switch to a competitor.

From a business perspective, these requirements are reflected in KPIs such as:

- High First Contact Resolution Rate (FCR)
- High Service Quality
- High productivity with minimal service costs
- Customer satisfaction (CSAT and NPS)

The common thread in customer service is the ability to deliver accurate, timely and relevant information on-demand. A modern knowledge management platform is a fundamental part of your customer service infrastructure in order to meet these customer and business requirements.

This white paper will illustrate the differences between legacy and modern knowledge management and the role it plays in meeting customer service KPIs and goals. It will first define knowledge management and then explain its importance and impact on your business and customer experience to justify the investment.

What is Knowledge Management?

Knowledge management is still often confused with document storage or management. This stems from the past, when the only customer support channels were the telephone and snail mail and the world was not tightly connected as it is today. Let's begin by defining modern knowledge management.

Modern knowledge management

- Identifying and capturing knowledge
- Storing and organizing knowledge
- Reviewing, maintaining and improving knowledge
- Sharing and exchanging knowledge
- Delivering knowledge quickly wherever necessary

Data, information and knowledge

Words like data, information and knowledge are often used as synonyms. However, in this context, they are quite different. Data consists of simple facts which are unprocessed and unorganized or raw. Information is structured, organized and processed data that is relevant and useful. Finally, knowledge is a kind of map of information linked together. Knowledge has the ability to predict and make decisions and generalizations.

Knowledge management in customer service

A modern KM platform is designed to support customer service representatives and assist them in quickly resolving cases in any channel as well as assisting customers directly via self-service. It is a central repository for information, used internally and primarily by customer support. Knowledge management seeks to systematically organize information so that it is useful, easy to find and able to be easily and quickly delivered when necessary.

Preventing knowledge drain and capturing implicit information

Explicit knowledge

This is knowledge that is documented and accessible. It may be in paper or digital form such as training manuals, return policies or product information. It can be used for knowledge management in contrast to things which have not been written down.

Implicit knowledge

Implicit knowledge isn't written down or stored digitally. In other words, it's the instincts and "just knowing" the answer that experienced employees have. Most institutional knowledge is implicit meaning by definition that it is not captured in written form anywhere. This leads to information gaps, shoulder taps and inconsistent service.

Institutional knowledge that is built up over time is easily lost forever when employees leave. Thus, it is important to have a continuous, KCS-like cycle of knowledge creation, feedback and improvement to ensure that valuable knowledge gained by your agents is available and actionable for others.

Whether implicit or explicit both types of knowledge are relevant and should be documented and accessible. Companies always have plenty of knowledge (e.g. guidelines, instructions etc.) but there can often be a large gap between what is known and what is documented. In many cases, employees are not even aware that they know something until a new hire asks them.

Identify relevant knowledge with these two questions:

01 | Is the information relevant for my target group, agents or daily work?

02 | Is the information frequently used or required?

If you've answered yes to both questions, you have the basis for your knowledge management. After identifying all relevant knowledge, the next step is to begin managing it in a single place so it can quickly be delivered to agents and customers.



The 4 Pillars of Modern Knowledge Management

Modern knowledge management is built on four pillars: organization, employees, culture and technology. Understanding the interplay between them and ensuring they work together will make or break both customer experience and your KPIs.

01 | Organization

The value of creating a framework of processes and procedures to manage knowledge cannot be underestimated. Knowledge is not static and must continually be reviewed, improved and updated over time via scheduled reviews, document expiration dates and ongoing user feedback. Methods like Knowledge Centered Service (KCS) provide an excellent starting point, even if not adopting it completely.

02 | Employees

Your employees are the tip of the spear. People, empowered by the technology you choose, will deliver information and solutions to the customers. This could be an agent on the phone, the person answering live chats or text messages or even the agents creating articles in your knowledge base and managing the

chatbot! Knowledge management's success is contingent upon its use. Everyone must be trained to regularly use and improve it via feedback.

03 | Culture

Organizational culture is often overlooked in more academic articles on knowledge management. However, experience has shown that it is decisive. Only if a company's culture supports and values knowledge management and provides the prerequisites for it, will it be successful. An open internal culture that appreciates, encourages and even rewards information sharing is an absolute must for successful KM. Knowledge management is not just a tool or a project but an ongoing process similar to having to regularly update and maintain your website.

