

# Knowledge Management Best Practices within Service Management: *A KCS<sup>SM</sup> Overview*



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# Knowledge Management Best Practices

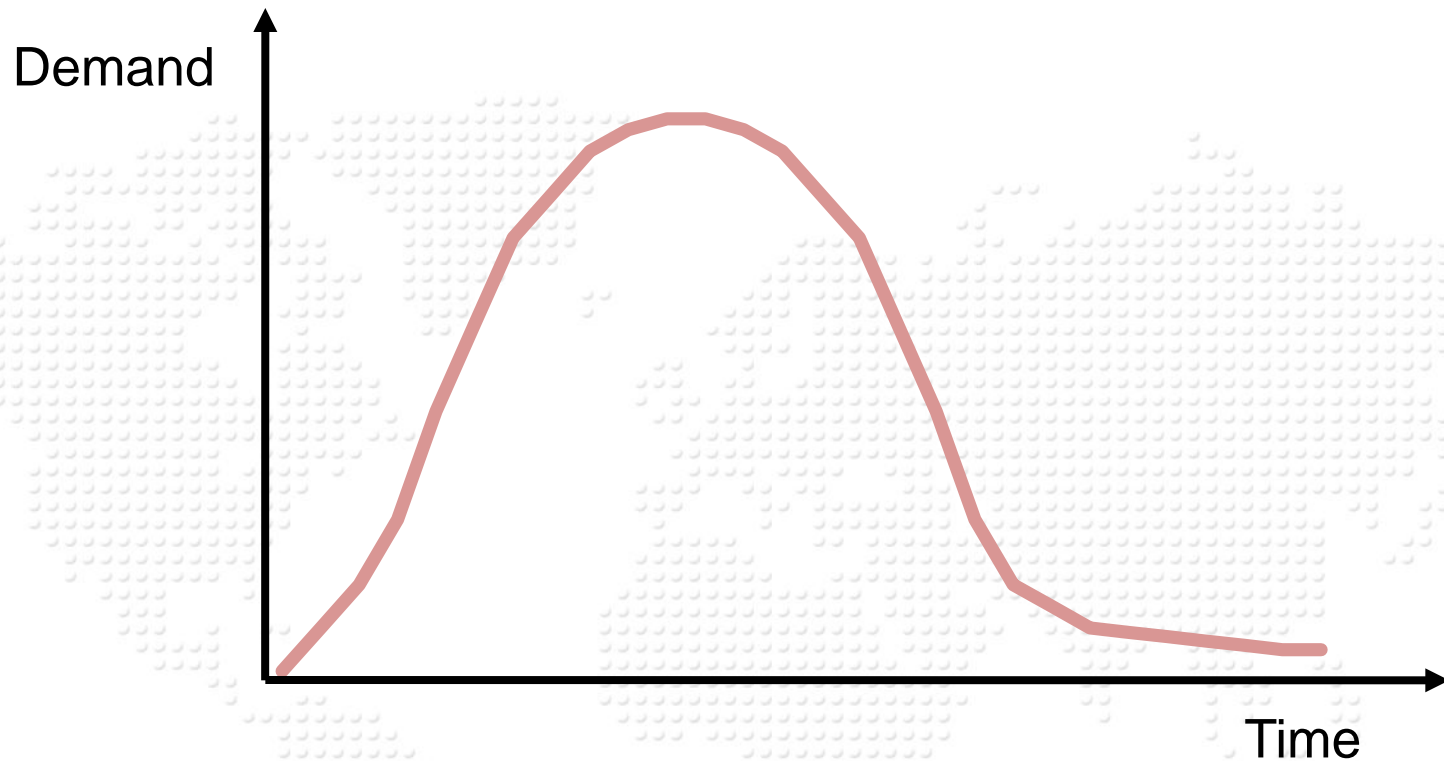
The old way:

- Dedicated knowledge management team
- Content created in preparation of demand
- Knowledge is verified, validated, and published
- Knowledge is an optional resource
- Knowledge is someone else's responsibility

