

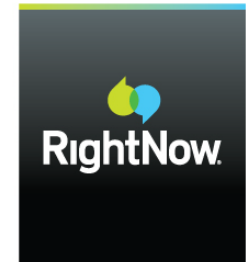
Knowledge Experiences

Understanding Crowd Sourced Knowledge

Greg Oxtan, Consortium for Service Innovation

POWERING GREAT EXPERIENCES

SUMMIT2011



Agenda

- What is the Consortium?
- Why should we care about KCS?
- The big picture – support as a network
- What is KCS?
- Q&A

What is the Consortium?

- An alliance of support organizations
- Focused on innovation
 - New ways to improve the customer's experience and productivity while managing the cost of support
 - High tolerance for uncertainty and ambiguity
- Member funded, not for profit
 - For the benefit of the members
- The members **are** the Consortium
 - Staff: 6 people

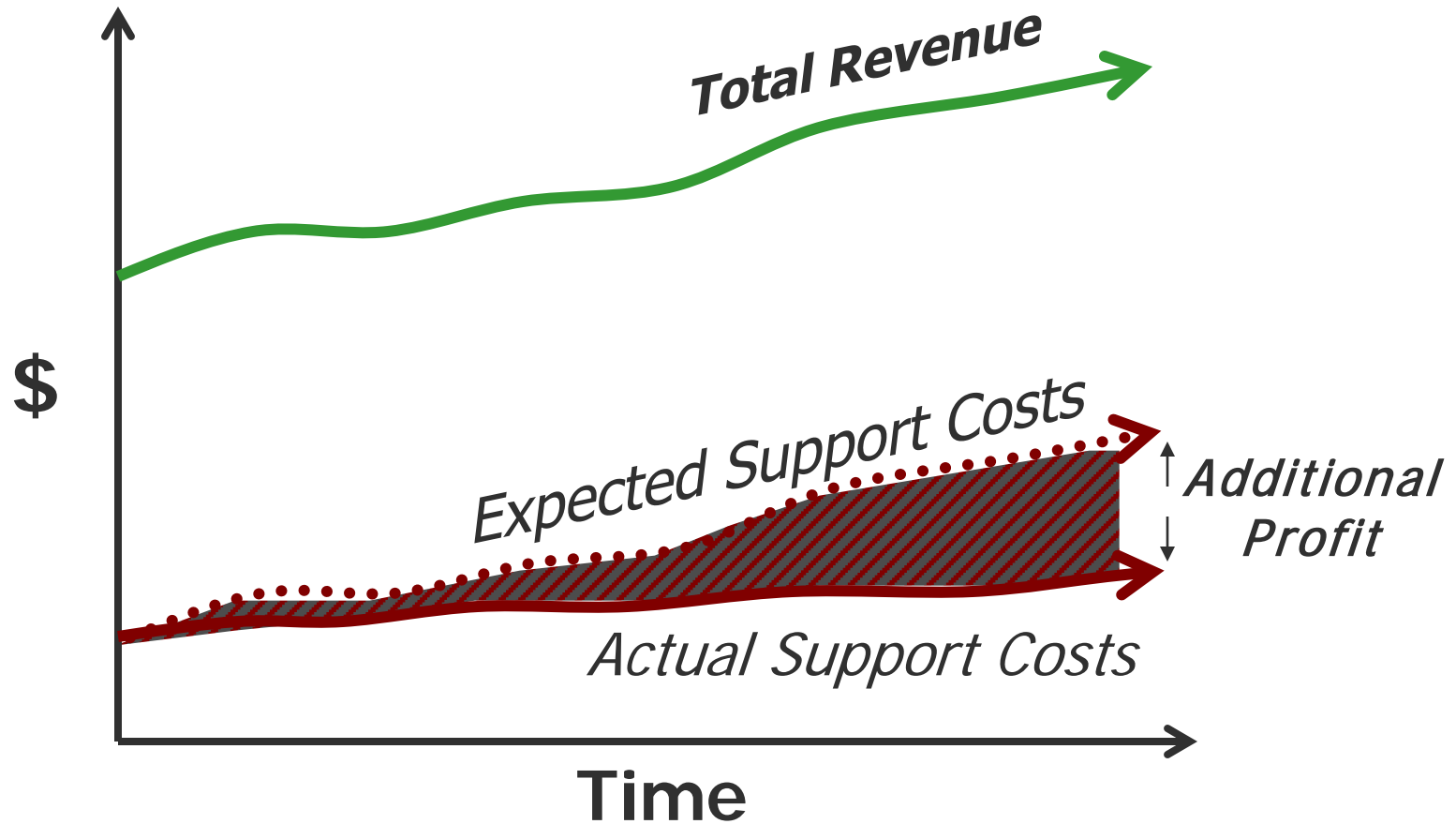
Board of Directors

- Rob Schauble – *HP*
- Ana Pinczuk - *Cisco*
- Bob Barnes – *Celgene*
- Dave Cutler – *Venify*
- Tom Brennan - *Oracle*
- Brad Smith – *Yahoo*
- Greg Oxtton – *the Consortium*

Why Should we Care about KCS?

- Dramatic operational efficiencies
 - Increase support org's capacity by 20%-100%
- Improves customer success with self-service
 - Industry avg. = 45-50%, with KCS avg. = 70-85%
- Identify high value product/service improvements
- Enables the future of support & the organization
 - Business strategy and methods to capitalize *on* *"the support network"*

Change the Ratio of Support Cost to Revenue AND improve the Customer Experience!



The Bigger Picture

A Demand Based View of Support

Customer Exceptions

Definition:

Usability

Interoperability


Defects

Installation

Configuration

New Functionality

How To...



Anything that inhibits
or prevents the user from
getting their work done.