04 | Technology

Technology provides the tools that deliver the right outcome in skilled hands. A knowledge base sits between your agents and your information, enabling them to deliver accurate solutions quickly, on-demand and in the right channel.

Some may feel that technology is not an absolute and people can naturally share knowledge and communi-

cate without it. Of course, this is true but not at scale, and especially not in large work from home environments.

A knowledge management platform acts as a force multiplier enabling employees to quickly create, distribute, consume and deliver content at scale. That means increased productivity, lower workforce costs and a consistent customer experience.

How to Plan a Knowledge Management Project in 6 Steps

A knowledge management project is neither a breeze nor impossible either. It requires time, resources and that employees be actively involved in the process. The following six steps will walk you through creating a project plan for your customer service department or contact center.

01 | Define your goals

Begin by defining the end result in detail. It may help to begin in story format instead of concrete numbers, such as "All agents access one source of knowledge to support customers" or "We can provide support information on our website for self-service without having to maintain it separately from our internal knowledge base" or "We want to reduce costs by X% via increased FCR and reduced AHT." Turn your stories into concrete requirements, features and numbers where possible.

02 | Analyze the current situation

Where is your current knowledge and support information stored and are there any defined processes for creating, approving and publishing it? Which knowledge has already been documented and how much must still be written down (e.g. implicit knowledge)? Will the new system replace or complement any existing systems? Are there other departments or stakeholders who may be affected if we change or replace these systems?

03 | Develop a strategy to achieve your goals

There is no off-the-shelf solution for developing your strategy, although the four pillars of KM should be taken in account. Your plan needs to be individually tailored to your company and include the steps and actions required to meet your goals. This includes defining incentives that motivate employees to share and review knowledge, specific measures for creating and cultivating the right corporate culture to support it. It is critical to define concrete use cases and processes that are required for agents, editors, managers and so forth, not a one-size-fits-all approach. Moreover, customers should also be included as well along with specific use cases. Your goals should reflect both classic business goals such as productivity, cost savings and meeting KPI/SLA targets as well as customer-focused ones such as churn rate, CLV and NPS.



04 | Choose the right tool

Just as there are many types and sizes of screwdrivers, there are many KM tools on the market, each with a different focus and use case in mind. Some are designed for enterprise search where knowledge remains stored in many places while others centralize everything into one system. Others may be aimed at internal employee collaboration and information sharing which is not suitable for customer service. With your specific use cases (e.g. an agent in your contact center), you can better define and identify the exact features required. For customer service specific needs, it is important to involve users for each role in the review and selection process.

05 | Create and organize your knowledge

This is perhaps the most important component of the process. After all, without knowledge there is no knowledge management and as the saying goes, garbage in, garbage out. Therefore, it is critical to begin with a thorough knowledge audit. This begins with identifying all relevant information and where it is stored. Next, review it and check whether it is accurate, up-to-date and duplicated elsewhere.

Identify and capture knowledge

Identify the topics, issues and products where your customers need support. This may be on the phone, via chatbot or self-service. From there, identify gaps in knowledge in comparison to the knowledge audit and develop a plan to fill them. By creating automated workflows for editorial and feedback processes as well as document templates, it will be easier to maintain a

healthy ongoing cycle of knowledge creation, use, feedback and updates.

Organize and store knowledge

Categories and clear navigation options are especially helpful for organizing your information, for both editors and users.

Review and improve knowledge

Depending on relevance and quality, you should also aim to receive feedback from other departments, not just your customer service areas. Sales, marketing and others provide valuable and timely information about sales, policy changes, product news and more. Define clear release processes for content, including all relevant markets served and ensure agents have the opportunity to provide regular feedback on it.

Distribute and exchange knowledge

Information changes constantly from seasonal sales, product changes and even external factors which may impact policies (e.g. the coronavirus). That means agents need to know immediately without cluttering their inboxes further. Therefore, a notification function within your KM software is important as it is the main tool agents work with and thus the most visible place. This further reinforces your knowledge base as the single source of truth and additionally enables you to link directly to the new articles or changes.