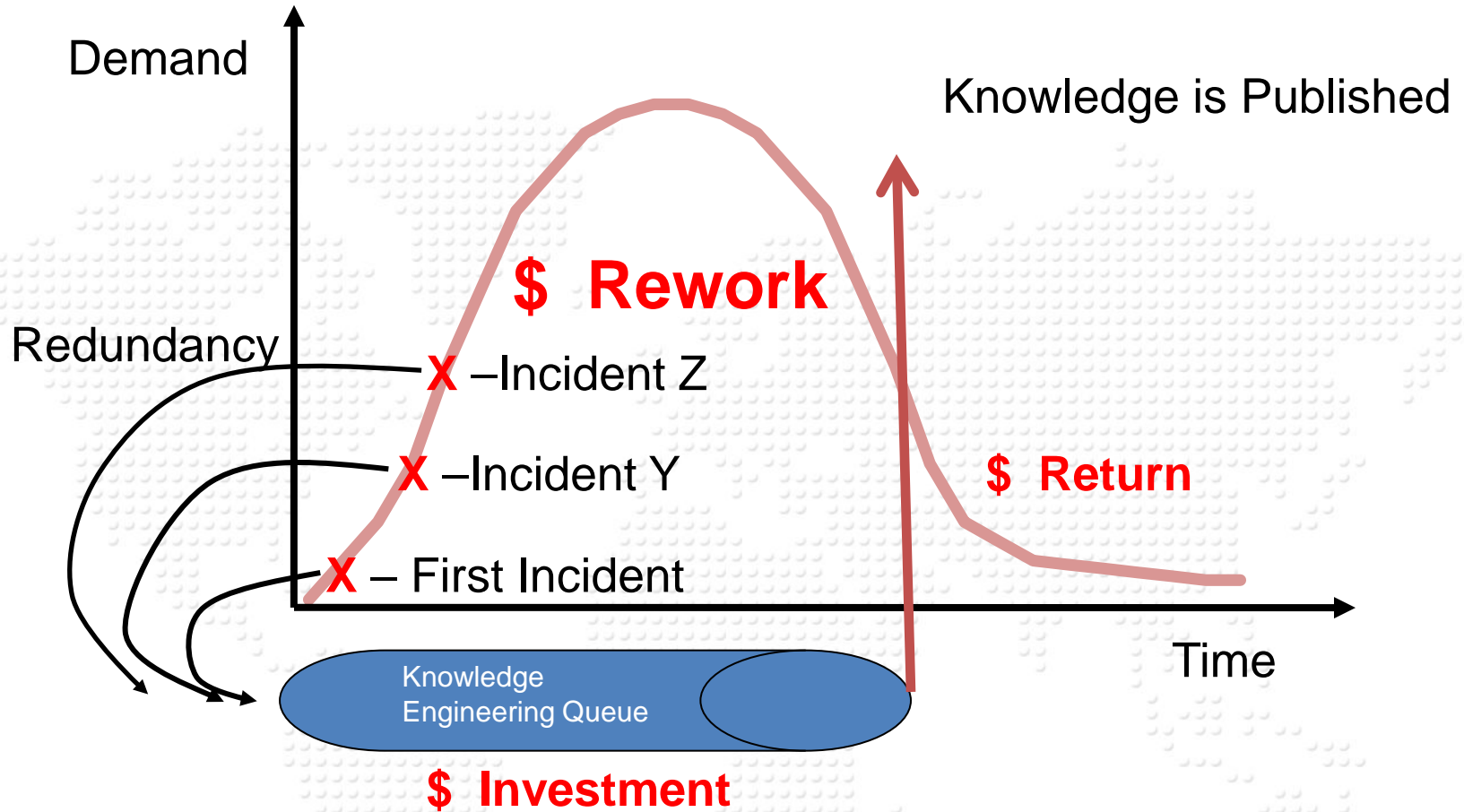
Known as Knowledge Engineering

- Follows a manufacturing process

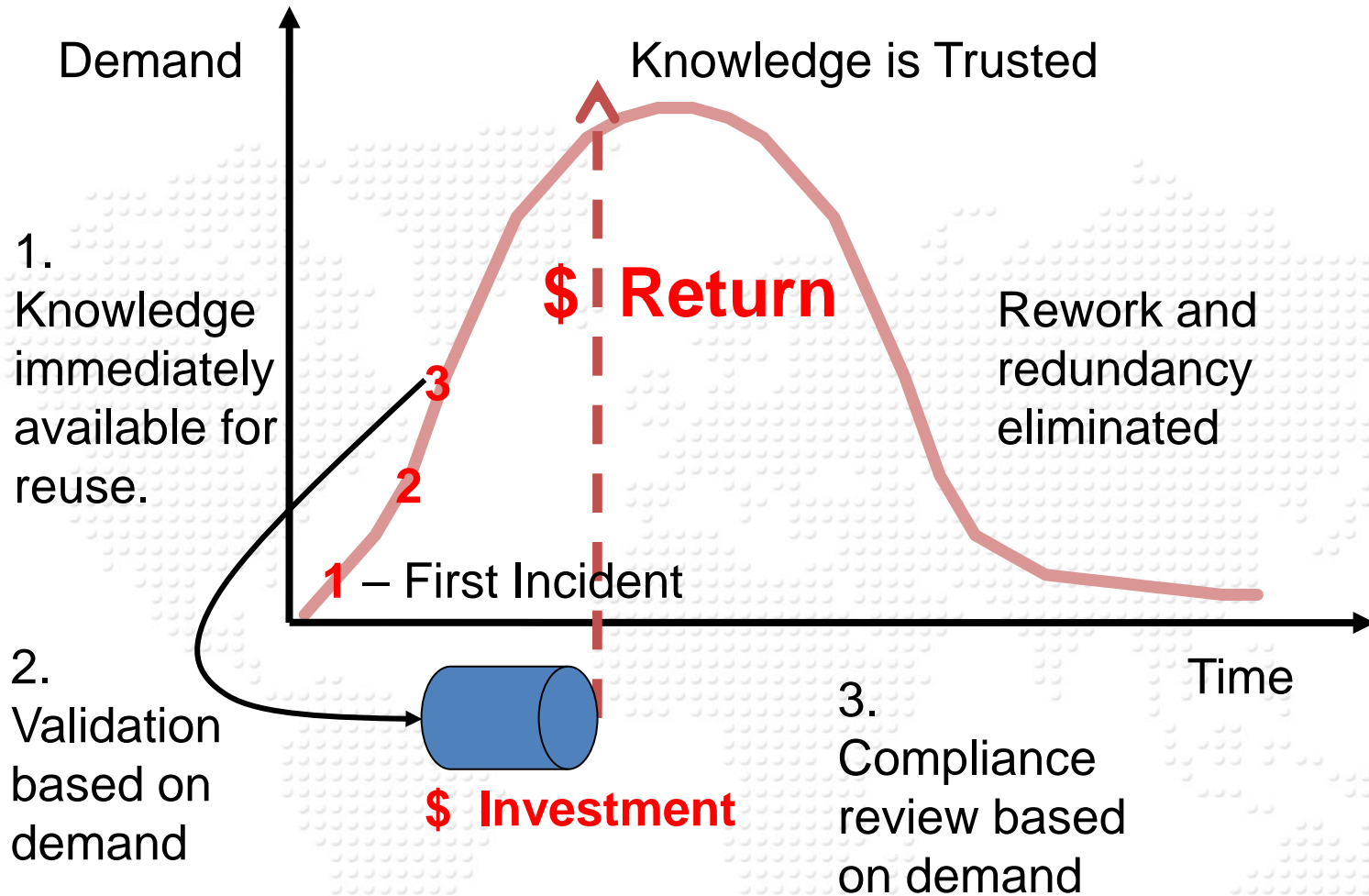
# The Support Demand Curve



# Knowledge Engineering



# Dynamic Knowledge Management



# Knowledge Management Best Practices

## The new way:

- Create content as a by-product of solving problems
- Evolve content based on demand and usage
- Develop a KB of our collective experience to-date
- Reward learning, collaboration, sharing and improving

## Known as Knowledge-Centered Support (KCS)

- Developed by the Consortium for Service Innovation
- Research began in 1992
- Promoted by HDI in 2003
- Compliments and enhances ITIL

## Simple premise:

To capture, structure, and re-use support knowledge

# The Concepts of KCS

*KCS is a methodology  
and a set of practices and processes  
that focuses on knowledge as a key asset  
of the support organization.*

KCS is not something we do  
in addition to solving problems...  
KCS becomes the way we solve problems

# Top Ten Reasons Support Centers Need KCS

10. Respond and resolve issues faster.
9. Provide answers to complex issues.
8. Provide consistent answers to customer's questions.
7. Address support analyst burnout.
6. Address the lack of time for training.
5. Answering recurring questions.
4. Identify opportunities to learn from customer's experiences.
3. Improve First Contact Resolution.
2. Enable self-service.
1. Lower support costs.



