

# Providing Quality Solutions at the Speed of Conversation



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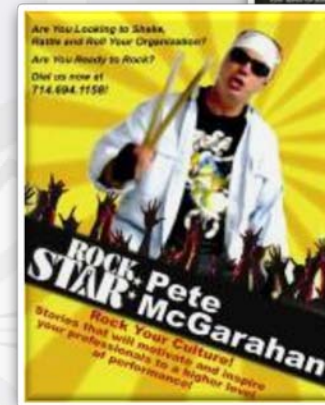


**MCGARAHAN & ASSOCIATES**

*Service and Support Value*

# About The Speaker

- 12 years with PepsiCo/Taco Bell IT and Business Planning
- Managed the Service Desk and all of the IT Infrastructure for 4500 restaurants, 8 zone offices, field managers and Corporate office
- 2 years as a Product Manager for Vantive
- Executive Director for HDI
- 6 years with STI Knowledge/Help Desk 2000
- 8 years with McGarahan & Associates
- 2 years as Chairman, IT Infrastructure Management Association ([www.itimassociation.com](http://www.itimassociation.com))



**MCGARAHAN & ASSOCIATES**

*Service and Support Value*

# *This Session is Targeted At*

1. Creating a simplistic process for Knowledge Management that facilitates the end-result of a first contact resolution by presenting the service representative with quality solutions, answers and procedures during their initial contact with the customer.
2. Creating a Knowledge Management adoption strategy that details purpose, tactics, practices and measurements of success.
3. Creating realistic roles and responsibilities around the Knowledge Management Initiative.

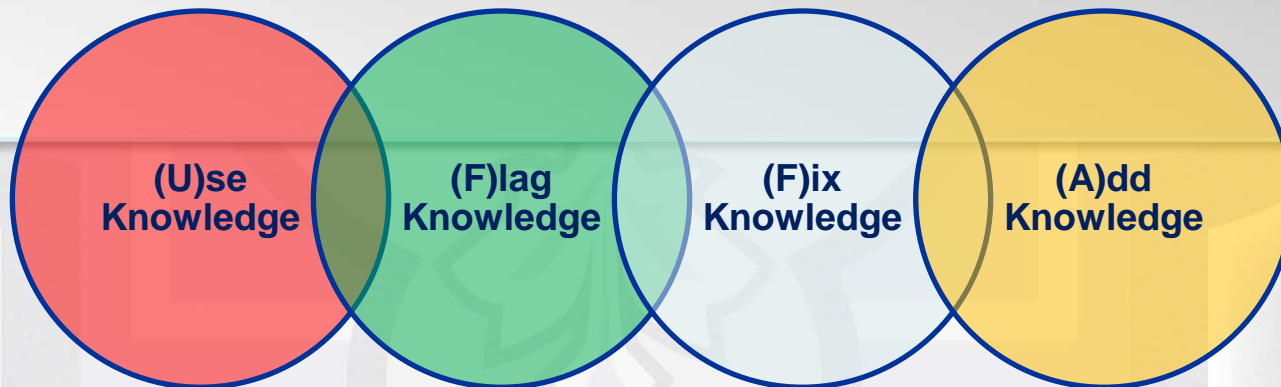
**Provide Knowledge @the Speed of Conversation**



# No End Date

*Simply UFFA; a part of the KM culture!*

*Knowledge Management is NOT a one-time project;  
It's a Program and a way of doing business.*



# *Common Mistakes*

- Thinking that IT is the only stakeholder, owner and beneficiary of KM.
- Not defining a common glossary of terms and key word indexing approach for optimization of search engines.
- Not considering long-term governance, maintenance and change management of knowledge.
- Under resourcing the project and program with a cross-functional team of qualified, engaged professionals.
- Coming out of the gate with a manageable and impactful scope.
- Thinking an integrated, suite approach to KM will solve your issues.
- Not setting expectations nor establishing the correct success metrics and targets for the KM program.