Three “Types” of Demand

*Customer
Exceptions*

Assisted

Self-Service

Communities
and Social Media

Assisted Support

- Customers want to talk to the vendor
- Phone, chat, email, click to submit case
- Support center, support analysts respond

Customer Self-Service

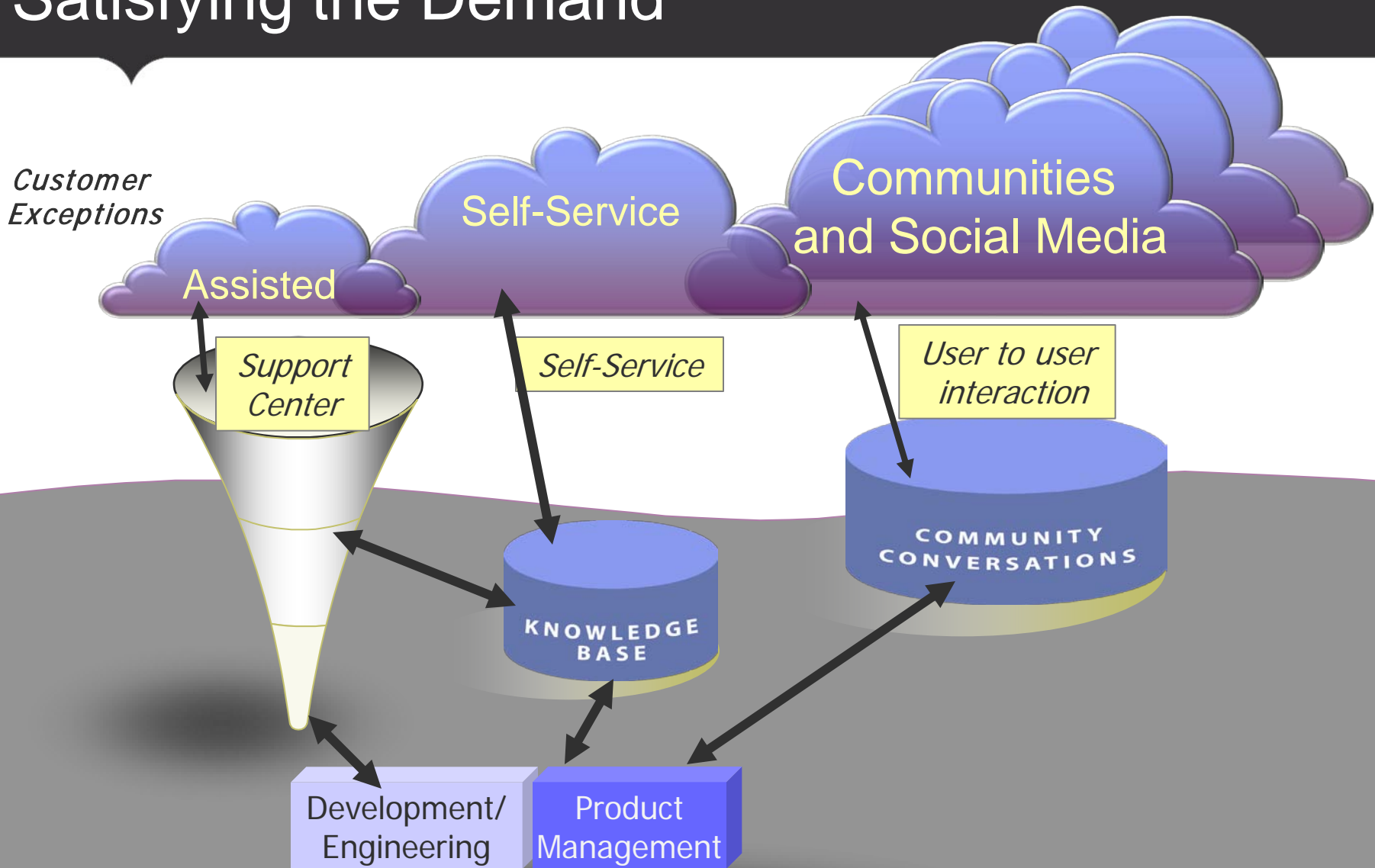
- Automated service tools
- Help integrated into the product
- Web based portal/KB