# Tangible Benefits

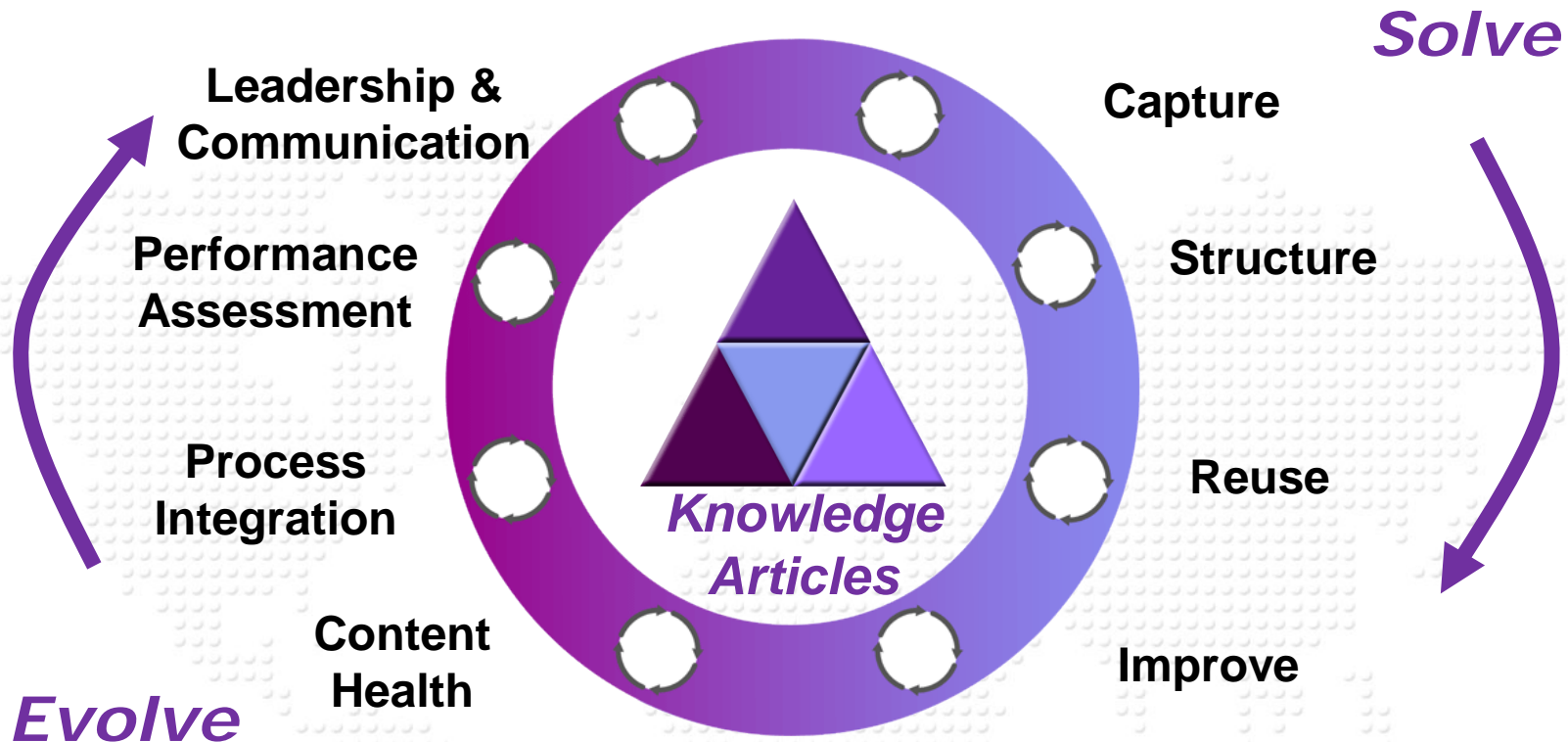
- Operational efficiency
  - Improved time to resolve **30% - 60%**
  - Increased support capacity **22% - >100%**
  - Improved time to proficiency **months to weeks**
  - Efficient creation of content to enable self-service
  - Identification/elimination of root causes
- Increased job satisfaction
  - Less redundant work
  - More confidence
  - Reduced training time
- Increased customer satisfaction

# Who Has Invested in KCS?

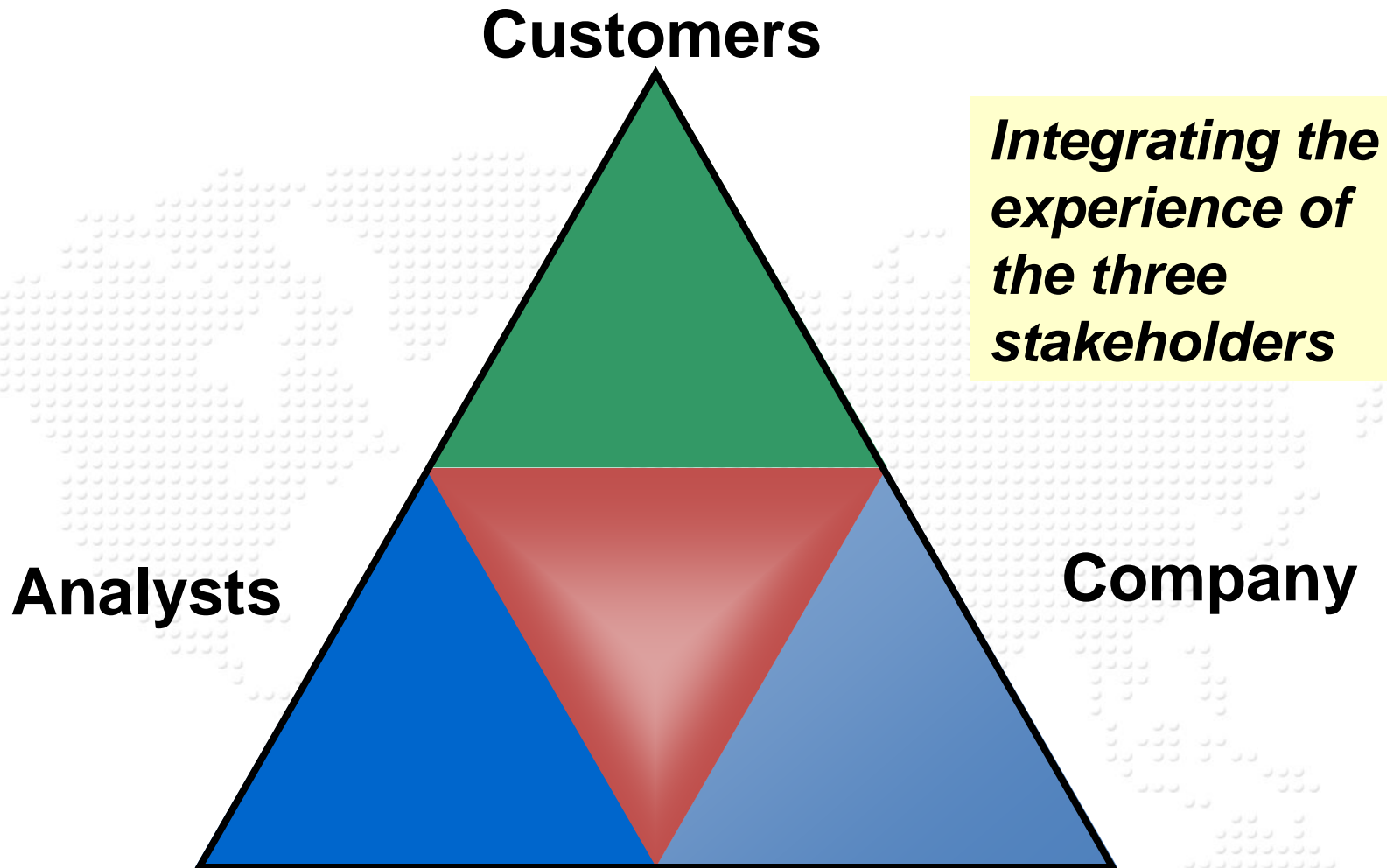
- Lucent
- Nortel Networks
- Motorola
- 3Com
- Unisys
- Peregrine Systems
- Intel
- Network App.
- BMC Software
- EMC
- Microsoft
- Novell
- QAD
- HP
- Oracle
- Legato
- Lexmark
- SGI
- Amdahl
- Attachmate
- VeriSign
- CompuCom
- ARAMARK
- Texas Instruments
- Abbot Labs
- JP Morgan Chase
- Sanofi-Aventis
- Pepsi Co.
- Bingham Young University