# *The KM Program*

- To continuously capture,
- Structure, and
- Re-use knowledge
- In an integrated solution
- Easily accessible
- To resolve issues quickly
- With measurable results

**SIMPLY STATED**



# *The Resulting End*

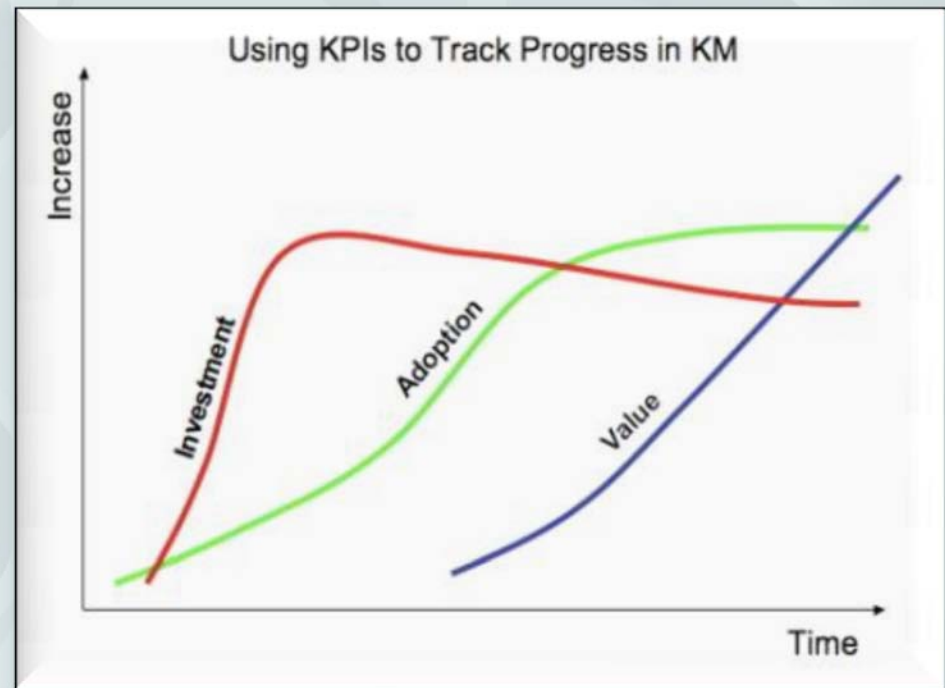
- Everyone knows, uses and contributes knowledge
- The knowledge is a source of training
- Self-service use dwarfs internal IT service and support activity
- No more knowledge hunting, it's captured as it happens
- The culture cares and shares knowledge freely
- A quality focus on measurable results

***KA Quality = Use (KBU) & Effectiveness (FCR, R@L0).***



# Measuring the End-Result

- # Knowledge Articles created.
- Frequency of use of Knowledge Articles created.
- Average age of knowledge articles created.
- % of knowledge articles less than 6 months old.
- Time to search for information.
- *Staff & End-User confidence in finding the right information.*
- % of staff accessing, contributing and modifying documents & # steps and time to access a document.





# UFFA “Must Dos”

- **Track all service and support activity.**
- **Process and Tool as one (Integrated)!**
  - The solutions must be provided to the support analyst during the Incident Management Process to facilitate first contact resolution (FCR).
- **Using knowledge when available for timely resolution – minimize escalations.**
- **Use, Add, Fix and Flag (UFFA) capabilities!**
  - Ability to *flag* incidents / problems that require Knowledge Articles to be *added* or current Knowledge Articles to be *fixed*.
  - Ability to contribute their own quality knowledge (*Add*).
  - Incentive, recognition, rewards, performance appraisals around UFFA.
- **Knowledge articles successfully utilized at Tier-1 (FCR) are prime candidates for Self-service.**
- **Let L2 / L3 focus on higher priority items / infrastructure / application projects.**