Deploy and use

If your knowledge is not regularly reviewed and updated, it turns into the equivalent of a fridge full

of expired or moldy food. It only takes one bad experience for agents to lose confidence in it and start looking elsewhere. Working effectively with knowledge requires quality information, a culture of sharing and feedback and the right tools for accessing it. Using a combination of document expiration dates, automated editorial processes and regular feedback, agents can be confident in the information and system, which increases user buy-in and adoption.

06 | Knowledge management is a process, not a project

Purchasing, planning and implementing a knowledge management system is a project with a concrete end. However, knowledge management itself never ends, even once the tool is rolled out and in production. Conduct regular reviews over time to ensure it continues, meets existing requirements and will be able to meet new ones such as a new support channel or integration with a new tool.



The Technology Behind Knowledge Management

There are many tools used for knowledge management, but far fewer actually designed for it. To evaluate the suitability of a potential KM software product, it is critical to ask where you currently create, store and manage knowledge as well as what processes for creation, collaboration and editing are involved.

The following is a list of commonly used software tools for knowledge management and why they are unsuitable for contact center use.

Shared drives

Shared drives and Windows Explorer are often the first solution companies reach for, particularly when the user base is very small. With a hierarchical folder

structure, basic rights and permissions and access for the entire network, it does the trick for a free solution using existing capabilities. However, with no editorial process, document versioning or feedback many problems arise including outdated and duplicate documents, difficulty finding the right information, long unstructured text and no integration with critical systems like your CRM or CCaaS platform.

Sharepoint

Microsoft's SharePoint is often the next step for many. It is well known, often already available to many organizations and familiar to users. Designed for document storage, it makes collaboration and content creation by multiple users simpler as well as being a single location for agents to search. However, contact centers will find that significant customization is required to meet their needs and accurately reflect their workflows. For customer service, SharePoint suffers from weak search, poor usability and a lack of purpose-built features. Small contact centers may be able to get by for a time but will ultimately need to find something designed for their needs instead of trying to adapt their needs to the tool's limitations.

Portal/Intranet

Company intranets or portals are often coopted as knowledge management tools since employees already have access and are familiar with them. They do make information more accessible for those working in different locations and typically enable some collaboration. They suffer from the same shortcomings as other tools mentioned insofar as lacking editorial processes, decision trees, omnichannel functionality and integrations with key software. Additionally, they require a large amount of customization work to meet basic customer service requirements which often costs more than purchasing a new purpose-built tool.

Wikis

Wikis were an exciting new collaboration tool when first introduced. They enable fast collaboration and document creation via a user-friendly interface. They are browser-based and already familiar to most users. However, without an editorial process and built-in workflows, the lack of oversight results in inaccurate information and clutter in the long run. It also lacks reporting and analytics which are must-haves both for management and to optimize the system.

Enterprise search

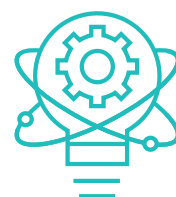
Enterprise search is a tempting mistake to make. However, it is important to understand that it is not a knowledge base. By definition, it simply enables users to search multiple sources with a single query instead of having to manually do it in each individual system. Organizations have found that it does make finding information significantly easier. It also does not require big migration projects nor create any pushback or internal hurdles from retiring multiple tools. The danger is data continues to be stored and created in a variety of systems without structure, quality control or review. For customer service, this is a no go.

Classic knowledge base

In order to overcome the challenges of information overload, unstructured information and poor search, many have turned to classic knowledge base tools. These legacy systems solve many of the problems the previous solutions suffer from, making them an excellent step in the right direction. There are a variety of vendors offering tools focused on different use cases such as self-service, federated search or internal collaboration. However, legacy systems still suffer from missing customer service specific features and above all, the inability to deliver information into multiple service channels and integrate with critical CRM and CCaaS systems.

Knowledge management platform

For customer service, the difference between a legacy knowledge base and a modern KM platform is similar to the first internet search engines and modern ones. The first generation of search engines like Yahoo and Altavista used simple algorithms to return a list of results. They did not learn from user behavior or searches, nor offer dynamically generated answers like featured snippets, knowledge panels or "People also ask." Knowledge management platforms offer the same AI powered search, dynamically generated documents and solutions as well as integration with multiple communication channels to push out information.



