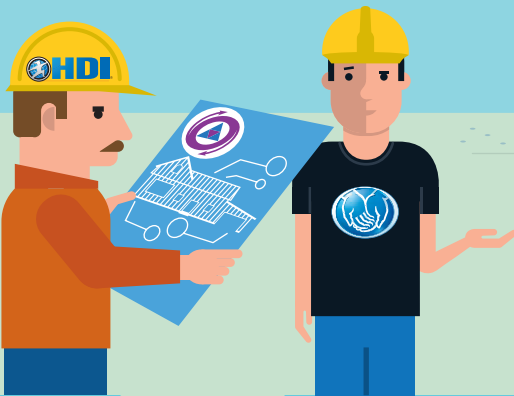**The Challenge:** With an approach that was both inefficient and labor-intensive, the Allstate Technology Support Center's (ATSC) knowledge-sharing process was in serious need of an overhaul.

The Action: The ATSC adopted a phased approach, focusing first on rolling out KCS to impacted areas, second on maturing the processes to meet the business needs, and third on using the knowledge as an enabler for other strategic projects.

CUSTOMER SATISFACTION
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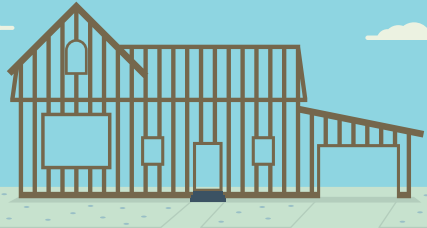
Results: By staying true to the principles of KCS in implementing a centralized knowledge base, the ATSC drastically transformed their support processes and improved the quality and efficiency of their services.

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The Allstate Corporation is the largest publicly held personal lines property and casualty insurer in America. In 2014, Allstate was included on the Fortune 500 list of largest companies in America (#92). Allstate's Technology organization has over 3,500 IT professionals utilizing over 5,000 software applications on over 50,000 PCs enterprise- wide. Its infrastructure utilizes multiple operating systems, technology platforms, and database systems.

Supporting the Allstate Corporation is the Allstate Technology Support Center (ATSC), a division within Allstate Technology and Operations comprising 648 employees and vendor partners across the globe—in the USA, Northern Ireland, and India. In 2013, the ATSC received 1.4 million contacts through phone calls, chats, and electronically submitted requests, and it exceeded the industry standards for global first call resolution and customer satisfaction

What was the situation before the launch of the knowledge management initiative?

Prior to adopting KCS best practices in 2012, the ATSC's knowledge-sharing process was in serious need of review. The key challenges for the management and staff of the organization were as follows:

1. Every issue required the documentation of a single solution, an approach that was both inefficient and labor-intensive.

2. The level of proficiency required to make useful contributions to the knowledg base required several years of experience and training, which required a significant investment in training and supervision for the Level 2 Specialists creating the knowledge documents. This strategy placed an extraordinary amount of power n the hands of just a few individuals.

3. An additional limitation of our existing knowledge base was the fact that the knowledge documents didn't contain input from either the customer or the call handler. Lacking input from the interdependent groups at different levels of the organization, as well as customers themselves, documents became outdated quickly, and there was no way for those using the articles to update them.

4. The ATSC had difficulty capturing and structuring knowledge documents in the customer's own terms, and there was no way to trend usage, so the ATSC had no insight into which documents were the most useful to the organization.

5. As the content standards became more elaborate and complex, even the Level 2 Specialists who had created the documentation began to abandon the knowledge base. Between 2002 and 2012, the ATSC created over 20,000 articles, most of which hadn't been updated in over a year.

6. Due to the unworkability of the knowledge base system, Level 1 Generalists relied on undocumented workarounds, building a repository of "social knowledge" that was not vetted, recorded, or approved by upper levels of support.

7. Complicating the situation further was the fact that the ATSC's support volume was being handled by hundreds of employees and vendors in multiple locations around the world, but there was no centralized repository for their collective knowledge.

The ATSC recognized the need for a more inclusive and collaborative approach to knowledge management, one that would leverage Level 1 Generalists, Level 2 Specialists, and relevant external groups to create a purposeful knowledge base.

What was the knowledge management strategy?

While it was clear the Knowledge-Centered Support (KCS) methodology would help to address some of the key problem areas within the ATSC, it was also evident that KCS would have significant benefits for the organization. This knowledge compelled us to completely redefine our strategy, taking a more holistic approach to the initiative. In determining what needed to be improved, we defined the key activities for the program as follows:
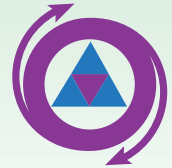
- **Define the relevant roles** and structure for supporting the KCS methodology.
- **Establish the baseline** for measuring the success of the KCS strategy.
- **Establish the relevant metrics** and reports for ensuring KCS is impacting the business across all roles and functional areas.
- **Ensure that all key resources**, KCS roles, and managers are trained, understand, teach, and collectively employ the KCS philosophy.
- **Pilot the usage** of the roles and KCS measures on a subset of teams within the agency and enterprise contact types.
- **Update the performance** management system to ensure adequate accountability is maintained.
- **Define a recognition strategy** to ensure that good practice is rewarded.
- **Rollout the KCS methodology** across all sites and teams.
- **Define the long-term strategy** and targets for improvement using KCS.
- **Build the relevant tools**, structure, and processes that enable self-service with the adoption of the KCS methodology.