# *Discipline & Process*

## **1. Capture in the workflow**

- Knowledge is captured as a natural by-product of solving a problem

## **2. Structure**

- Improves the analysts' problem solving process
- For the context and relevance of search response

## **3. The process of searching is also the creation process (in the event you don't find anything)**

## **4. Just-in-time training**

- Solutions provide analysts with continuous, relevant learning

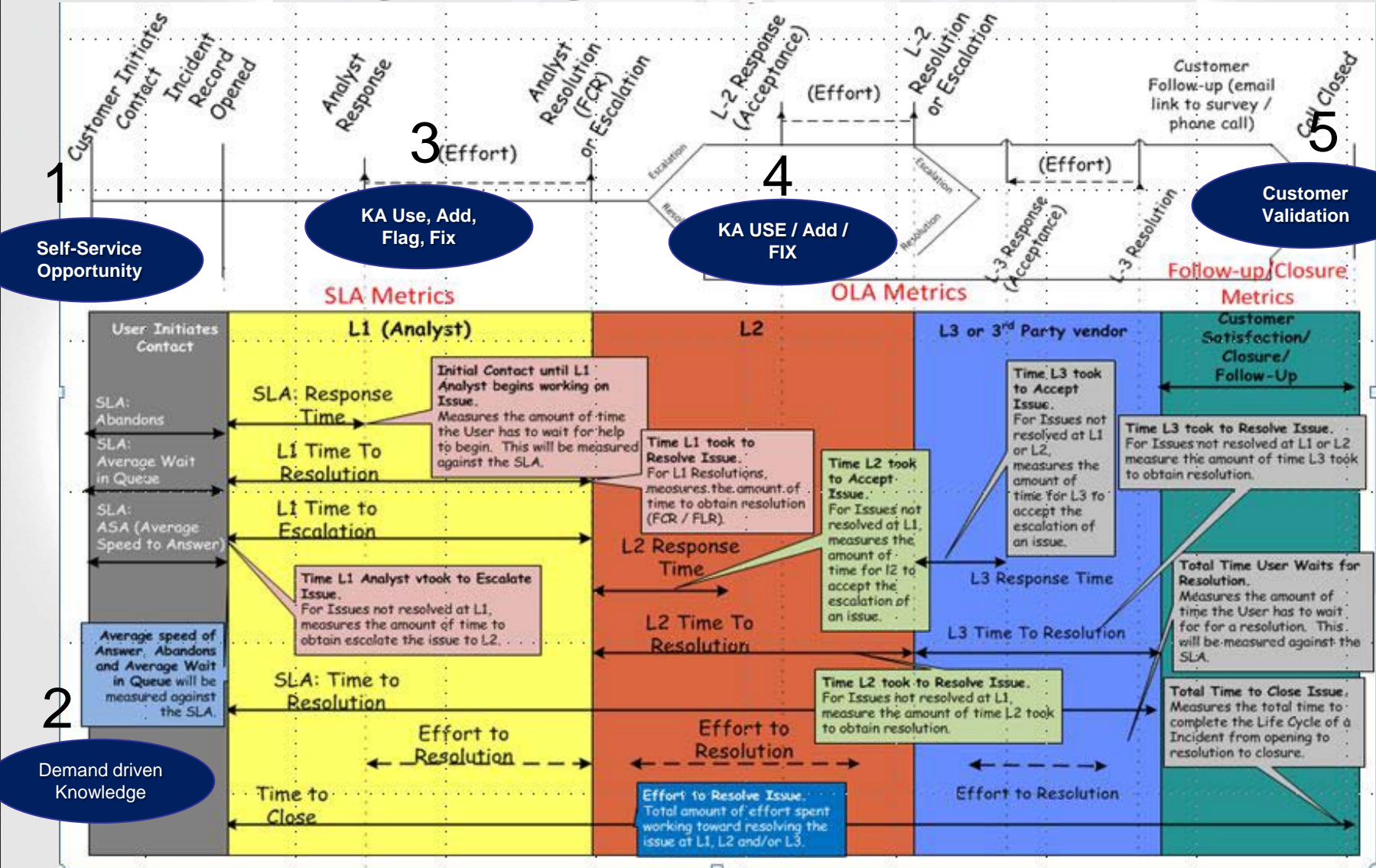
## **5. Manage solution quality through use and to new audiences based on demand**