*Partial list*

# Knowledge Centered Support Practices



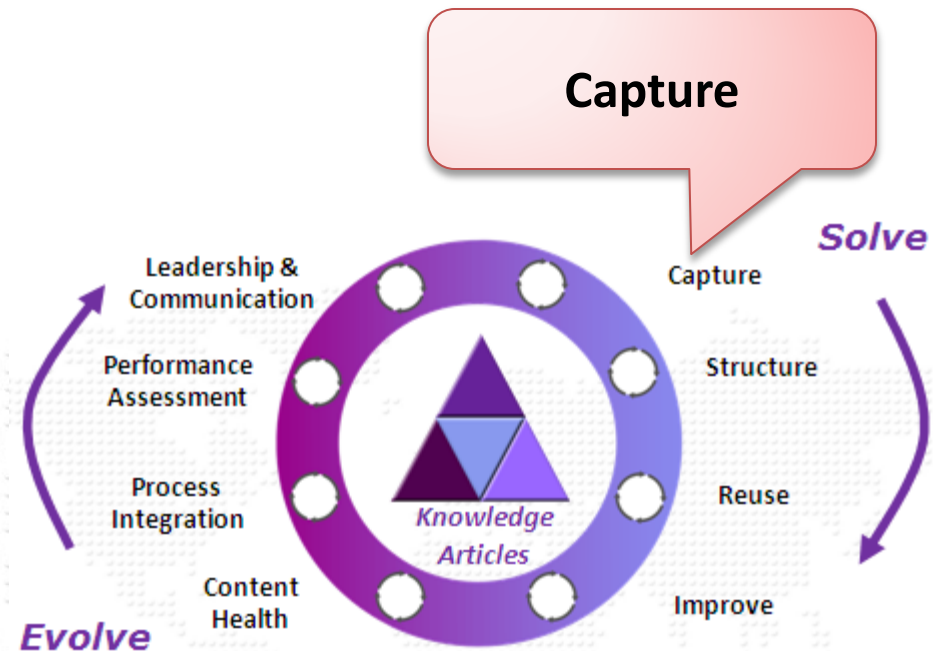
# The Knowledge Article Concept



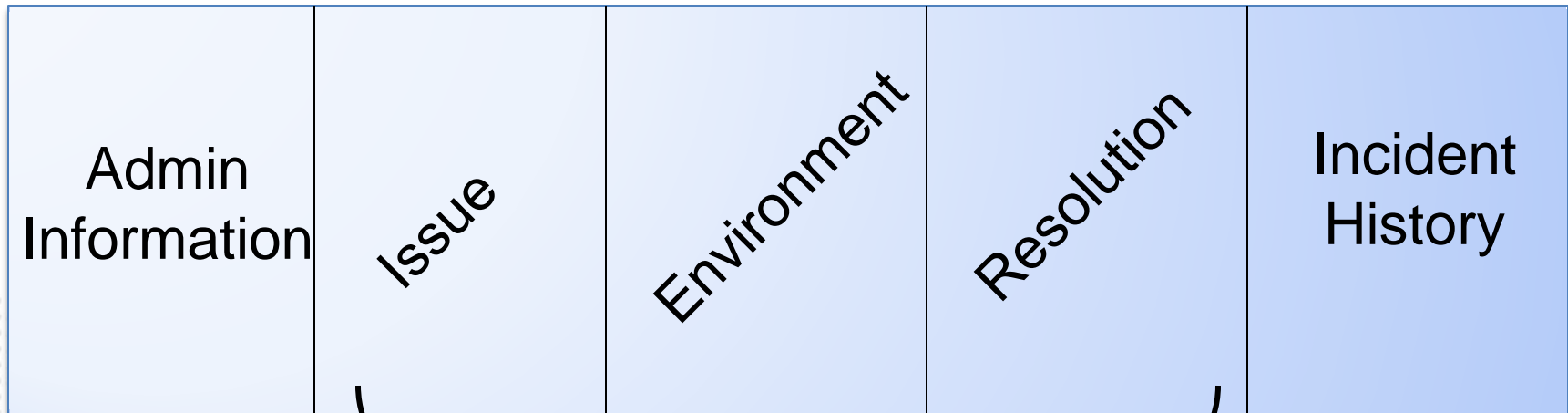
# The Solve Loop

## Capture

- In the problem solving process
- In the moment
- In the customer's context
- Information about the environment
- Relevant content
- When tacit becomes explicit
- Search the KB before you add



# An Operational View



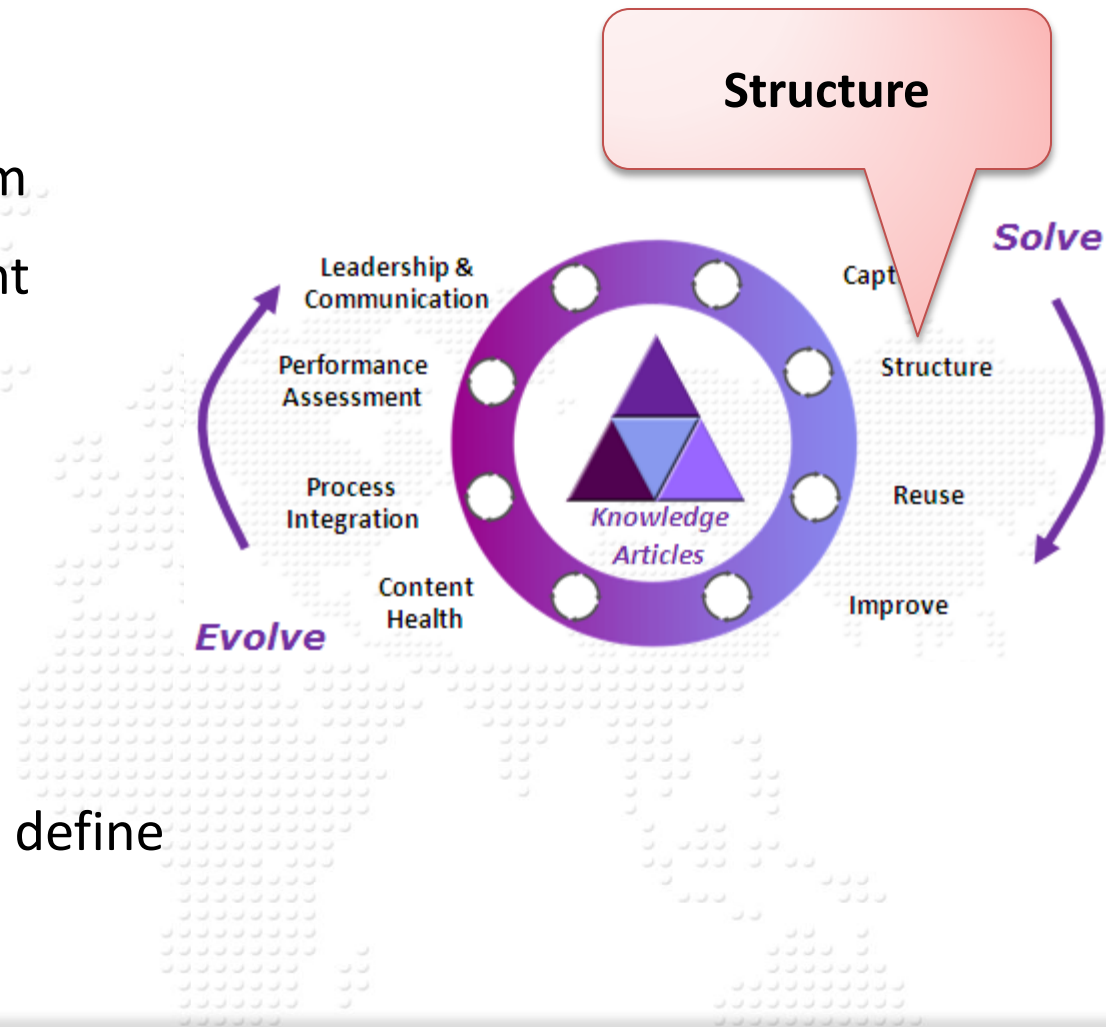
**Article** (reusable)

