



Leading Change with Knowledge-Centered Support

By Rick Joslin
Executive Director, Certification and Training, HDI

LEADING CHANGE WITH KNOWLEDGE-CENTERED SUPPORT

The successful adoption of Knowledge-Centered Support (KCSSM) is more about people than process and technology.¹ KCS is the set of knowledge management best practices for service management. It provides guidance for defining processes and acknowledges that technology is a required component to enable the processes to be efficient and effective. KCS also requires leadership. This is so critical to success that one of the eight KCS practices is *Leadership and Communication*.

As KCS has evolved, it's become clear that organizational change management is required to help individuals adapt to the transformational changes brought on by a KCS initiative. One of the most well-known contributors to organizational change management is Dr. John Kotter, author of the best-selling books *Leading Change*, *Our Iceberg Is Melting*, and *The Heart of Change*. Dr. Kotter developed an eight step process for leading change and if you look closely at KCS, you will see that the eight steps can be applied to the KCS methodology, and that the concepts are integral to the methodology.

For this comparison, I have turned to the online publications by Kotter International, the company founded by **Dr. John Kotter** to help leaders tackle the challenges of change. Let's begin with an introduction to his 8-Step Process for Leading Change.

To successfully react to windows of opportunity, regardless of the focus—innovation, growth, culture, cost structure, technology—a new methodology of change leadership is required.

Thirty years of research by leadership guru Dr. John Kotter have proven that 70% of all major change efforts in organizations fail. Why? Because organizations often do not take the holistic approach required to see the change through.

However, by following the **8-Step Process** outlined by Dr. Kotter, organizations can avoid failure and become adept at change. By improving their ability to change, organizations can increase their chances of success, both today and in the future. Without this ability to adapt continuously, organizations cannot thrive.

Step 1 - Establishing a Sense of Urgency: Help others see the need for change and they will be convinced of the importance of acting immediately.

Step 2 - Creating the Guiding Coalition: Assemble a group with enough power to lead the change effort, and encourage the group to work as a team.

Step 3 - Developing a Change Vision: Create a vision to help direct the change effort, and develop strategies for achieving that vision.

Step 4 - Communicating the Vision for Buy-In: Make sure as many as possible understand and accept the vision and the strategy.

Step 5 - Empowering Broad-Based Action: Remove obstacles to change, change systems, or structures that seriously undermine the vision, and encourage risk-taking and nontraditional ideas, activities, and actions.

Step 6 - Generating Short-Term Wins: Plan for achievements that can easily be made visible, follow through with those achievements, and recognize and reward employees who were involved.

Step 7 - Never Letting Up: Use increased credibility to change systems, structures, and policies that don't fit the vision, also hire, promote, and develop employees who can implement the vision, and finally reinvigorate the process with new projects, themes, and change agents.

Step 8 - Incorporating Changes into the Culture: Articulate the connections between the new behaviors and organizational success, and develop the means to ensure leadership development and succession.

Source: Kotter International, "The 8-Step Process for Leading Change"

¹ KCS is a service mark of the Consortium for Service Innovation. The Consortium for Service Innovation is a nonprofit organization that developed and continues to evolve the KCS practices.

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The KCS methodology is organized into eight core practices. The first four practices make up the **Solve Loop** which consists of *Capture, Structure, Reuse, and Improve*. They represent the four practices that are transactional: daily activities performed by support professionals as they provide support services and deliver resolutions to issues. The second set of four practices make up the **Evolve Loop** which consists of *Content Health, Process Integration, Performance Assessment, and Leadership and Communication*. They represent the practices that are primarily systemic, the implementation of which is the organization's responsibility, if it hopes to adopt KCS successfully and mature.

As you study the KCS methodology, you'll learn that organizational change management concepts are integrated throughout the KCS practices. A successful adoption of KCS requires the organization to adopt all eight KCS practices and, I believe, follow Dr. Kotter's 8-Step Process for Leading Change.