The overarching objective was to ultimately change the culture of the organization to be more proactive in solving customer problems, reducing the contact volumes, and improving the quality of the systems we supported.

Which processes and tools had to be implemented, modified, or leveraged to support the knowledge management strategy?

Due to the overall scope of the project, the ATSC adopted a phased approach, focusing first on rolling out KCS to impacted areas, second on maturing the processes to meet the business needs and third on using the knowledge as an enabler for other strategic projects.

Phase 1 – Adoption: Phase 1 covered activities such as the provision of training and the creation of the metrics, reports, processes, and roles and responsibilities.
Phase 2 – Proficiency: This phase was primarily concerned with establishing a culture of continuous delivery improvement using KCS.
Phase 3 – Leverage the Knowledge Base: The key priorities for this phase are to utilize the benefits from the knowledge as an enabler for other strategic initiatives, including problem management, emerging trends and self-service.

The ATSC implemented ServiceNow as its enterprise ITSM tool in January 2013. In the year after implementation, we seamlessly integrated the tool's incident and knowledge management capabilities, which created several efficiency gains: robust reporting for trend analysis,

populating known information into incidents from knowledge articles, and creating articles with information from the incident.

What organizational changes (cultural, structural, or political) had to be implemented or modified to support the knowledge management strategy?

In order to make sure that the adoption of KCS was successful, it was necessary to significantly change the organizational structure within the ATSC to ensure that the support infrastructure was built into the organization. This required the creation of a number of new roles and responsibilities at all levels to support the KCS framework.

In defining the changes to the organization, it was necessary to determine a structure that ensured all parts of the business were successfully supported. We wanted to build a structure that provided strong support across the various call types and geographic locations. The main challenge in determining the structure was getting the relevant people in place to support the adoption while adhering to the principles of role progression. In order to mitigate any risk associated with this, we identified candidates who were best suited to fill the roles at the time, while acknowledging that changes were likely to be necessary as we matured.
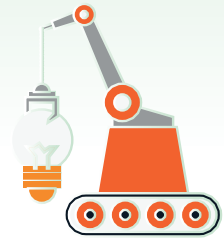
How did your organization define success for this initiative?

Success for the adoption of KCS was determined by the ability to provide a high-quality and efficient service while ensuring that the teams were fully engaged with the vision. The critical success factors for the adoption of KCS were as follows:

- **Commitment:** Commitment from all levels was critical to success. Due to the breadth of the organization, it was essential to rally the support of multiple groups both internal and external to the ATSC and across the geographically dispersed teams. Commitment from the ATSC senior management was never in question, as the senior leaders fully understood the urgent need for change. The challenge was to ensure the commitment of the frontline teams by enabling them to see the benefits that KCS could bring.
- **Measurement and Reporting:** One of the keys to the success of the initiative was the implementation of an effective metrics strategy, focusing on good analysis, better decision making, and improved visibility.
- **Building the Support Organization:** It was essential to put the relevant roles in place to support the deployment and maturity of KCS across the organization. In developing these roles, we considered such factors as attrition levels, channels of support, and sourcing strategies. The overall objective was to ensure the correct ratio of KCS roles across the business units and geographic locations.
- **Performance and Recognition Systems:** Another key success factor was the ability to create greater levels of accountability and appropriately recognize and empower the people. KCS helped to empower the teams by showing them the value they brought to the business and helping them identify opportunities for improvement.
- **Enabler for Self-Service:** As we adapt to an ever-changing environment, we are constantly looking at opportunities to provide more effective and efficient service. Therefore, a key success measurement of our KCS initiative was the degree to which it enabled areas like self-service, emerging trends, and problem management.

What were some of the lessons learned?

A number of stakeholders were involved throughout the initial onboarding of KCS. We reached out to the original program team to seek their feedback on the lessons learned throughout our KCS journey.

What do you believe is critical to the success of KCS?

- **Teresa Anderson:** The success of KCS relies on adhering to the KCS framework and not trying to twist the processes as you think they should be. The success also depends on engagement of all levels in the ATSC.
- **Mary Corrigan:** Communication and recognition—and lots of it!
- **David Waid:** Changing the culture from tiered support and analysts roles to a community of service mentality.
- **Gwen Smyth:** That analysts can see value in their roles through progression, which puts the ultimate responsibility for their career with the analyst. Analyze the available data we have to drive further improvements.

What advice and/or best practices would you share with other companies that are leveraging KCS?

- **David Waid:** All of it...don't recreate the wheel. Remember the "book" is the collection of best practices...don't deviate or recreate—just follow it!
- **Zel Pineda:** Work toward a measurement system that measures the creation of value and not just activity.
- **Teresa Anderson:** Document a timeline, stay consistent with your communications and messages, and avoid having too many chiefs and not enough Indians.
- **Gwen Smyth:** What you think you know isn't always how it is, so keep an open mind. The KCS handbook contains best practices - do not hesitate to refer to it time after time, even months into the project. It helps to maintain balance, perspective and focus on the correct way to live out the KCS methodology.

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