**Incident** (a snapshot in time)

# The Solve Loop

## Structure

- Requires a template or form
- Provides context for content
- Improves readability
- Promotes consistency
- Complete thoughts, not complete sentences
- Keep it simple
- The issue and environment define a framed article



# KCS Structure – Technical Service

## Incident

- Customer called about a problem with WIN7 and an iPhone. The iPhone will not sync. Reviewed sync settings and could not find anything wrong. Customer has meeting and would like a call back tomorrow am.
- Talked to Bob about iPhone problem, he is running Win7 on a Lenovo T41 and he needs to disable the USB power management option. Bob asked to leave the call open until he reboots and test it.

## Article

### Issue:

- Cannot sync phone

### Environment:

- iPhone
- Windows7

### Cause:

### Resolution:

1. Disable USB power management.  
[How to disable USB power management](#)
2. Reboot the PC.





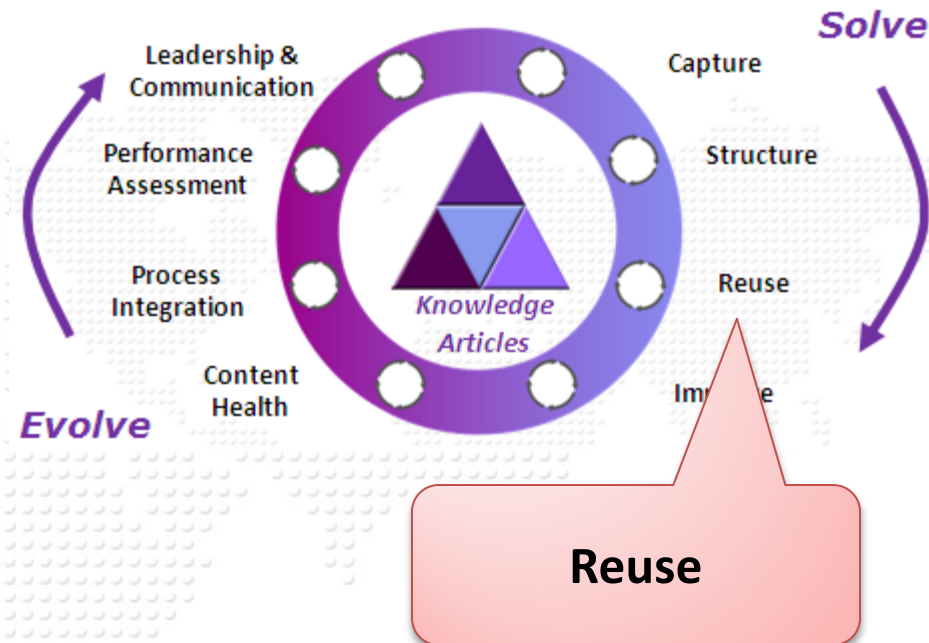
# Structured Knowledge

- **Issue**
  - Question
  - Error Message
  - Symptoms
  - Keywords
- **Environment**
  - Application
  - Hardware
- **Cause**
- **Resolution**
  - Resolution Detail
  - Links to Related Info
- **ID Number**
- **Title**
- **Abstract / Summary**
- **Meta Data**
  - Audience
  - Categorization
  - Create Date/Time
  - Modified Date/Time
  - Author / Modified By
  - Source
  - History Information

# The Solve Loop

## Reuse

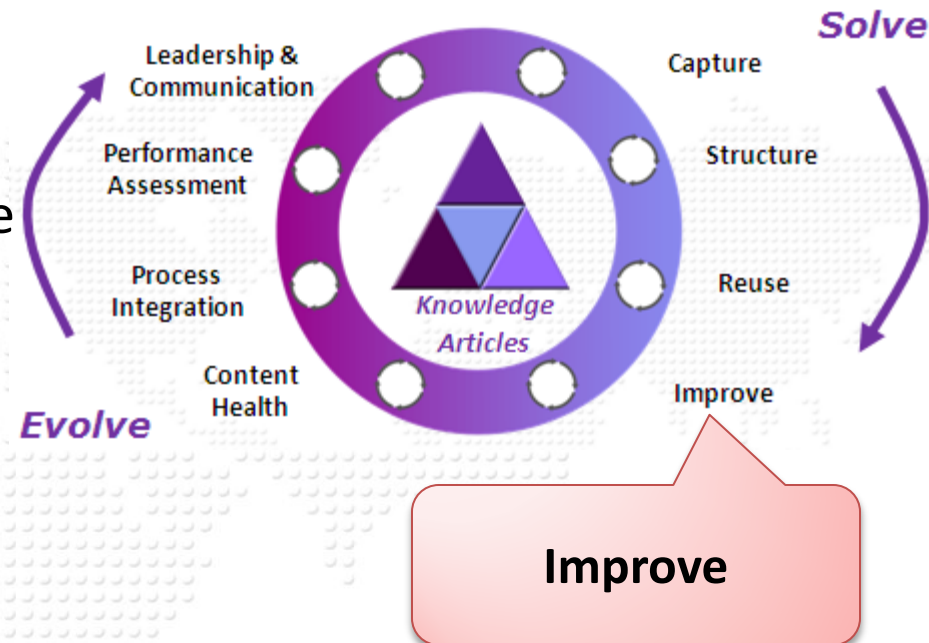
- Search early, search often
- Seek to understand what we collectively know
- Search words are candidate knowledge
- Link relevant articles to incidents