Step 1: Establishing a Sense of Urgency

The KCS methodology promotes the need to align the initiative with the objectives of the key stakeholders. Using a technique and form referred to as the "strategic framework," KCS adopters identify the business objectives of the organization, the support staff, and the customers they support. For each objective identified, the adoption team must identify a strategy for satisfying that objective, metrics for measuring progress against the objective, the current baseline, the forecasted improvement, and the impact the KCS initiative will have on their ability to satisfy the objective. This is but one step in clearly identifying the business need and the urgency for change.

The change leaders must develop a business case, including a forecast for return on investment, to justify the organization's KCS adoption. This justification helps to articulate the need and sense of urgency, enabling senior management to evaluate the business priority of the initiative against other proposed investments.

The change leaders, including a high-level sponsor, are then responsible for communicating to each stakeholder the justification using a message that is appropriate to that stakeholder. Each message will be different based on the business objectives identified in the strategic framework so that the intended audience will understand the benefits of the change to them and the urgency adopting the change. This message should be carried throughout the communications plan, including any training that's developed and delivered to stakeholders.

The adoption strategy calls for a phased implementation whereby the first adopters will verify that the change has been properly designed. The early adopters are also carefully selected so as to derive the greatest impact from the change. Their success is then broadly communicated to support the need for the change to be adopted throughout the organization. This often creates a sense of urgency, prompting those who weren't early adopters to participate in the next phases of implementation (i.e., they want to reap similar benefits to those achieved by the early adopters).

Step 2: Creating the Guiding Coalition

One of the initial steps in adopting KCS is to create a KCS Adoption Team. This cross-functional team is responsible for designing the change, and it's made up of management, support analysts, web developers,

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and project management professionals. They create the foundation on which the KCS initiative is built. This team is responsible for defining new processes, modifying existing processes, and enabling those processes with technology; defining the quality standards and a means to evaluate, manage, and measure quality; adjusting the performance assessment practices including the development of roles and reports; and creating the communication plan and the necessary training.

With the support of a sponsor, this guiding coalition is assembled and given the power to not only lead the change effort but also serve as evangelists to promote the adoption. As KCS is rolled out to a larger audience, KCS Coaches are introduced to support the development of the staff's competency. KCS Coaches also become evangelists and form the KCS Council. The KCS Council becomes the guiding coalition that continues to care for the KCS initiative after the KCS Adoption Team is dissolved. Management also receives training on how KCS impacts the business, their teams, and themselves. Management must continue to play a supportive role and join the coalition to maintain the transformation changes brought on by KCS.

Step 3: Developing a Change Vision

Defining success is the responsibility of the change leadership. The reason for the change and the desired end state need to be clear to those affected by the change. As a part of the communications plan, the KCS Adoption Team works with management to define a clear, concise statement of common purpose to unite and align the organization in support of the vision.

Step 4: Communicating the Vision for Buy-In

Leveraging the work done in the strategic framework, the KCS Adoption Team builds the vision, the purpose, the objectives, and the strategies for achieving the vision into the communications plan. The sponsor and management are trained so as to maintain a consistent message for each stakeholder. The communications plan is ongoing and not limited by time. The messages must be repeated and delivered in multiple formats to help the stakeholders understand and buy into the vision and the strategy.

Step 5: Empowering Broad-Based Action

Change generates resistance. To mitigate the resistance and remove obstacles to change, the KCS Adoption Team will forecast the potential objections and questions that will be raised within each community of stakeholders and then develop and test appropriate responses and answers. These responses and answers are built into the communications plan and training programs.

By aligning the benefits of the KCS initiative to known employee-motivating factors, additional messaging can be developed to generate interest in and desire for the change, thus removing additional barriers.

KCS Coaching is a critical success factor for KCS adoption. Coaching provides one-on-one guidance for the support staff, delivered by someone who has had proven success with KCS and who continues to evangelize for the change.

Enabling KCS processes with the right technology is another critical success factor. A well-defined process that is burdened by poor technology (or the lack of technology) is a barrier to adoption. One of the objectives of enabling processes with technology is to benefit the performance of people. Experiencing the direct benefits of new processes and technologies reduces resistance to change. Support professionals who can identify this value are more likely to participate in other activities necessary to achieve the complete vision.