Knowledge Management for Customer Service

Modern knowledge management platforms focus on using, integrating, improving and delivering information on-demand in multiple channels. In contrast to legacy systems whose focus is organization and storage, the building blocks of new systems are content, not documents. The intent of a user's search is finding a solution to a problem or question, not just seeing a list of text results. Therefore, modern KM systems can dynamically generate answers, overviews and custom content instead of simply creating results lists.

Role-based features

A key differentiator for customer service is role-based features to address the requirements, rights and goals of each user type including front line agents, editors, managers and of course customers.



Service agents

- Context-dependent results
- Dynamically generated content
- Decision trees for common issues
- Easy document feedback

Editors

- Easy and consistent document creation via templates
- Automated workflows and approvals
- Task lists and notifications
- Secure archiving, versioning and document history

Managers

- Reporting and analytics
- Create custom workflows
- Centrally manage scripts and decision trees
- Integration with critical systems such as CRM, CCaaS, BI tools etc.

Customers

- Simple, on-demand self-service
- Accurate, up-to-date answers
- Consistent service
- Able to use preferred channel (e.g. self-service, social media, chatbot, phone)

Agent assistance tools

As we've seen, knowledge management today is about far more than organizing documents. KM begins with organizing information but must extend all the way through to enable users to create, find and deliver it. Therefore, agent assistance features are absolute must-haves. Otherwise, you're back at basic document management.

AI search and dynamic results

Agents are searching for answers, not lists of search results. Just as Google uses knowledge panels, featured snippets and direct answers to common questions, so too should your knowledge base. For customer service, your KM system should learn from user searches, content and which results are clicked on and solved the issue. Automatic suggestions, autocomplete and a search algorithm which can learn and be adjusted are no longer innovative features but basic requirements of modern knowledge management.

An intuitive editor made for KM

Content, not documents must be the building blocks of your support data. This enables individual content blocks to easily be moved, copied and integrated into dynamic search results. Features such as market-

specific approvals and documents (e.g. for different countries) and translations should also be included to better mirror the needs and requirement of international business today.

Decision trees

Call scripting is out, but ensuring consistency, accuracy and quality remains important. Decision trees offer a single process that can be followed in every support channel (including by chatbots) without having to script agent dialogue. Moreover, it increases agent confidence and helps new agents be productive faster. While unnecessary for generic knowledge bases aimed at collaboration and search, it is an absolute must-have for customer service use.

Search one place and deliver anywhere

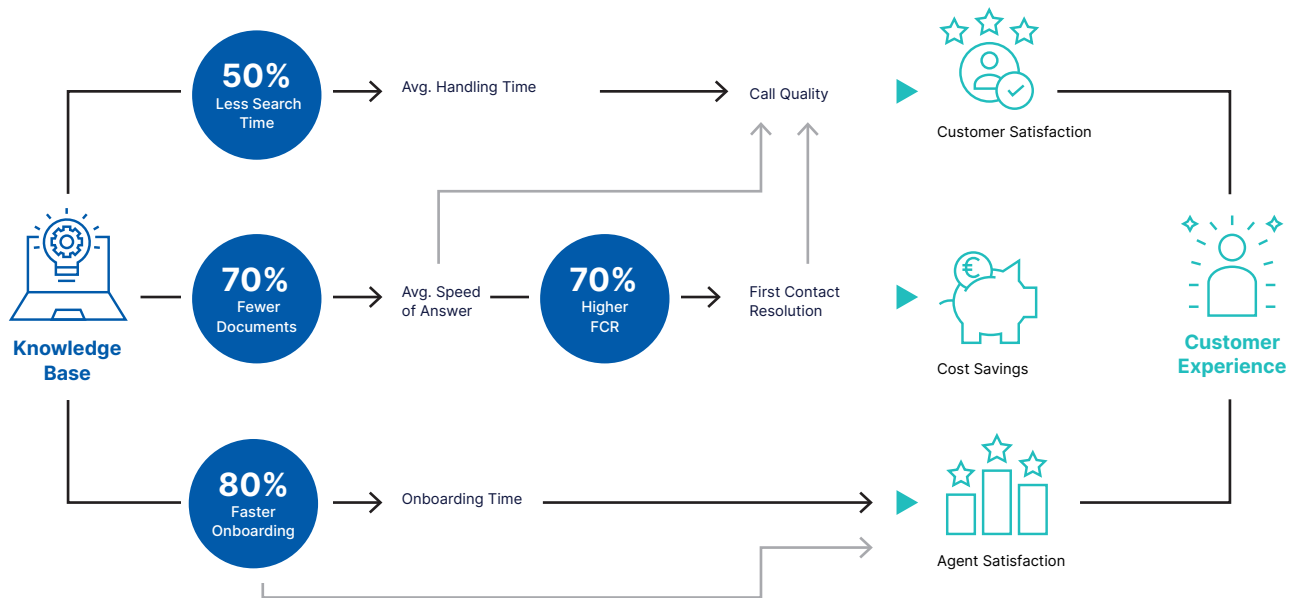
Customers expect and even demand support in the channel of their choice today. That may be web self-service, messaging programs or social media. The value of a modern knowledge base comes not just from its information, but its ability to deliver it on-demand where needed.