# The Solve Loop

## Improve

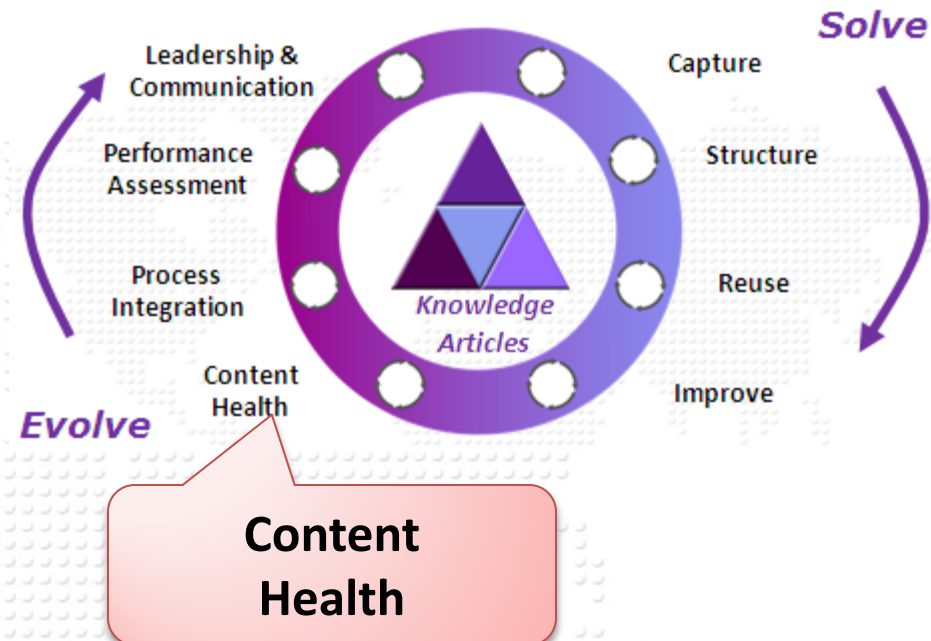
- Just-in-Time Quality
- Reuse is review
  - Demand driven article review
  - Modify articles based on usage
- Use It, Flag It or Fix It, Add It
- Licensed to Modify
- Ownership is shared
- Migrate articles to new audiences based on demand



# The Evolve Loop

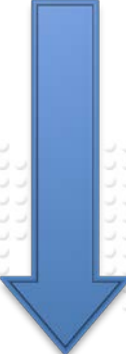
## Content Health

- KCS Article Structure
- KCS Article Lifecycle
- Content Standard  
... tailored to the organization
- Visibility Matrix
- Knowledge Monitoring




# The Knowledge Article Life Cycle

## Minimum States:

- 
- Work In Progress (WIP)
  - Draft
  - Approved
  - Published

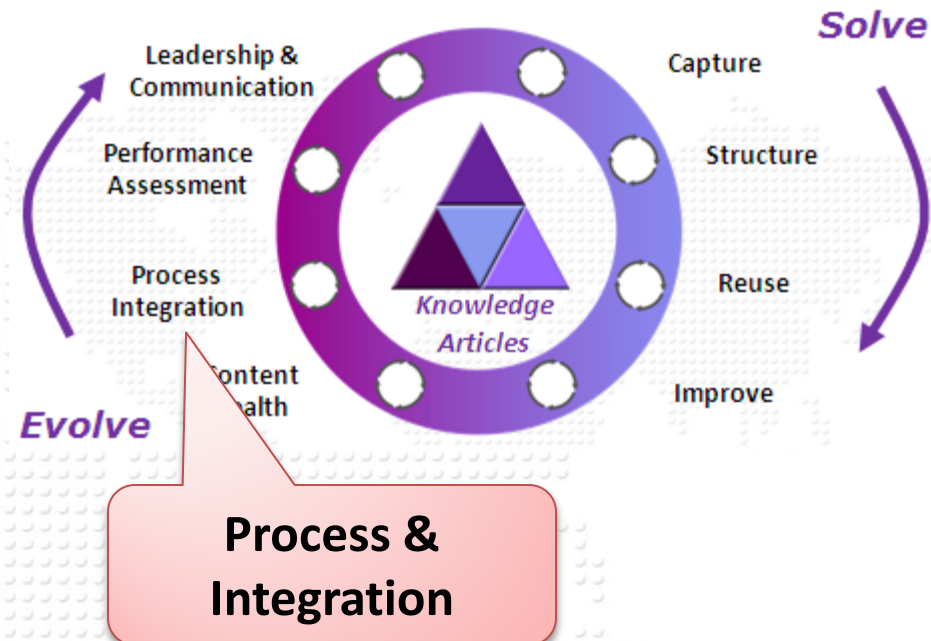
## Optional States:

- 
- Technical Review
  - Compliance
  - Rework
  - Obsolete

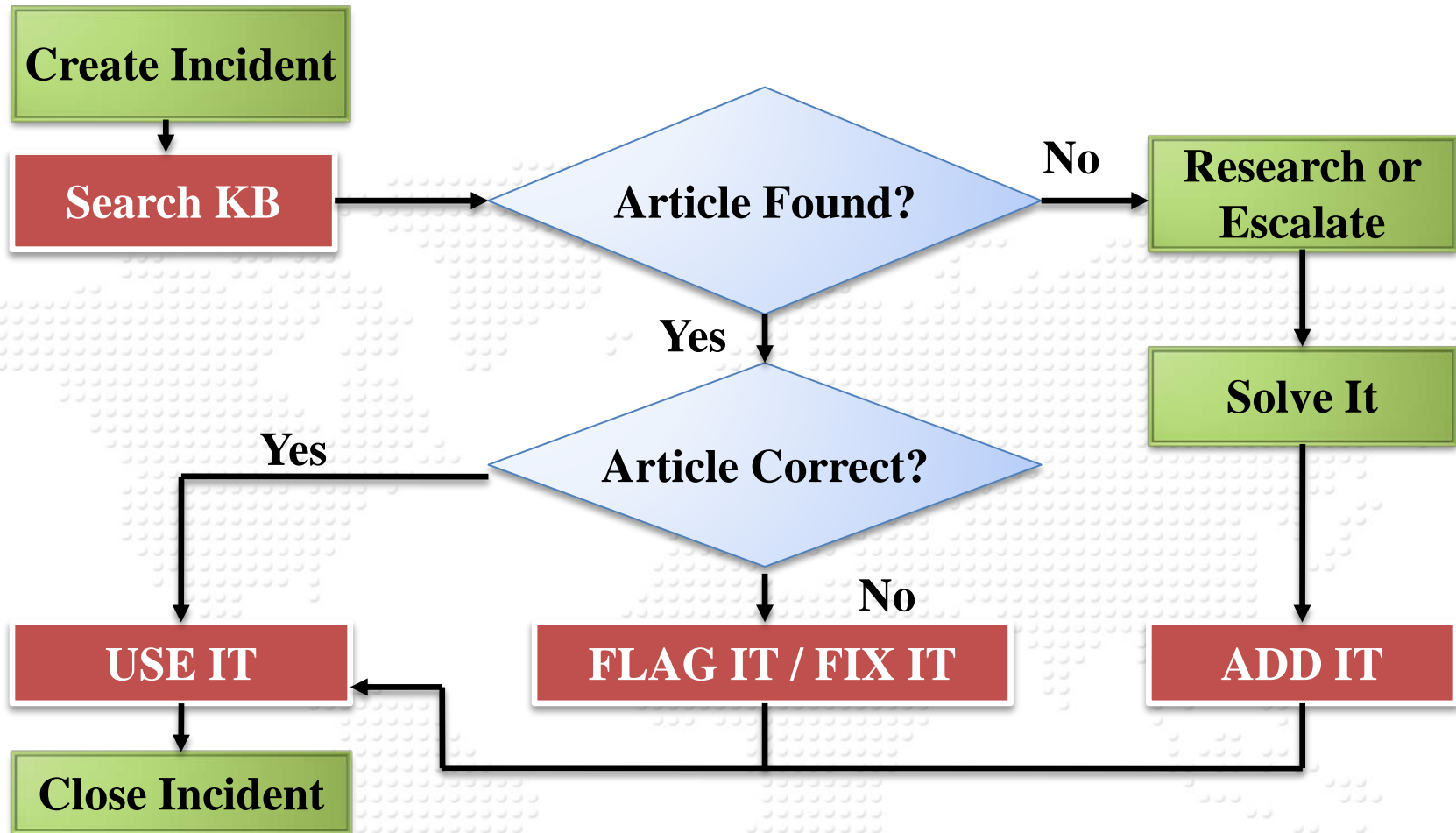
# The Evolve Loop

## Process Integration

- Structured Problem Solving (SPS)  
*seeks to understand before seeking to solve*
- Seamless Technology Integration
- Search Technology for KCS
- Closed Loop Feedback