Communities, Social media

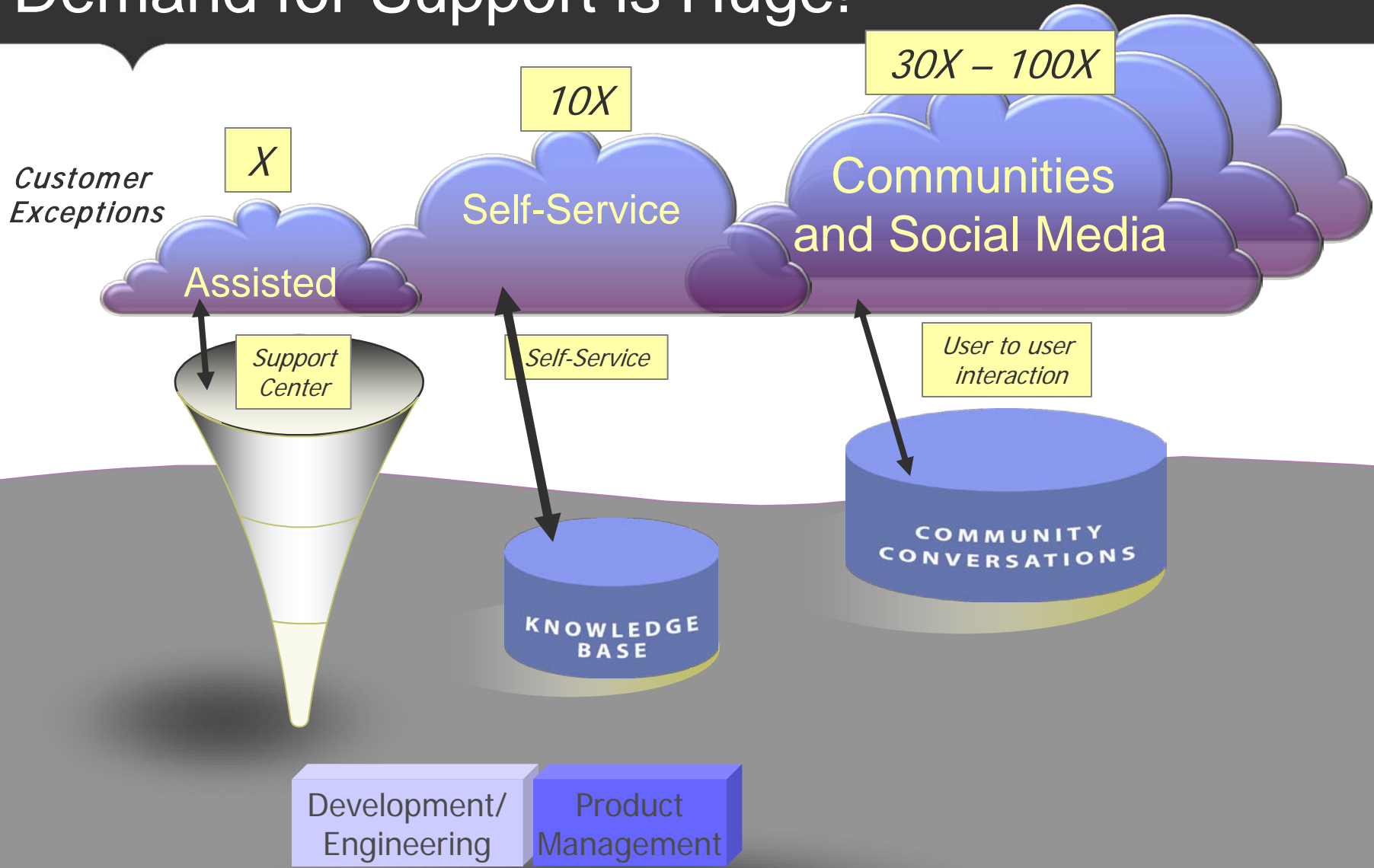
- Customers want to interact with other users
- Ask, respond, comment, rate, vote
- Online forums, ideastorms, blogs, wikis, twitter, Facebook, LinkedIn