## **6. Wholly beneficial**

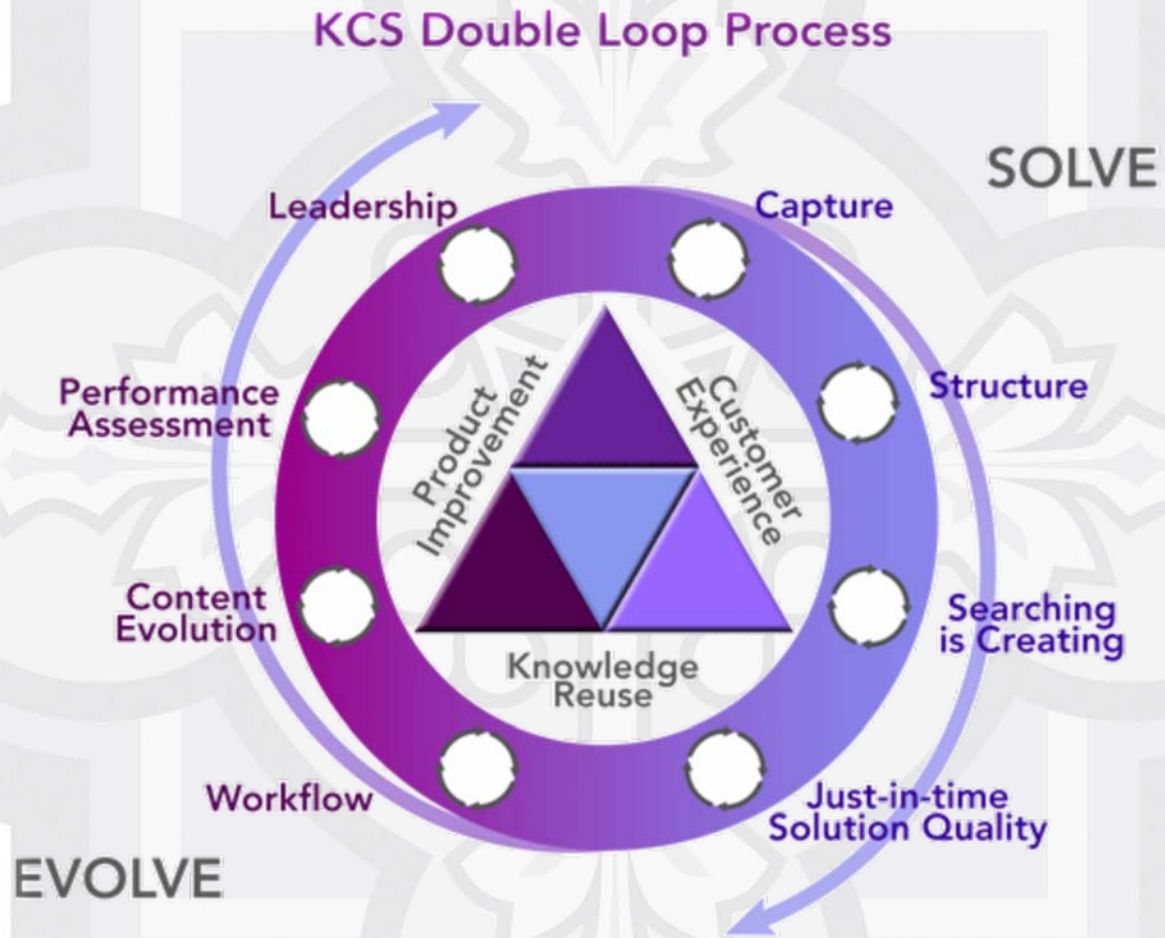
- As a methodology KCS provides significant benefits to each of the three stakeholders (customers, analysts, the business)