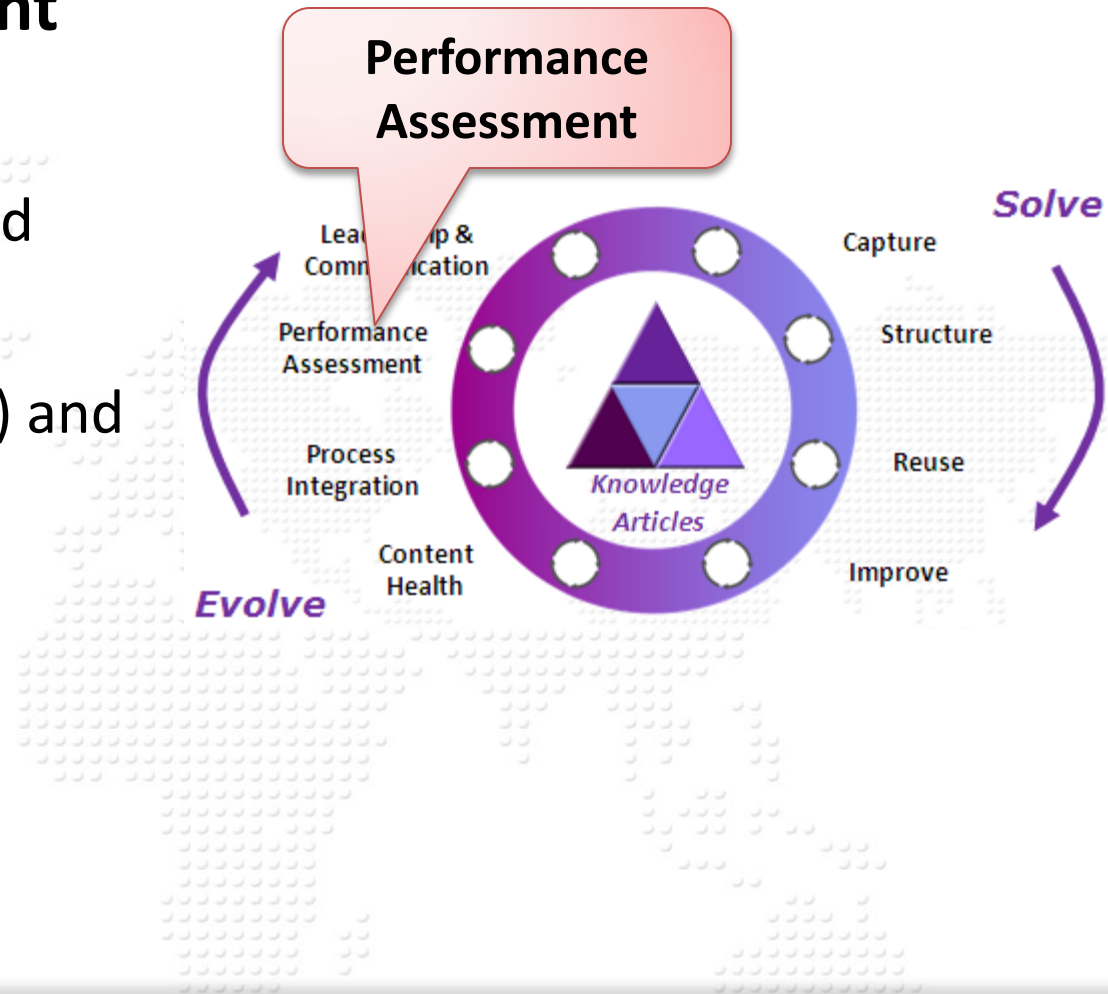
# Simple Incident Process



# The Evolve Loop

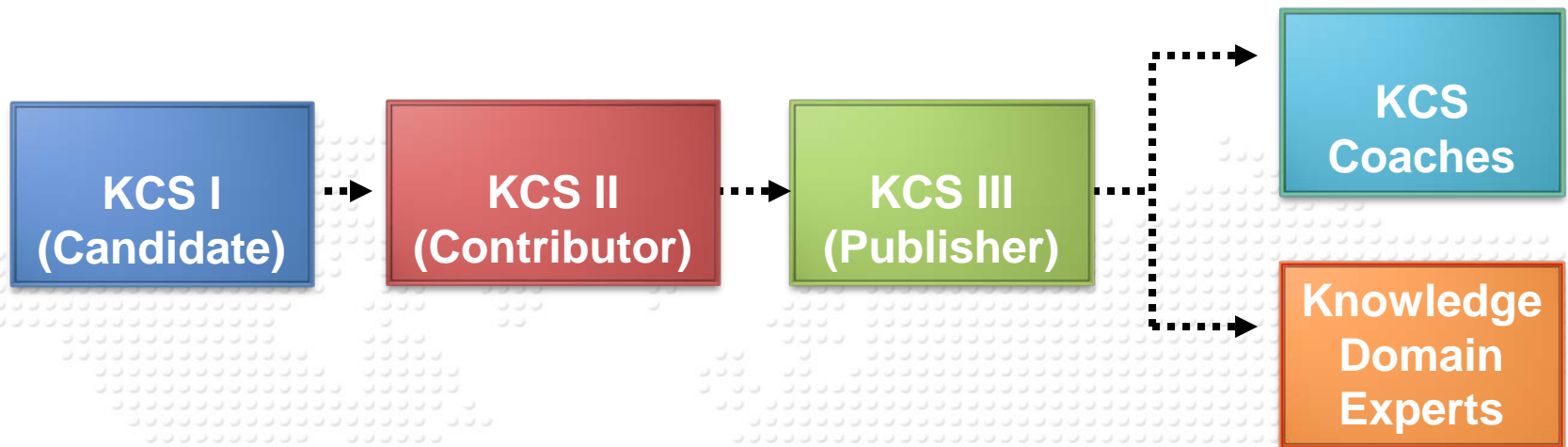
## Performance Assessment

- KCS competency model
- Integration subjective and objective metrics
- Measure lagging (results) and leading (activities)
- Team and value-creation measurements
- Feedback systems  
*A Balanced Scorecard*