Three different Support Paths

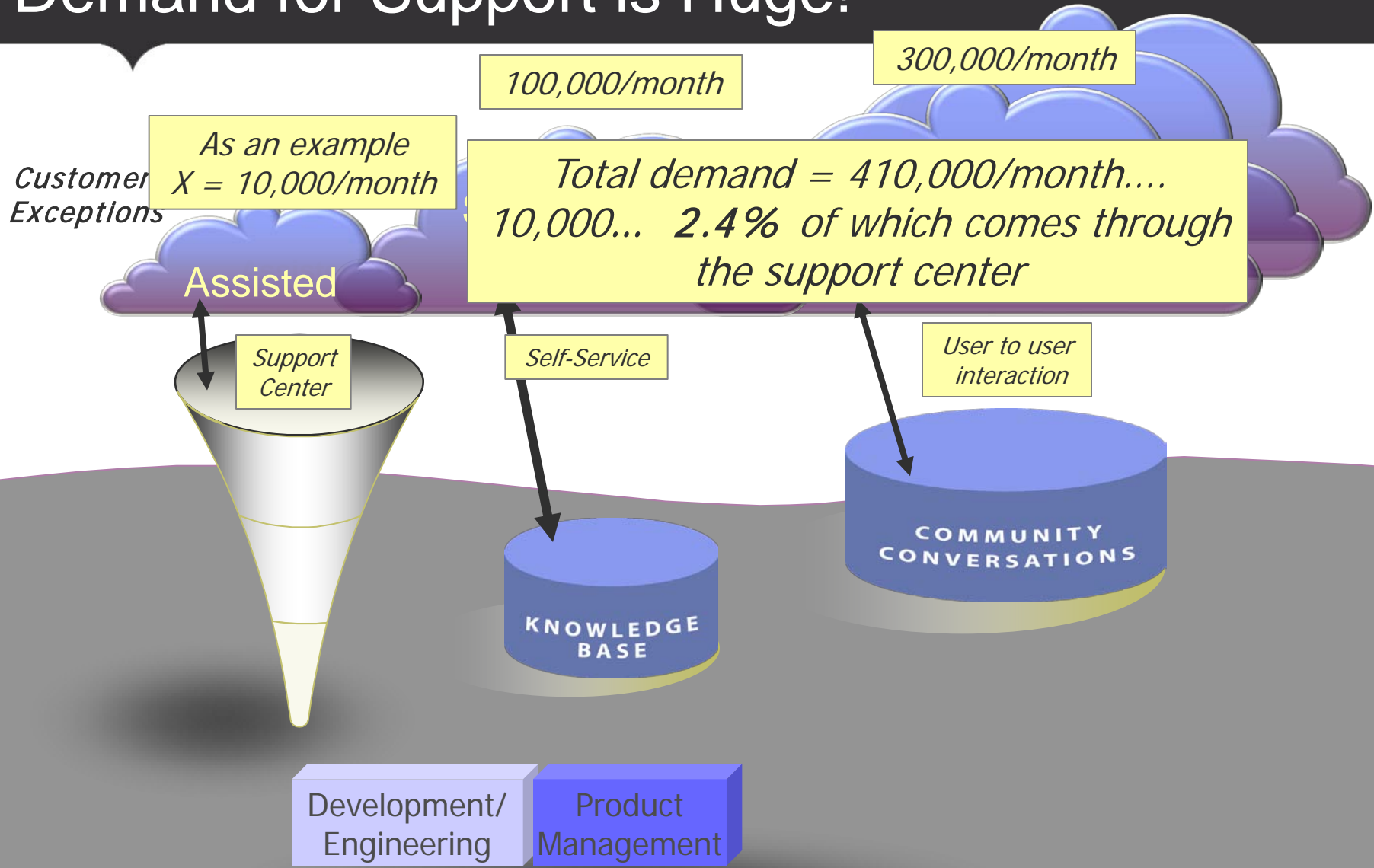
Satisfying the Demand



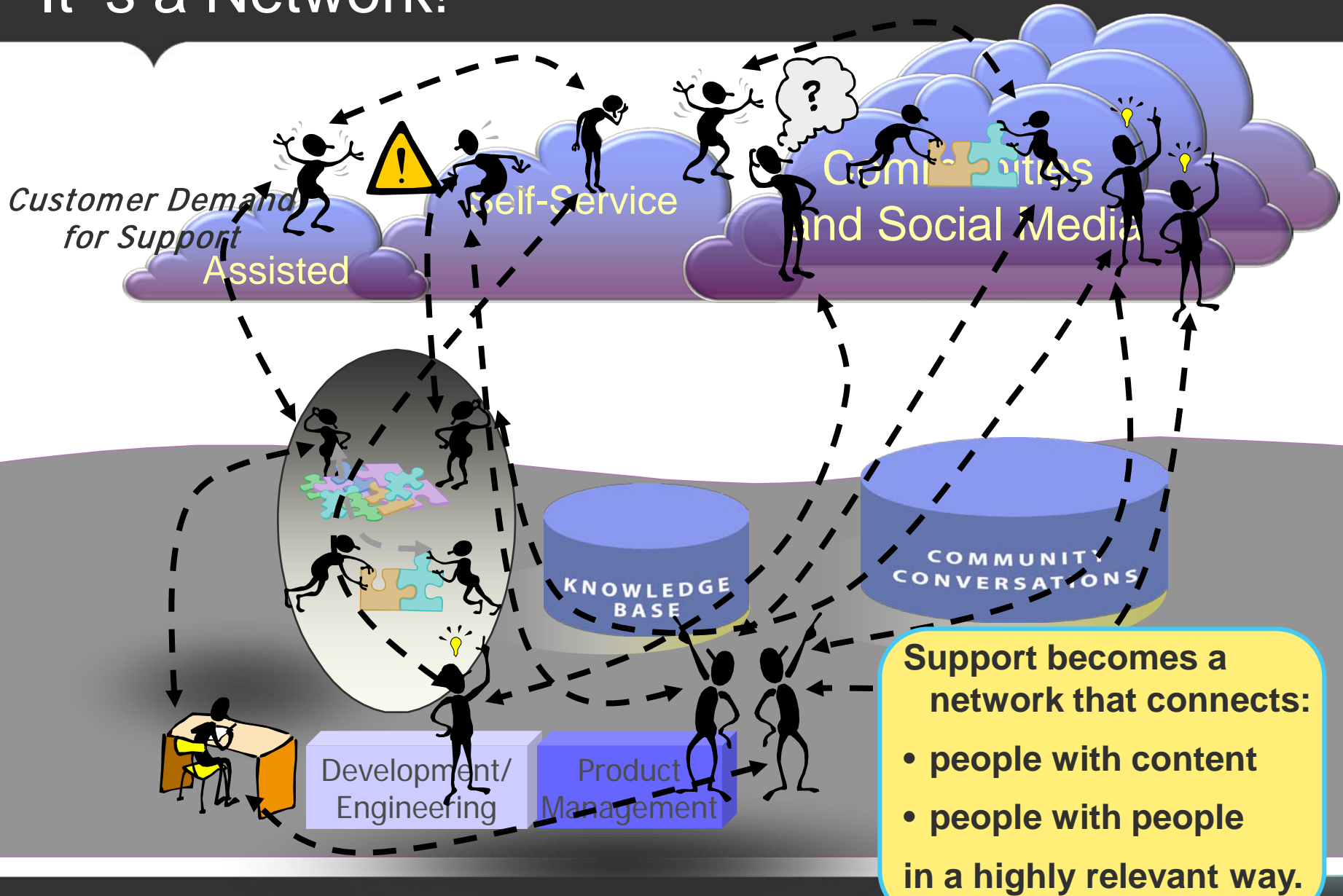
Demand for Support is Huge!



Demand for Support is Huge!



It's a Network!