Therefore, it is critical to ensure that the platform you choose can connect to and directly distribute support data to multiple channels. Otherwise, agents are stuck with copy and paste, reading aloud or emailing attachments. This will lead to inconsistent answers, errors and eventually unofficial adoption of ad-hoc tools which dilute the value of your knowledge base and decrease agent efficiency.



The cascading impact of KM

The impact of choosing a knowledge management platform designed for customer service extends far beyond consolidating and improving your support data. The efficiency and productivity gains have a cascading impact throughout contact center KPIs such as average handling time and first contact resolution as well as things like onboarding time.



USU Knowledge Management in Action

The following are two examples of how knowledge management goes beyond just capturing, organizing and delivering information. It can enable things previously impossible as in the first example or bring service to new and unexpected places as you'll see in the second.

Automotive: personalized global roadside assistance



Background

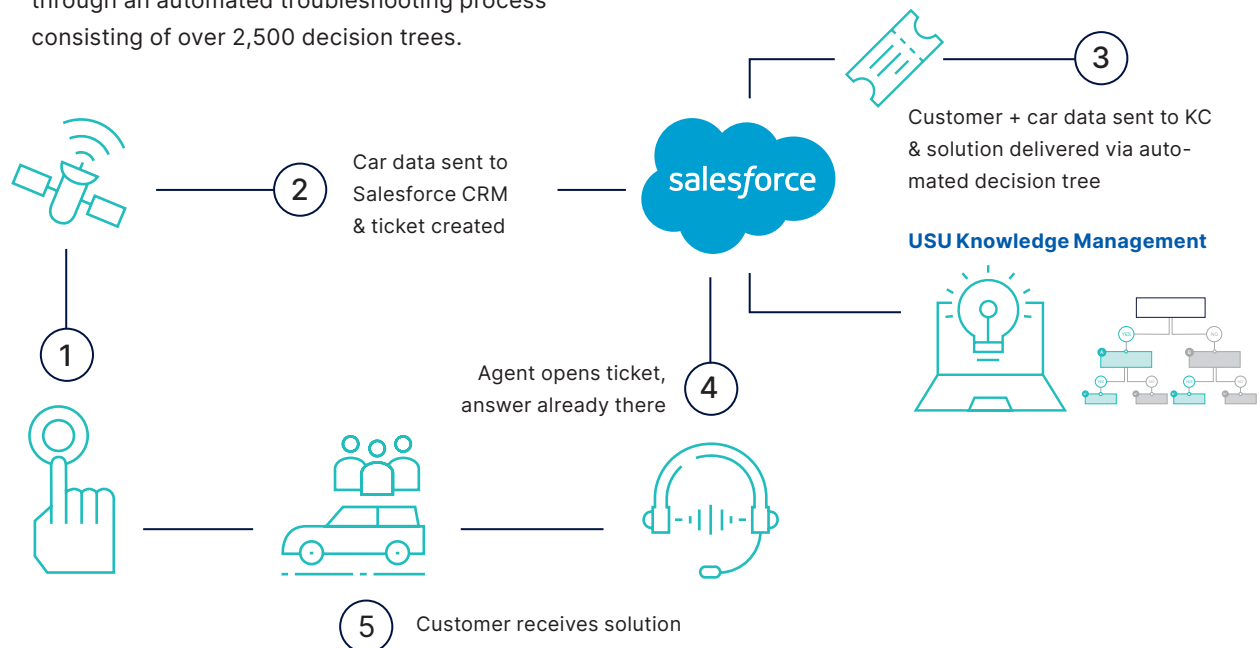
With twelve automotive brands in several dozen countries, the Volkswagen Group's goal of providing global roadside assistance was no easy feat. The project encompasses 34 languages across 44 countries which each have different driving laws

and regulations. In order to provide on-demand, consistent and location accurate support, multiple systems and data sources were required: Salesforce CRM, vehicle data, and a knowledge management platform.