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Step 6: Generating Short-Term Wins

Selecting the right people is a critical success factor, beginning with the adoption team and the sponsor. The KCS Adoption Team owns the implementation strategy, which the KCS methodology recommends rolling out in phases or waves. The first wave is where the first people will be trained on KCS, test the new processes and technology, and adopt them in the production environment. These first people are referred to as the Pilot Team. While the objective is to verify that the initiative is ready for a broader distribution, it also creates an early win that can be promoted to generate demand for the change and mitigate risk.

KCS is rolled out to a broader audience using the wave strategy, adding more people based on the success of those who came before them. Each wave can be a little bit larger, and the Pilot Team can leverage the earlier adopters to assist them with the learning process. Individuals from previous waves may be asked to serve as coaches for the newly trained. The wave implementation strategy begins with an analysis of the support organization so that the teams selected for the early waves have the highest potential for success. Their success creates energy and momentum for the later waves, which may include people who are more likely to generate resistance to change.

As individuals develop their skills with KCS and improve their performance, they are rewarded and recognized. The KCS competency model drives the desire for additional authority and responsibility. As an individual earns new rights, the organization publicly recognizes their accomplishments, which encourages others to improve their skills.

The performance assessment practice within KCS requires that the organization develops reporting to evaluate the impact on the organization, the team, and individuals. Using a triangulation method, such as a balanced scorecard, many of these weekly and monthly reports are used to recognize individuals and teams for successful progress and identify accomplishments and added value that justify rewards. Rewards in KCS are used to help change behavior, while recognition must be ongoing to maintain the desired behavior.

Step 7: Never Letting Up

KCS is a transformational initiative that changes the way support is provided and performed. It's not a project or a program; there's no end date or end point. It's a journey that must be maintained. The KCS Council is responsible for making adjustments along the journey to both maintain it as well as strive for higher level of value generation.

KCS coaching does not end when someone becomes licensed in KCS. Periodic random sampling ensures performance and skills are maintained. The culture shifts to employee empowerment where everyone owns the knowledge, and the knowledge base becomes a collaborative sharing space where individuals leverage the power of the team to serve customers.

The communications plan also has no end date. It must be maintained and evolved to promote the ongoing message, recognize successes, explain adjustments and take corrective action, and reinvigorate the initiative. Ongoing reporting provides data for course corrections, as well as content for communications and a source for ongoing recognition and rewards.

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Step 8: Incorporating Changes into the Culture

Incorporating change into the culture is why KCS is transformational. Leadership, communications, performance assessment, rewards and recognition, and continual process improvement must be incorporated into the culture as a business norm. Rewards and recognition must be timely, and the link between the desired behavior and the business outcome must be clear. Communications must continue to promote the value the change has made and expects to make for each stakeholder. Metrics must be trended and monitored. Adjustments will need to be made. None of this can be accomplished without leaders who can motivate individuals to change their behavior to produce the desired outcome.

Summary

KCS has evolved under the care of the Consortium for Service Innovation and has been shaped by the experiences of the many organizations that have adopted KCS. Leadership is the common thread that links all of these successes. The successful adoption of KCS requires leaders to implement organizational change management strategies. Leaders are responsible for creating a sense of urgency, building a guiding coalition, developing a change vision, communicating the vision for buy-in, empowering broad-based action, generating short-term wins, never letting up, and incorporating changes into the culture. These core concepts can be found in the KCS methodology, as well as in guidance from industry experts like Dr. John Kotter.

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About the Author

Rick Joslin, HDI's executive director of certification and training, is responsible for the development and delivery of HDI's certification and training offerings and strategic relationships. As a recognized expert in knowledge management, Rick has served on the Consortium for Service Innovation's KCS Program Committee. He has written two books on knowledge management and the knowledge management maturity model, and was a contributor to the *HDI Service and Support Handbook* (2002). As a certified KCS instructor, he guides organizations through the implementation of KCS. He is also an HDI Certified Instructor for the range of HDI certification courses.

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