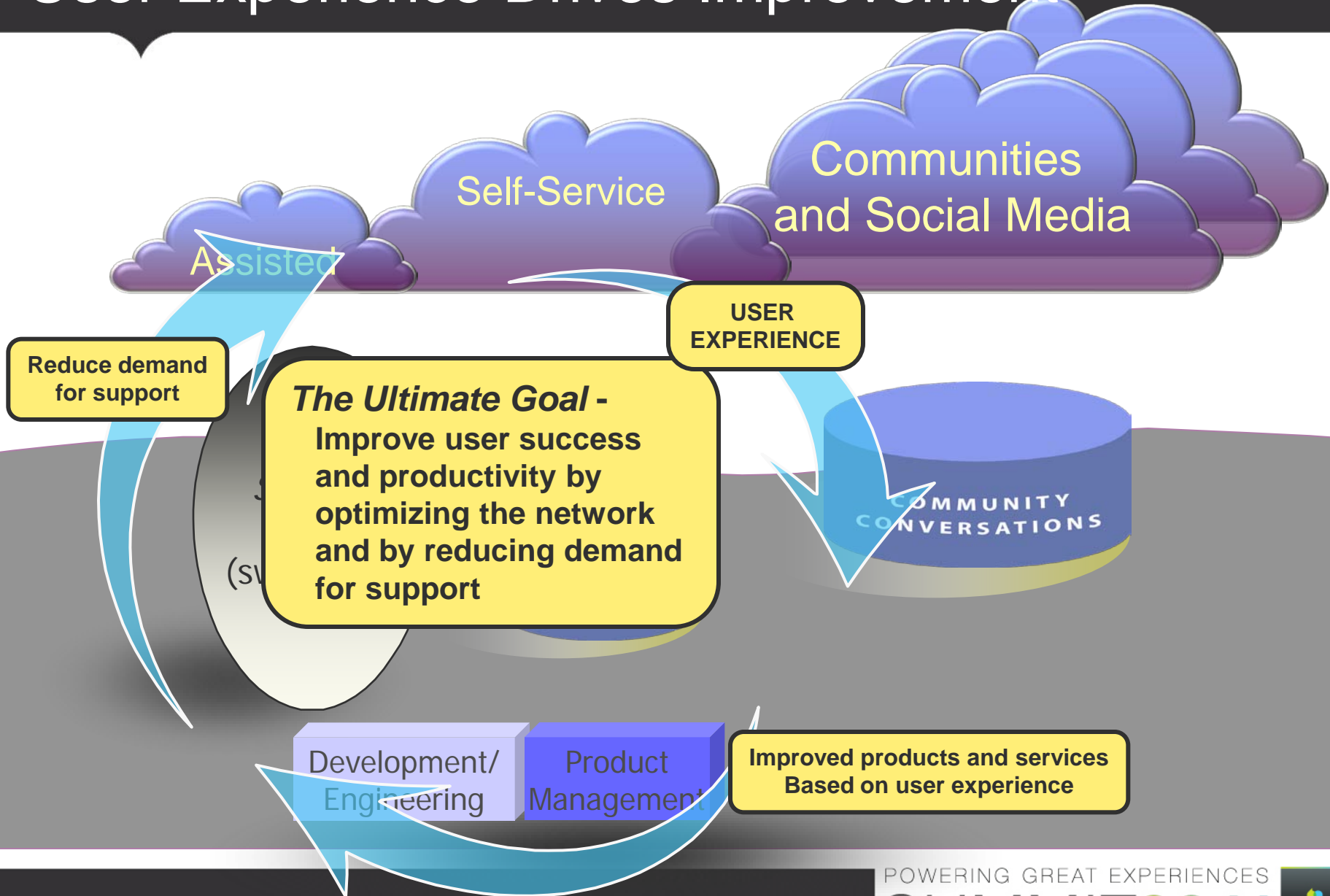


5 Tenets for Social Media and Support

The following should be considered in the context of your business

- 1. Let social support social**
 - Pay attention to the health of the network
- 2. Continuous improvement of customer success and realized value**
 - Listen, learn and improve
- 3. Get the issue into an appropriate channel for resolution**
 - Be quick to respond to issues that only you (the vendor) can resolve
 - Direct issues that are best handled in another channel to that channel (self-service, forum or assisted)
- 4. Monitor and influence the collective voice**
 - Influence programs that recognize and nurture high value contributors (like MVP, trusted partner or enthusiast designation)
- 5. Listen to and engage the individual voice - based on criteria**
 - Dependent on the “know me factor” and cross functional response capability