# KCS Competencies



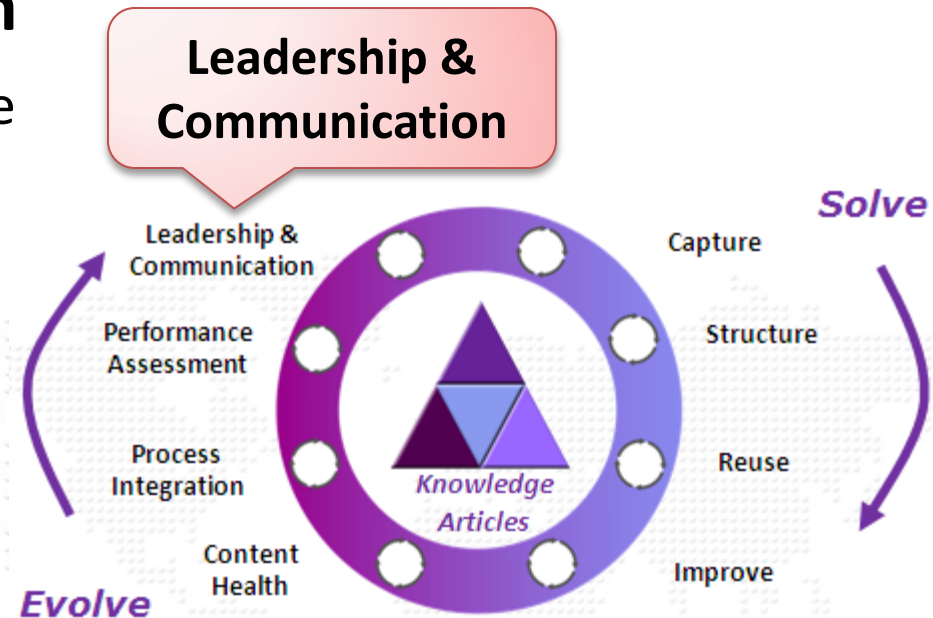
Competency defines system rights and privileges.

Some in the organization will stay,  
while others evolve.

# The Evolve Loop

## Leadership & Communication

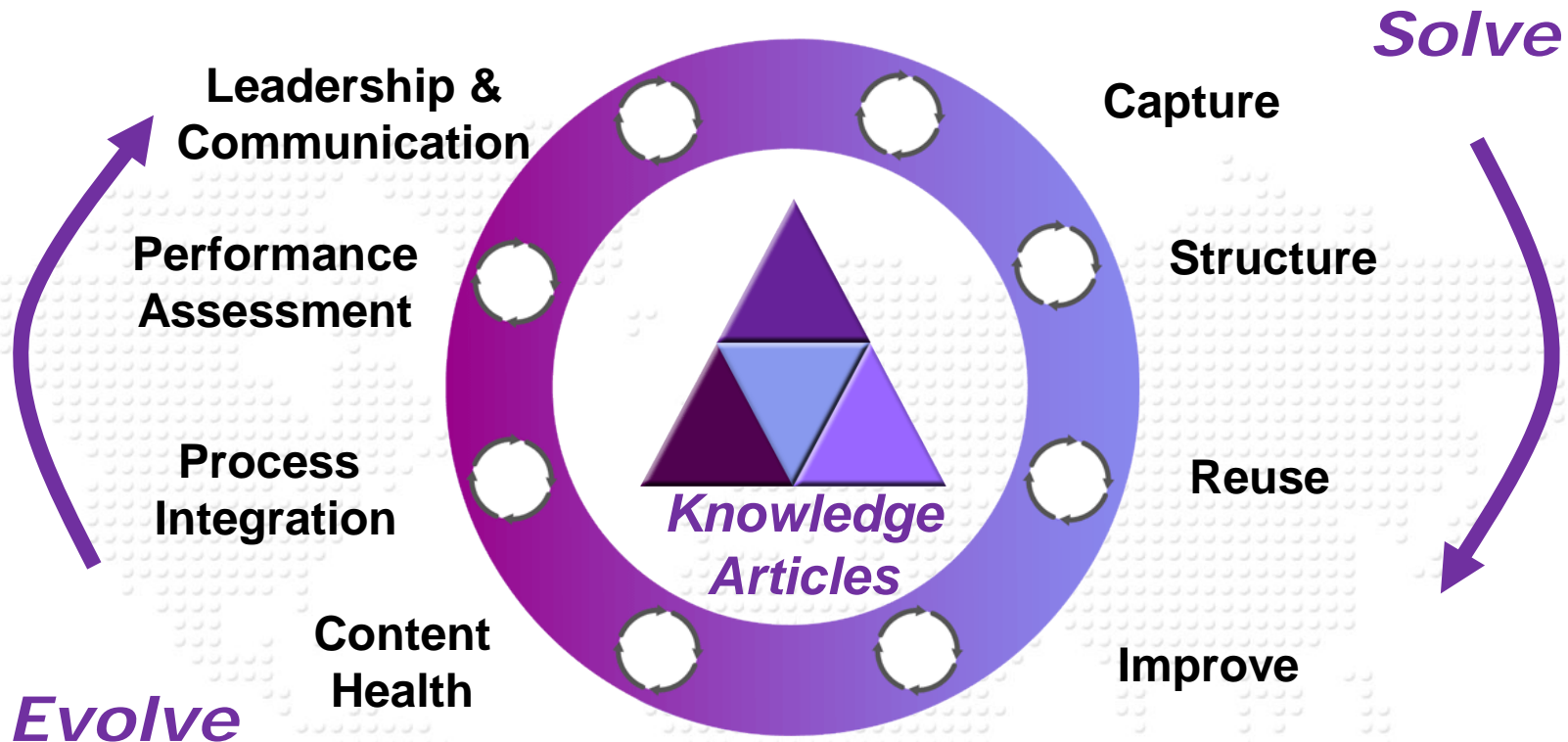
- Alignment to a compelling purpose
- Create a strategic framework
- Promote teamwork
- Tap into internal motivators
- Rewards and recognition program
- Communications is the key
- Support and encourage good performance and deal with inadequate performance
- Engage the people doing the work to figure out how best to get it done



# KCS Roles

- Sponsor – provides vision, objectives, and resources
- KCS Coordinator / Manager – coordinate and oversee
- KCS Program Team – designs the implementation
- Management – motivates and supports
- KCS Pilot Team – pilots and evangelizes
- KCS I or KCS Candidate – uses and contributes
- KCS II or KCS Contributor – uses, contributes, and enhances
- KCS III or KCS Publisher – uses, contributes, enhances, and publishes
- KCS Coach – monitors and mentors process and people
- Knowledge Domain Expert – monitors and enhances knowledge base
- KCS Council – assumes ongoing management

# The KCS Practices



# KCS and ITIL

## KCS

- Developed by the Consortium for Service Innovation, a non-profit member based organization in the United States in 1992
- Designed to improve support operations of member companies
- Contributed to by senior support practitioners from global corporations

## ITIL

- Developed by the United Kingdom's Office of Government Commerce (OCG) in the 1980's
- Intended to improve management of IT services in the UK Central Government
- Contributed to by expert IT practitioners around the world

# KCS Integrates with ITIL Process

- Incident Management
  - As well as Request, Access, and Event
- Problem Management
- Change Management
- Release & Deployment Management
- Service Level Management
  - Impact on SLAs and OLAs

## Where to learn more...

- HDI's Knowledge Management Foundations: KCS Principles workshop
- HDI's Knowledge-Centered Support Fundamentals
- HDI Webinar Archives
- HDI Focus Book: Knowledge Management Maturity Model
- [www.serviceinnovations.org](http://www.serviceinnovations.org)

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