Solution

- Vehicle data is sent to Salesforce and combined with customer data, creating a new support ticket.
- The vehicle information and error codes are run through an automated troubleshooting process consisting of over 2,500 decision trees.

- The solution, or required follow-up questions, is sent to the Salesforce ticket within seconds and the agent already has the customer, car and solution information before picking up the phone.



Insurance:

"Alexa, does my policy cover that?"



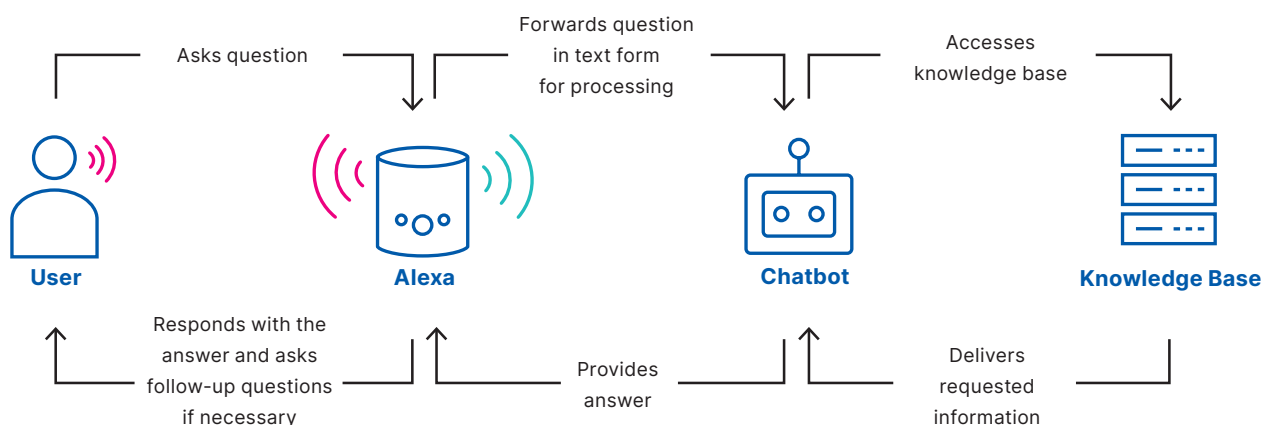
Background

Insurance is a complex product which by definition, is only used when customers have a problem. The Bavarian Insurance Chamber (VKB) wanted to make understanding policies and coverage easier while reducing friction and customer effort. Keen to differentiate themselves from competitors as well, their goal was to offer on-demand 24/7 customer service via Amazon's Alexa.

Solution

- USU developed a custom voicebot for Alexa using VKB's existing knowledge management platform's built-in chatbot.
- All data is stored in the knowledge base, so no additional technical or editorial maintenance is required.
- Customers can check their policy, coverage and ask questions from any Alexa enabled device.

USU Knowledge Management integration with Alexa



Conclusion

The days of document storage, management and basic search are gone. A modern knowledge management platform for customer service is must-have infrastructure to meet existing and future customer expectations, support new channels and meet KPI and SLA targets. New KM systems are based on an entirely different concept, focus on a best of breed approach by integrating with key tools like CRMs and CCaaS tools and feature artificial intelligence for continual optimization.

In order to scale up customer support and launch additional channels, your knowledge has to be consolidated into a single source of truth. This reduces maintenance effort, eliminates knowledge silos and duplicate systems while ensuring consistency and quality.

As more employees work remotely and customer demands rise while budgets shrink, knowledge management will help streamline your service processes, increase efficiency and lower support costs. Get started today.



**Get in touch for
further information.**

www.usu.com



USU-202012