User Experience Drives Improvement

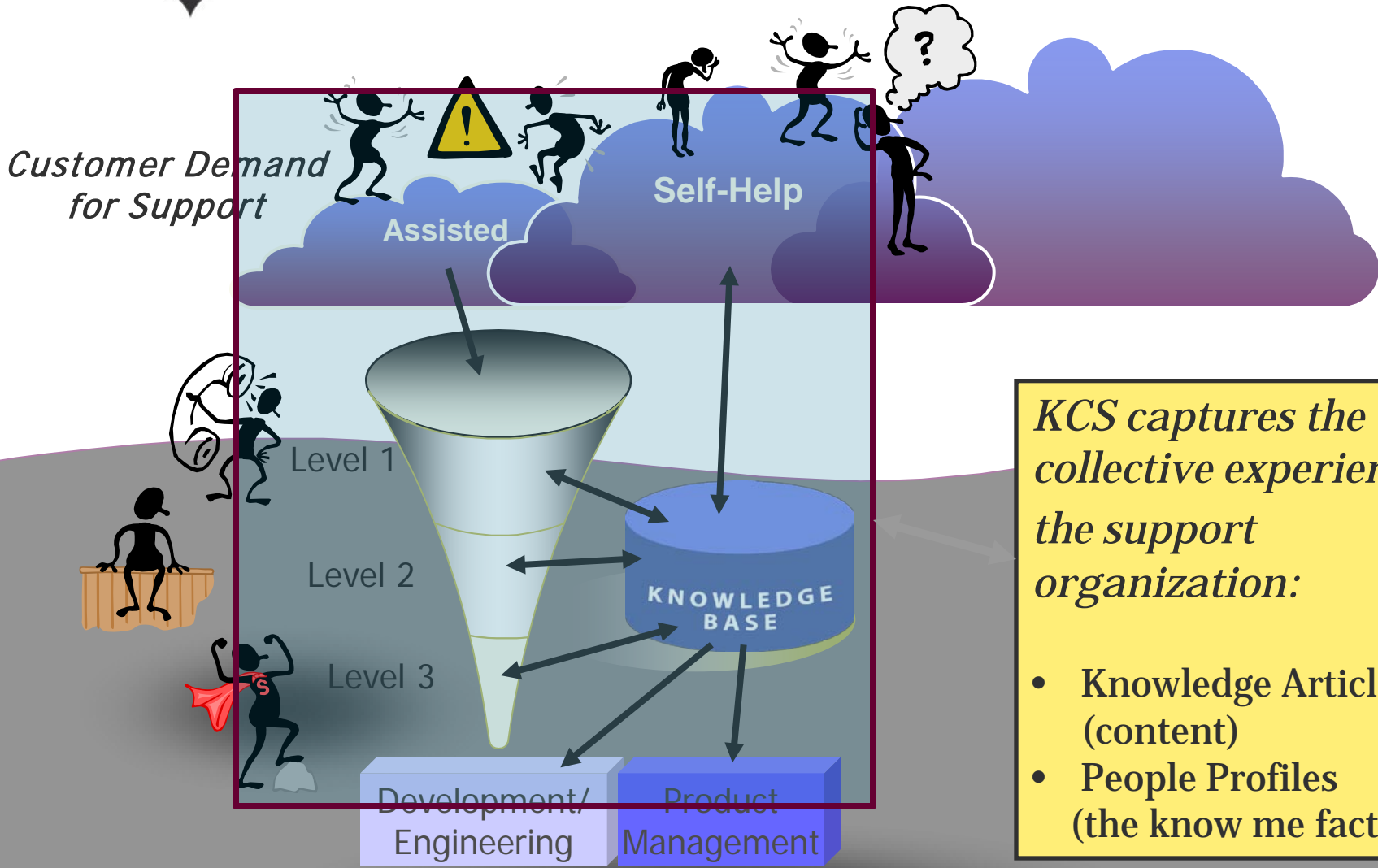


The Role of Support Changes

- Support becomes
 - Resolution experts for new, complex problems
 - Facilitators of connections (the network)
- Connect people to content
- Connect people to people
- Based on:
 - Context, Need, Legitimacy (identity and reputation)
- Knowledge is the **enabler**
 - Content (the collective experience)
 - People profiles, identity, reputation (the “know me factor”)
- Customer’s success and productivity is the **goal**
- Collaboration is the key

Support is a Network!

KCS is a Pre-requisite



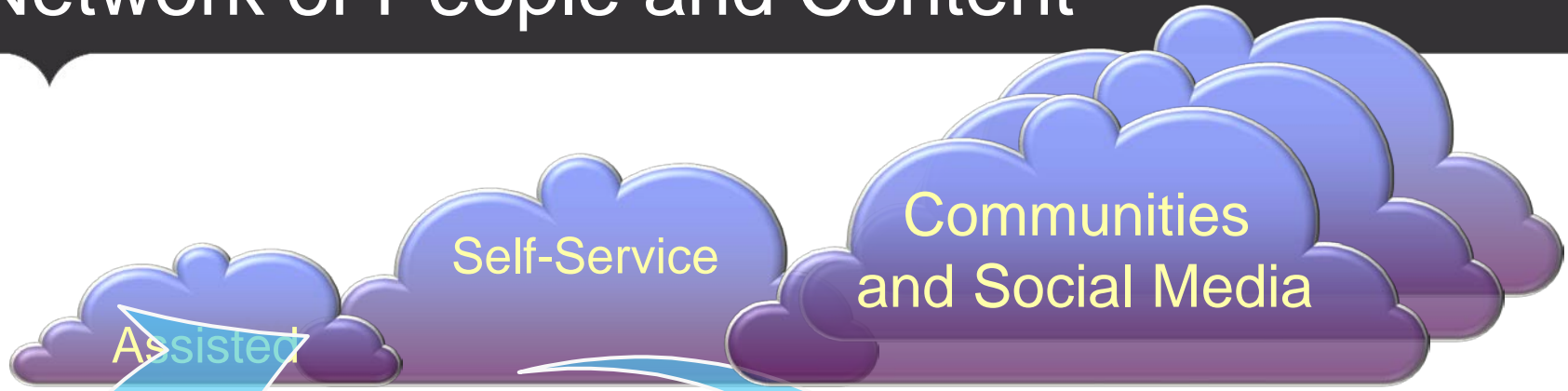
KCS captures the collective experience of the support organization:

- Knowledge Articles (content)
- People Profiles (the know me factor)

The KCS Journey... a few Key Concepts

- Content: context, completeness and timeliness
 - Integrate knowledge capture and maintenance into the problem solving process
 - Key to improving user self-service
- New vs Known: two distinct processes
 - *New*: fix it once and treat as known
 - *Known*: self-service, automate and/or remove
- Driving improvements in the customer's environment
 - Patterns, clusters and trends in the KB (customer experience)
 - Root cause identification and removal (cross functional)
- Transformational measures
 - Customer focused and cross functional

A Network of People and Content



The network view

- Optimization of the network
 - Response rates
 - % Appropriate channel used
- Health of collaboration in the network
 - Relevance
 - Reach
 - Diversity
- Loyalty of the players
- Cost/Exception solved
- Support cost as a % of total revenue
- Demand reduction – root cause removal



A Few Implications

- We cannot measure the value support creates inside of support! New measures:
 - Customer focused and cross functional
 - More complexity and harder to measure
- As work shifts from mostly **known** to mostly **new** we have to rethink how we align people to work
 - Intelligent swarming (collaboration replaces escalation)
 - Social shift – an end to the caste system within support?
- Less *managing* and more *leading*

A New Measurement System?

Assisted

Self-Service

Old Measures:

- # of Calls handled
- Time to resolve
- \$/incident
- First Contact Resolution
- Customer Satisfaction
- Employee satisfaction

New Measures:

- Total demand (exceptions)
- % by path (assisted, self-service or community)
- % use of web first
- % success on the web
- % success in the community
- % New vs known in assisted
- Time to solve known
- Time to solve new
- Time to publish
- % of product improvements identified vs accepted
- Time to cure (remove issues from the environment)
- Time to adopt
- Time to stability
- Collaboration health, health of the network
- People loyalty (customer, employee, partner)
- Cost/exception (system level)
- Support cost as % of revenue