# Integrating KM into the Process



# Continuous Improvement

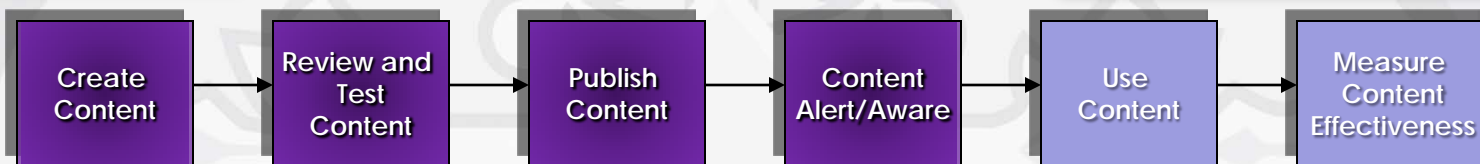


# Implementing KM - A Quick Start

## Managing the KM Initiative with UFFA:

1. (U)se Knowledge
2. (F)lag Knowledge
3. (F)ix Knowledge
4. (A)dd Knowledge

This is a continuous improvement process where knowledge articles are measured for effectiveness and continually refined to meet it's "viewed/use" ratio.



- Names of Content Authors:
- Content Title:
- Content Purpose:
- Content Audience:

- Names of tester:
- Review cycle:
- How tested:
- Approver :

- Names of Content Authors
- Content Title:
- Content publish date:

- Names of Content Users by Group:
- When communicated to:
- How they were communicated to:

- Displays the number of times solutions were viewed, used, and rated.
- Displays usage information by solution.
- Displays usage information by user.
- Displays the detail information for each usage event.

- Authoring History
- Authoring Process
- Published Documents
- Up for Review
- Search History
- Usage and Feedback

This is the process for targeting, creating, reviewing, testing and publishing new knowledge articles.



# Everyone has a Role!

- **Create the Knowledge Manager position.**
  - Define a KM strategy, plan and processes.
  - Appoint Category Owners, Content Authors (SMEs).
  - Identifying, creation, approval & updating content.
  - Monitor / measure the use / quality of knowledge (KBU and reports).
- **Involve the Support Analyst's early in the process.**
  - Get their buy-in, create awareness and ideas, feedback & contributions.
- **Provide Support Analysts with guidelines / expectations /training**
  - Reinforce continuous contribution, usage and end user conversion.
- **Managing to resolution with these rules for (UFFA)**
  - (U)se Knowledge
  - (F)lag Knowledge
  - (F)ix Knowledge
  - (A)dd Knowledge



# Targeting Stakeholder Adoption



## Knowledge Manager

- **Role:** To architect the KM process and ensure it's successful implementation and continuous improvement.



## Subject Matter Experts

- **Role:** To contribute frequently to the creation and maintenance of the knowledge as it relates to their domain and subject area of expertise.



## Front-line Analysts

- **Role:** To search and use knowledge to resolve issues on First Contact, flag KAs that need fixing and issues that need KAs creating.



## The Collaborators

- **Role:** Working together, these workers share knowledge real-time and are the ones best positioned to capture as created.



# Thinking Differently

- Do you require Analysts to search the KB before escalating the incident to Level-2 resources?
- Would you make self-service automated password reset mandatory for all customers if you had 50% adoption, 90% success rate & a high customer satisfaction?
- Have you calculating the cost for resolving repetitive issues / fulfilling requests via the phone when you KNOW self-service WORKS?
- If your self-service solution contained a robust library of content and solutions, would your require your customers to always check the self-service portal before calling the service desk?





# Questions & Answers



**"Being a service leader is about positively impacting the world around you! It's not about you, it's about all that you can do to make other people successful."**

***Thank You  
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