Development/
Engineering

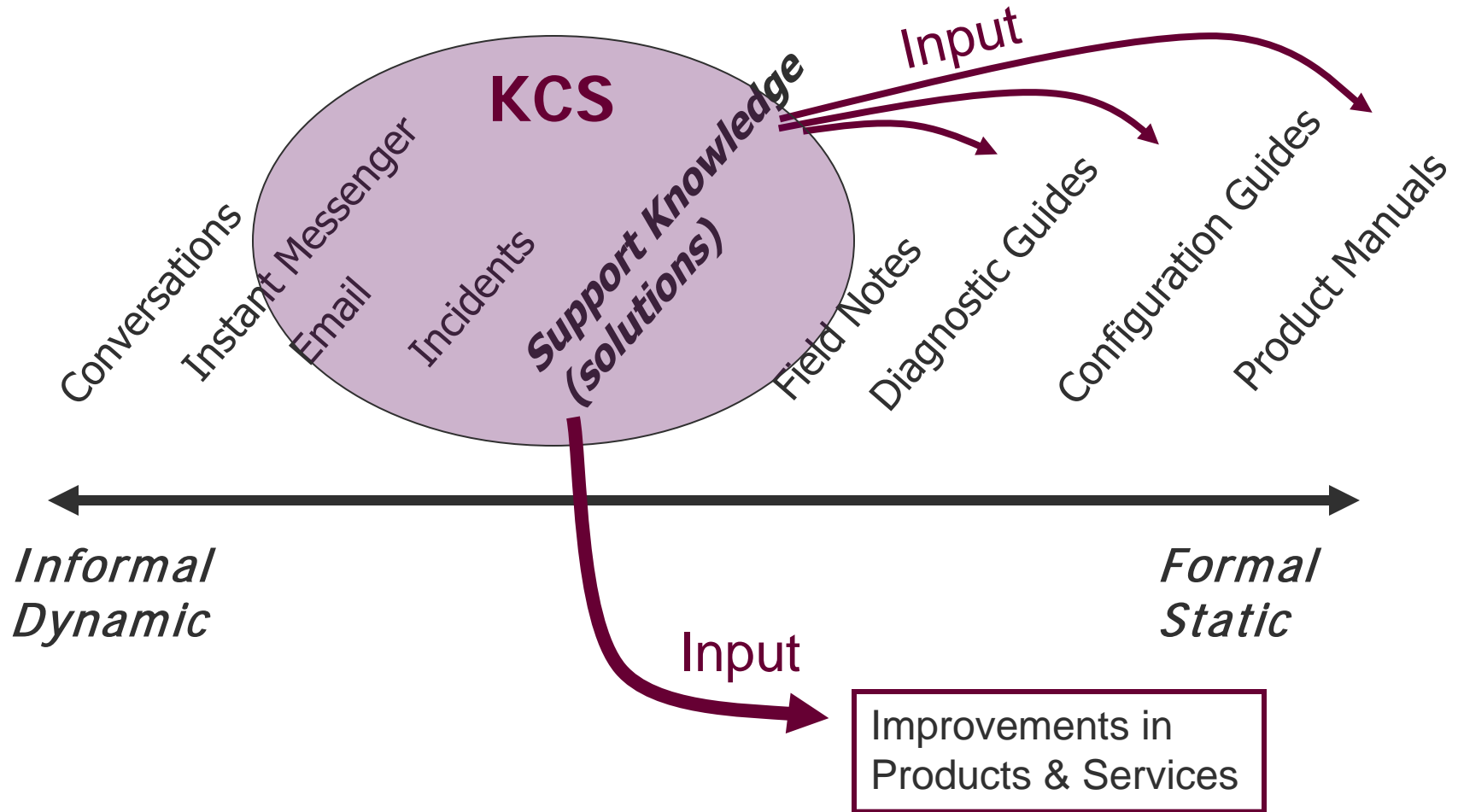
Product
Management

KNOWLEDGE
BASE

What is Knowledge-Centered Support?

- KCS is a methodology
 - It is about people (not technology)
- KCS integrates knowledge creation and maintenance into the solving process without adding time (really!)
- KCS seeks to:
 - Create JIT content as a by-product of solving issues
 - Develop a KB of our collective experience to-date
 - Evolve content based on demand and usage
 - Reward learning, collaboration, sharing and improving

Content Continuum – the Scope of KCS



Content is King!

- KCS seeks to create content that is "sufficient to solve" and is *findable* and *usable* by a specific audience
- We call the collection of information an "**Article**"
- An Article is more than just the answer or fix
 - Question/Issue/Symptoms (in the customer context)
 - Environment (products, versions, release)
 - Fix/answer (resolution)
 - Cause (optional)
 - Information/meta data
- Solutions have a life cycle,
 - They go through different states; i.e.. draft, approved, published

KCS Articles A Simple Structure

Incident/call record

- Customer called about a problem installing a NIC. Cannot get the system to recognize the NIC after reboot. Did not order the card from us, it is a 3Com NIC. Reviewed network settings and could not find anything wrong. Customer has meeting and would like a call back tomorrow am.
- Talked to Bob about NIC card problem, he is running Win 7 on a HP and he needs the latest driver for Win 7. Bob asked to leave the call open until he downloads driver.

Article

Problem:

- Install network card
- Network card not recognized

Environment:

- 3Com network card, model 300X
- Windows 7
- HP Pavilion

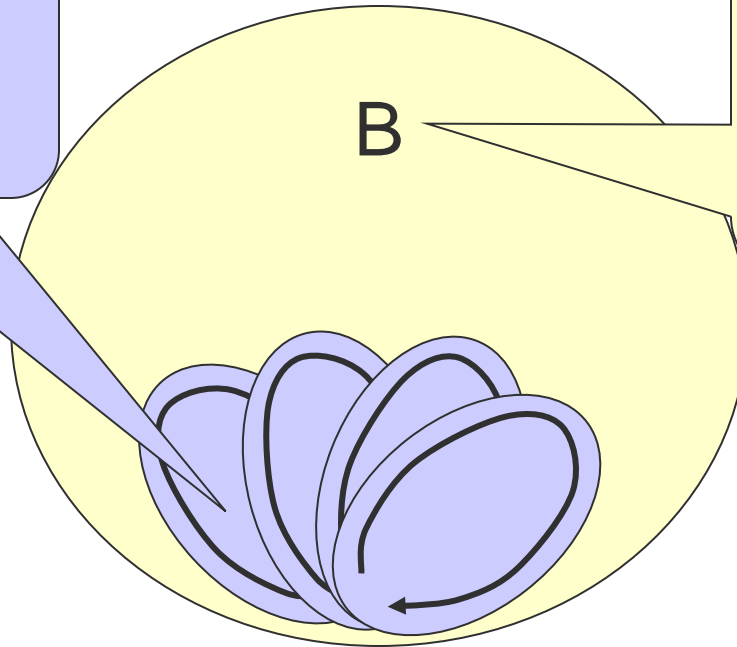
Fix:

1. Download latest driver for Network Card 300X from 3Com
www.3com.com/drvrs/NIC
2. Follow the installation instruction on the 3Com site.

Double Loop Process?

A loop:

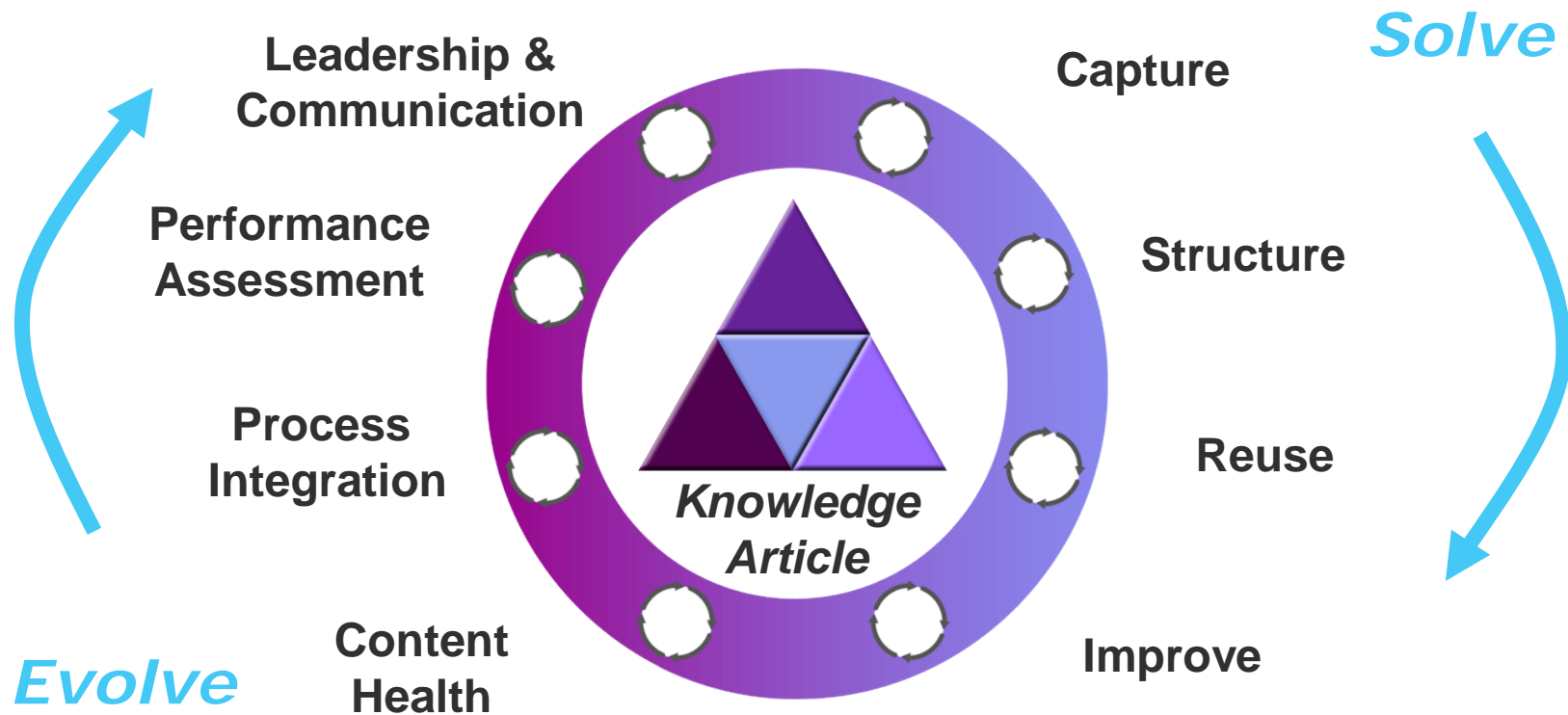
- The event level
- Solving issues
- JIT content



B loop:

- Organization level processes across many events
- High value content

KCS Practices



KCS is not something we do in addition to solving problems...

KCS becomes the way we solve problems.

The Leadership Challenge

- KCS is transformational ... it changes how we think about and manage support
 - People:
 - Motivation, roles, performance assessment, compensation, teams
 - Process: double loop
 - Measurements: who is creating value
 - Structure: an *unbounded* collaboration network
 - Knowledge: it is about people

Questions?

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You Know You Are “Doing KCS” When . . .

Initial Operational Improvements

- Support analysts integrate use of the KB 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 content with 0 incremental minutes
- % of problems handled as **known** doubles
- Average time to resolve drops by 20-100%
- Support capacity increases by 20 – 100%
- The biggest cynics become KCS advocates because they have “experienced it”
- Support Analyst morale is at an all time high
 - Turnover rate is at an all time low
 - Analysts don’t tolerate their peers messing up the KB

You Know You Are “Doing KCS” When . . .

Longer term – leverage knowledge to improve self-service

- 80-90% of customer consumable content is published to the web in minutes (90-120min)
- Customer use of and success on the web is over 80%
 - Content is timely and in the customer’s context (KCS)
 - Good portal design (choices on content access and no dead ends)
- The work shifts from mostly ***known*** to mostly ***new***
 - Perceived incident complexity in the support center increases
- Support Analyst morale is at an all time high
 - Analysts are spending a higher % of time on new, challenging issues
- Support process evolves to a non-linear, collaborative network (intelligent swarming: collaboration not escalation)

For more information the organizational benefits and measures of KCS please download the “Measurement Matters” paper